

CPP Illustrator User Manual

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System Requirements

Languages support

- Illustrator is available in both English and French languages

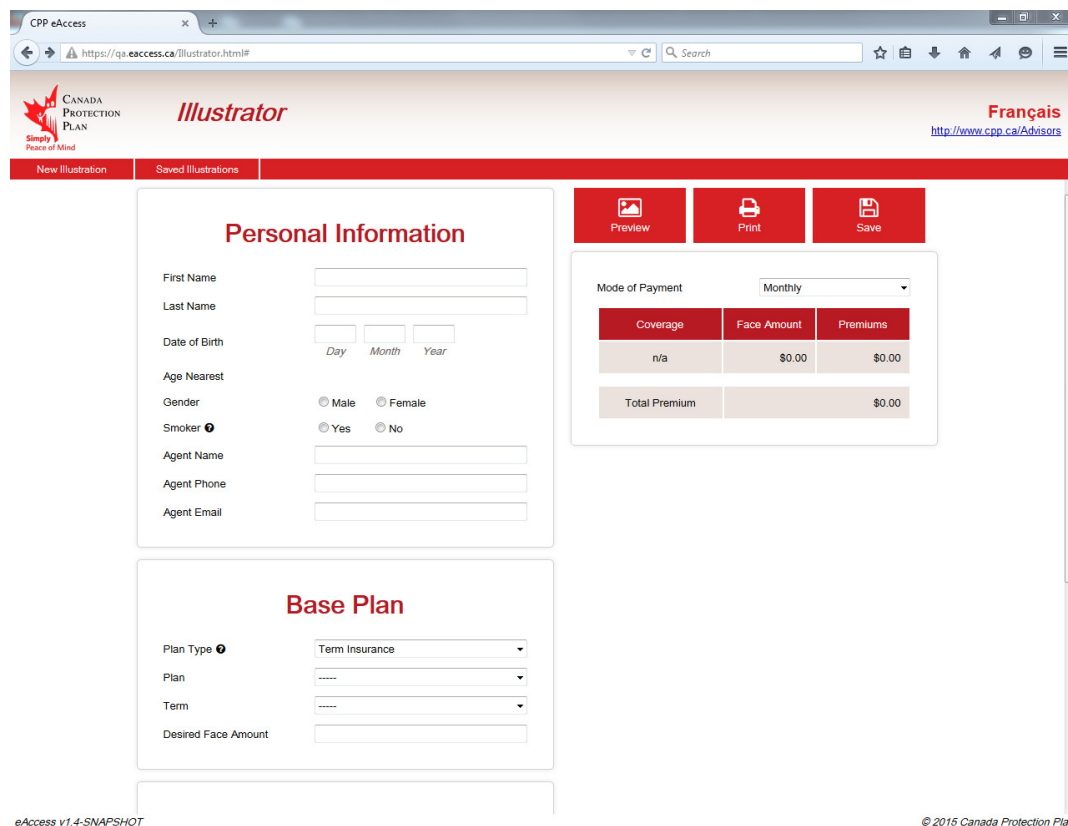
Browser support matrix

	Export to HTML	Save as PDF	Offline Mode
IE 8	Y	Y*	N
IE 9	Y	Y*	N
IE 10/11	Y	Y*	Y
Chrome	Y	Y*	Y
FireFox	Y	Y*	Y
Safari	N	Y	Y
IPad	N	N	N
*Save as PDF enabled if 3rd party PDF writer is installed			

Getting Started with Illustrator

How to access the Illustrator

To access the Illustrator website, open a supported internet browser and go to: <https://cpp.eaccess.ca>. The following page will be displayed:



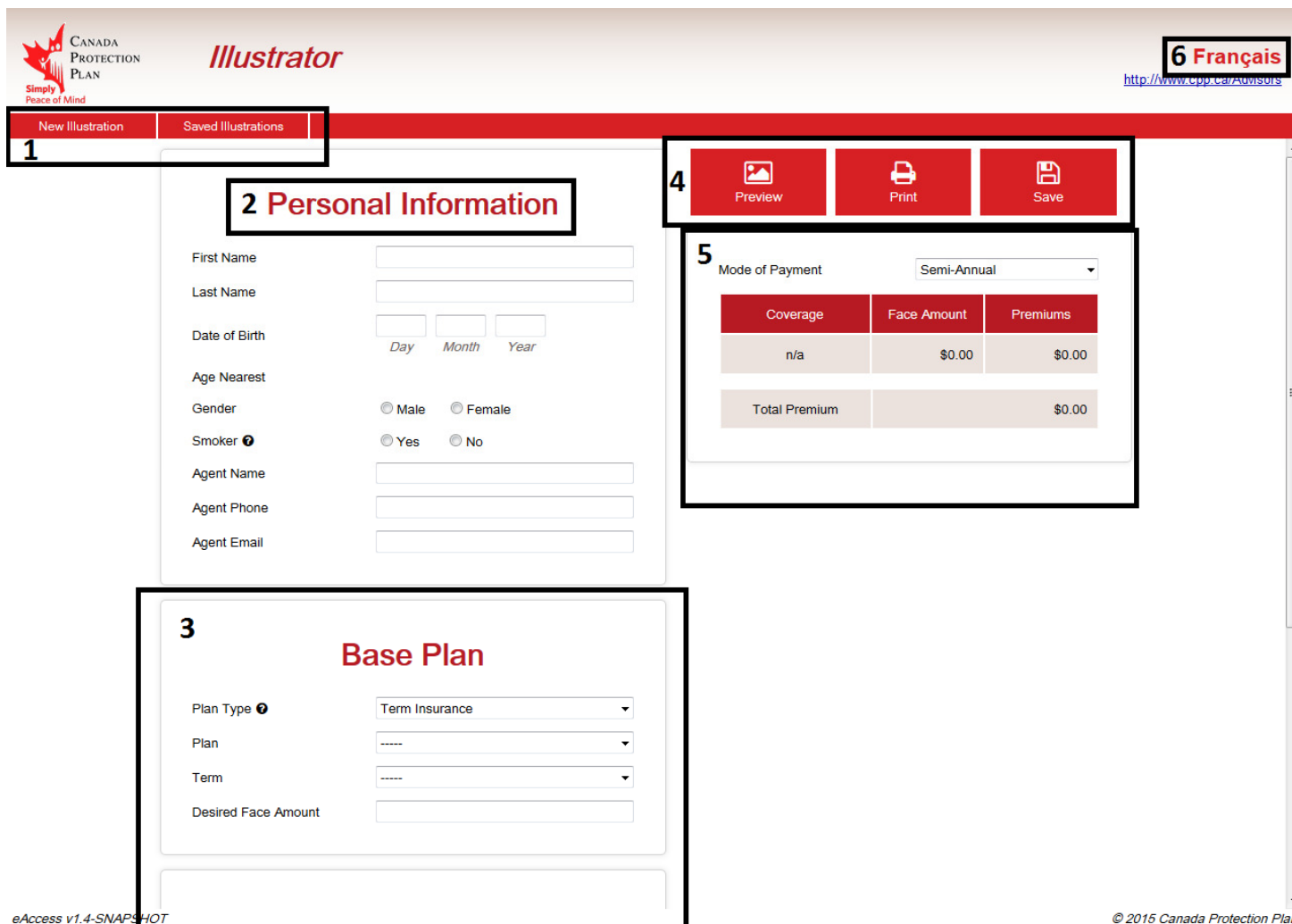
The screenshot shows the CPP eAccess Illustrator website. The browser address bar displays <https://qa.eaccess.ca/illustrator.html#>. The page header includes the Canada Protection Plan logo, the word "Illustrator", and a "Français" link with the URL <http://www.cpp.ca/Advisors>. Below the header is a red navigation bar with "New Illustration" and "Saved Illustrations" buttons. The main content area is divided into two columns. The left column contains a "Personal Information" form with fields for First Name, Last Name, Date of Birth (Day, Month, Year), Age Nearest, Gender (Male/Female), Smoker (Yes/No), Agent Name, Agent Phone, and Agent Email. The right column contains a "Mode of Payment" dropdown set to "Monthly" and a table showing Coverage, Face Amount, and Premiums. The table has a row for "n/a" with Face Amount \$0.00 and Premiums \$0.00, and a "Total Premium" row with a value of \$0.00. Below the personal information form is a "Base Plan" form with fields for Plan Type (Term Insurance), Plan, Term, and Desired Face Amount. The footer of the page includes "eAccess v1.4-SNAPSHOT" and "© 2015 Canada Protection Plan".

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Illustrator at a Glance

Below is a list of commonly used areas of the Illustration software. This user guide will refer back to this list when providing directions.

1. Navigation Menu
2. Personal Information
3. Plan Information
4. Action Menu
5. Mode of Payment
6. Language Selection



The screenshot shows the CPP Illustrator software interface. At the top left is the Canada Protection Plan logo. The title bar says "Illustrator". In the top right corner, there is a language selection button labeled "6 Français" and a URL <http://www.cpp.ca/Autoais>. Below the title bar is a red navigation bar with two buttons: "New Illustration" and "Saved Illustrations", with a callout "1" pointing to them. The main content area is divided into several sections. On the left, there is a "2 Personal Information" section with fields for First Name, Last Name, Date of Birth (Day, Month, Year), Age Nearest, Gender (Male/Female), Smoker (Yes/No), Agent Name, Agent Phone, and Agent Email. To the right of this is a "4" callout pointing to an "Action Menu" with three buttons: "Preview", "Print", and "Save". Below the Personal Information section is a "3 Base Plan" section with fields for Plan Type (Term Insurance), Plan, Term, and Desired Face Amount. To the right of the Base Plan section is a "5" callout pointing to a "Mode of Payment" section. This section includes a dropdown menu set to "Semi-Annual" and a table showing Coverage, Face Amount, and Premiums. The table has two rows: one for "n/a", "\$0.00", "\$0.00" and another for "Total Premium", "\$0.00". At the bottom left, it says "eAccess v1.4-SNAPS-HOT" and at the bottom right, "© 2015 Canada Protection Plan".

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Creating an illustration

1. Click on the 'New Illustration' button (1) to begin a new illustration.

2. Fill in the following fields:

- Personal Information (2)

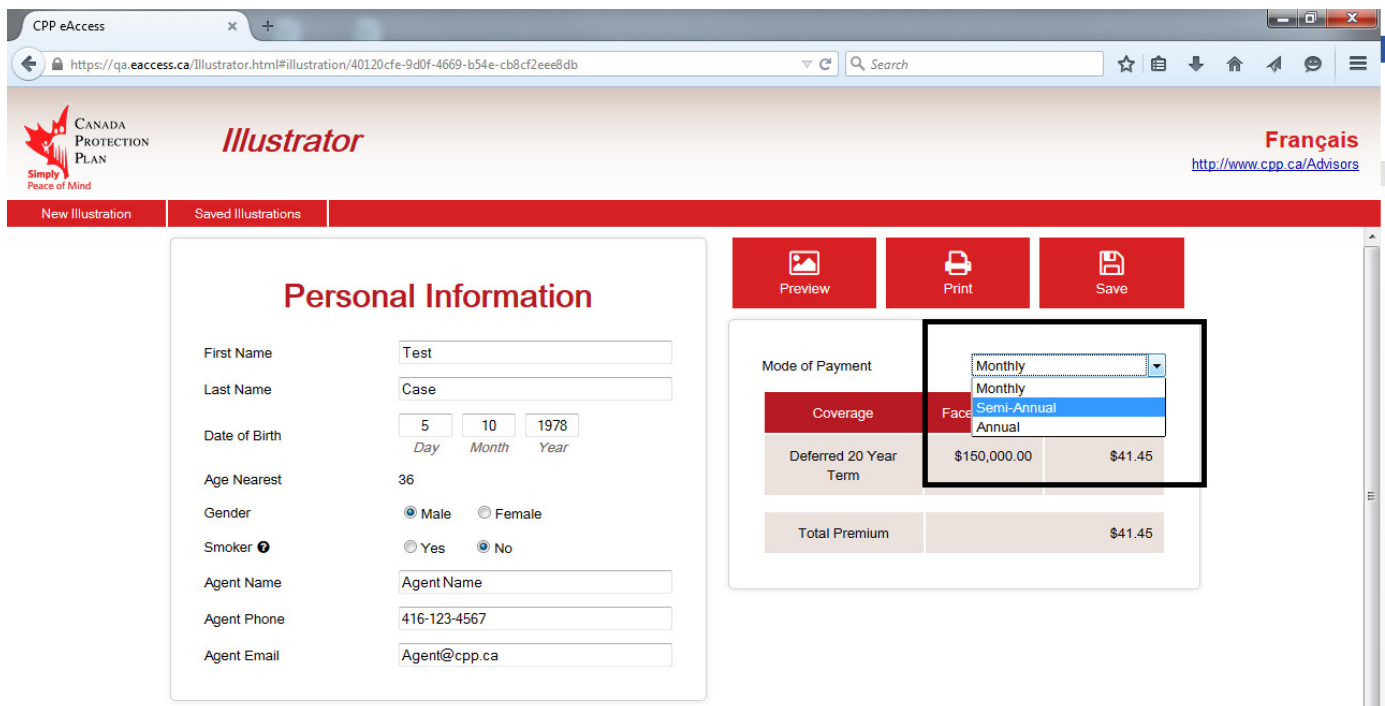
- Plan Information (3)

This Includes: Base Plan, Term Riders and Optional Benefit Riders

3. Click on Preview button to generate the Illustration (4)

Viewing monthly, semi-annual and annual premiums

You have the ability to view the premiums depending on the mode of payment before generating the full illustration. Using the drop down list in section 5, you can select the mode of payment. This will display the premium for each product and the total premiums for all products.



The screenshot shows the CPP eAccess Illustrator web application. The browser address bar displays the URL: <https://qa.eaccess.ca/Illustrator.html#illustration/40120cfe-9d0f-4669-b54e-cb8cf2eee8db>. The page features the Canada Protection Plan logo and the word "Illustrator" in a large, stylized font. A red navigation bar at the top contains the links "New Illustration" and "Saved Illustrations". Below this, there are three red buttons: "Preview", "Print", and "Save".

The main content area is divided into two sections. The left section is titled "Personal Information" and contains the following fields:

- First Name: Test
- Last Name: Case
- Date of Birth: 5 / 10 / 1978 (Day / Month / Year)
- Age Nearest: 36
- Gender: ☒ Male ☐ Female
- Smoker: ☐ Yes ☒ No
- Agent Name: Agent Name
- Agent Phone: 416-123-4567
- Agent Email: Agent@cpp.ca

The right section is titled "Mode of Payment" and contains a dropdown menu. The dropdown menu is open, showing the following options: Monthly, Monthly, Semi-Annual, and Annual. The "Semi-Annual" option is highlighted. Below the dropdown menu, there is a table showing the premium amounts for each mode of payment:

Coverage	Monthly	Semi-Annual	Annual
Deferred 20 Year Term		\$160,000.00	\$41.45
Total Premium			\$41.45

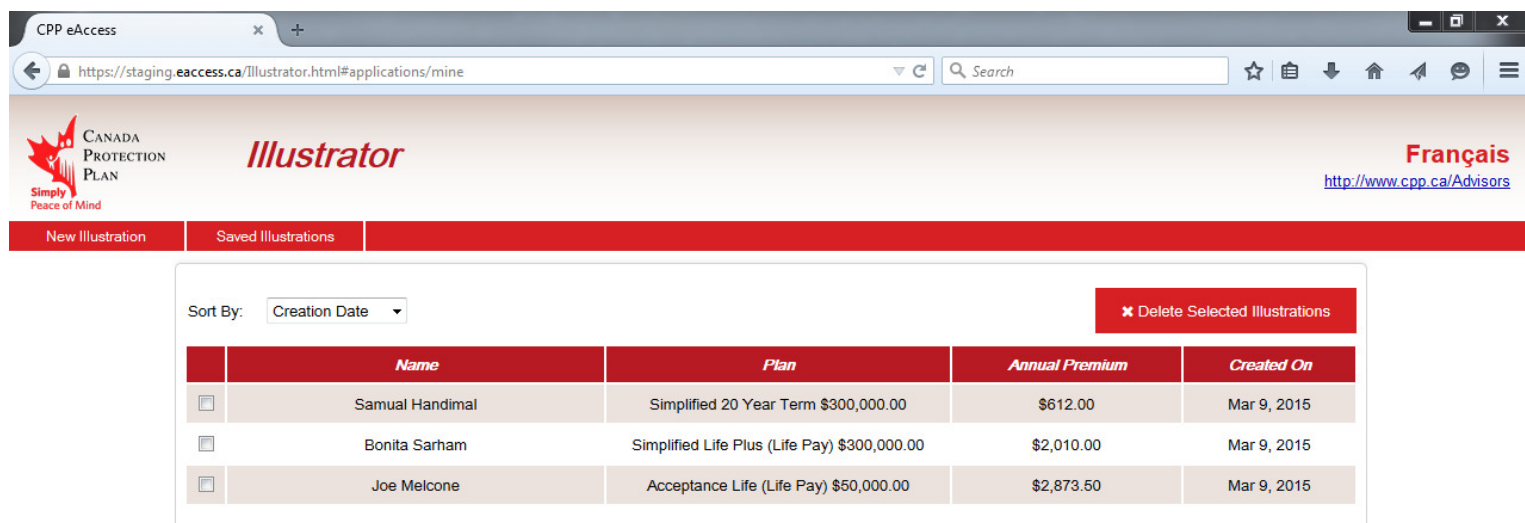
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Saving/Retrieving illustrations.

Once you have created an Illustration, you can save it for future use. To save the Illustration, click on the save button in the actions menu (item 4 on page 3).

Once saved, it will be listed under the Saved Illustrations Screen. This can be access by hitting the “Saved Illustrations” menu from the navigation menu (item 1 on page 3).

You will then see the following screen:



The screenshot shows the CPP eAccess web application. The browser address bar displays <https://staging.eaccess.ca/Illustrator.html#applications/mine>. The page header includes the Canada Protection Plan logo, the word "Illustrator" in a stylized font, and a "Français" link with the URL <http://www.cpp.ca/Advisors>. Below the header is a navigation bar with two tabs: "New Illustration" and "Saved Illustrations". The "Saved Illustrations" tab is active, showing a table of saved illustrations. The table has a "Sort By" dropdown menu set to "Creation Date" and a "Delete Selected Illustrations" button. The table contains three rows of data:

	Name	Plan	Annual Premium	Created On
<input type="checkbox"/>	Samual Handimal	Simplified 20 Year Term \$300,000.00	\$612.00	Mar 9, 2015
<input type="checkbox"/>	Bonita Sarham	Simplified Life Plus (Life Pay) \$300,000.00	\$2,010.00	Mar 9, 2015
<input type="checkbox"/>	Joe Melcone	Acceptance Life (Life Pay) \$50,000.00	\$2,873.50	Mar 9, 2015

You can use the “Sort By” drop down menu to sort the list by creation date or insured’s name.

To retrieve a previously saved Illustration, simply click on the information for needed Illustration and it will open. For ease of use, Illustrator will highlight the Illustration as you hover over it.

Do Not Delete Your Cookies!

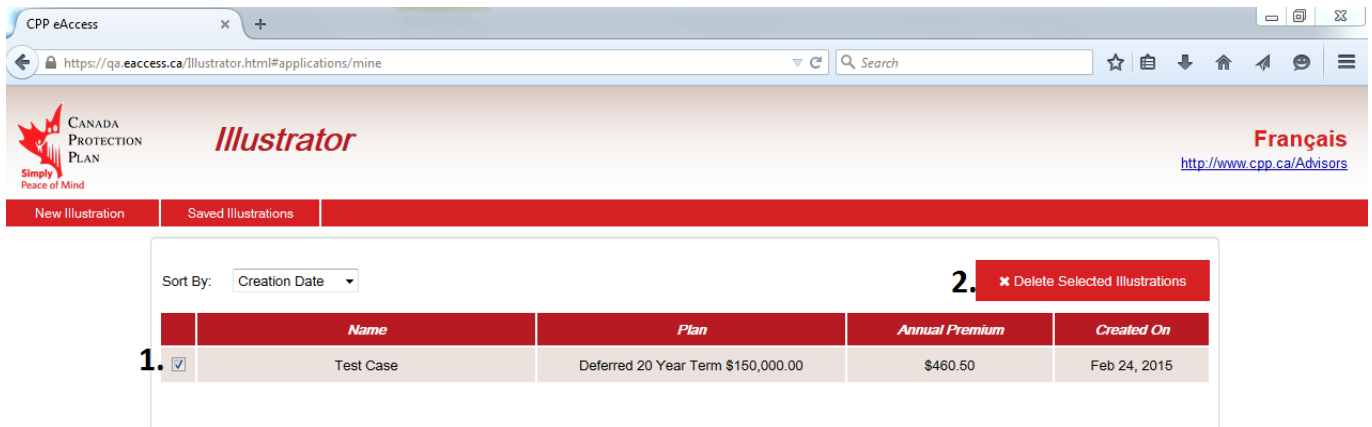
Please note: The saved information is stored in your browser’s temporary internet files. If you clear your browser’s temporary internet files or delete your cookies, **you will lose your saved Illustrations.**

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Deleting applications

After using the Illustrator software, you will have a long list of saved applications. You may want to clear out saved Illustrations that are no longer needed. You will need to go to the **Saved Illustrations** page and follow these steps:

1. Select the Illustrations you would like to delete by checking the box on the far left side of the Illustration
2. Click on the Delete Selected Illustrations button on the top right side of this list.



Sort By: Creation Date

2. **Delete Selected Illustrations**

	Name	Plan	Annual Premium	Created On
1. <input checked="" type="checkbox"/>	Test Case	Deferred 20 Year Term \$150,000.00	\$460.50	Feb 24, 2015

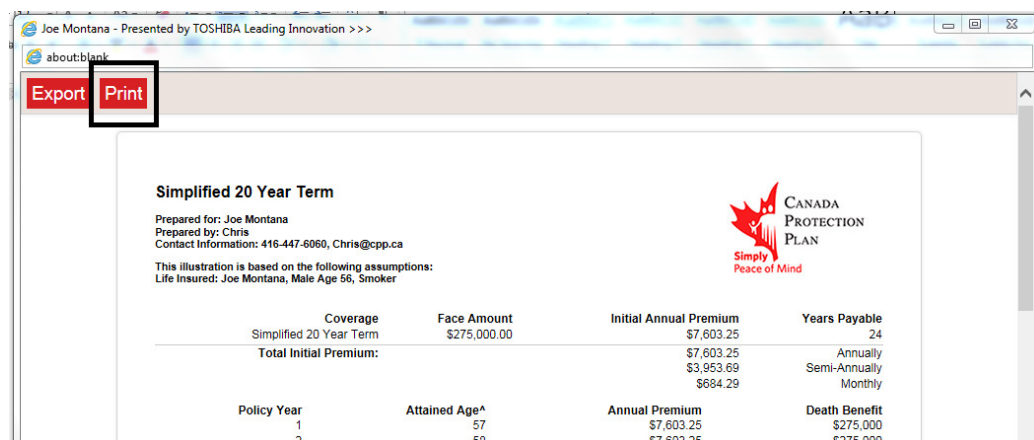
Additional Features

Printing an Illustration

Using Internet Explorer

Printing an Illustration can be accomplished by two ways:

1. Clicking on the print button in the actions menu (item 4 on page 3).
- Or
2. Clicking the preview button, then selecting print from the top menu of the preview page.



Joe Montana - Presented by TOSHIBA Leading Innovation >>>

about:blank

Export **Print**

Simplified 20 Year Term

Prepared for: Joe Montana
Prepared by: Chris
Contact Information: 416-447-6060, Chris@cpp.ca

This illustration is based on the following assumptions:
Life Insured: Joe Montana, Male Age 56, Smoker

Coverage	Face Amount	Initial Annual Premium	Years Payable
Simplified 20 Year Term	\$275,000.00	\$7,603.25	24
Total Initial Premium:		\$7,603.25 \$3,953.69 \$684.29	Annually Semi-Annually Monthly

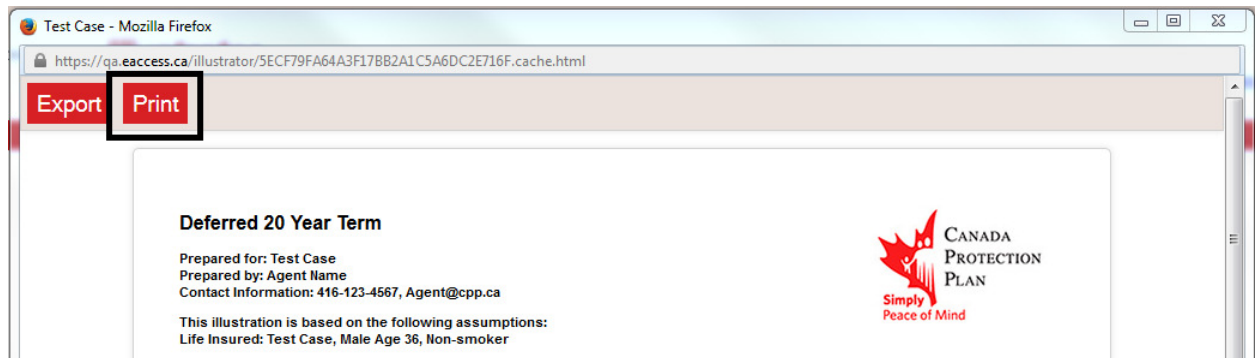
Policy Year	Attained Age^	Annual Premium	Death Benefit
1	57	\$7,603.25	\$275,000
2	58	\$7,603.25	\$275,000

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Using FireFox

Printing an Illustration can be accomplished by two ways:

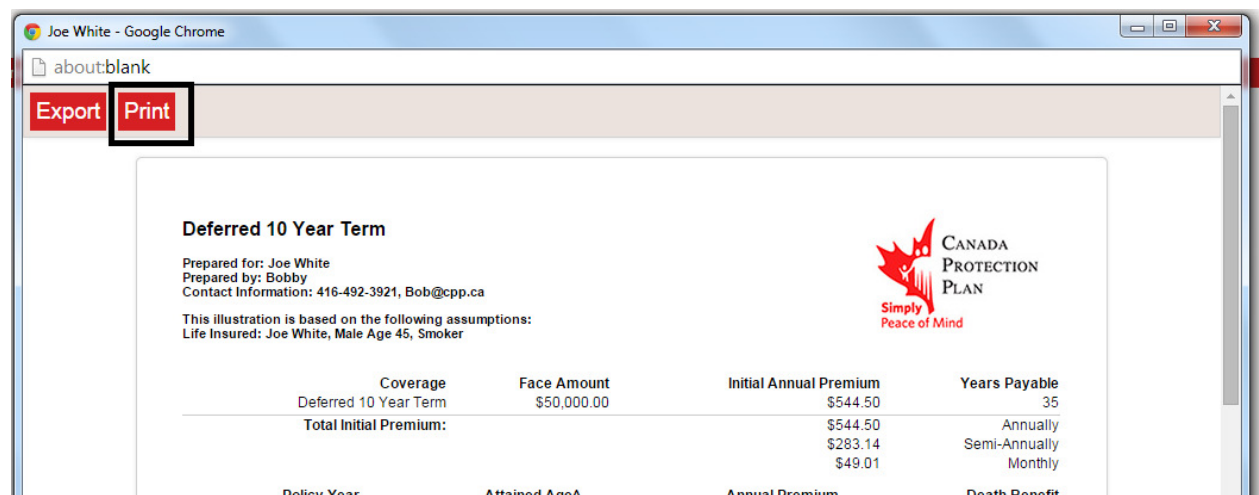
1. Clicking on the print button in the actions menu (item 4 on page 3).
- Or
2. Clicking the preview button, then selecting print from the top menu of the preview page.



Using Chrome

Printing an Illustration can be accomplished by two ways:

1. Clicking on the print button in the actions menu (item 4 on page 3).
- Or
2. Clicking the preview button, then selecting print from the top menu of the preview page.

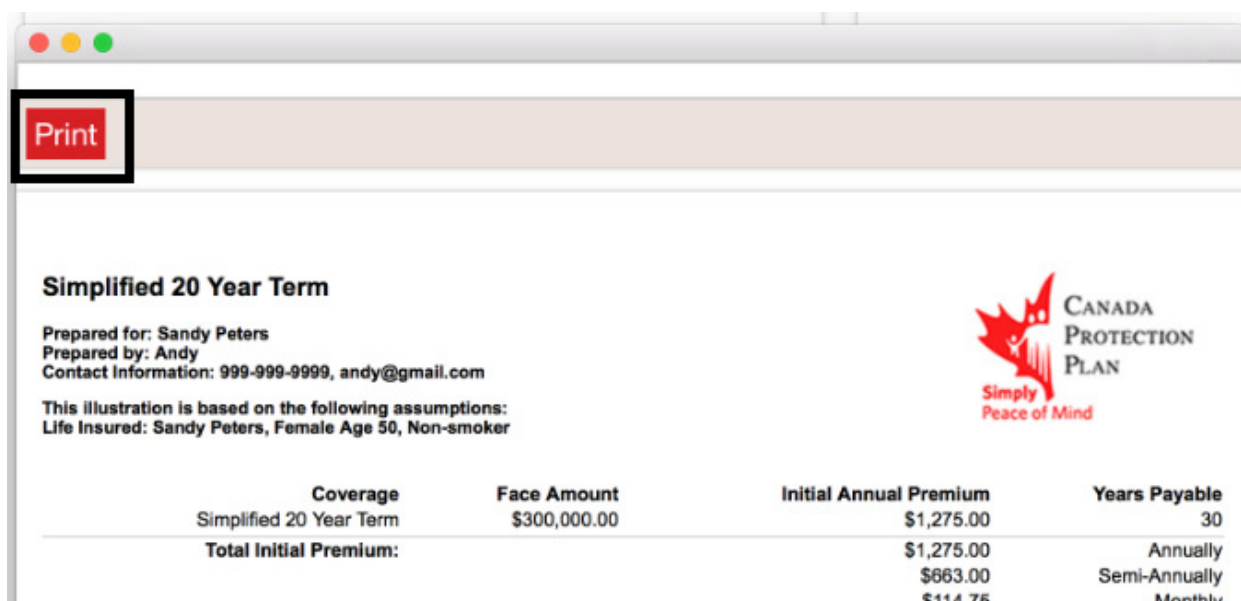


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Using Safari

Printing an Illustration can be accomplished by two ways:

1. Clicking on the print button in the actions menu (item 4 on page 3).
- Or
2. Clicking the preview button, then selecting print from the top menu of the preview page.

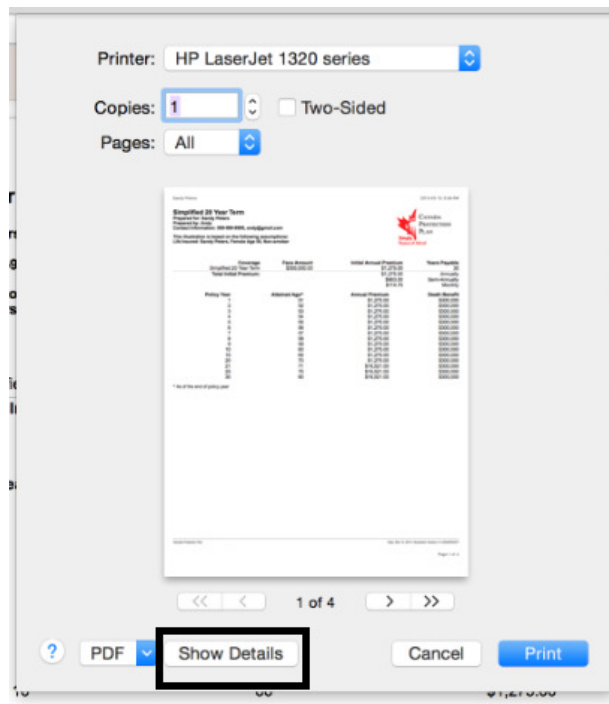


Note: Safari users may notice that the illustration may print **extra pages that only contain header/footer information**. To correct this issue, you will have to disable header and footers before printing.

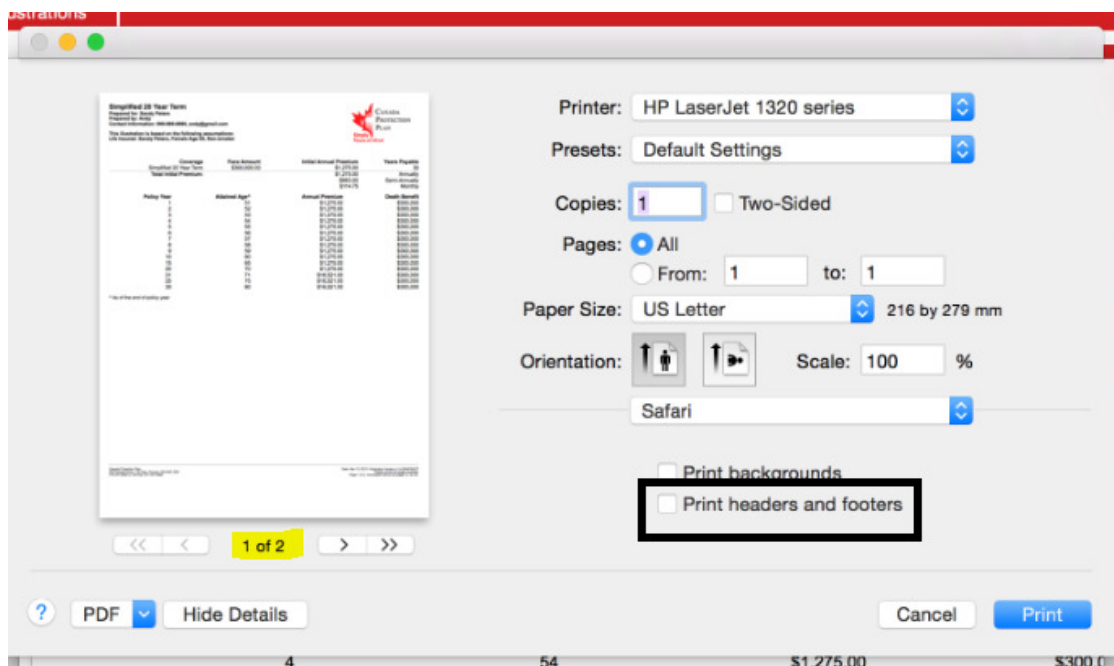
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To remove the extra pages, please follow these steps:

1. At the print dialogue box, select the show details button.



2. Uncheck the “Print headers and footers” as seen below. You should now notice the number of pages are correct. Then select print to print the Illustration.



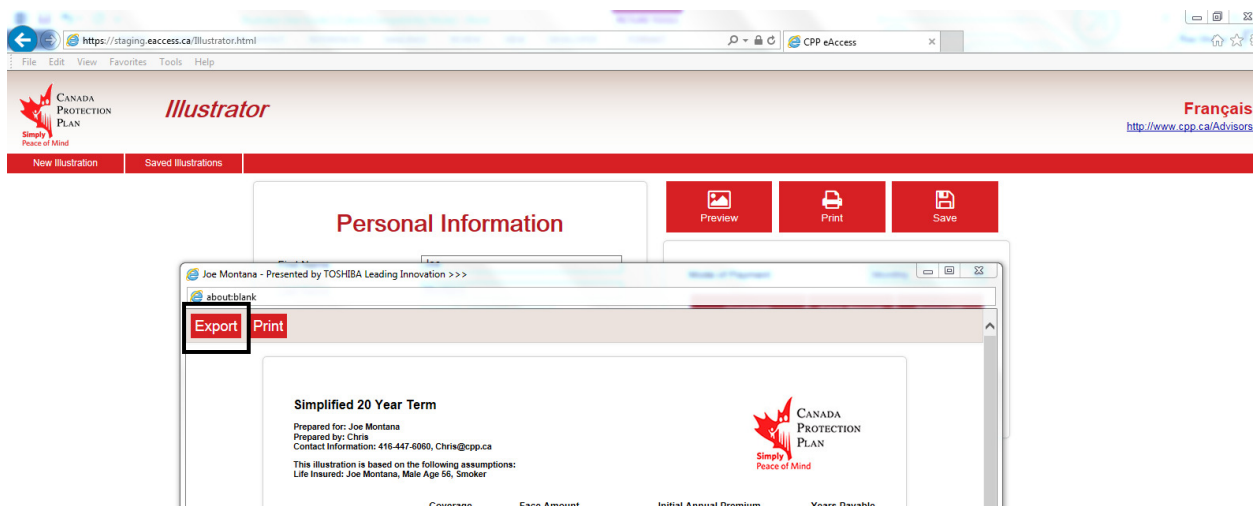
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Exporting an Illustration (PC Only)

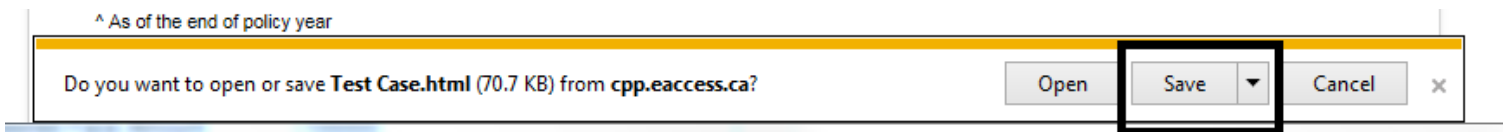
Using Internet Explorer

If you would like to save your illustration outside of the Illustrator software, you will have to export it to an HTML file. This file is a universally readable format that is based on internet web page format. It can be opened by any internet browser without additional software. To export an Illustration follow these steps with the Illustration on the screen:

1. Click on the preview button in the actions menu (item 4 on page 3)
2. Select export from the top menu



3. At the bottom of the screen you will see a prompt to save the file, select save



4. You will then see a confirmation that the file has been saved, select "open folder" to see the file in the download folder.

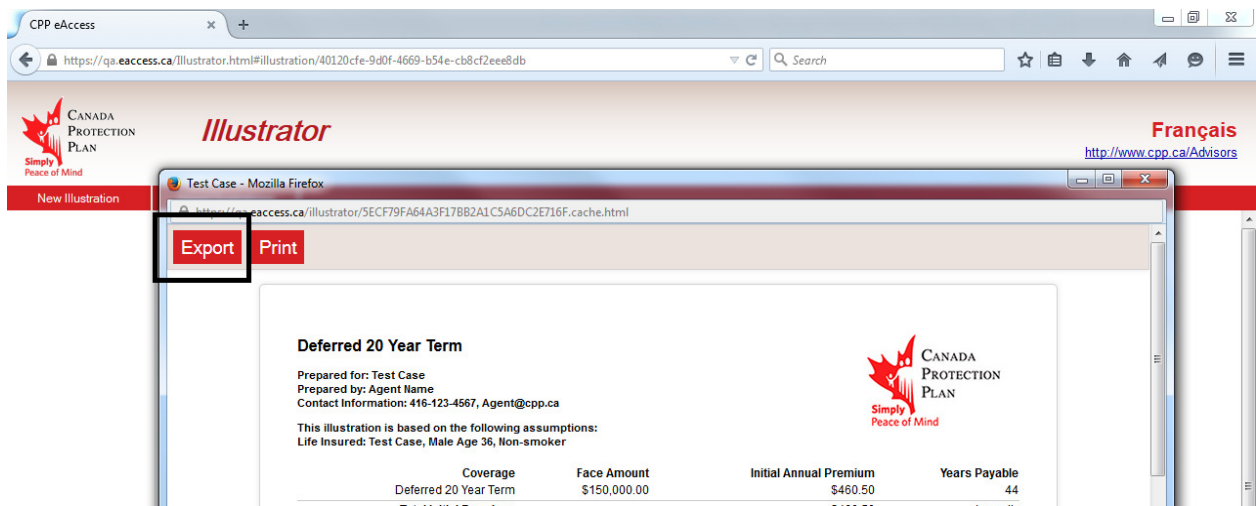


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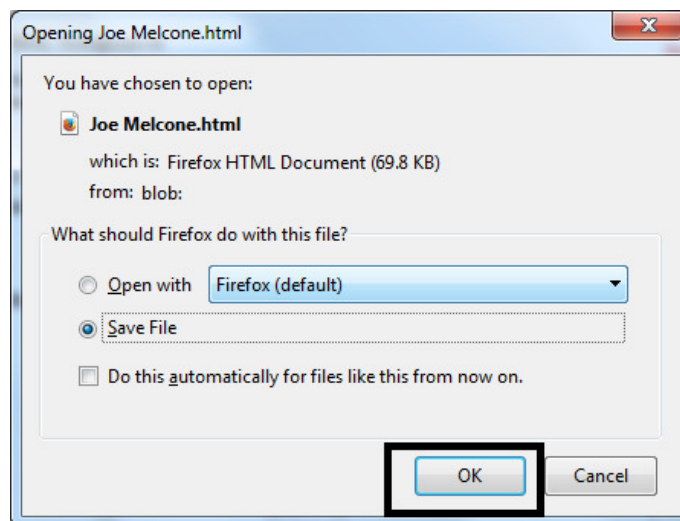
Using FireFox

If you would like to save your illustration outside of the Illustrator software, you will have to export it to an HTML file. This file is a universally readable format that is based on internet web page format. It can be opened by any internet browser without additional software. To export an Illustration follow these steps with the Illustration on the screen:

1. Click on the preview button in the actions menu (item 4 on page 3)
2. Select export from the top menu

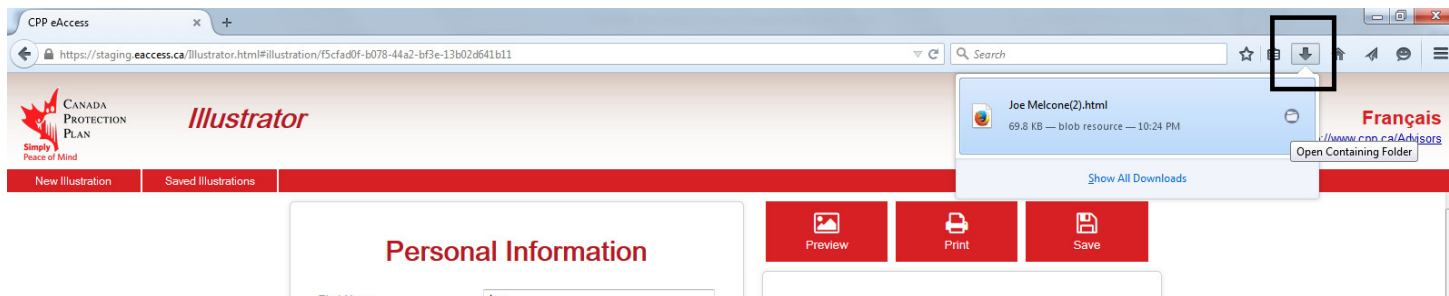


3. Click OK when you see the following prompt to save the file:

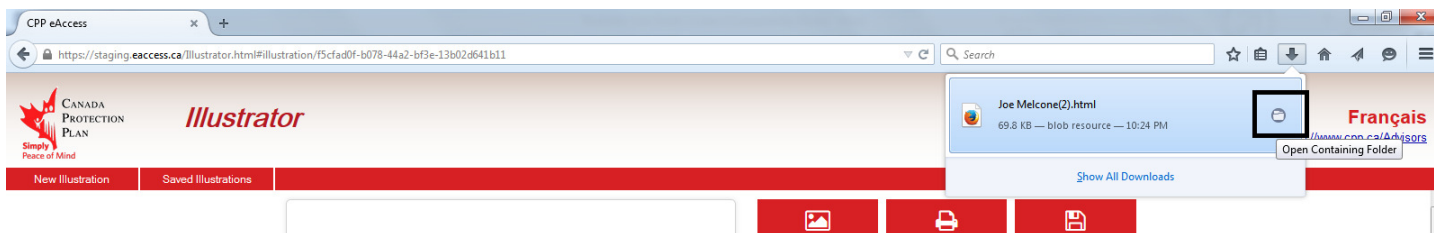


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- The download icon in Firefox will flash indicating the file is being downloaded, click on it to see its progress:



- Clicking on the folder icon beside the file name will open the folder containing your exported quote

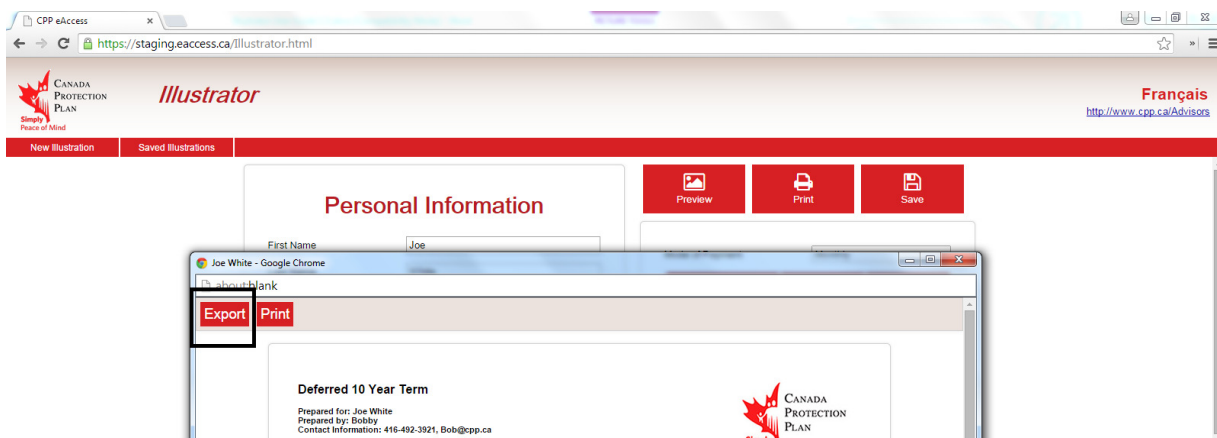


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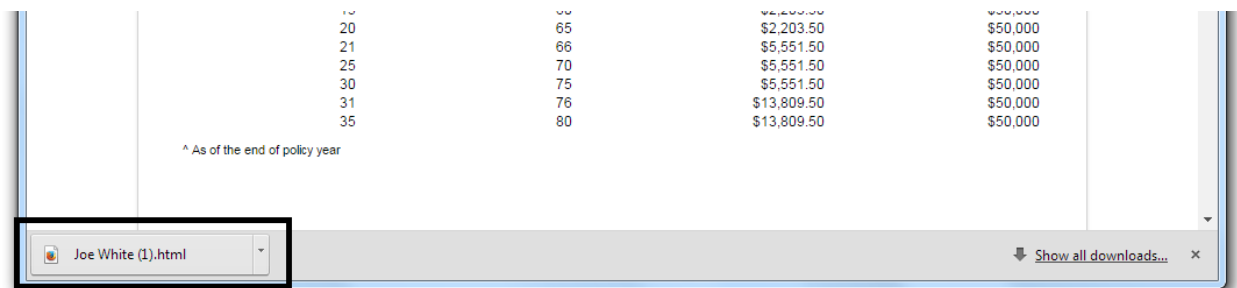
Using Chrome

If you would like to save your illustration outside of the Illustrator software, you will have to export it to an HTML file. This file is a universally readable format that is based on internet web page format. It can be opened by any internet browser without additional software. To export an Illustration follow these steps with the Illustration on the screen:

1. Click on the preview button in the actions menu (item 4 on page 3)
2. Select export from the top menu

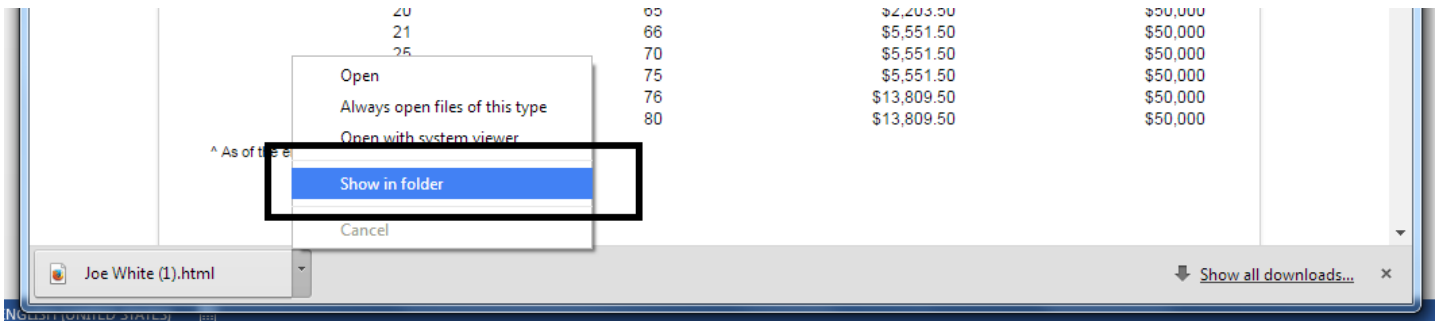


3. The download will now start and the exported file will be listed at the bottom bar of the window.



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- To locate the exported file, click on the arrow at the right of the file name, and select “Show in folder”. This will open a folder with the exported file highlighted.

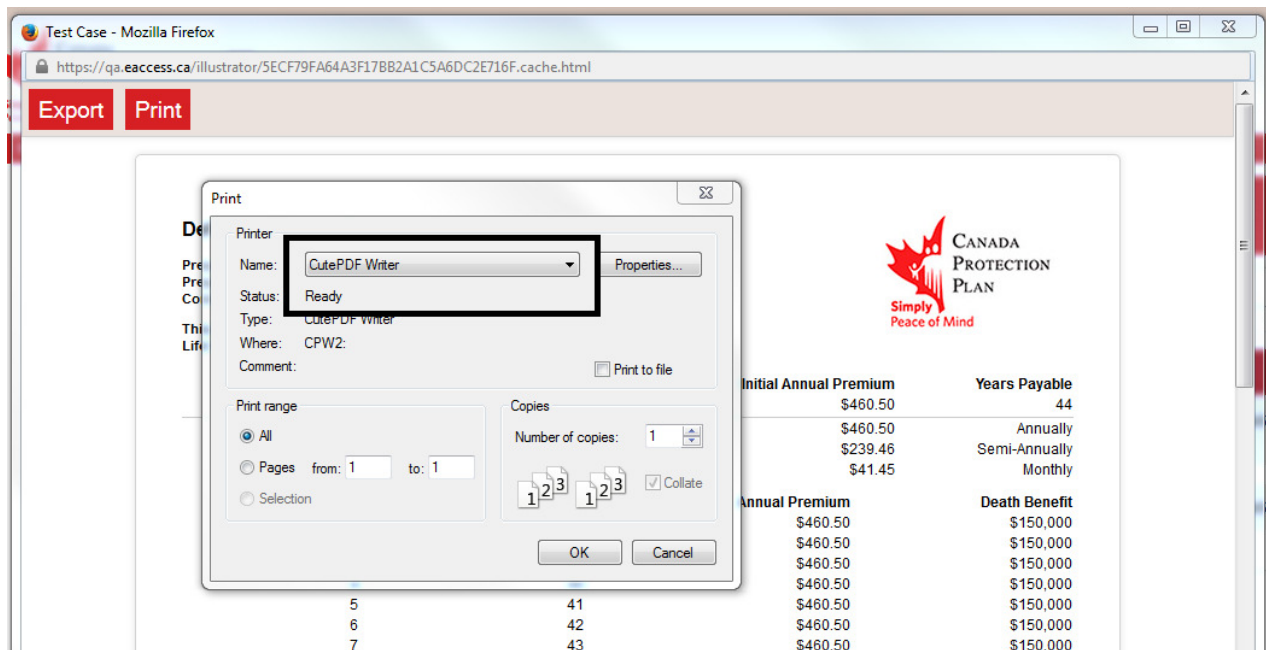


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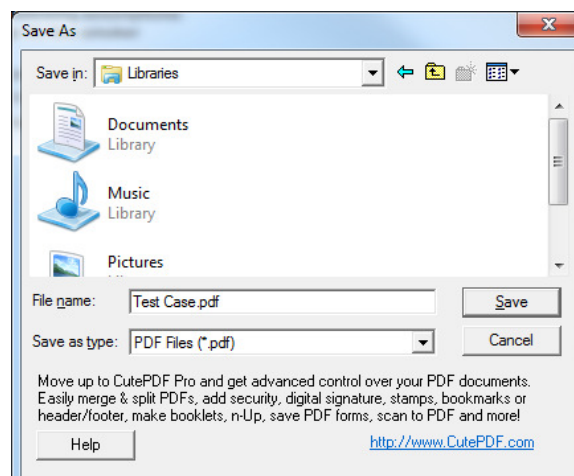
Saving as a PDF (PC)

A pdf writer is required in order to create a pdf document of the illustration output. If you are using Windows and require a pdf writer program, one is available here <http://www.cutepdf.com/Products/CutePDF/writer.asp>

Once the PDF writer is installed, simply select the print option in Illustrator and chose the PDF Writer as the printer and hit OK.



You will then be prompted for the location to save the file. Select your location and type in a file name then select Save.

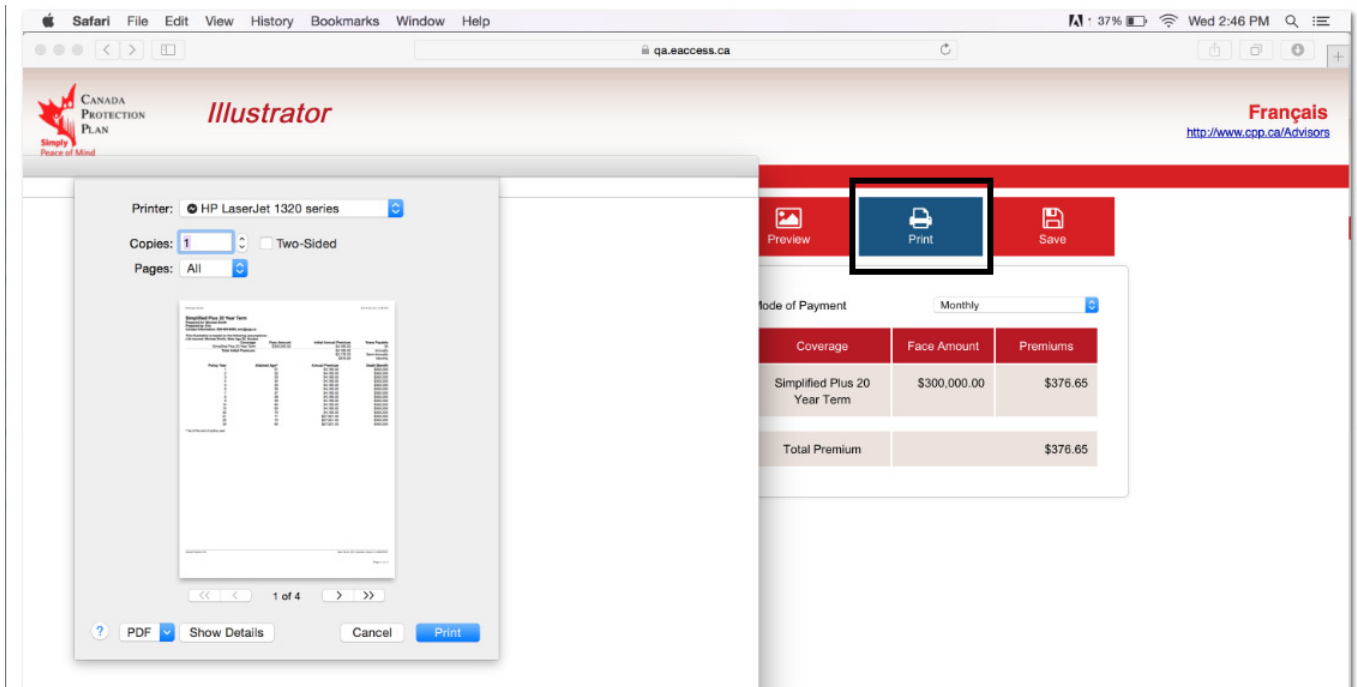


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Saving as a PDF (MAC)

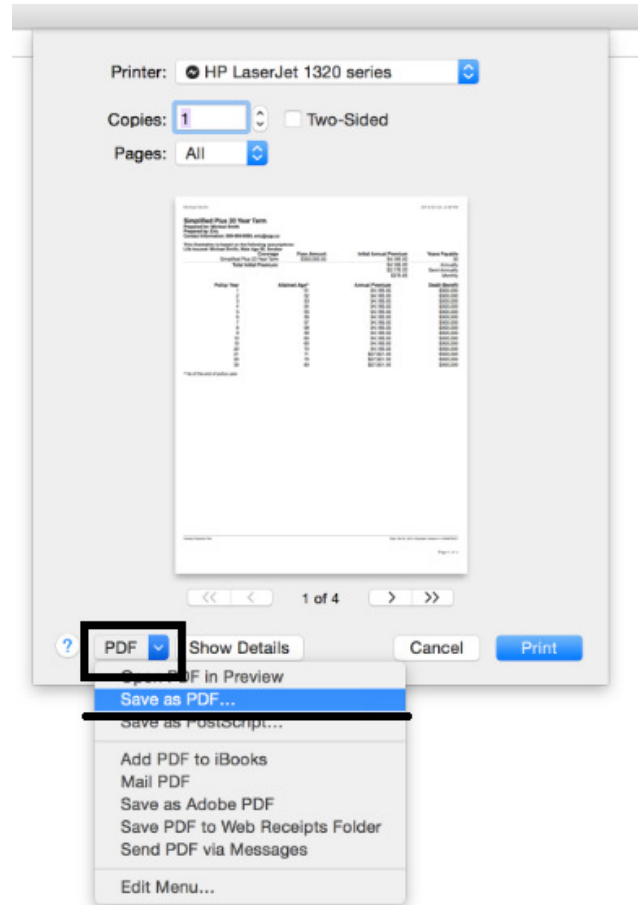
The Safari browser has the ability to save as a PDF built into the browser. To use this feature, please follow these directions:

1. When the Illustration is open, click on the print option from the action menu (item 4 on page 3)

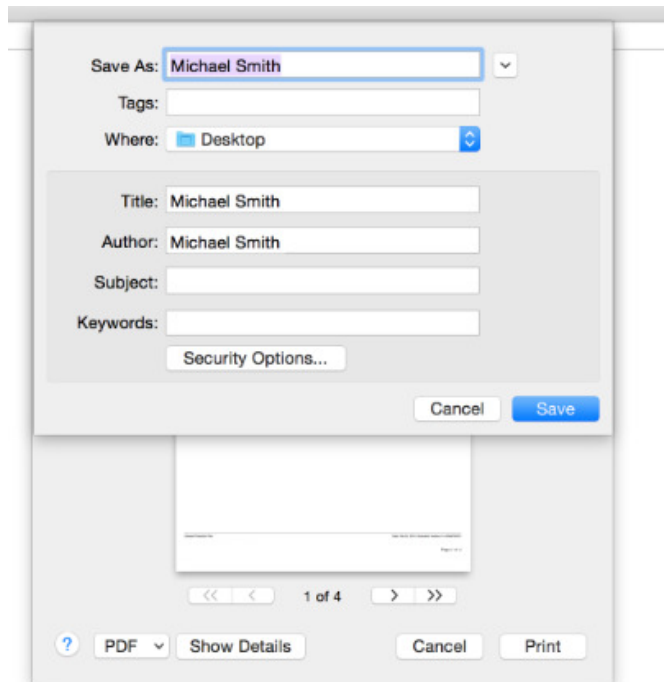


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2. Select the blue drop down arrow from the PDF button in the lower left of the screen. Then choose "Save as PDF" from the menu. .



3. Fill In the name of the file, location and other details and click save to store the PDF.



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Illustrator on the go

Illustrator is available to you when working offline without an internet connection. You can perform all the premium calculations, generation of illustrations, access saved illustrations and carry out all other functions of the Illustrator even when you do not have an internet connection!

To setup this feature, please follow these steps:

1. When **connected to the internet**, visit <https://cpp.eaccess.ca> to load Illustrator on your computer.
2. Create a Bookmark, Favorite or Link the site in your Internet Browser.
3. When **disconnected from the internet**, use the previously saved Bookmark, Favorite or Link to re-open Illustrator.

QUICK TIP

To ensure you have the latest version of the Illustrator data. Please periodically load Illustrator with an Internet Connection. Updates are transparent and no further action is needed to keep up-to-date.

This feature is available in Internet Explorer 10+, and current versions of Safari, Firefox and Chrome.