PUBLISHER ADMINISTRATION FOR HOTRESPONSE

Contents

*The Hotresponse Publisher Administration Interface (PAI) puts
the power to create, update, and maintain sites built on
the Hotresponse platform directly in the hands of the publisher.*

*In this brief document, you will find instructions on
how you can put the PAI to use quickly and efficiently.*

CHAPTER 1. GETTING STARTED

Hotresponse offers many web site solutions for Publishers including buyer guides or reader service programs. Web sites built by Hotresponse vary in appearance and have different features, but they all use the PAI for maintainance and administration. This document outlines the use of this intuitive web-based interface.

Throughout these pages we will refer to something called a 'listing', which is any instance of advertiser or product information occuring on the site. It is possible that in the PAI a listing will have a different title like 'microsite' (a page within your Hotresponse site containing text, images, and links supporting an advertiser or product). Keep this in mind when you see the word 'listing' used.

1.A. What You'll Need:

You'll need a web browser. Hotresponse recommends using at least Netscape Communicator or Navigator version 4.0 or higher, or Microsoft Internet Explorer 5.0 or higher.

If you're not sure which browser or version you have, follow these directions:

<u>Windows IE and Netscape</u> - Launch your web browser. Once it's running, look for a menu called "Help" and click on it. You'll see a list of choices; at the bottom, you'll see "About X", where X is either Navigator, Communicator, or Internet Explorer. Select this choice and you will see a window listing the version of your browser.

<u>Macintosh IE and Netscape</u> - Launch your web browser. Under the apple menu the first option should be "About X", where X is either Navigator, Communicator, or Internet Explorer. Select this choice and you will see a window listing the version of your browser.

You'll also need an Internet connection. This can be a dial-up modem, a dedicated office connection, DSL, etc. The only caveat is that, as of January 2001, the PAI does yet not support rotating proxy servers. This is due to security constraints. The major affected group is America Online users, who will need to find another way to access PAI.

Finally, you'll need a username and a password to login. If you're a Publisher, you'll get your username and password from your Hotresponse account representative. He or she will also give you the web address (URL) at which to begin. If you're an Advertiser, you need to contact your representative at the Publisher for this information.

1.B. Logging In

Now you're ready to login. First, head to the URL you were given by your Hotresponse representative or Publisher. It will look something like:

http://www.yoursite.com/admin/

When you arrive, you should see a screen like this:

Where it says "Enter Your User Name", type the username given to you by your Hotresponse Representative or Publisher. Where it says "Enter Your Password", type the password given to you by your Hotresponse Representative or Publisher.

Note that passwords are case-sensitive; if your password is 'Yellow', you must type 'Yellow'; not 'yellow', 'YELLOW' or anything else.

If you're having trouble logging in, follow these directions:

If PAI displays a message saying, "This is not the correct password for X..." you've got the right user-name, but the wrong password.

If you see "The username you have entered does not match the one on record for X..." where X is the username you were trying, double-check your username and ensure that you are typing it correctly. Make sure your Caps Lock key isn't accidentally 'on'.

If all else fails, and this is your first time logging in, you might need to double-check your username and password with your Publisher or Hotresponse representative.

CHAPTER 2. OVERVIEW

After logging in, you should be greeted with a screen like this:

This is the Publisher Home Screen. It is the central gateway to any action you can perform as a Publisher. The Letters represent each of the 5 main parts of this chapter, which are:

A. **The Navigation Menu**
B. **Site Management**
C. **Advertiser Management**
D. **Issue Management**
E. **Stats & Reporting**

2.A. The Navigation Menu

The tabs along the top mimic the publisher home screen options, allowing you to access these sections in the PAI directly by clicking on them. If you are using a newer browser which allows for DHTML you will also notice collapsing menus that appear if you mouseover any of these tabs. Use these menus to quickly access individual tasks within the main sections.

2.B. Site Management
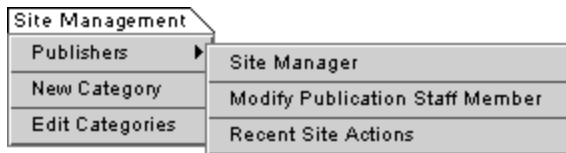
The links in the Site Management section are tools that will be used routinely in the management of your web site developed by Hotresponse.

SITE MANAGER:

This page has important information for a publisher, including stats on how many advertisers and listings your current issue contains. If publishers or advertisers have submitted listings which have not been added to an issue, they will be displayed here, allowing you to preview the data submitted and approve or reject the listings easily. It is a good idea to check this screen everytime you log in.

MODIFY PUBLICATION STAFF MEMBER:

When your Hotresponse site is first created, there is a primary publisher account username and password created. From this screen, you can add accounts that the individuals on your staff can use to log in and maintain the site. This allows you to distinguish between publishers when they access the PAI.

From the intial modify publication staff member screen, you can add a new staff member, update a staff member account, or delete a staff member. If you choose to add a new account, the most important option on that screen is the advertiser access pulldown: *Full access means that the new staff member will be able to perform all the actions of a publisher. Restrictive access means that the new staff member will only be allowed to view publisher reports. Sales associates also have full access to the PAI, and will also appear in the "Sales Representative" dropdown for each advertiser (see section 2.C).*

After creating a new account, it is a good idea to click on log out, and then test your new username and password on the log in screen to make sure the account has been created successfully.

RECENT SITE ACTIONS:

Sometimes you might be curious to see the history of publisher actions taken upon your system. This screen gives you an idea of who did what when. You can also view the actions that a particular advertiser has taken upon your system by accessing their advertiser info and clicking on 'Most Recent Actions' at the bottom of that screen.

EDIT CATEGORIES:

One of the most powerful features of the Hotresponse is its open-ended categorization system. Microsites can be placed in multiple categories with a simple or complex categorization hierarchy, making the Hotresponse directory easy to use for large or small amounts of microsites.

There are several parts to categorization. At its simplest, you merely create Categories by assigning them names, and then update/create your microsites with the proper categories checked. More sophisticated variations allow you to create a Category 'hierarchy' with 'parent' and 'child' categories for more specific categorization.

You should see a screen similiar to this one when you click on 'Edit Categories':

This is where you would view all the categories available for your site, and also edit or delete categories that you have created. The Sort Order boxes in the right column are sometimes used to determine the display order of categories in pulldown menus or other lists. You can update the sort order by entering numbers into the Sort Order boxes and clicking on 'Update Sort Order' (check with your Hotresponse Representative for information regarding how your site displays categories). The default sort order is alphabetical.

NEW CATEGORY:

Click on 'New Category' in the navigation or 'Click Here to Add New Category' on the 'Edit Categories' page and you will see this screen:

Category Name has to be filled in with an accurate, appropriate title. (This is the text that will be displayed on the reader service website, the reports, and the setup program). This is the only required field that you must fill in on this page.

Is a subcategory of: allows the user to select a "parent" category for the current category by clicking 'Switch Categories'. This basically lists your new category as a subcategory of another for specific categorization.

Response Card Number (Reader Response Publications Only) This is to be filled in with the Reader Response card number that represents your new Category (found on the Reader Response card in the magazine).*optional

Category Type indicates whether the category is listed as a regular category, or a special/bonus category. *Special/Bonus is a type of category that does not get listed in the site pulldowns.

Can Items... specify whether or not you want items to be put directly in category. Clicking 'Yes' puts a checkbox next to the category in the 'Edit Microsite' screen (Figure 12, page 16) under 'Category'. Only check 'No' if the category has subcategories that do allow items to be put in them.

Category Media is not usually required. Find out from your Hotresponse representative if your site supports these options.

When you have finished entering all relevant information, click on 'Add Category'. If you wish to return to this info and change it you can at any time by clicking on the 'edit' link in the options column under Edit Categories.

2.C. Advertiser Management

ADVERTISER SEARCH:

You can choose this option and be taken to a screen that allows you to search or browse for advertisers to edit:
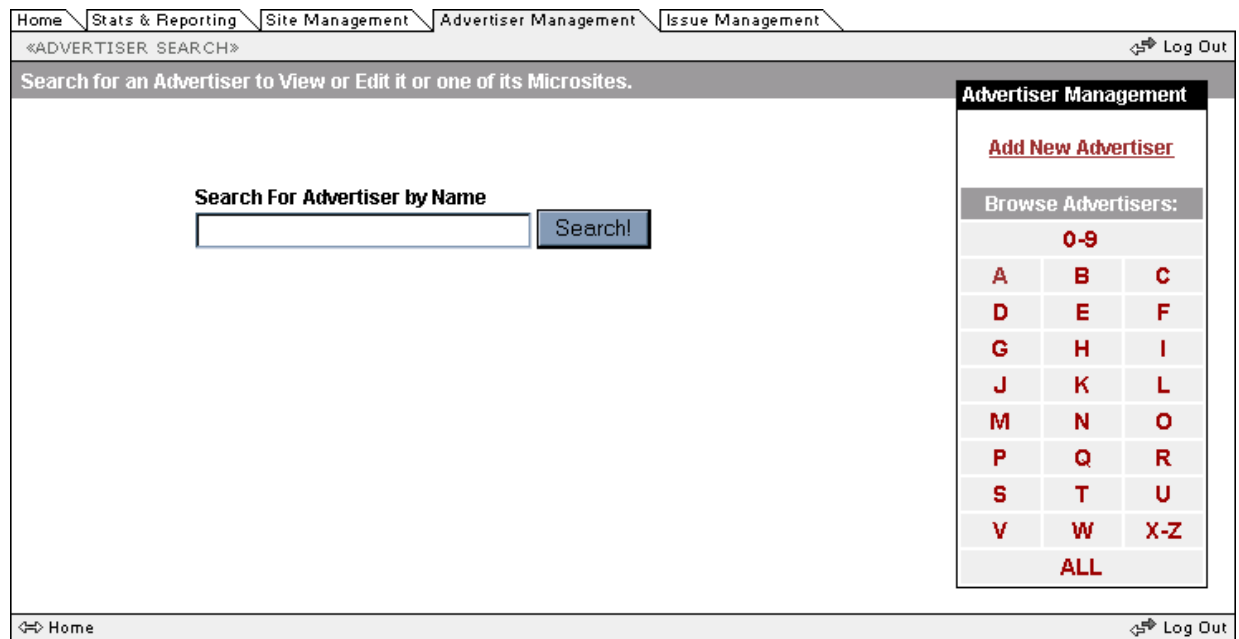
Note that on the publisher's home page there is a search box as well, so if you know which advertiser you are looking for, you can start your search from there directly. After you have searched using the keyword or by clicking on a letter in the right hand column under 'Browse Advertisers, you will see a results screen with listings like this:

From this page you can:

1. Edit the company information by clicking on the company name.
2. Add a new listing for this advertiser by clicking on [Add New Microsite].
3. Edit any of the listings which are associated with this advertiser by clicking on [Edit] in front of the product name.

NEW ADVERTISER:

You will use this screen to setup information for an Advertiser:

The 'Advertiser Name' is the only required field.

The **URL** should be in a format like www.companyname.com, or https://www.companyname.com. In other words, you can omit the 'http://' unless 'https://' is included in the URL. This is the 'company url' that will be displayed in the microsite.

A **Logo** is sometimes required depending on the site, ask your Hotresponse representative. For more information regarding the uploading of images, see chapter 3.

The **Username** and **Password** must be unique to the Hotresponse system. No two advertisers can have the same Username/Password. This will allow the advertiser to access their own restricted administration site and edit their advertiser data or view their advertiser reports.

Sometimes you will see an option for **Distribution Method** and **Distribution Frequency**. This allows the publisher to set how often leads are sent to the advertiser and how requests for more information are processed by the advertiser. If you have created **Sales Associates** logins, you will see a dropdown box listing all possible sales associates that can be assigned to this account.

Contact Info is used in reporting and sometimes in the microsite. Always fill in with as much information as possible for reference.

ADVERTISER LOGINS:

After you have created an advertiser, you may need to change the advertiser's username and password so they can log into the system, and this option will give you an easy way to do it for multiple advertisers. When you have the advertiser or advertisers you are looking for, simply change their usernames/passwords and click on 'Update'. Of course, you can also change each advertisers username and password seperately in the 'Edit Advertiser Info' screen.

LIST ADVERTISERS THAT HAVE MISSING INFORMATION:

This link is not found in the menu, but is listed in the advertiser management box on the publisher home screen. With this tool, you can check your advertiser information to make sure that you have entered all important and relevant contact information. When you click on this link, you will see a list of advertisers. An advertiser will appear here if either one of the following are true:
1. The advertiser has a listing which allows for request fullfillment by email, but they have no email address in their contact information.

2. The advertiser has a listing which allows for request fullfillment by mail, but they have an incomplete mailing address in their contact information.

3. When you have entered the proper contact information for an advertiser, they will no longer appear on this screen.

2.D. Issue Management
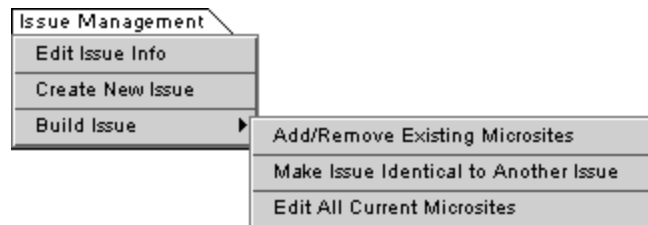
If your Hotresponse site is issue-based, this section will help you manage the creation and maintainance of these issues. This is very important, because once you have created a listing you will have to add it to an issue before it appears on your web site.

At the top of every page in the PAI there is a pulldown menu titled 'currently editing:' which indicates the working issue. If you switch to a different issue using this menu, you will be changing the issue that you are working in. Many of the pages in the issue management section use this to determine what issue should be updated as you perform your actions upon the system. **Always double-check that you are editing the right issue before you make any changes!**

EDIT ISSUE INFORMATION:

If you need to change the issue date, the go-live date, the issue name, cover image, etc. then click on this option. You will find a screen that looks like this:

Issue Date should indicate the calendar date of the new issue.

Go Live Date is the date the issue is to be seen by users, or goes "live".

Issue Name is only filled out when the user wants to override the default name of the issue. If not filled out, the default name is the issue date. (example: 'April 2001' overrides '04/01/2001')

Cover Image is for if your site uses a cover image of the magazine on its front page. *Note: the size of image can change depending on your site.

Registration Survey is only used if you have a registration survey online. If so you can associate it with the issue here.

Issue belongs to which publication is where you would choose a publication to put the issue in if your site has multiple publications.

CREATE NEW ISSUE:

You will use this screen to set up all the specifics of the new issue. See the previous page for details on issue setup information.

When you've finished entering information for the Issue, click 'continue', and you should see a screen confirming that your new issue has been added. You can return to edit this information at any time by clicking on edit issue information. Now that you've added an Issue, you can now begin adding listings to your issue.

ADD/REMOVE EXISTING MICROSITES:

This page allows you to add or remove existing listings to the working issue (displayed int the "currently editing" dropdown at the top of the screen). To add a microsite to an issue, click on the desired microsite and click 'Add to Issue'. To add multiple listings, follow the directions on screen above 'Microsites Not Yet In This Issue' box.

MAKE ISSUE IDENTICAL TO ANOTHER ISSUE:

This is another time saving tool, in case you have an issue to set up that is similar to another issue in your system. After you select which issue you would like to mimic, there will be a confirmation screen showing you which listings will be added to the issue you are working on. Note: it is best to use this option only when you have an issue that is new or empty because all previous listings associated with this issue will be replaced.

MANAGE RR NUMBERS OR EDIT ALL CURRENT MICROSITES:

You will see one of these links, depending on whether or not your site uses reader response numbers. Either way, the screen that you will be taken to has a list of all the advertisers and listings in the working issue. This is a great way to check your work after setting up an issue. You can remove items from the issue, or edit the listings by clicking on 'edit' to the right of the listings name. If your site uses Reader Response Numbers, you will also see information regarding the reader response number, page number, ad size, and ad color of each listing. If these are listed, you can choose 'Edit ISI' to change this informa-tion. (For more information on setting up reader service numbers, see section 3.C.)

Here is what this page will look like if your site uses reader response numbers:

| SU | Stats & Reporting | Site Management | Advertiser Management | Issue Management | | | | | |

«VIEW/EDIT THE LISTINGS IN "SPECIAL ISSUE"»   ⇦ Log Out

Sort by: Company Name   RR Number   Page

Company	Ad Name	Issue Specific Information (ISI)					Remove from issue?
		RR #	Page	Ad Size	Color		
bob	computer products [edit]	150	23			[Edit ISI]	☐
Global Risk Consultants	WFR Gonova [edit]	22	112	100	4C	[Edit ISI]	☐
Heather	computer products [edit]	100, 101, 102	20	33	BW	[Edit ISI]	☐
IBM	Computers [edit]	120	23	25	BW	[Edit ISI]	☐

Remove Selected Items From Issue
note: Clicking this WILL NOT delete these items from the system.

⇦ Home   ⇦ Log Out

2.E.Stats & Reporting

This section of the PAI will vary depending on what reporting options are available for your site. These are some of the reports you might see:

TRAFFIC REPORTS:

The traffic reports offer a wide range of statistical reports and graphs on web site traffic. Publishers can monitor their site traffic on a monthly or weekly basis and find the most popular pages within the site. If your site has advertiser microsites, you can find out what actions were performed by visitors to those pages as a whole or broken down by individual advertiser. You can also download a .csv file containing any leads that your site has generated.

RR REPORTS:

This is a set of reports based around requests for more information (traditionally known as reader response). Inquiries are broken down by company, issue, source, month, etc. You can also see survey results and download registered visitor contact information or leads in a .csv file.

DATA EXPORT:

You can use the options available here to export your site data to another database or a publishing pro-gram such as Quark Xpress. The resulting exports are in the form of a .csv file.

REGISTERED USER:

You can use this report to view all the users who have registered on your site, or to match survey results with registration data. The resulting exports are in the form of a .csv file.

CHAPTER 3. WORKING WITH THE PAI

In this chapter the discussion turns from 'what' the PAI is to 'how' to use it.

3.A. Quick Tutorial

The Hotresponse PAI is a tool with many features which can seem overwhelming at first. This section will start by explaining how to set up an issue and add microsites to it. Having a familiarity with these basic tasks will give you the majority of the knowledge you will need to use the entire PAI.

Hotresponse sites display listings or microsites by the 'issues' they exist in. An issue could correspond to a publication's issues or it could be a general issue, for example, an online buyers guide. Your site can have as many different issues as you wish, or one general issue in which all microsites exist. Note: some Hotresponse sites display only the current issue, others can switch between issues. If you do not know which type of site you have, contact your Hotresponse representative.

If you wish to set up a new issue, start by choosing 'Create New Issue' from the Issue Management Menu. Here you will be asked for an issue date and a go live date. These are very important, and must be set properly. The issue date should be the actual display date of the issue you are creating, but what the issue date is actually used for is to determine the order in which issues are displayed. The go live date is for determining when an issue will be visible to the sites users. Until the go live date has passed, the issue is invisible to anyone who is not in preview mode. This allows you to create and edit an issue while it is not live, and then when you are finished with it and have previewed it, you can make it live. (See Section 3.C.)

The issue date and the go live date are the only required fields for your new issue, but of course at this time you can also set other issue information such as the 'issue name'. (See section 2.D.)

When finished, click on 'save changes', and notice the result screen says 'Your new issue has been added!'. Now you must make sure you are working in the issue that you have created. Click on the link that says 'Begin working with this new issue' on the result screen, or use the pulldown menu at the top of the page titled 'Currently Editing:'. This should set the working issue to the new issue you have created.

Now lets add some listings or microsites to the new issue. If there are already existing listings or microsites, you can use 'Add/Remove Existing (Listings or Microsites)' which is under the issue management menu. This screen has two text boxes. In the top box you will see all the existing microsites or listings available, and in the bottom box you will see any that are in the working issue. Because you haven't actually added any listings or microsites to your issue yet, the bottom text box will probably be empty. Select any items in the top box that you would like to be in your issue, and click on the 'add to issue' button.

Now you may need to create new listings or microsites for your issue. Every listing or microsite is indexed under an advertiser. If the product that you are creating a listing for is from a new advertiser, start by clicking on 'New Advertiser' under the Advertiser Management Menu. The screen that you will then see has one required field, 'Advertiser Name', but you will eventually want to complete as much of the information as possible. For now, enter the advertiser's name and the company url if available, and click on 'save changes'.

If there are no errors, you will be taken to a screen that says 'Your changes have been saved for this advertiser'. Below that is the name of the advertiser and a link next to it that says 'Add New Listing' or 'Add New Microsite'. Click on this link.

You will now see a screen that resembles the one to the right. This is the screen for setting up a listing or microsite for an advertiser. The numbered areas are explained here:

Note: Depending on the options available on your site, some of the following sections listed here may NOT appear.

1. Advertiser Data: This is the advertiser name and url. Also Displayed is which issues this listing appears in.

2. Microsite Data: This section contains the most important parts of your new listing, which are the name of the product or service, and the available methods of request. Also in this area is the layout type, which varies depending on the publication, but usually you have the option of selecting either a microsite or a light listing, depending on which would be more suitable for your product.

3. Microsite Media: The Microsite Media section allows you to create the bulk of a microsite for a product, as well as upload images and documents to support the product. The "Descriptive Text" field stores the main body of text for the microsite, and can contain HTML tags.

4. Call-Out Media: A "callout box" is a chunk of text (with optional image) that serves as a direct link to the microsite from different pages in your site. If your site uses callout boxes, you can upload a short description and a thumbnail image here.

5. Categories: The Categories for the site are listed here, and you should check any that you would like this listing to appear in.

Some general rules when creating a new Microsite:

Remember that you can use HTML tags in your 'Text' section, but if you do, be sure to properly close your tags or your Listing may not display properly.

Don't over-categorize your microsite. Just because there are 10 (for example) categories on your site doesn't mean they are all appropriate. Over-categorization is just as bad as under-categorization.

When creating a new microsite, you usually want to add it to the issue that you are working in. You can use the checkbox at the bottom of the page labeled 'Click Here to Instantly Add this…' to save yourself time. Go ahead and check this now. Fill out the rest of this screen with any data you have and then click the save button.

3.B. Uploading Graphics

One important part of working with the PAI is using the HTML forms to upload .jpg and .gif images of advertiser logos and product images. When uploading images, follow these guidelines:

1. **Images should be saved at a resolution of 72 dpi.** Save "simple" images with fewer colors as GIFs and "photographic" images with lots of colors as JPGs.

2. **Always stick to the pixel sizes specified by the form.** Images will have to be a certain size on screen, so the forms where you upload the images will specify a width and height in pixels. Sometimes the preferred background color or other instructions will be displayed on the form as well.

3. **Watch the file size of the images you are uploading.** If they are big, then the web site will load slowly.

4. Make sure you check your work after uploading graphics, and if you have problems making a certain graphic fit your site you can call your Hotresponse representative for help.

3.C. Reader Service

If you use Hotresponse as a reader service program and you have checked the box to instantly add the listing or microsite to the working issue, then you will see a screen like the following after you finish editing your listing:

Here, you fill out the information regarding the inbook advertisement:

1. Specify advertisement's Reader Service number (as shown in magazine) *required
2. Page number the advertisement is on in the magazine *optional
3. Ad size (1 page=100, 1 ½=150, 2 1/3=233, etc.) *optional
4. Ad Color (b/w, 2 color, 4 color) *optional

Click Finish when you are done. Remember, at any time you can change the reader response values for your issue by going to the 'manage rr numbers' option under issue management. The values for Reader Response Number, Page Number, Ad size, and Color are displayed, as well as a link titled 'Edit ISI' which links to a page where you can edit these values. (See Section 2.D.)

3.C. Previewing Your Work

If an issue has not passed its go-live date, you can preview the issue on your live site by using "preview mode". By turning the preview on, you are turning off the flag in your cookie that tells your browser not to display an issue if its go-live date is in the future. This turns the issue live for you, but not for the rest of the site's visitors. While in preview mode you can build an issue or just preview an issue and no one else can see what you're seeing unless they are also in preview mode.

To turn preview mode on, return to the publisher administration interface home page by clicking on home in the menu. There you will see a grey box on the left hand side of the screen like this:
Click on the link 'Turn Preview On'. Now when you open up a new browser window and view the publication web site you will be able to see issues that are not yet live. While you are working with the PAI in preview mode you will see a message across the top of the screen that says 'hotresponse preview

Preview Mode Is Off
If this issue has not passed its go-live date, you can preview the issue on your live site.
Turn Preview On

mode'. To turn preview mode off, return to the home page of the PAI and click the same link again. It's a good idea to turn preview mode off before logging out when you are finished.

After you have previewed your issue, you can do one of two things to take your issue live:

1. Wait for the 'Go Live Date' that you set when you created your issue.

2. Go to 'Edit Issue Information' page in the Issue Management Section, and set the "Go Live Date" to the current date. This makes the issue visible to the frontend user. Make sure preview mode is off and then view the frontend to make sure your issue is being displayed properly.

3.C. Summary

Congratulations, you have set up your first issue! You should have enough familiarity with the PAI now to set up more issues, advertisers, or listings.

We have covered many of the features of the PAI, but you may have more questions. Feel free to talk with your Hotresponse representative or call Hotresponse Technical Support at **1-800-730-7303** if you need help.