TeamSite Training
Public Relations

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1.0   Introduction

The TeamSite Training Manual — *Public Relations* instructs associates in the Public Relations department how to create and edit press releases on the Independence Blue Cross (IBC) website — www.ibx.com — or the AmeriHealth (AH) website — www.amerihealth.com.

1.1   Purpose

This document presents a process through which members of the Public Relations department can create and edit press releases on www.ibx.com or www.amerihealth.com.

1.2   Intended audience

This document is a reference for Corporate Communications and any members of the Public Relations department that are responsible for creating or editing press releases on www.ibx.com or www.amerihealth.com.

2.0   Logging on

All of the content on www.ibx.com and www.amerihealth.com is maintained through a content management system called TeamSite. The following are steps to log on to the TeamSite server:

1.   Go to http://teamsite.ibx.com/.
2.   Enter your *c62 number* in the *Username* field and your *LAN password* in the *Password* field.
3.   In the *ContentCenter* drop-down menu, choose *Standard*, and in the *Role* drop-down menu, choose *Author*.
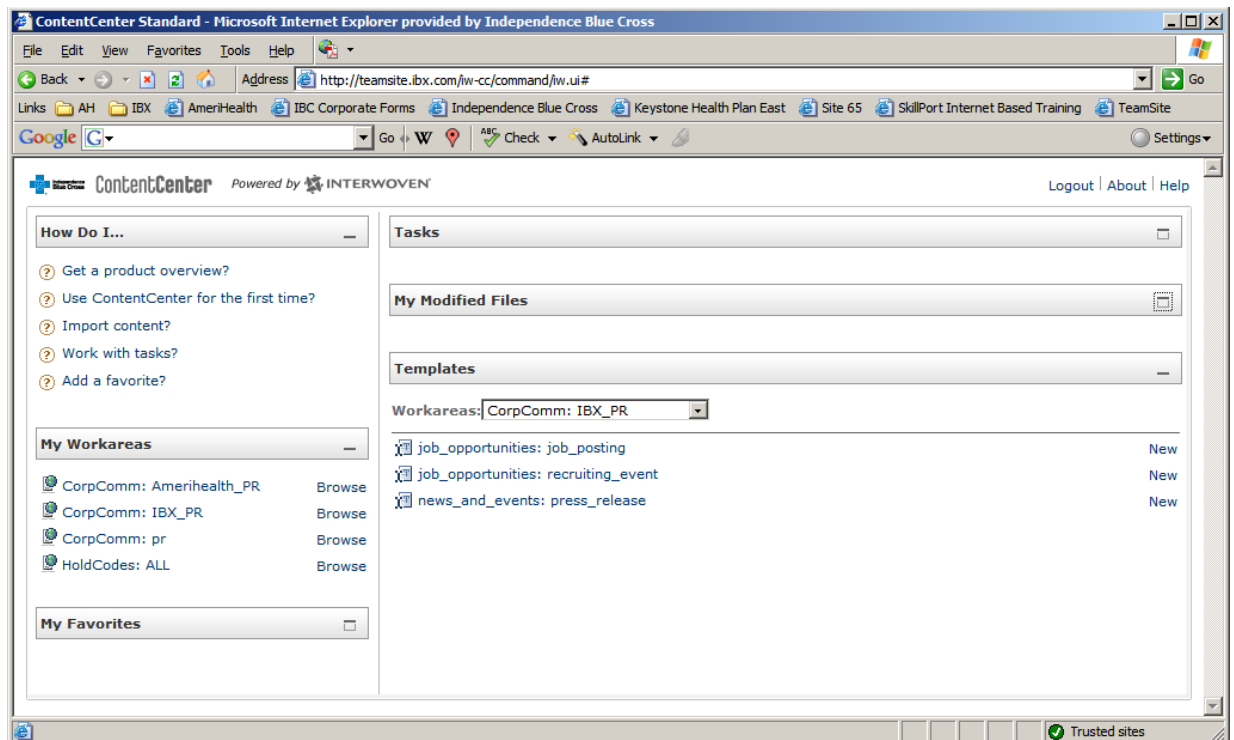4.   Click on the *Login* button.

3.0   Create a press release

To begin creating a press release file through TeamSite, please follow these steps:

1.   After logging in, your *Home* page will be displayed.

2. On the *Home* page, scroll down to the *Templates* area on the right side and open it (each area on your *Home* page can be opened and closed in the upper right corner like a window).

3. If you are creating a press release for www.ibx.com, choose *CorpComm: IBX_PR* as displayed in the drop-down area circled in red below. If you are creating a press release for www.amerihealth.com, choose *CorpComm: Amerihealth_PR* from the drop_down area.

4. Click on *news_and_events: press_release* (the second area circled in red below).
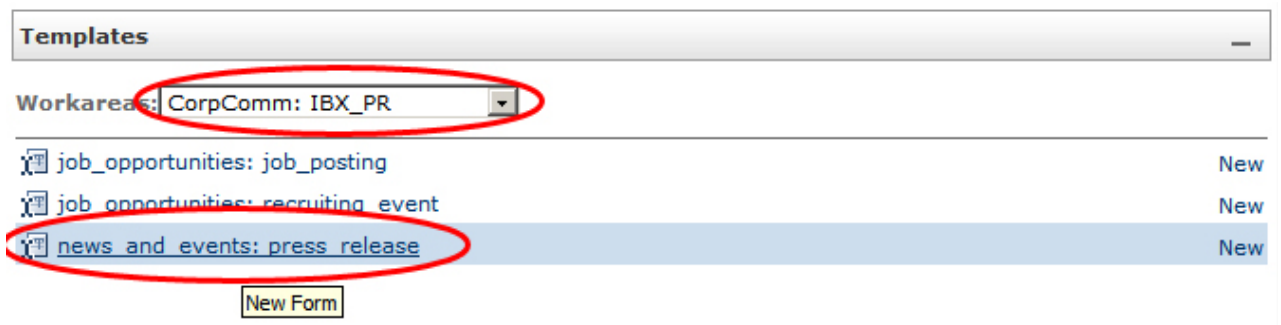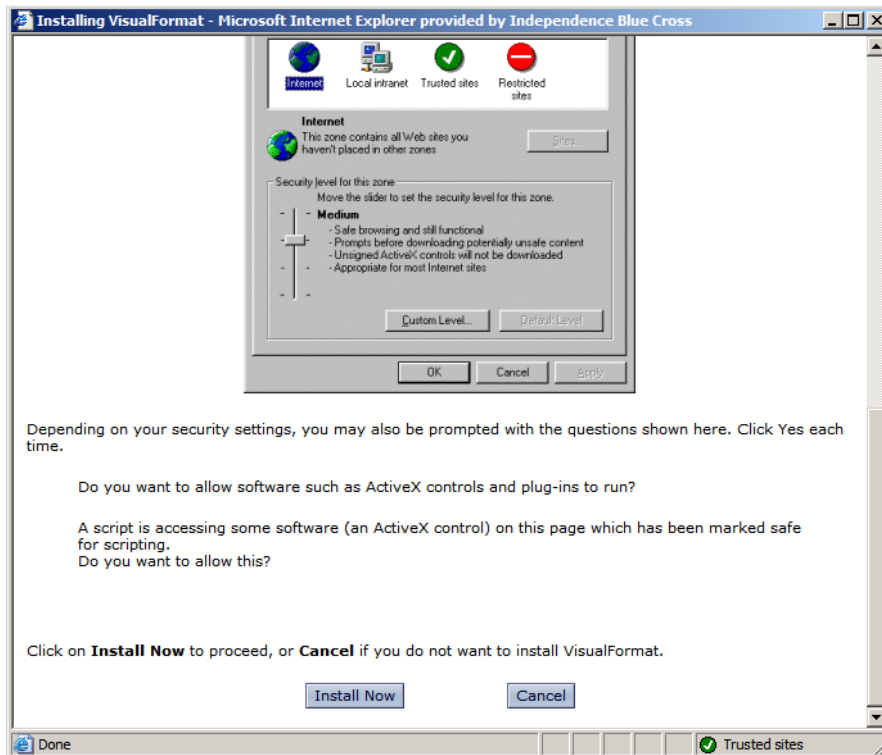
3.1 Install VisualFormat

If you do not have a program called VisualFormat installed on your machine, you will be prompped to install it when you begin creating a press release. Here is how to install VisualFormat:
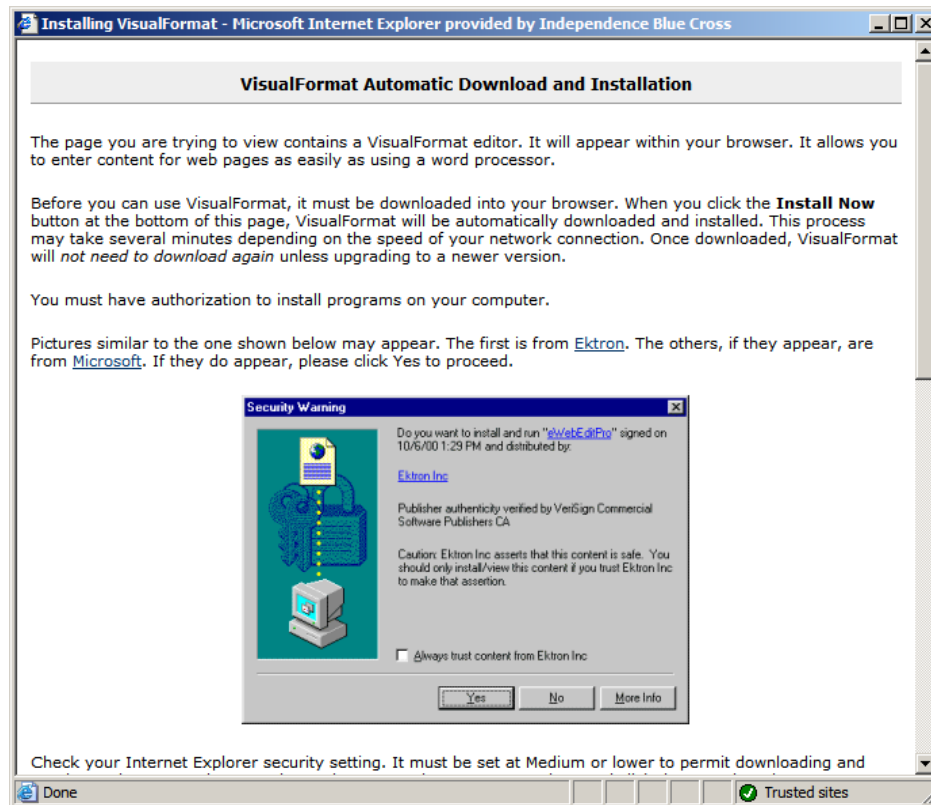
1. When you are prompted with the above screen, scroll to the bottom of the page.

2. Click the *Install Now* button.
3. The program will start installing on your computer. A confirmation will display.
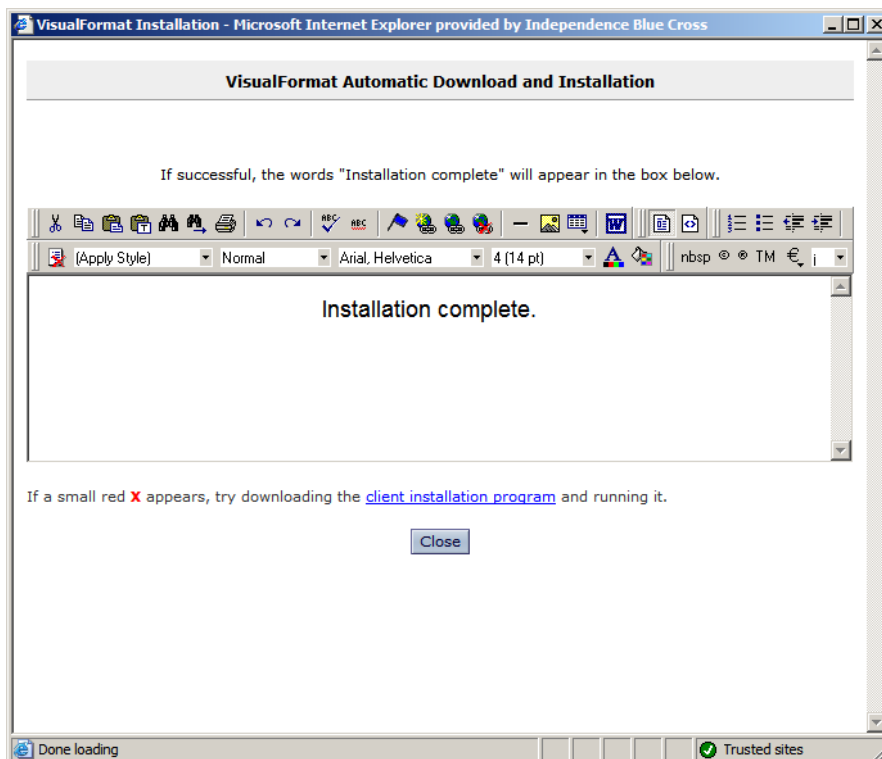
4. Click the *Close* button.

3.2 Entering preliminary data

The press release form in TeamSite is like any other online form you may have completed in the past. The first section contains all of the preliminary data. The fields that are required are marked with an asterisk (*). Here is how to enter the preliminary data contained in a press release:

1. Enter the title of your press release in the *Press Release Title* field. There is a 100-character limit for this field. **It is very important that you enter the Press Release Title in title case (every major word capitalized) and without special characters (®, ™, ˢᴹ, single quotes, double quotes, and dashes). Please use only letters (a-z) until the file is saved and generated for the first time. Once that is done, you can go back and add the following special characters: single quotes, double quotes, and a dash. Each special character has to be entered directly from the keyboard (not copied and pasted from Microsoft Word). TeamSite can not process ®, ™, or ˢᴹ for the Press Release Title field.**

2. If you have a subtitle for your press release, you can enter it in the *Press Release Subtitle* field. This field also has a 100 character limit.

3. The *Location* field is automatically set to *Philadelphia, PA*, but can be changed to a different location if needed.

4. Click on the *Calendar* button. The *Set a Date* window will appear with today's date selected. You can set this to any date by selecting a different month or day. You can click on the "?" in the upper, left corner for more detailed instructions on how to use the Calendar.

5. Choose a date and click on the button *Set Date*. If you click *Clear Date*, the window will close and the *Date* field will be reset. You can also manually type in the date using the format YYYY-MM-DD.
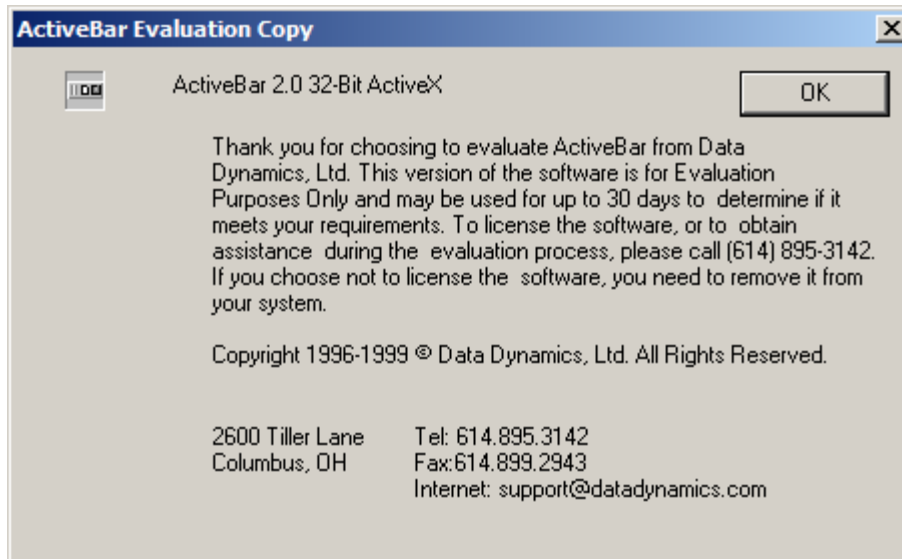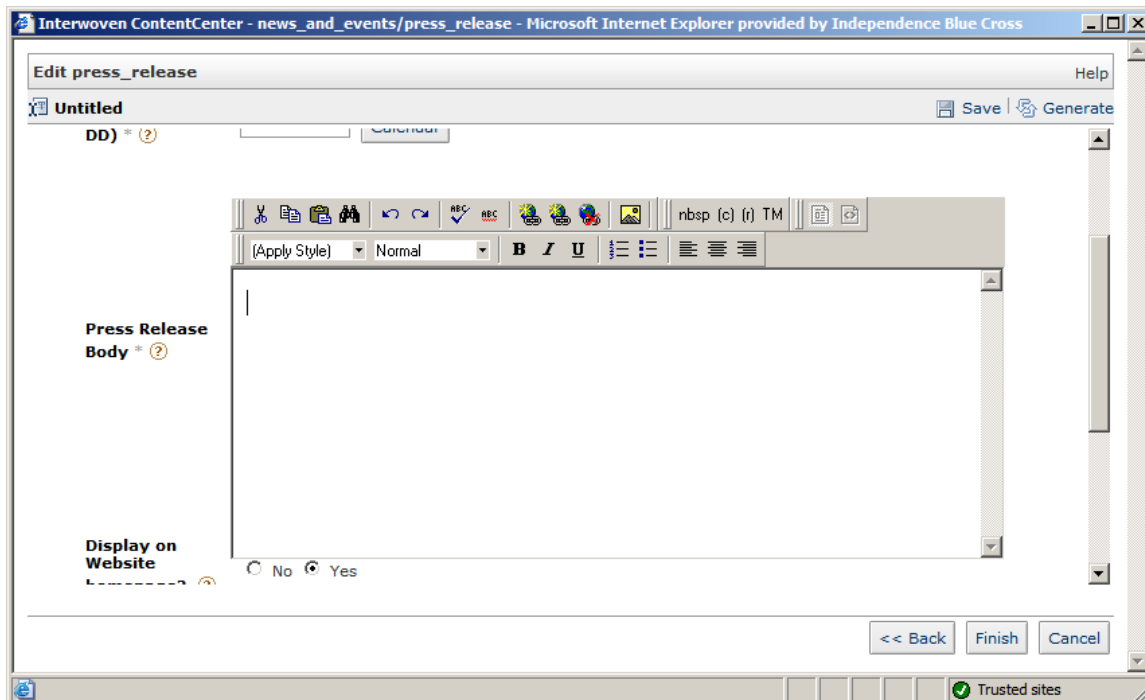
3.3 Entering the press release body

After you have finished entering the preliminary data, you can start working on the body of the press release.

1. Click inside the empty *Press Release Body* textbox.
2. You may receive a confirmation that ActiveBar is running.

3. Click the *OK* button.
4. The grey control panel (pictured below), which appears inside of the *Press Release Body* textbox, is a custom editor that functions like a word processor.


5. The easiest way to handle the body of the press release is to copy and paste one paragraph at a time from your original press release document (usually a Word file). Copy the first paragraph after the dateline.

6. Come back to the *Press Release Body* textbox and click once inside of it again.
7. A cursor will appear. Right click and select *Paste Text*. **It is very important that you click *Paste Text* or you will experience formatting difficulties.**
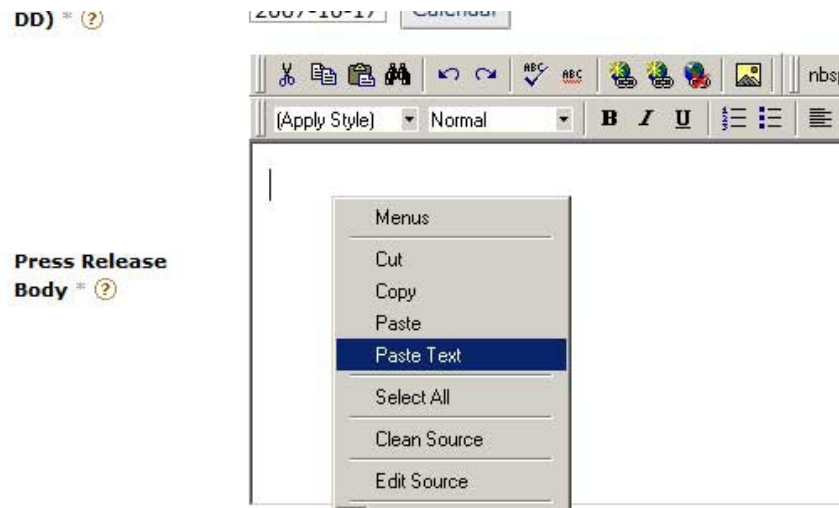
8. Your paragraph of text will appear in the text box. If your paragraph contains service marks (^{SM}), follow these steps. Otherwise, move ahead to step 9.
   - Copy your paragraph of text from Word.
   - Paste Text into the TeamSite editor.
   - You will see the word you have service marked with an SM at the end of it. You now need to make that superscript.
   - To do this you will have to change the editor to source mode.
   - Right click and select *View Source*.
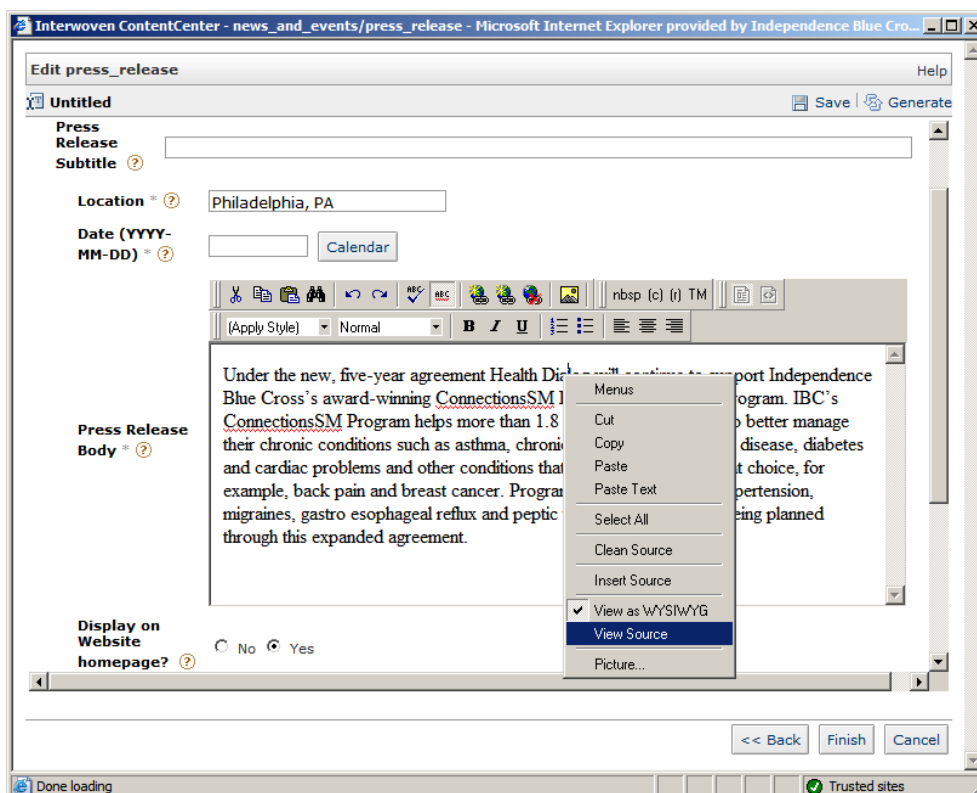
≅ Place the cursor right before the S in SM.

≅ Enter the code <sup>

≅ Now place the cursor right after the M.

≅ Enter the code </sup> (as pictured in the first sentence below).
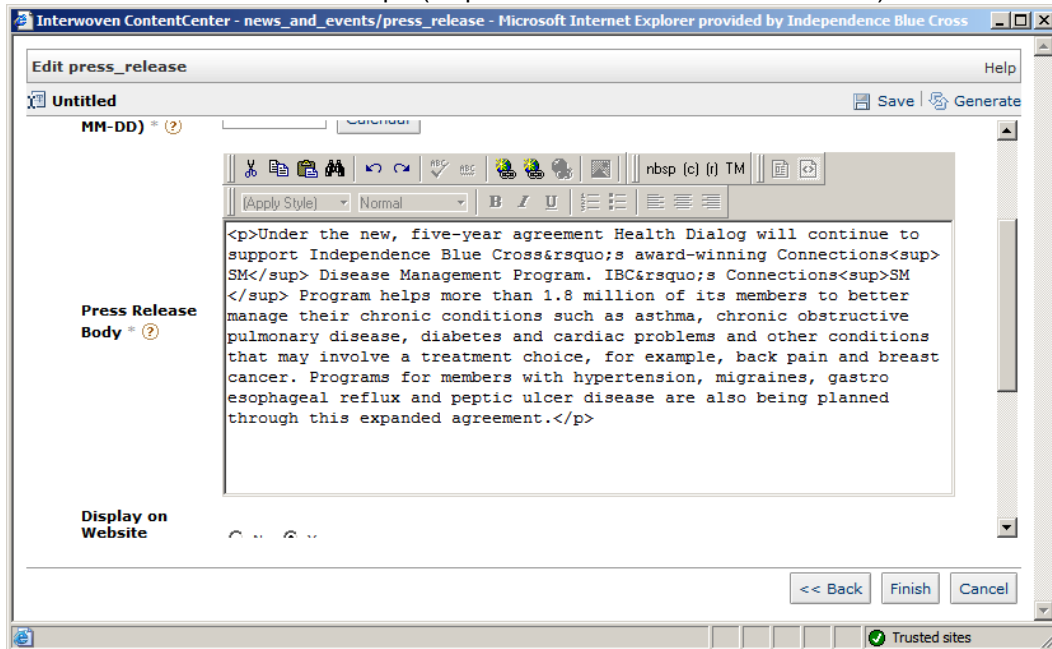
≅ Do this for all of the service marks in your paragraph.

≅ Right click on the paragraph and choose *View as WYSIWYG*. Your paragraph should then look similar to the one below.
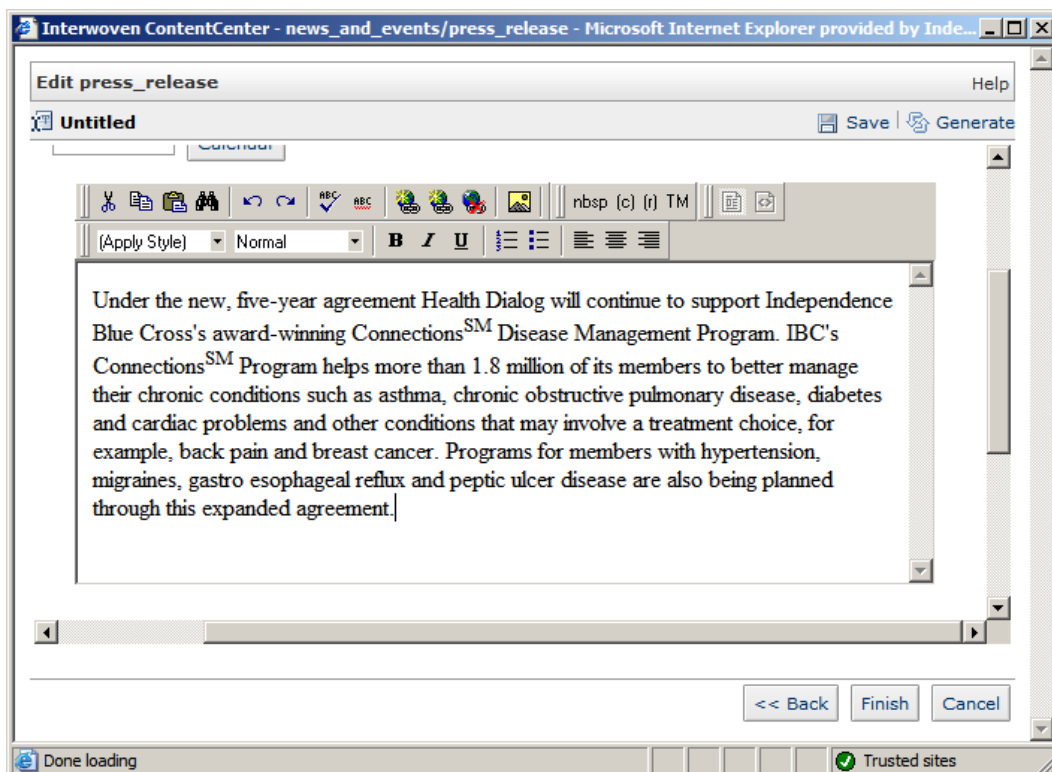
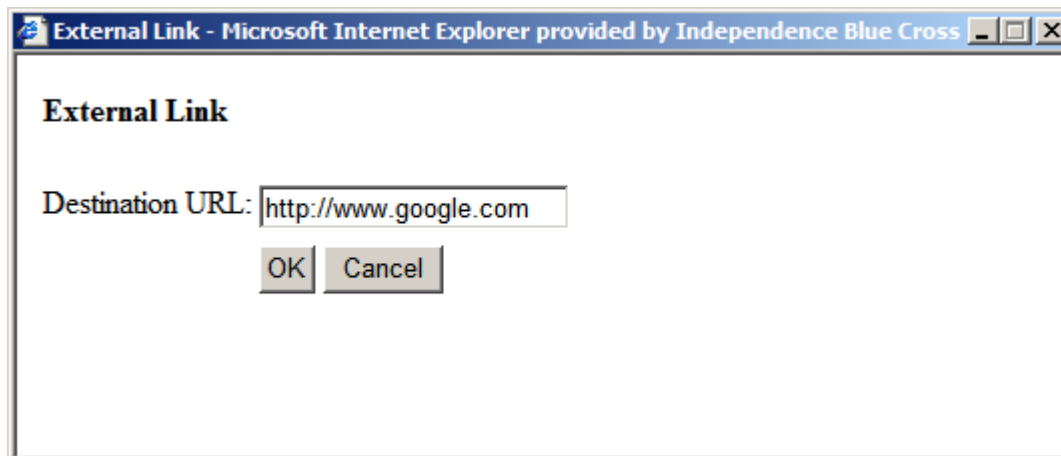≅ Press the enter key to move the cursor to the next line. You can now continue creating the body of your press release by copying and pasting each paragraph from the Microsoft Word document.

9. Your press release may also contain hyperlinks. If they don't, you can continue to section 3.3, otherwise here's how to handle internal links (links to pages within the www.ibx.com or www.amerihealth.com websites):

≅ Copy the paragraph that contains the link from your Word document.

≅ Come back to the TeamSite editor. Right click and select *Paste Text*.

≅ Highlight the words in the link.

≅ Click the internal link button ⬛ in TeamSite's editor (there are two buttons that look like this, but when you put your cursor over the left button it will read *Internal Link*).

≅ A new window will pop up titled *Link*. Enter the URL of the www.ibx.com or www.amerihealth.com page you want to link to in the field titled *Link URL:*

≅ Click the *OK* button.

Here's how to handle external links to websites outside of www.ibx.com or www.amerihealth.com:

≅ Copy the paragraph that contains the link from your Word document.

≅ Come back to the TeamSite editor. Right click and select *Paste Text*.

≅ Highlight the words in the link.

≅ Click the external link button ⬛ in TeamSite's editor (there are two buttons that look like this, but when you put your cursor over the right button it will read *External Link*).

≅ A new window will pop up titled *External Link*. Enter the outside URL (i.e. http://www.google.com) you want to link to in the field titled *Destination URL:*

≅ Click on the *OK* button.
≅ You can now continue creating the body of your press release by copying and
   pasting each paragraph from the Microsoft Word document.

3.4 Choosing to display press release on website homepage

If you would like the title of your press release, along with a link to the actual file, to appear on
IBC's homepage (www.ibx.com) or AmeriHealth's homepage (www.amerihealth.com), please
select *Yes* in the *Display on Website homepage* field, which is the default option. If you don't want
your headline on the homepage, please change the response to *No*. Most new press releases are
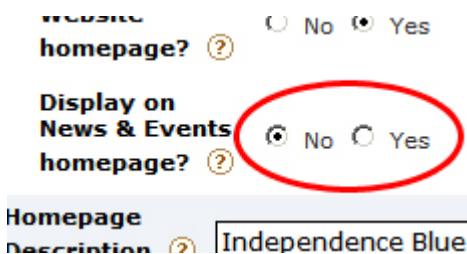displayed on the website homepage, while backdated releases are not.

3.5 Choosing to display press release on "News & Events" homepage

If you would like the title of your press release, along with a link to the actual file, to appear on the
News & Events homepage (http://www.ibx.com/news_events/index.html or
http://www.amerihealth.com/news_events/index.html), please select *Yes* in the *Display on News
& Events homepage field*. Otherwise, leave this option selected as *No* (the default selection).
Most new press releases are displayed on the News & Events homepage, while backdated
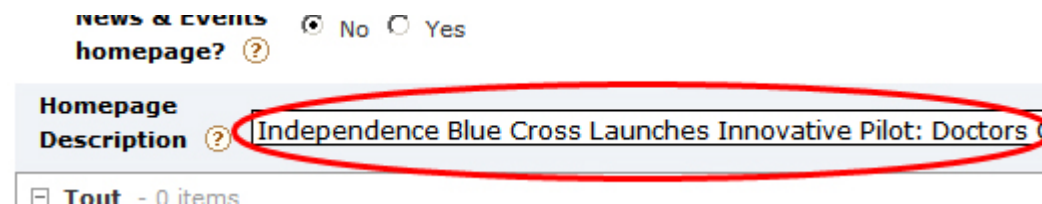releases are not.

3.6 Entering the homepage description

If you decided in **Section 3.3** to have your press release title displayed on the homepage
(www.ibx.com or www.amerihealth.com), the *Homepage Description* is where you enter the
headline you want displayed. Please note that this field will only accept 78 characters, which is
less than the *Press Release Title* field. You may have to edit you original headline to fit in the
Homepage Description.

3.7 Adding a tout

A tout is the beige colored box that you can see on the right side of many pages at www.ibx.com and www.amerihealth.com.

Very few press releases require a tout. If your press release doesn't need a tout, you can proceed to the next section. Here's how to add one if you need one:
1. Click on the plus symbol on the right side of the form.

2. The tout editing box will open. Required fields are noted with an asterisk.
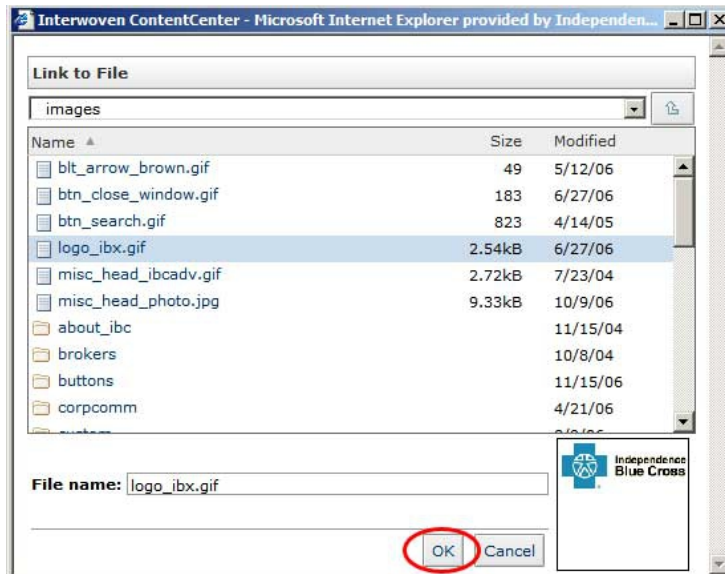

3. Enter your title in the *Title* field.
4. Adding an image to your tout is optional and a bit on the complicated side. **Please note that you will probably need to contact the Web Team to load your image into the TeamSite directory.** Then you can click on the *Browse* button next to the *Image* field. A *Link to File* window will open.

5. You can choose your image by clicking on it and then clicking the *OK* button.
6. The *Body* textbox functions just like the *Press Release Body* textbox. When you click inside of it, a control panel will appear and you can *Paste Text* inside of it.
7. Entering a link is optional. If you have a link that you need to enter, you will have to first enter the text you want to appear as the link in the *Link Text* field.
8. Then you can enter the actual URL that you want the link to go to in the *Link* field.
9. If you need more than one tout, just go back to step #1 and repeat the process for Tout #2. It is very easy to delete a tout. Just click the X icon near where you clicked the plus (+) icon when you added the tout.

3.8 Adding a logo

Most press releases will not require a logo, but a few will. **Please note that adding a logo, like adding an image to a tout, is a bit complicated. You may need to contact the Web Team to upload your specific image so you can access it.** If your press release doesn't need a logo, you can proceed to the next section. If it does, here are the steps for adding a logo:
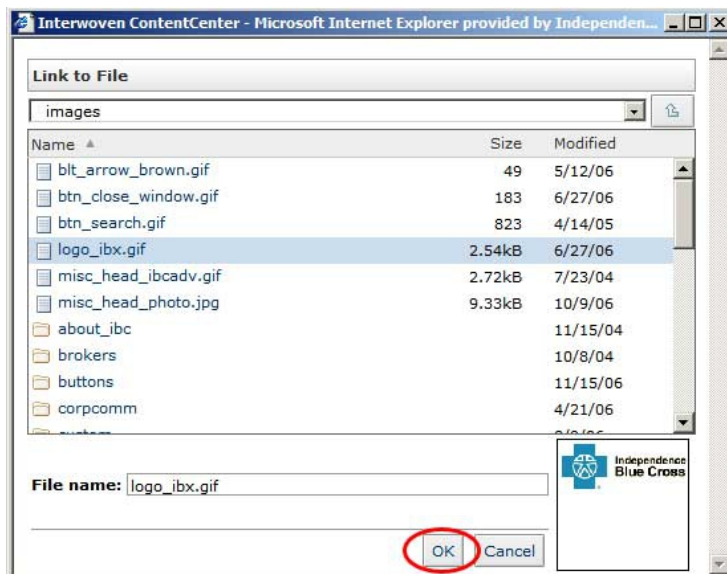1. Click on the plus (+) icon on the right side of the form.

2. The logo editing box will open. Click on the *Browse* button.

3. A *Link to File* window will open. Navigate through the directories using the pathway the Web Team provided to find your file.

4. Select your image. Once the image is selected, click *OK* to close the window.

5. The pathway to the image will appear in the *Image* field on the original form.

3.9 Save your press release

To save your press release, please follow these steps:

1. Go to the top of the *Edit press_release* form.
2. On the right side of the page you will see a *Save* button. Click it. Your data will be saved.

3. Next to the *Save* button is the *Generate* button. Click on this button and a window will be generated with the text and images you created.

4. This is a good time to check for spelling or grammar mistakes. If you find any, just close this window and make edits on the form. You will have to resave and regenerate the press release if you do make any edits. If you don't have any edits you can just close the generated window.
5. After you save and generate your press release, click on the *Next* >> button at the bottom of the form. This will take you to the submittal process.

3.10   Submit your press release

Submitting a press release begins at the *Select Next Action* window (pictured below).

1. The only thing you have to worry about on the *Select Next Action* screen is clicking the *Next* button in the bottom right corner of the screen.

2. This will take you to the *Contributor Submit* page.

3. You may enter anything you like in the *Description* textbox, but you may want to enter the title of the press release here.
4. If you would like to add additional reviewers for the job posting and you don't feel like typing in their email directly or you don't know their exact address, you can search any IBC email address by clicking *Search* next to the *Additional Reviewers* text box. If you have no additional reviewers or know their email addresses, you can skip ahead to Step 8.
5. An *Email Search* pop-up window will appear.

6. You can enter either the first or last name of the employee that you are searching for and when you click on the *Search* button, all matching requests will display in the *Search Results*. Then you can click on the employee's name and press the right arrow (>) button. Their email will appear in the *Email Recipients* box (as mine does above). You can also manually add email addresses that don't appear in the IBC database by using the *Additional Email Addresses* text box. Click the *Submit* button when finished using this screen.

7. The window will close and the email addresses you added will appear in the *Additional Reviewers* textbox on the *Contributor Submit* page.

8. Click the *Next* button in the lower right corner.
9. You will then be taken to the *Submission succeeded* page.

10. Click the *Done* button in the lower right corner.
11. Your file has been submitted. You will be taken back to your *Home* page.

12. Shortly you will receive an email confirmation that your file has been submitted. The subject will be *FYI: IBX: Contributor Submit [ ] (IBX)*. In other words, you — the "Contributor" — have submitted your file. Please review your file by clicking the link contained in the email under the heading *Files*.
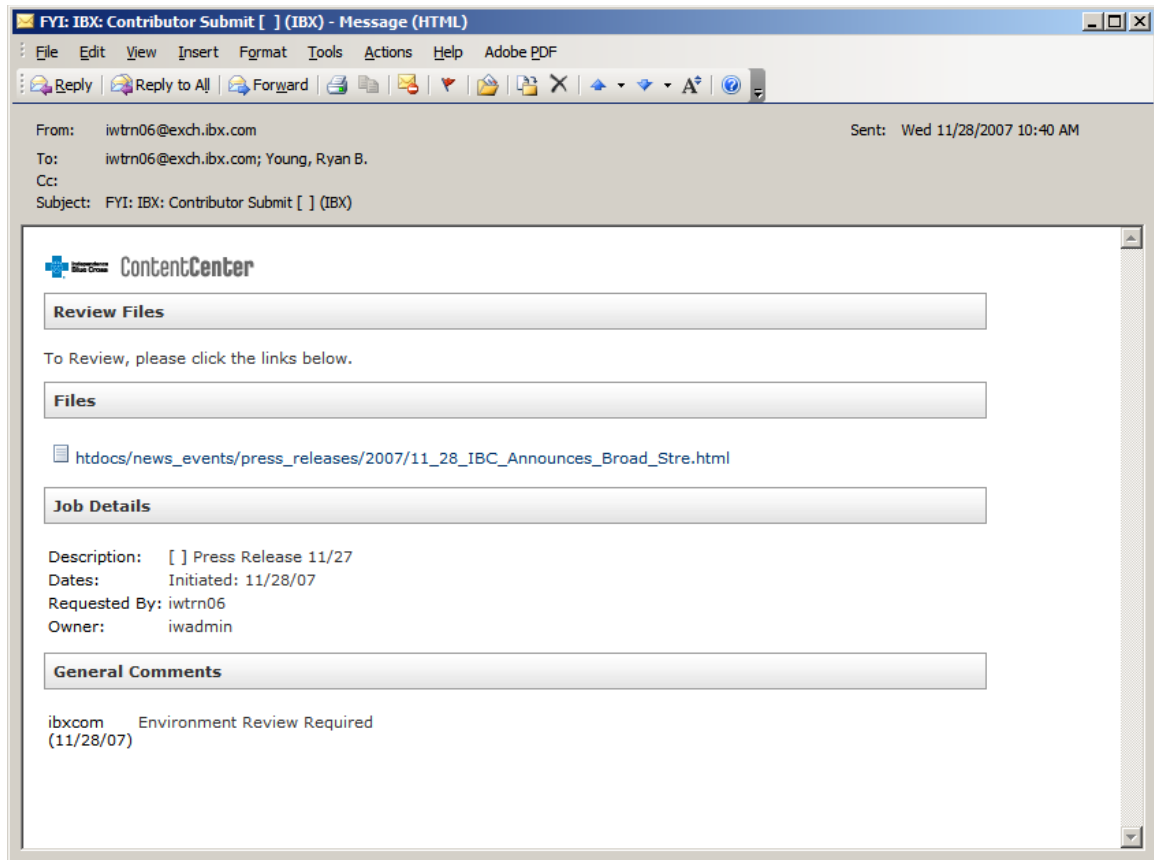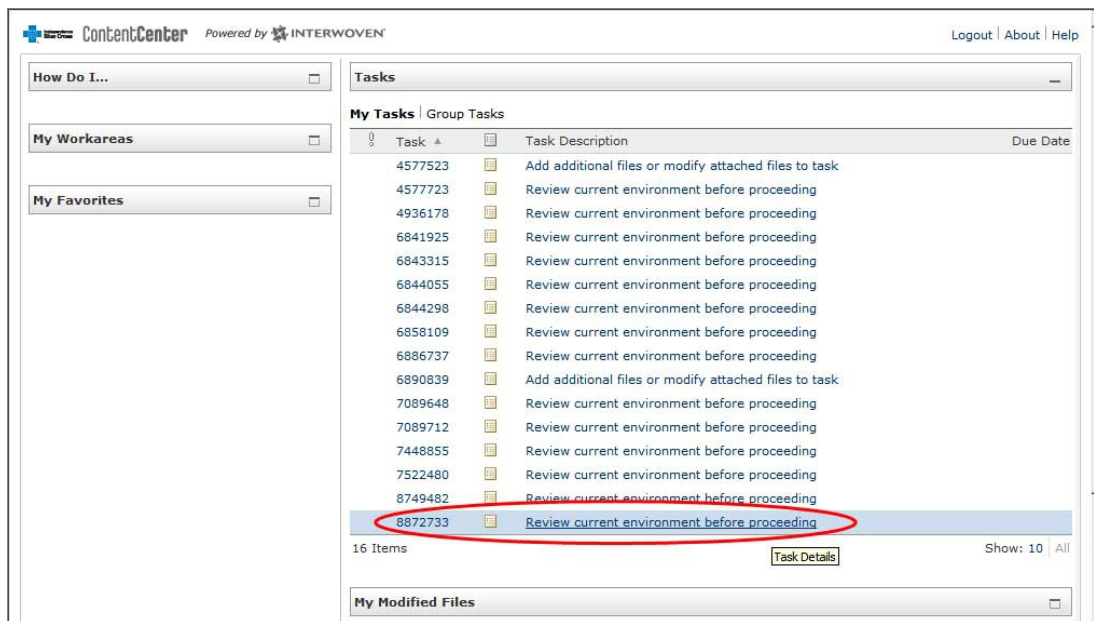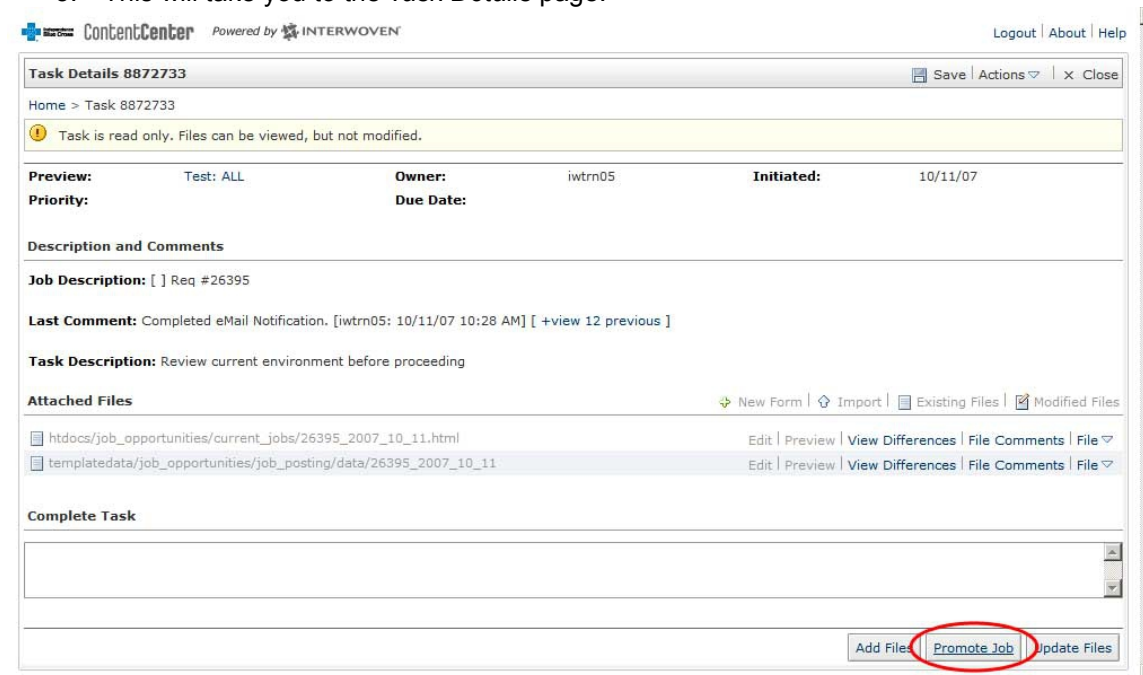
4.0   Promote files to www.ibx.com or www.amerihealth.com

The following section describes how to promote your files to www.ibx.com or www.amerihealth.com.
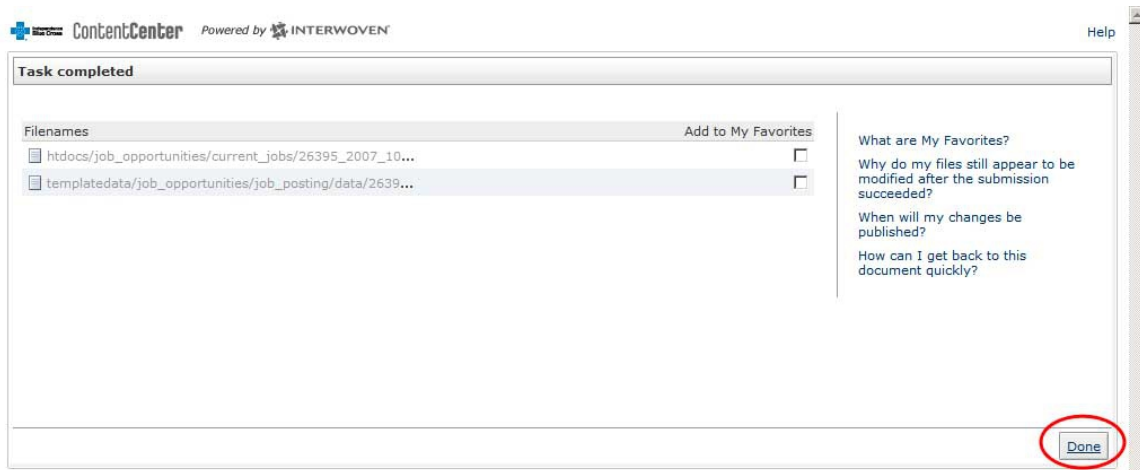
1. From your *Home* page, open your *Tasks* window.

2. In the *My Tasks* list, the last item is your most recently edited file. Click *Review current environment before proceeding*.
3. This will take you to the *Task Details* page.

4. Click on the *Promote Job* button in the lower right corner.

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5. This will take you to the *Task completed* page.

6. Click on the *Done* button in the lower right corner.
7. Shortly, you will receive an email notification (shown below) that your file has been promoted and is awaiting approval by the web team. The subject of this email will be *FYI: Group Assignment: IBX: Contributor Submit [ ] (IBX)*. In other words, you — the "Contributor" – have promoted your file for "Group Assignment" — the Web Team. There will be a link in the file where you can see how it will look after the Web Team approves it.
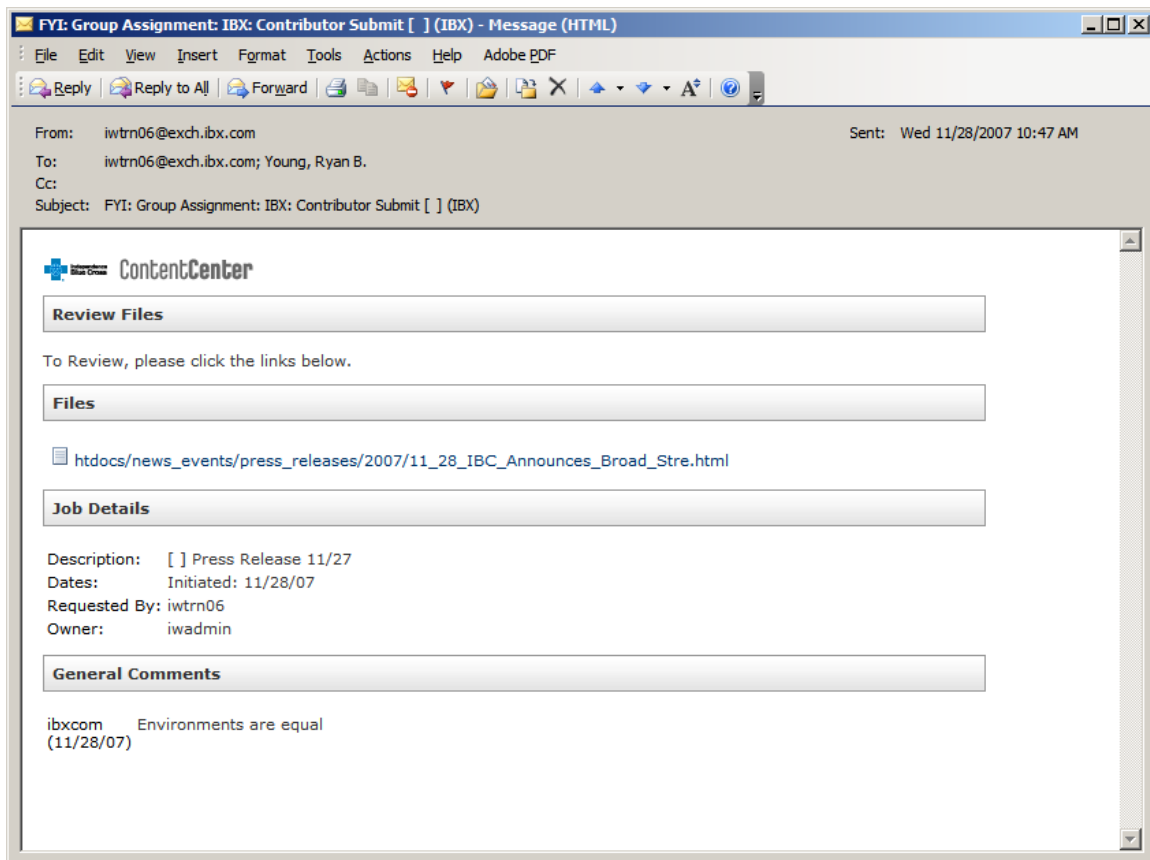
8. Congratulations! The process is creating a press release is complete. You will receive an email from the Web Team notifying you that your file has been posted to www.ibx.com after the next production build.

5.0   Editing a press release

At some point you may need to make some last minute edits to a press release you have already created. Here's how to edit an existing press release:

1. Go to your *Home* page.
2. Go to the *My Modified Files* section and open it, as pictured below.

3. All of the files that you should be concerned with end with ".html" in the name. The files that don't end with ".html" you don't need to worry about.
4. Click *Edit* for the file you are trying to edit. This will take you to the *Edit press release* form that is detailed in **Sections 3.2 – 3.6**.
5. Edit the fields you need to change and then follow the process for saving and submitting your press release as detailed in **Sections 3.9 – 3.10**.
6. Promote your press release as detailed in **Section 4.0**.

Revision History

Date	Version	Description	Author
2/13/08	1.0	Original Document	Ryan Young
8/8/08	2.0	Add AmeriHealth instructions	Ryan Young
10/16/08	2.1	Add more detailed instructions	Ryan Young