eZ Newsletter

User Handbook

version 1.5.3

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1. Introduction

eZ Newsletter is a powerful solution for newsletter management, combining the benefits of a sophisticated distribution system with optimization of the editorial process. It integrates the entire newsletter life cycle, from configuring the campaign to the distribution of email and the follow-up.

eZ Newsletter is an extension to eZ Publish, a full-featured Enterprise Content Management System. eZ Publish includes features that support multiple authors working on the same site, multiple kinds of content (text, images, multimedia files), content version management and multi-language sites. As an Enterprise Content Management System framework, eZ Publish is highly customizable, capable of fulfilling the complex needs of large organizations.

1.1. About eZ Publish

eZ Publish is a full-featured Enterprise Content Management System that includes sophisticated features to support multiple authors working on the same site, multiple kinds of content (text, images, multimedia files), content version management and multi-language sites. As an Enterprise Content Management System framework, eZ Publish is highly customizable, capable of fulfilling the complex needs of large organizations.

1.2. Purpose of this book

This book provides an overview of eZ Newsletter. Basic eZ Newsletter functions are described along with examples on how to create a newsletter.

1.3. Limitations of this book

This book is not a complete reference of all the functions of eZ Newsletter. It is also possible that the current version of the system differs slightly from what is described in the handbook.

1.4. Conventions

- Code samples, functions, variable names and so on, are printed in `monospace font`.
- File names and paths are printed in `monospace italic font`.
- Commands are printed in **`monospace bold font`**.
- Elements of graphical user interfaces (such as buttons and field labels) are printed in **bold font**.
- Component names (such as application and content class names) are capitalized, for example "Administration Interface" and "the Folder content class").

1.5. More resources

For assistance with eZ Newsletter, refer to the following resources:

- **eZ Newsletter**: More information is available on the eZ Newsletter page: http://ez.no/products/solutions/newsletter

- **eZ Publish forums**: The forums on the eZ Systems website are a valuable community-driven resource where eZ Publish users provide assistance and support to each other. Access to the forums is free. The forums are located at: http://ez.no/community/forum

- **Other eZ solutions**: For information about other solutions provided by eZ Systems, refer to: http://ez.no/products/solutions

- **Issue tracker**

  Current issues, bugs and feature requests concerning eZ Newsletter can be found at: http://issues.ez.no/ProjectSummary.php?id=7

1.6. Contacting eZ

If you have questions or suggestions about this handbook, please contact us:

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2. eZ Newsletter overview

2.1. Requirements

eZ Newsletter supports all browsers that eZ Publish supports, since it relies on the default Administration Interface. It is designed to work in all major browsers on all of the mainstream operating systems.

In general, eZ Newsletter should work in any XHTML- and CSS-conformant browser.

To log in to the system, you need to have a username and a password. Please contact your system administrator to get an account.

2.2. General concept

The newsletter system is a very complex and fully-featured tool. The system can be adjusted to meet the requirements of a large enterprise. It is designed to handle a large number of subscribers and to send out thousands of newsletters in a short period of time. Once you have completed the setup process, the creation of a newsletter can be done quickly and easily.

Before you can create a newsletter (a newsletter issue), a newsletter type must be defined. You can think of a newsletter type as a framework for all newsletters that are built upon that type. It defines the possible output formats (such as Text, HTML and External HTML), the design to use, the email address from which it will be sent and, most importantly, the subscription lists to which it will be sent.

In order to be able to handle many subscribers, the subscription system is separate from the newsletter system. Subscribers can add themselves to subscription lists through the front-end of the site. Administrators can manage the subscribers through the site's back-end (called the Administration Interface).

An import function for CSV lists is part of the system. Subscribers can be directly imported to one or several subscription lists. These subscription lists can be assigned to one or more newsletter types. This concept is illustrated in the following image.
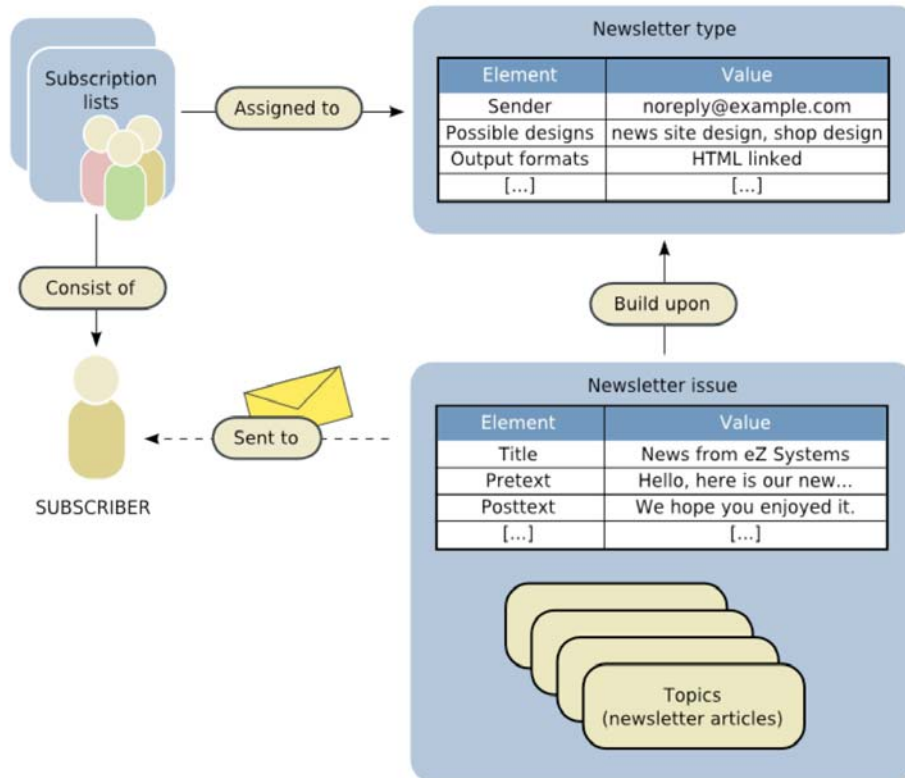
Figure 2.1: eZ Newsletter general concept

The creation of newsletter articles is the next step before you can create the newsletter issues. It enables a team to work together on content that can be used in newsletters. It is possible to use eZ Publish workflows to integrate an approval process.

A newsletter issue represents the newsletter that will be sent out. The newsletter issue includes the pretext (an introduction text) and the posttext (a closing text). During the creation of a newsletter issue, you have the option to send a preview of the newsletter or make a preview sendout to get an representation of how it will look in an email client.

2.3. Accessing the newsletter system

Log in at the URL of the editorial siteaccess (usually `http://hostname/newsletter_editor`).
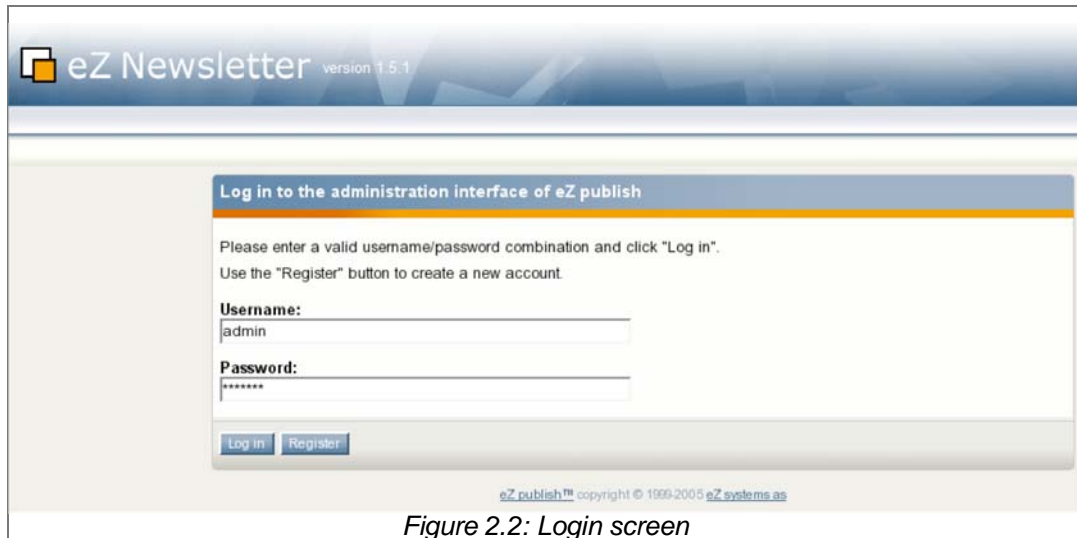Fill in your username and password and click the **Log in** button.

Figure 2.2: Login screen

For security reasons, if you are logged in for an hour without performing any actions, your session will be closed automatically, forcing you to log in again. Upon re-logging in, you will be forwarded to your last view. Unfinished session information is saved for three days. We recommend that you always log out whenever you are finished, in order to avoid losing any in-progress work. This is applicable to any eZ Publish interface.

3. Basic settings

Some basic settings for the site and the newsletter can be changed under the **Look & Feel** tab.

For example, you can define a company logo, which is used by the default newsletter templates and the front-end of the site. To upload a logo, click the **Browse** button in the Image attribute section and select an image file from your file system. When you click the **Send for publishing** button, the logo will be uploaded and stored in the system.

The Title and Meta data attributes will be used on all your pages. The title will be shown in the browser's title bar. The metadata is used for indexing by search engines like Google or Yahoo.

Further information about design in eZ Publish can be found at the standard eZ Publish documentation site at http://www.ez.no/doc.

3.1.1. General setup

When you click on the **Newsletter setup** tab**,** you will find some additional settings that are related specifically to the newsletter functionality. The **General setup** window allows you to configure the transport method used by eZ Newsletter for newsletter sendouts and previews.

Figure 3.1: General setup

You can choose between three different transport methods. The appropriate choice will depend on your system environment or the options given by your hosting provider:

- **SMTP**
  The use of a Simple Mail Transfer Protocol (SMTP) server is the same as usually configured in your email client to send emails. eZ Newsletter will use the same settings that were configured in the installation of eZ Publish.

- **Sendmail**
  The sendmail binary (or a compatible program) is available on most Linux/UNIX systems. Sendmail is often the best choice here, followed by SMTP. This method usually requires no additional setup.

- **File**
  To deal with big sendouts, the file transport can be used.

  Each individual newsletter is written to the file system, then a cronjob distributes them the newsletters to multiple SMTP servers. This transport method is not recommended when sending a preview unless you need it for a special setup.

  This method is for advanced use and requires additional setup in the ini system that will not be described further in this book.

3.1.2. Bounce settings

To set up bounce management, click on the **Newsletter setup** tab and choose the **Bounce** link from the left menu.

<div style="border: 1px solid black;">

What is a bounce?

The technical term "bounce" or "bounce message" is used for an email message that could not be delivered to the target email address.

Bounce messages are generated and sent back by the email server for multiple reasons. Causes of bounces include:

- the recipient's mailbox is full

- the target mail server cannot be reached

- the target mailbox does not exist

- the target mailbox is temporarily not available

</div>

First, you can configure the number of soft bounces that will stop messages from being sent to a particular subscriber. Soft bounces can occur due to a full mailbox or some technical problem with the destination server. Hard bounces occur when the destination does not exist. Bounce management is further described in the Chapter 10, "Managing bounces".

In addition, you have to set up at least one email account from which to fetch bounced emails. In most cases, the email address is the same as the email address used as the sender address for newsletters (if you are unsure, ask your email provider for the correct setup).

For example, if a newsletter is sent from `noreply@example.com`, you should configure this account as the bounce account, since bounces are usually delivered to that inbox.
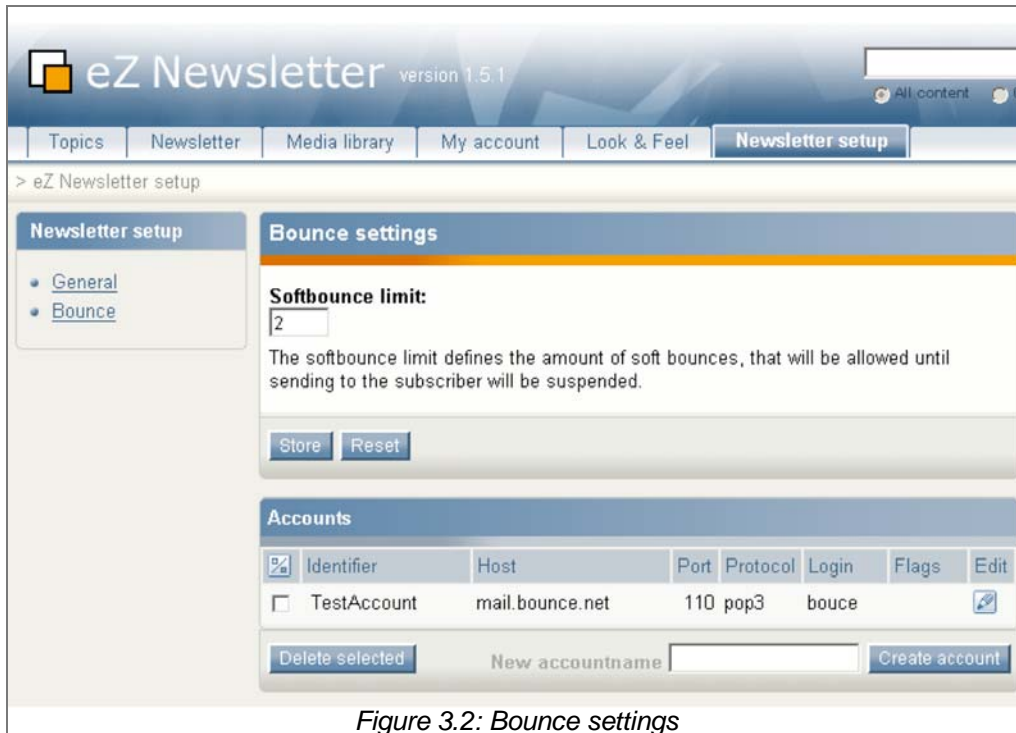
Figure 3.2: Bounce settings

You can create a new account to fetch bounces from by entering a descriptive name for the account into the **New accountname** input field and clicking the **Create account** button.

To delete an account, mark the corresponding checkbox and click the **Delete selected** button.

After clicking the **Create account** button, the edit form for a new account is loaded.
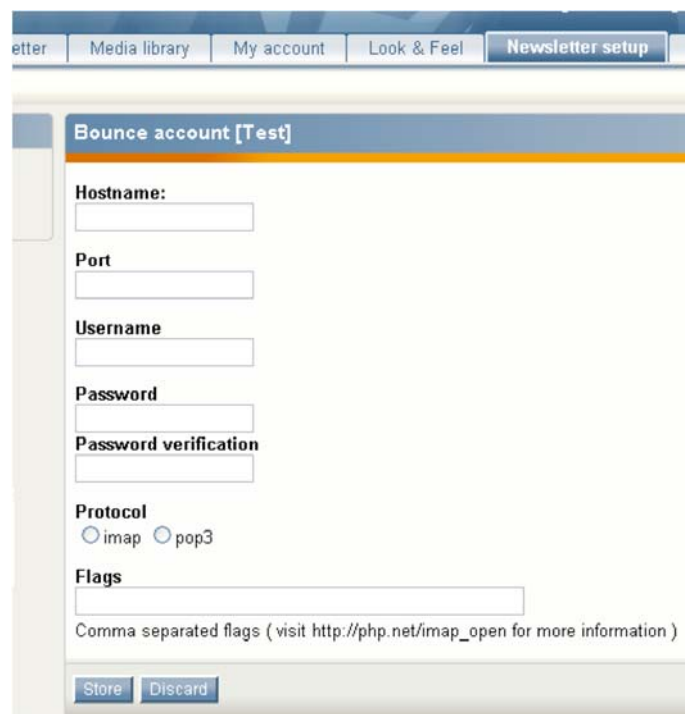

Figure 3.3: Bounce account edit form

The following is a description of the input fields:

- **Hostname**
  This is the hostname of your email server. It is usually something like
  `pop3.example.com`, `imap.example.com` or `mail.example.com`.

- **Port**
  When you are using pop3, the default port is 110 (or 995 for pop3s), and for imap it
  is 143 (or 993 for imaps).

  If you need to set up pop3s or imaps (the "s" stands for secure) you have to add
  "ssl" in the **Flags** field.

- **Username** and **Password**
  Most email accounts need a username and a password to authenticate. Enter the
  valid user credentials in these fields.

- **Protocol**
  You can choose between pop3 and imap. This depends on your mail server setup.

- **Flags**
  PHP's imap extension allows you to set different flags. For example, you can
  specify whether old messages are deleted (or expunged). Those flags are for
  advanced use and are normally not necessary.

  For additional information about the possible flags, refer to the PHP manual at
  http://php.net/imap_open.

For the bounce import to work, a cronjob must be periodically executed. The command
that should be run directly from the installation directory of eZ Publish is as follows:

```
php runscripts.php check_bounce
```

Contact your system administrator about whether the cronjob script is set up and how
often it is executed.

4. Subscriptions

4.1. Creating a subscription list

To send newsletters to subscribers, you need to create subscription lists. Subscription lists contain personal user information such as names and email addresses, as well as the formats in which to receive newsletters. The subscription lists are assigned to newsletter types. Every newsletter issue that is created based upon that newsletter type will then be sent to the subscribers on the specified lists.

This makes it easy to assign subscription lists to a newsletter type for a new campaign, or to edit your newsletter type structure and properties, without losing subscriber information.

To create a subscription list, select the **Newsletter** tab in the top menu. Then, click the **List management** menu item on the left.
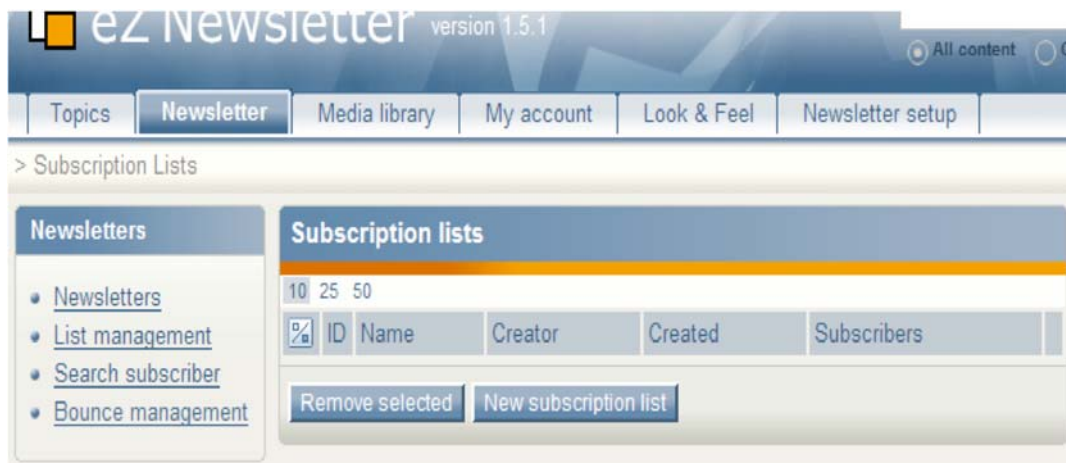
Figure 4.1: Subscription lists

You will now see a list of the existing subscription lists. Click on the **New subscription list** button to create the subscription list.

An input form will be displayed where you can enter properties for the subscription list.

Figure 4.2: Creating a subscription list

The following fields have to be filled out to create a new subscription list:

- **Name**
  The name will be, by default, visible to subscribers on the front-end of the site. Therefore, you should select a descriptive name like "Company news".

- **Registration URL**
  The registration URL is required to allow users to subscribe to the list. The URL can contain a unique id or a custom name that is appended to the URL.

  When you click on the **Generate hash** button, the system generates a random string. This is useful when you do not want to have a guessable registration URL, for instance when you have internal or partner lists.

  Regardless which URL method you choose, you can add a link on your website pointing to this subscription URL. To make it work, you have to prepend the hostname and the siteaccess of the front-end site. For example, when you have created your first subscription list this could be:
  `http://YOURHOSTNAME/eng/register_subscription/1`

- **Login steps**
  The newsletter system discerns between two possible login steps. Login steps are the steps that must be taken to successfully subscribe to a subscription list.

o **Confirm user**
After a user subscribes to a subscription list, a confirmation link is emailed to the user. The user must click on the link to activate the subscription and confirm the entered email address. This is also called "double-opt-in".

o **Confirm and approve user**
The user has to confirm the email address as described in the first option. However the subscription needs to be approved manually by an administrator. This is useful, for example, to prevent customers from registering on a partner list.

● **Require password**
The user must choose a personal password during the subscription process. With this password, he / she can access and manage his / her profile later. If this option is not checked and the user does not define a password, he / she can access his / her profile only via a special link that is embedded in the newsletters. The link contains a unique hash that identifies the user.

● **Allow anonymous users**
Anonymous users can join the subscription list. Otherwise, only registered and authorized eZ Publish users can register for the subscription list.

● **Auto confirm registered users**
The confirmation step for authenticated eZ Publish users is skipped. Therefore, they can bypass the double-opt-in feature.

● **Auto approve registered users**
Users that are already registered with eZ Publish will automatically be approved and do not need to be activated by the administrator.

After filling in all of the necessary fields, click the **OK** button to create the new subscription list. You will be forwarded to a detailed view of the subscription list and can check your settings.

4.2. Adding & managing subscribers

In the detailed view of the subscription list, subscribers can be added manually or imported from a CSV list.
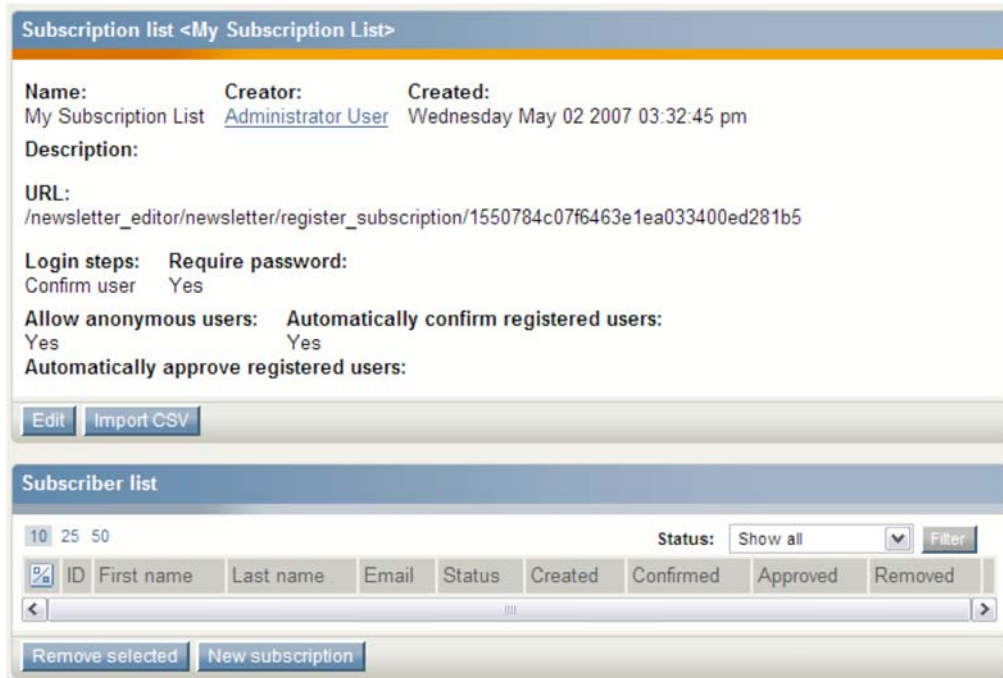
Figure 4.3: Subscription list detailed view

In the detailed view, the listing of subscribers can be filtered by subscription status. Select the desired filter properties on the **Status** dropdown list, then click the **Filter** button.

Click the **Edit** button to edit the options of the subscription list. You will be presented with the same form as described in the previous section for creating a subscription list.

At the bottom of the detailed view is a list of all subscribers registered on the list.

4.2.1. Adding subscribers to the list

Click the **New subscription** button to be redirected to the edit subscription form.

Enter the subscriber's first and last name. The email address is the most important attribute, as you cannot create a subscriber without an email address. The mobile number is only needed when you want to send SMS messages about newsletters. Users without a mobile number will simply not be sent SMS messages.

As mentioned in the section on how to create a subscription list, you can define a password to protect the user's profile. Remember to provide the password to the subscriber, so that he / she can access his / her own profile.

The **eZ Publish user** field lets you assign an already registered eZ Publish user to this subscription. Click on the **Select** button and browse for the user.

In the **Output formats** selectbox, you can define the newsletter formats the user will receive.

If, for example, a newsletter in HTML format is sent to a list that this subscriber belongs to, but the subscriber only has the Text format selected, he / she will not receive the newsletter. If Text, HTML and External HTML are selected, the subscriber will only receive the External HTML format (this is usually the preferred format).

You can directly set the status of the subscription in the **Status** dropdown list. Usually, you will set it to "Confirmed" or "Approved", so that the subscriber can receive newsletters

Figure 4.4: Edit subscription form

The possible statuses are as follows:

- **Pending**
  This status is usually set when the subscription is initially created by the user. Newsletters are not sent to subscribers with this status. The subscription is awaiting confirmation from the subscriber.

- **Confirmed**
  The subscription has been confirmed by the user and the entered email address is validated.

- **Approved**
  The user subscription has been confirmed and approved by the administrator. Subscribers with this status will receive the newsletters sent to lists that require approval.

- **Removed self**
  Users are able to edit their profile and unsubscribe themselves from subscription lists. When a user unsubscribes, the status is set to "Removed self". The user can re-subscribe to the subscription list if desired.

- **Removed by admin**
  The administrator has removed the subscription. Only the administrator can re-activate this subscription.

4.2.2. Editing subscribers

The last column on the list of subscribers provides a small edit icon for each subscriber. Click this icon to get to the edit form for the selected subscription. The behaviour is the same as when creating a subscription, except that you are editing an existing subscription.

4.2.3. Deleting subscribers

Mark the checkboxes to the left of each subscriber that you want to remove, then click the **Remove selected** button. To disable a subscription without completely removing the subscriber entry, the subscription's status can be set to "Removed". This is useful for producing statistics about the number of users that have been unsubscribed.

4.3. Importing subscribers

The import interface is accessed by clicking the **Import CSV** button from the subscription list detailed view.

> What is a CSV file?
>
> CSV (Character/Comma Separated Values) is a method to store and transfer tabular data, independent of the operating system, in a text file. Each line represents a record whose values are separated by a character (often a comma is used, but semi-colons or pipes could be used as field delimiters as well).
>
> Many programs such as office suites, email clients and CRM systems can export data into this format.
>
> An example CSV file looks like this (the first line represents column

headings):

```
"firstname","name","mobile","email"

"Cindy", "Kendal", "+49303196716", "cindykendal@gmx.de"

"Odette", "Crossfield", "+49249138982", "o.crossfield@msn.de"

"Chantal", "Glendinin", "+493017107561", "chantal_g@msn.com"

"Cindy", "Farrell", "+49 2280 21355", "cindy_farrell@msn.de"
```

The imported file must be in CSV format and must include at least the email addresses and names of the subscribers to import. You can also import mobile numbers if desired.

With the checkbox **First row is label**, you can tell the system that the first line of the file is not a subscriber but a column heading. The system will ignore that line during import.

Because there are different ways to separate the fields in a CSV File, you can define a CSV Field delimiter. Each row in the file is split into columns using this delimiter.
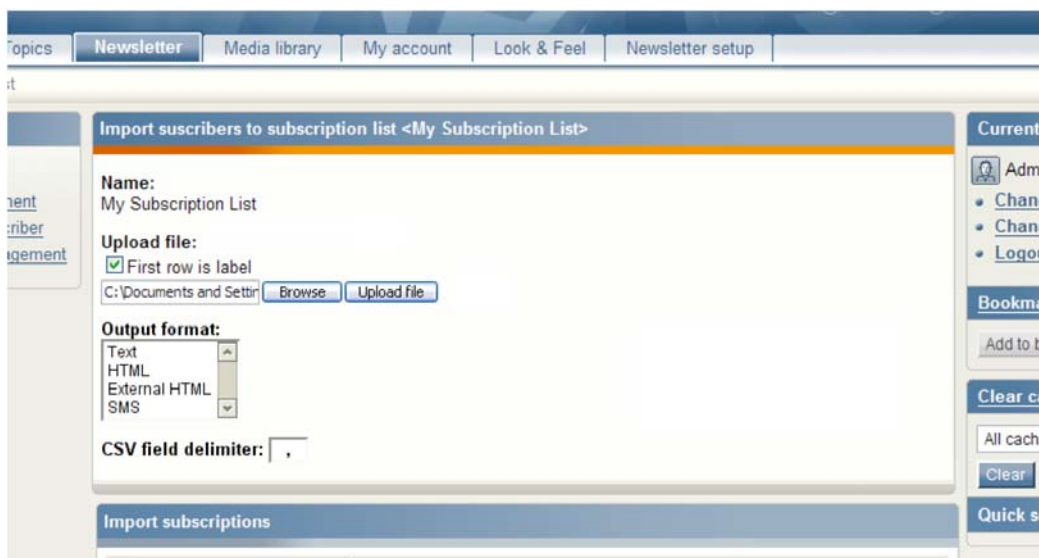
Figure 4.5: Importing a CSV file

Click the **Browse** button to select a file from your local file system. Then, click the **Upload file** button.

After uploading the file, it is automatically parsed by the system. In the **Output format** selectbox, you can define the default output formats in which all of the imported subscribers will receive newsletters. This can later be customized on an individual basis.

The **Import subscriptions** window lists the subscribers that have just been imported. Using the dropdown lists, you can map which imported columns correspond to which user fields.
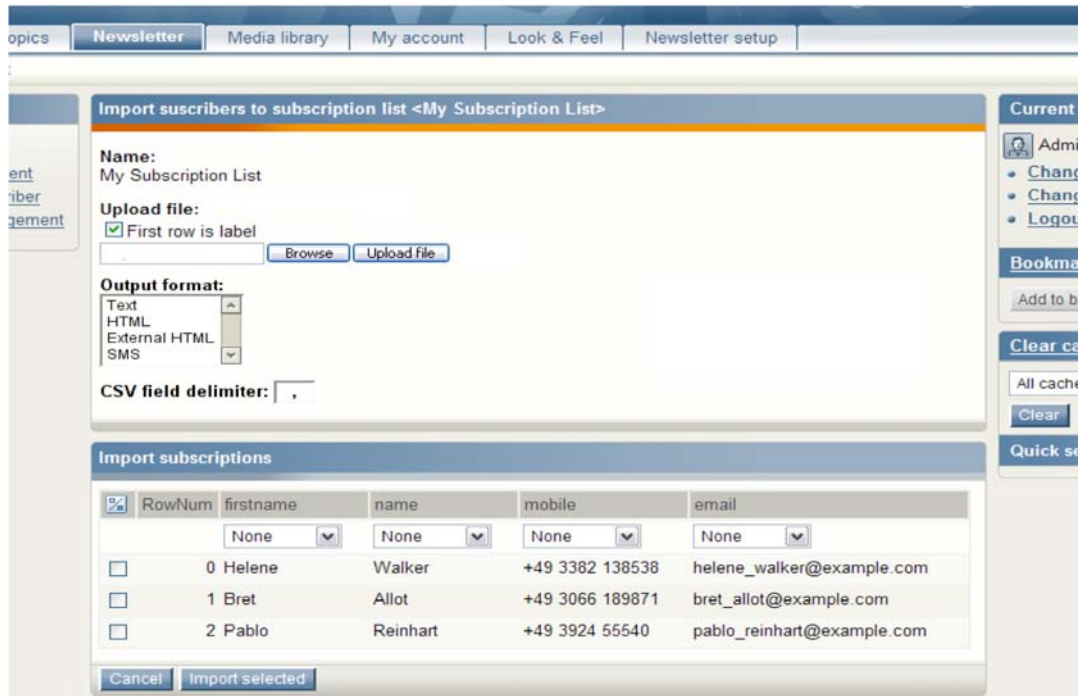
Figure 4.6: Mapping imported columns to subscriber list

Mark the checkboxes corresponding to each user to be imported. If you want to import all users, click the icon at the top of the checkbox column.

When you have selected the entries to import, click on the **Import selected** button.

The subscription list view will be displayed with the newly imported subscribers. The status of the subscriptions will automatically be set to "Approved" and the output format will have the default value "Text".

4.4.   Managing subscription lists

In the list management view, new lists can be created and existing lists can be edited or deleted.
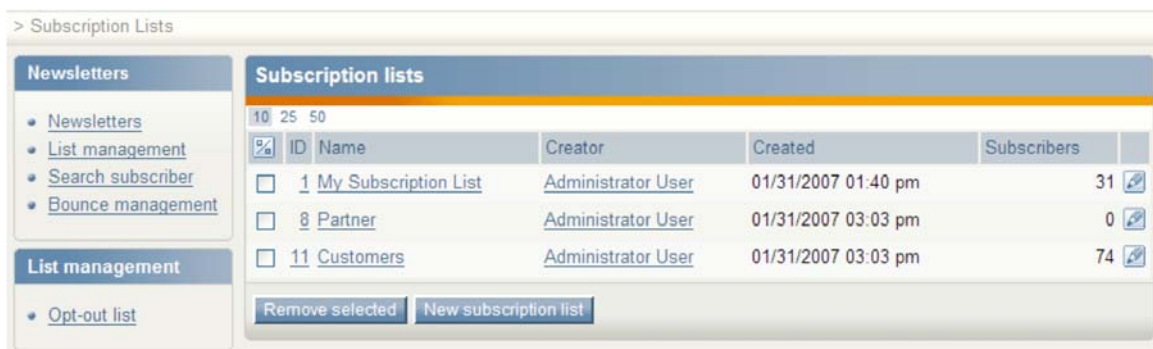
Figure 4.7: Subscription lists

4.4.1.   Adding subscription lists

To add a subscription list, click the **New subscription list** button, as previously described. Once the new subscription list has been created, it will be listed in the list management view.

4.4.2. Editing subscription lists

The last column on the list provides a small edit icon for each subscription list. Clicking this icon opens the edit form for the selected list. This is the same form as described in Chapter 4.1, "Creating a subscription list" of this handbook, except that the fields will be pre-filled with the properties of the selected subscription list.

4.4.3. Deleting subscription lists

Mark the checkbox corresponding to the list you wish to delete, then click the **Remove selected** button. All subscribers assigned to the list will not be deleted; only their relation to the list will be removed. Subscriber properties such as name and email address will remain in the database.

If you want to remove a list and all subscriber entries, first remove the subscribers, then the subscription list. The subscriber data is saved for each subscription list separately, thus when a subscription is removed, all other subscriptions for that user remain intact.

5. Newsletter types

5.1. Creating a newsletter type

Before a newsletter can be created, a newsletter type must be defined. Recall that newsletter types are frameworks for each newsletter. They define the basic options for the newsletters and build the relation between the newsletter and the subscription lists.

First, click the **Newsletter** tab in the top menu to get to the newsletter type list. Then, click the **New newsletter type** button to create a new type.

Figure 5.1: Creating a newsletter type

The input form for a new newsletter type consists of the following input fields:

- **Name**
  The name of the newsletter type. This is a mandatory field. You are free to choose any alphanumeric text as the name. Often this will be something like "Customer newsletters".

- **Description**
  The description of the type is optional and only used for informational purposes. You can use it as an internal description or you can output it in a customized template.

- **Send date modifier**
  When you create a newsletter later on, one field you have to fill is the send date. This is the exact time that the system will start sending emails to subscribers (the delivery time depends on the number of subscribers and the performance of your server / network). The default will always be the date and time when you create the newsletter. However, sometimes you might want to prepare a newsletter to be sent after it has been created.

  For example, to send newsletters of this type two hours after they have been created, enter "2" in the hour field.

- **Default pretext & Default posttext**
  The text you enter here will be pre-filled into the pretext and posttext fields of each newsletter. That way you do not have to type the same text for a newsletter each time. Both fields can be changed when creating the actual newsletters.

- **Personalize newsletter**
  This option enables the personalization of newsletters to each subscriber by replacing keywords with subscriber names.

- **Sender address**
  The email address entered in this field is used as the sender address for all newsletters of this type. The mailbox with this address should also be set under the bounce management section.

- **Valid content classes**
  In the standard installation, each newsletter you create will be of the Newsletter issue content class. In a modified setup, you might have more classes available. However, this requires more work because templates must be created for each class (for a deeper explanation of content classes, please refer to the eZ Publish documentation at http://ez.no/doc).

- **Allowed designs**
  You can limit specific designs to be used for newsletters. Then, when someone creates a newsletter, he / she can only choose between the designs defined here.

- **Allowed output formats**
  Here you can define output formats that are allowed for newsletters of this type. If all items are selected, all subscribers will receive newsletters in their chosen format. If only one format is selected, only subscribers who have this format selected in their user profile will receive the newsletters.

- **Subscription lists**
  Select one or more subscription lists. Newsletters of this type will be sent to all subscribers who are assigned to the selected lists.

- **Newsletter suggestion inbox**
  Select a folder in your content tree where articles with ideas for new newsletters will be placed. A new folder should probably be created for this. Because it requires additional configuration, folders are usually created by the administrator. Ask your administrator about which folder should be used.

- **Newsletter placement**
  Select a folder in your content tree where all created newsletters of this type will be

saved. In the standard system, you should use the folder `Newsletter repository`. This can be customized.

After entering all necessary information, click the **OK** button to save the new newsletter type. You will be forwarded to the detailed view of newsletter types.

5.2. Managing newsletter types

In the newsletter type list, all defined types are listed. You can create new newsletter types and edit or delete existing types.

Figure 5.2.: Newsletter types

5.2.1. Adding newsletter types

To add a new newsletter type, click the **New newsletter type** button, as previously described. Once the new newsletter type has been created, it will be listed in the newsletter type view.

5.2.2. Editing newsletter types

The last column on the list provides a small edit icon for each newsletter type. Clicking on the icon will lead to the edit form for the selected type. This is the same form as when you create a new newsletter type, except that the fields will be filled in with the properties of the existing newsletter type.

5.2.3. Deleting newsletter types

Mark the checkbox corresponding to the newsletter type you want to delete, then click the **Remove selected** button. After confirming the deletion, the newsletter type will be deleted. All newsletters of this type will still be stored in the database. However, the deletion of newsletter types should be handled with care because it will be difficult to access archived newsletters of this type.

6. Newsletter articles

6.1. Creating newsletter articles

Newsletter articles will be used later as content inside a newsletter. One or several articles can be added to a newsletter. We describe that further in the Chapter 8, "Working with newsletters".

To create a newsletter article, select the **Topics** tab in the top menu. Then click the **New article** button.

Figure 6.1: Newsletter article edit form

The default edit form for a newsletter article consists of the following input fields:

- **Locale**
  Set a local scope for this article. This defines the target country this article should address. It is intended as metadata (data about data) to facilitate the editorial process. The possible values can be customized by editing the Newsletter article class in the Administration Interface. This is an advanced task and should be done by an administrator.

- **Target Audience**
  This field can be used to filter the articles for a specific audience. However, when creating a newsletter, you can use a mix of articles for different audiences.

- **Validity & Expiry Date**
  A validity and expiry date can be set for each newsletter article. These fields are also used for the filtering mechanism. For example, you can indicate that the content will be outdated after a certain date. This way, it is easier for authors to find relevant articles.

- **Priority**
  Some articles can be marked with high priority so that important articles are more visible. It can also be used for filtering.

- **Title**
  This is the title of the article and is mandatory.

- **Subtitle**
  You can define a subtitle here. This field is optional.

- **Teaser**
  This is a short description of the article content. It will be visible in the sent emails. Clicking on the teaser text will lead the subscriber to the newsletter website where he / she can read the full text of the article.

- **Full Text**
  This is the body of the article. If you have the Online Editor enabled, the content of this field can be edited with formatted text. The XML markup is automatically generated by the Online Editor. You can add tables, lists, links and many other elements. For a detailed overview of the Online Editor, please refer to its documentation at http://ez.no/doc/extensions/online_editor.

- **Main Image**
  This image will be shown in the sent emails. You could, for example, include a picture of a new product or another suitable photo for the article.

- **Attachments**
  You can add an attachment, such as a price list or a specification document for a product. The attachment can then be downloaded by the users on the website.

- **Link**
  You can define a link here which will lead to more information about the article or redirect to a completely different site.

- **Proposer**
  When you have mail import configured, subscribers can send article ideas to the configured email addresses. Newsletter articles are then generated from those emails. The **Proposer** field for article suggestions will be filled with the email address of the sender; for normal articles, this field can be left blank.

After entering all necessary data, click the **OK** button to save the new newsletter article. If you are an editor and the approval workflow is configured, the approve form will be displayed where you can add one or several approvers.

6.2. Managing labels

Labels allow you to filter articles. The **Labels** window is on the right of the **Topics** and **Media library** tabs. Each newsletter editor or administrator can define several labels for personal and global use. Fold or unfold the **Labels** window by clicking the **+** / **-** buttons in the top right.
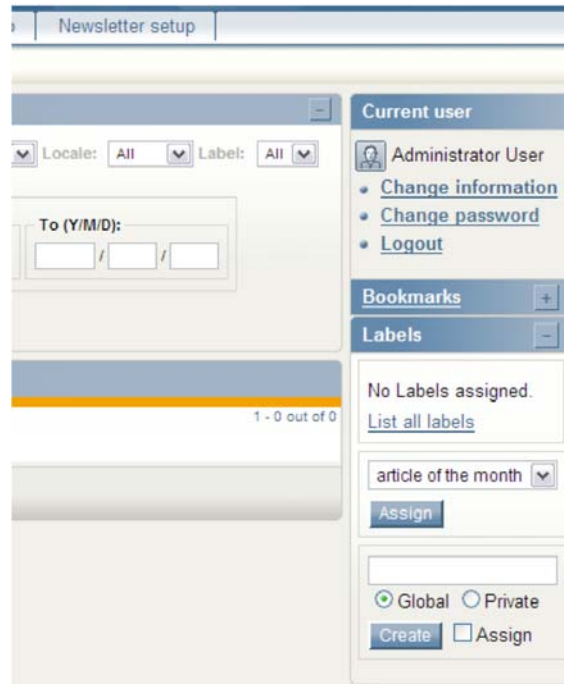
Figure 6.2: Labels window

To create a label, enter the name of the label and click the **Create** button. If you are viewing an article and want to assign the new label to the current article, mark the **Assign** checkbox before clicking the **Create** button.

You can select whether the label will be only visible to you (Private) or to all editors and administrators (Global). Administrators can limit this function with the rights system of eZ Publish.

To view all labels, click the **List all labels** link. From there, you can change the name of the label by clicking the small edit icon to the right of the label. An edit form will be displayed where you can change the label name.

Figure 6.3: Listing all labels

Labels can be deleted by clicking the trash icon.

6.3.   Labelling newsletter articles

Each newsletter article can be marked with one or more labels. To mark an article with a label, open the detailed article view by clicking on an article title. In the article view, all available labels are shown in the dropdown list of the **Labels** window.
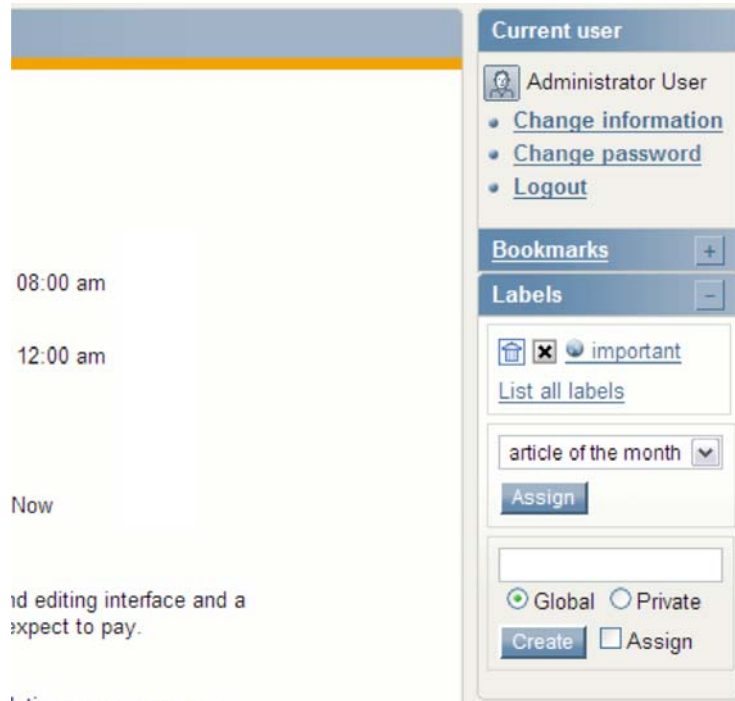
Figure 6.4: Assigning a label

If you have already assigned labels to this article, the labels are listed at the top of the **Labels** window.

To unassign a label, click on the cross symbol in front of the label. To delete a label completely, click on the trash symbol. This will remove the label from all other articles as well.

When you want to assign a label to the current article, select the desired label from the dropdown list and click the **Assign** button.

6.4.   Filtering newsletter articles

Articles can be filtered in each category by various fields. The **Filter options** window above the **Topics** window can be enabled and disabled by clicking on the **+** / **-** buttons in the top right of the window. The filter settings are user-specific and, once set, can be used for all categories in the topics section.

Figure 6.5: Filter options

You can filter according to the following fields:

- **Priority**
  The article priority was set by the author in the edit view of an article. Priority values include "Normal" and "High".

- **Status**
  This is the approval status of the article. The status can be set to "Finished" to view only approved and published articles. Filtering by status gives the user an overview of articles that are in different stages of the publishing process.

  Note: For this functionality to work, the approval system must be configured by an administrator (it is not configured by default).

- **Target Audience**
  The audience was set by the author in the edit view of an article. Default available values are "Endcustomers" and "Partners". The administrator can customize those by editing the Newsletter article class.

- **Locale**
  Articles can be filtered by language or country.

- **Label**
  You can filter articles by user-specific criteria.

- **Introduction Date**
  Articles can be selected that were created in the defined time period.

- **Expire Date**
  Articles can be selected that will expire in the defined time period.

To activate the filter, click the **Apply filters** button. The filter settings will be applied and

only articles that match the filter settings will be shown. The **Reset filters** button clears all user filter settings and resets the filter to display all articles in the current folder.

7. Approval process

7.1. Introduction to the approval process

The approval workflow enables you to select one or more people that must approve newsletter articles or newsletters before they can be published. Pending items can be edited by the approvers or further editing can be blocked. Notifications can be sent between authors and approvers to accelerate and facilitate the process.

Approval settings must be configured by an administrator and can be adapted to your specific needs.

7.2. Notification settings

Each user can modify the settings of the notification system. The user can subscribe to the approval process to be informed about all actions related to specific objects.

Figure 7.1: Notification settings

The following options are available:

- **Receive all messages combined in one digest**
  If you have subscribed to several notification items, you can receive only one message containing all accumulated messages, instead of receiving one email for each notification.

- **Receive digests**
  You can receive notifications daily, weekly or once per month.

- **Collaboration notification**
  Mark the checkboxes for all collaboration events you want to be informed about.

- **My item notifications**
  This is where you add objects, such as newsletter articles, to receive notifications about.

7.3. Marking content to be approved

When the approval workflow is configured, after you have to clicked the **Send for Publishing** button you will be directed to a view where you can select approvers. Depending on the workflow configuration, the approvers might be automatically defined or need to be manually defined by you.
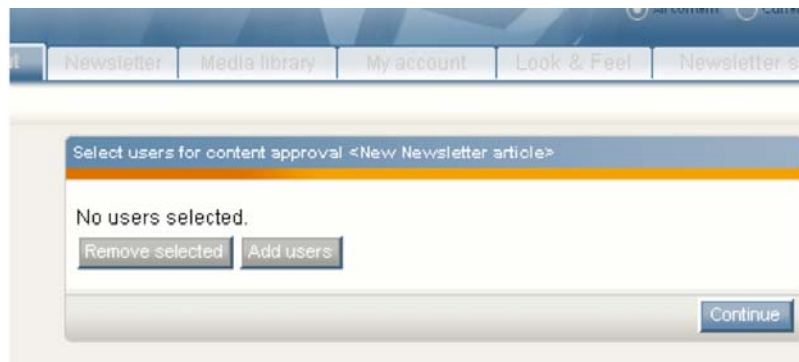
Figure 7.2: Selecting users for content approval

Click the **Add users** button to select one or more users to approve the content.
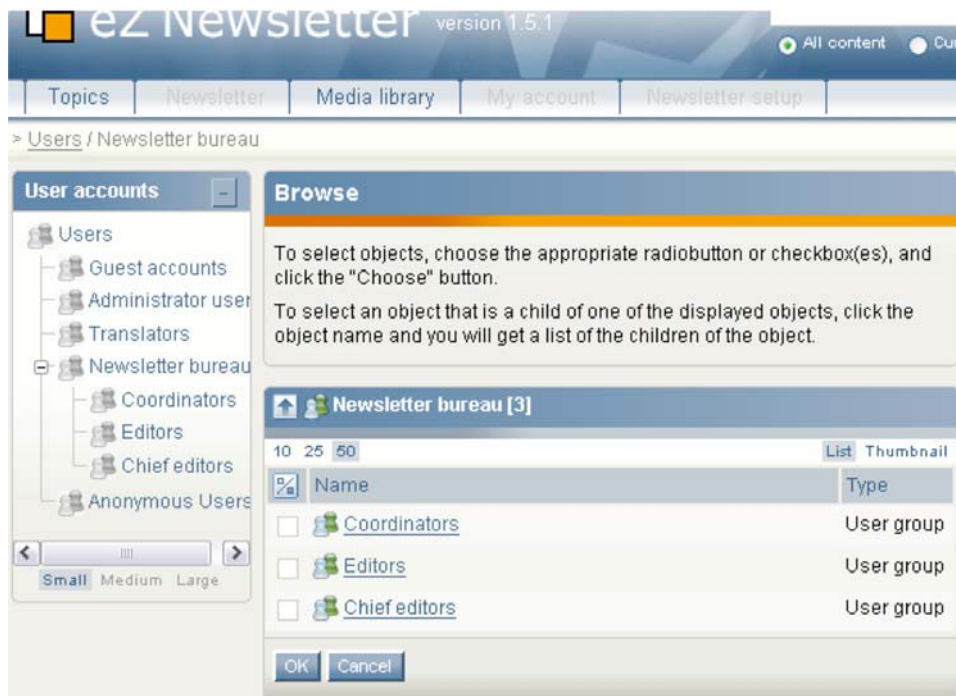
Figure 7.3: Selecting an approver

Navigate through the user groups and select users to approve the content.

Mark the corresponding checkboxes, then click the **OK** button.

If you have selected a wrong user, mark the corresponding checkbox, then click the **Remove selected** button.

If you want to select an additional approver, click the **Add users** button again.

Once you are done selecting users for the approval process, click the **Continue** button. You will be forwarded to the approval view where you can add comments and monitor the approval process.

To create a comment, enter some text into **Comment** field, then click the **Add comment** button. The comments will be added to that object and sent to the approver(s).
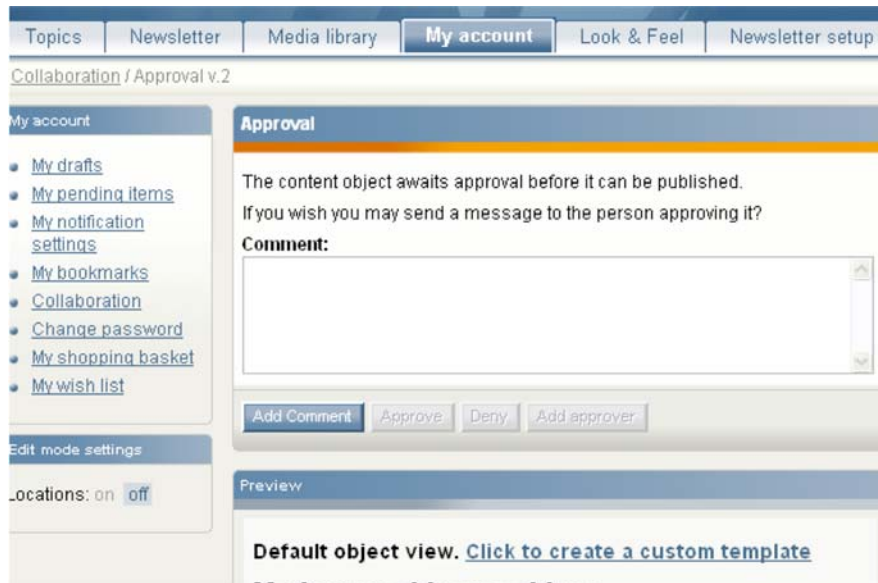
Figure 7.4: Adding a comment for approvers

The approver will receive a notification email about pending objects. To view pending objects, the user must select the **My account** tab in the top menu, then click the **Collaboration** link in the left menu.

7.4. Approving content

To approve content, first click the **My account** tab in the top menu.
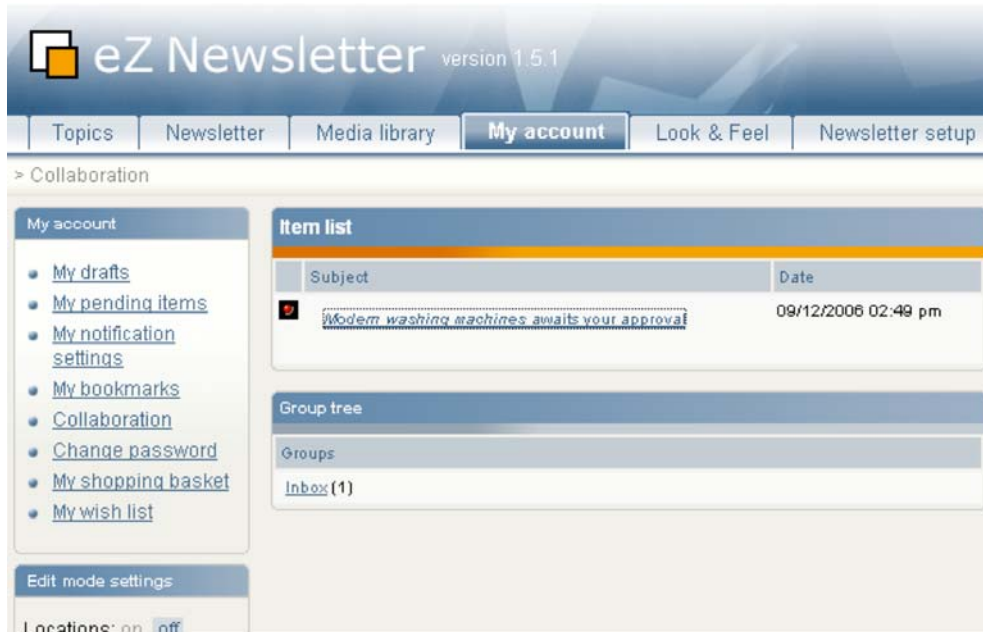
Figure 7.5: Items awaiting approval

Then, click the **Collaboration** link in the left menu.
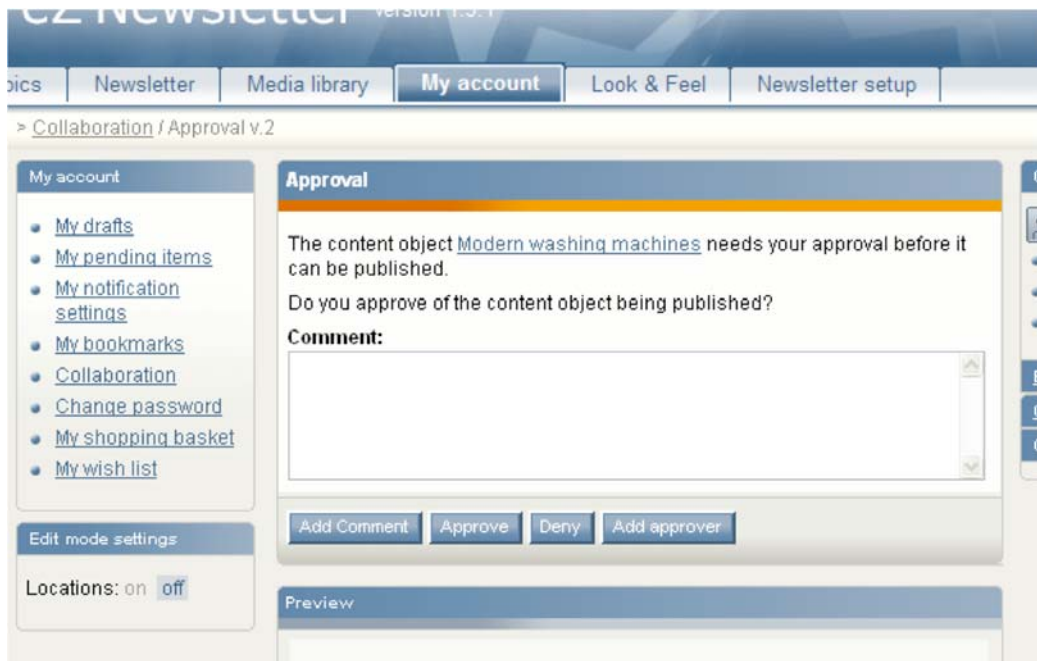
Figure 7.6: Article to be approved

You will get a list of articles / objects to approve. Click on a subject to access its detailed view.

In the detailed view of the article, it is possible to add additional approvers or approve or deny the article. The approval form contains the following options:

- **Add Comment**
  Additional comments can be added in this step by each approver. The comments will be delivered to each person (approvers and authors) assigned to this object.

- **Approve**
  Click the **Approve** button to approve the object. The object will be published when all approvers have approved the content. If you are the only approver, it will be published almost immediately.

  Note: A workflow cronjob has to be set up for the approval process. How long it takes until the content is available depends on how often this is executed. We recommend to run the workflow cronjob every five to ten minutes.

- **Deny**
  Click the **Deny** button to deny approval. Optionally, the object can be edited and subsequently approved.

- **Add approver**
  One or more additional approvers can be added.

- **Edit item**
  The item can be edited by each approver and by the author. Below the object preview, click the **Edit** button.

The edit functionality can be disabled by the administrator. It is also possible to disable the option for approvers to add other approvers, so that only the author can add approvers.

8. Working with newsletters

8.1. Creating newsletters

Before a newsletter can be created, some general conditions must be fullfilled, as described in the previous chapters. One or more subscription lists with assigned subscribers must be created and a newsletter type must be defined. The subscription list(s) must be assigned to the newsletter type.

First, select a newsletter type for which you want to create a newsletter. This can be done by selecting the **Newsletter** tab in the top menu, then clicking on the desired newsletter type in the newsletter type list.

To create a new newsletter, select a content class from the dropdown list. (In the standard installation, "Newsletter issue" is the only option.) Then, click then on the **Create Newsletter** button. The input form for a newsletter will be displayed.
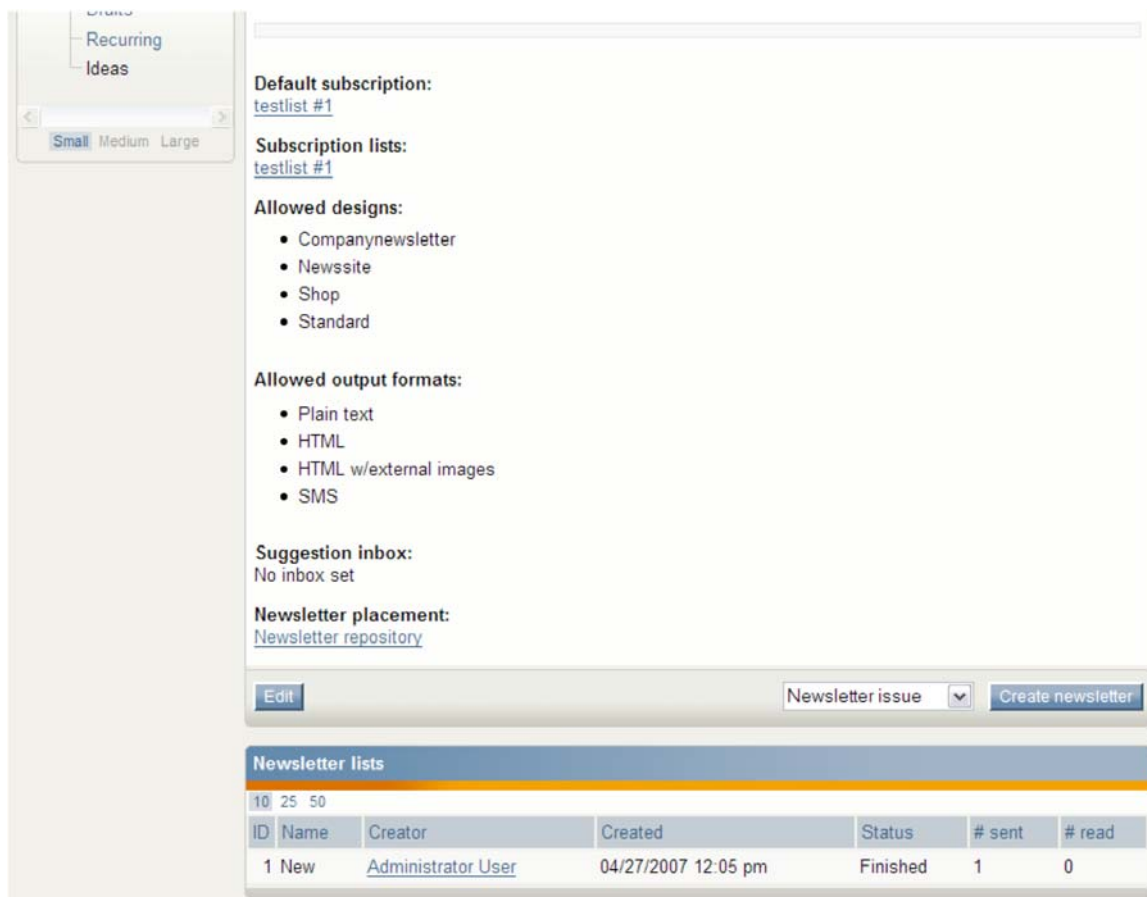
Figure 8.1: Creating a new newsletter

The input fields depend on the selected content class. In the following example, the fields pertain to the default content class (Newsletter issue).

Figure 8.2: Edit form for a new newsletter

The **Edit Newsletter** window is the same for each newsletter type. In it, the newsletter name and send date can be set. It also provides the preview functionality.

The newsletter object window occupying the bottom half of the page depends on your object class and object attributes. In the title you can find, in square brackets, the name of the class that is used.

The following fields are specified in the **Edit Newsletter** window:

- **Name**
  The name of the newsletter is used to identify the newsletter in the newsletter lists.

- **Newsletter send date**
  This defines the date when a newsletter should be sent. The default send date is set to the current system date and time. If you define a date in the future, the newsletter will be sent at the defined date.

- **Newsletter category**
  This value can be set to anything and is normally only used to categorize the newsletter for your own use. It is possible to display it or to make advanced operations on it in a customized template.

- **Output format**
  This field is used for two purposes: viewing and sending previews and sending the finalized newsletters to subscribers. Therefore, you can define which output formats are sent. For example, if subscribers have chosen to receive SMS messages, the messages will only be sent in SMS format if that was specified for the newsletter.

  We mostly recommend that you send out each newsletter in Text and External HTML format. However, because many clients block the download of external images, subscribers will have to view images by visiting the website to read the full newsletter.

  If you send out newsletters via email in HTML format (with included images), be careful that the size of the email is not too big. Choose which images to include carefully and do not use very high resolution images unless absolutely necessary. The templates can specify to embed only the company logo, then link the other content images.

- **Send preview address**
  Enter the email address where the preview sendout should be sent. The preview sendout is not fully personalized. Full personalization is only done in the actual sendout. Depending on the template, the links may not be clickable.

- **Send preview mobile nr.**
  Enter the mobile phone number of the phone where the SMS preview should be sent.

- **Design to use**
  Choose one of the allowed designs to be used for the sendout.

Send a preview to the defined address by clicking the **Send preview** button. A draft version of the newsletter is saved and the newsletter is sent with the current data.

In the newsletter object window, the following fields are specified (when using the default Newsletter issue class):

- **Locale**
  This setting defines the target country the newsletter should address and is for internal use. If you do not need the locale field, the administrator can customize the Newsletter issue class and remove the field or change the list of available countries.

- **Target Audience**
  As with newsletter articles, this field is only used as metadata. For example, you could provide some context about the newsletter for approvers. The administrator can remove this attribute safely from the content class if it is not needed.

- **Title**
  This is the mandatory newsletter title. When using the default templates, it will be used for the email subject.

- **Subtitle**
  This is an optional newsletter subtitle.

- **Shorttext (SMS/MMS)**
  This is a short description of the newsletter content to be sent with the SMS output format of the newsletter. This field should not have more than 160 characters, although if JavaScript is disabled in your browser, more characters can be entered. In that case, the character limit will be determined by the chosen SMS gateway. Ask your administrator if you are unsure.

- **Pretext**
  This field can be used to add a personalized greeting or introduction text to the newsletter. In the default templates, this is shown at the top of the newsletter.

- **Posttext**
  This can be used to add closing or legal text to the newsletter. In the default templates, this is shown at the bottom of the newsletter.

- **Header Image**
  The header image is used by the default designs "company newsletter" and "shop".

  Click on the **Add object** button to locate an image in your site's media library. From there, select the desired image and click the **OK** button. (When browsing for the image, click the thumbnail link to view the image.) The selected image will be assigned to the newsletter.

- **Topics**
  Here you can assign previously created newsletter articles to the newsletter. Click the **Add object** button to locate an article in the topics section. You can navigate through the topics section and browse through the categories. You can use the filtering functionality to find articles by different properties. Then, select several articles and click the **OK** button. The articles will be assigned to the newsletter. Templates determine the placement of articles in a newsletter. In the default template, the title and introduction text is displayed with a link to the website containing the full view of the article.

- **Newsletter recurrence**
  This option allows you to define the recurrence of a newsletter. Setting up a recurrence will cause a cronjob to send out the same newsletter at the defined dates. This is useful when using templates that create dynamic newsletter content.

  Three types of recurrence can be defined:

  - A daily recurrence, which allows you to define one or more days of the week.

  - A weekly recurrence, which allows you to specify one day of the week.

  - A monthly recurrence. For example, if the **Day of month** field is set to "5", the newsletter will be sent on the 5th of every month.

Figure 8.3: Newsletter recurrence

> When using recurrence, we suggest that you have a customized template. For example, this template should fetch dynamic content from your system, such as stock data or a list of recently added articles.

After entering all necessary data, click the **OK** button to save the new newsletter. The newsletter will be saved as a draft and you will be forwarded to the approval view (if configured) where one or several approvers can be added. If you have not configured the approval workflow, the newsletter will be prepared to be sent.

In the basic system, three placeholders can be used in all fields:

- [name]
  Will be replaced during the sendout with the last name of the subscriber.

- [firstname]
  Will be replaced with the first name of the subscriber.

- [generic_userhash]
  This can be used to build links to the profile management section for each subscriber. With the default templates, these links are already displayed.

8.2. Sending newsletter previews

To send a preview of a newsletter via email or to a mobile phone, you must select the design to use and an output format, and specify an email address or mobile number to send the preview to.

Figure 8.4: Sending a newsletter preview

Click the **Send preview** button to send a preview to the given email and / or mobile number.

8.3. Browser preview

In the **Output format** selectbox, select a format and click the **Preview** button to get a preview of the newsletter directly in your browser.
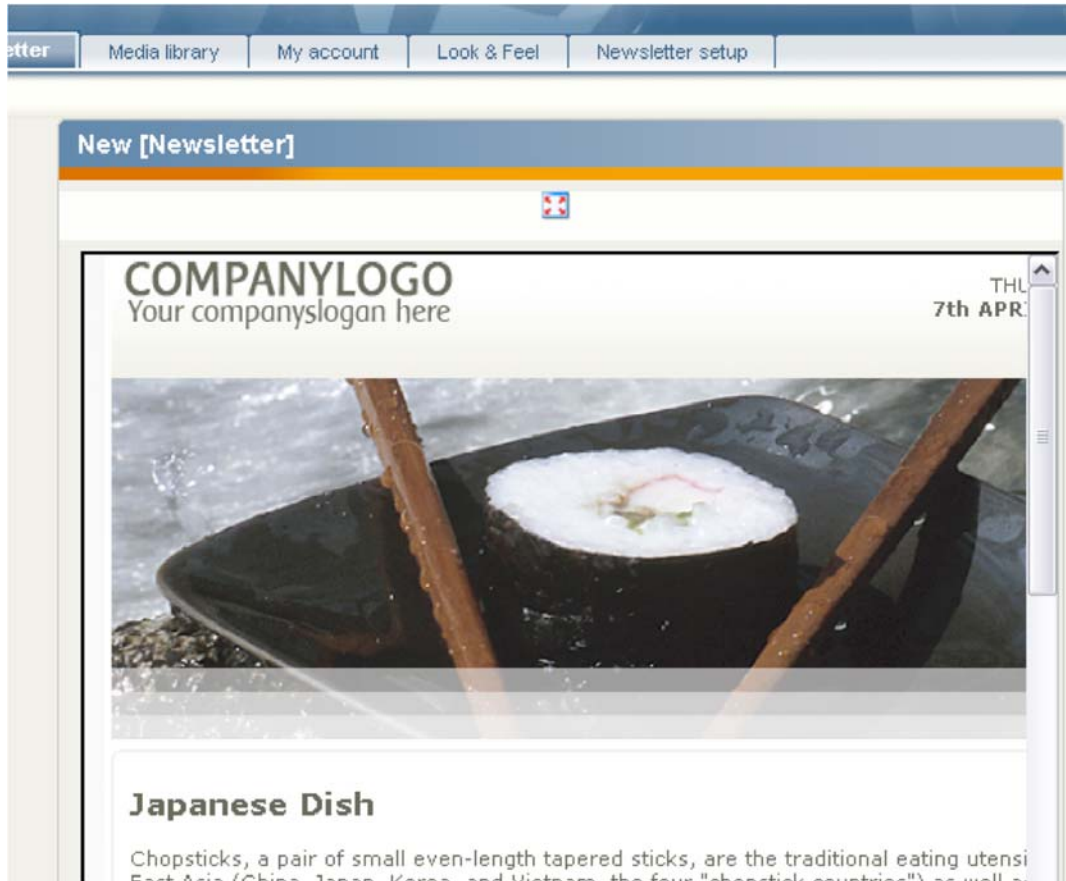
Figure 8.5: Browser preview

Click on the icon under the title bar to open the newsletter preview in fullscreen mode.

Close the preview by clicking the **Back** button at the bottom of the page.

Note: Due to differences in the rendering of browsers and email clients, this preview can differ from the actual representation to subscribers. We highly encourage you to use the "send preview" function for a more accurate preview. There are still rendering differences in email clients, but the default templates have been created to be highly cross-compatible.

8.4. Viewing newsletters of a type

Clicking on a newsletter type in the **Newsletter** tab shows a list of all newsletter types in the **Newslettertypes** window on the left. For each newsletter type, you can fold and unfold a submenu tree (described in the next section) by clicking on the corresponding **+** / **-** icon.
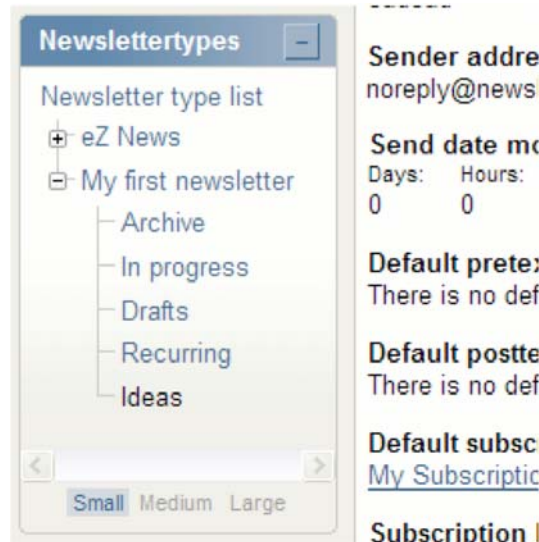
Figure 8.6: Newslettertypes window

8.5. Newsletter status

In the submenu of each newsletter type (in the **Newslettertypes** window on the left), you can select several views for newsletters with different statuses:

- **Archive**
  This will display a list of newsletters that have already been sent.

- **Draft**
  Drafts are newsletters that are currently in the approval process. These newsletters are not yet published. When a user has limited rights, he / she might be unable to see another person's drafts. Your own drafts are accessible in the **My account tab.**

- **In progress**
  This will display a list of newsletters that are currently in the sending process or that will be sent once the sending process is activated and the send date is reached.

- **Recurring**
  Here you get a list of all newsletters that are defined as recurring newsletters. Each time one of these newsletters is sent, a copy is stored in the "Archive" type and a new object is created for the next sendout.

Figure 8.7: Newsletter archive

If you access the list of newsletters of a certain type, you will see some properties pertaining to the newsletters.

- **Current send status**
Shows whether a newsletter will be sent or has already been sent.

- **Current object status**
Shows whether the newsletter has been published or whether it is waiting to be approved.

- **Icon**
Opens a detailed view of the newsletter object.

- **Preview**
When you click on the name you will be redirected to the preview of the newsletter.

8.6. Newsletter idea pool

Click on the **Ideas** item of the selected newsletter type (in the **Newslettertypes** window) to be forwarded to the location where newsletter ideas are stored. You will be shown a list of all idea emails that were imported and automatically converted into newsletter articles. Note that the mail import function must be configured in order to use this feature.
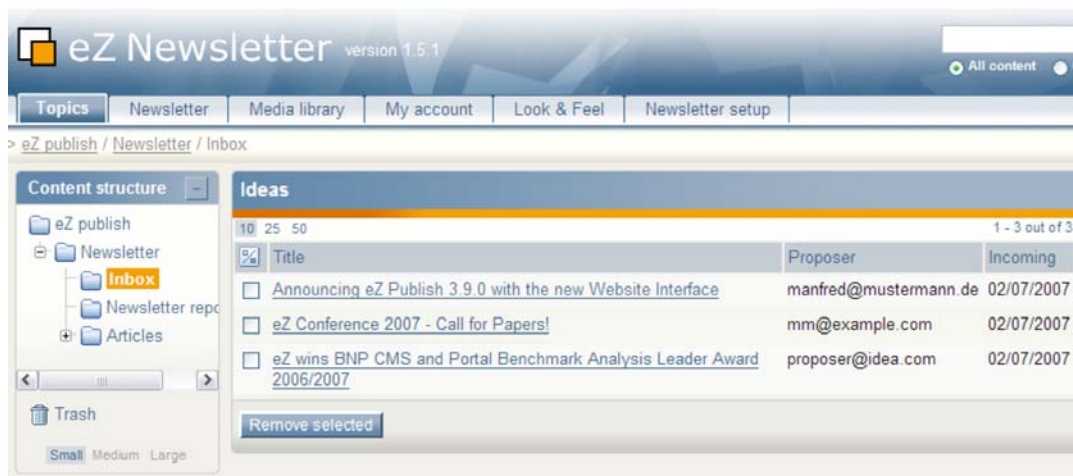
Figure 8.8: Newsletter idea inbox

Click on a title to get a detailed view of a proposed article.

The **Proposer** field is the email address of the person who sent the idea. The **Incoming** field shows the date that the idea was imported.

The imported ideas can be edited like any other newsletter article. In the detailed view, buttons for copying and editing the article are provided. Thus, the idea can be directly copied into the appropriate category and all required fields can be completed. This helps to more easily turn the idea into an article.

9. Newsletter sendout

9.1. Sending newsletters to subscribers

Newsletters are automatically sent to subscribers by the system. The system periodically executes a script (a cronjob) that creates and sends out newsletters that are ready to be sent (in-progress newsletters). The script that should be run directly from the installation directory of eZ Publish is as follows:

```
$ php runcronjobs.php send_newsletter
```

Contact your system administrator about whether the sendout script is activated and how often it is executed.

For testing, you could execute it manually after publishing a newsletter.

10. Managing bounces

Click the **Newsletter** tab in the top menu, then click the **Bounce management** link on the left to access a list of bounces. Bounces are sent back to the sender address when the delivery to a subscriber failed for various reasons (see also the description below about hard and soft bounces). The system executes a cronjob to import bounced emails from one or more specified email accounts. Contact your system administrator for information about the email accounts that need to be configured for importing.

Figure 10.1: Bounces

Below is an explanation of the different columns of the bounce list:

- **Newsletter**
  This is the name of the newsletter corresponding to the particular bounce if available.

- **Sent to address**
  This is the email address that caused the bounce.

- **Bounce count**

This is the number of times the email address has bounced. Each time the delivery of a newsletter sent to this address fails, the counter is increased by one. A maximum number of bounces can be set before the system will no longer send emails to that address. This is discussed in Chapter 3, "Basic settings".

- **Bounce type**
  The system distinguishes between hard and soft bounces. Hard bounces occur when the destination does not exist. Soft bounces can occur due to a full mailbox or some technical problem with the destination server.

You can remove bounces by marking the corresponding checkboxes, then clicking the **Remove selected** button.

If the maximum count of bounces for a subscription has reached, it will be disabled and the sending of these newsletters is suspended. A list of all suspended messages can be displayed by clicking the **On hold** link in the **Bounce management** window:
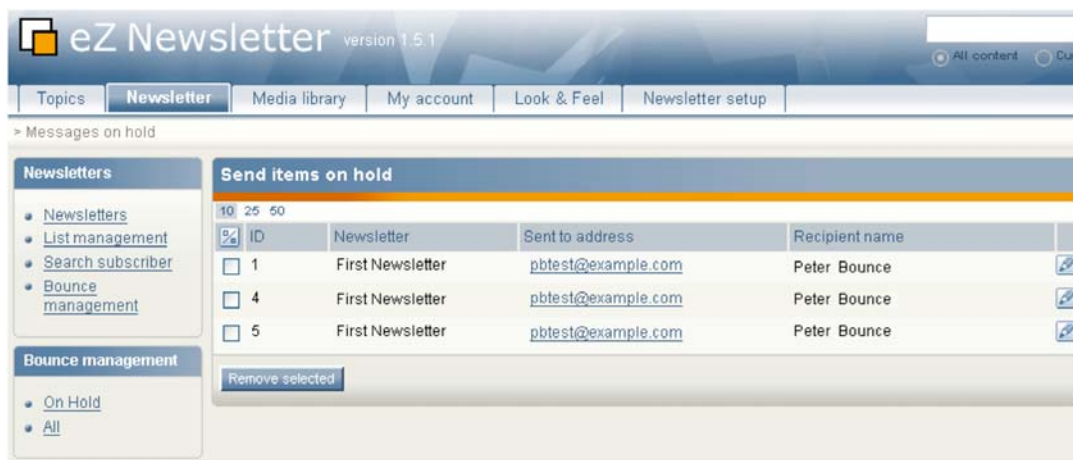
Figure 10.2: Send items on hold

The status of a subscription can be modified by clicking on the icon in the last column of the list. There, you can re-activate subscriptions so that they will once again be sent subsequent newsletters.

10.1. Modifying bounced subscriptions

In the edit bounce item view, you can change the status of the bounce item.
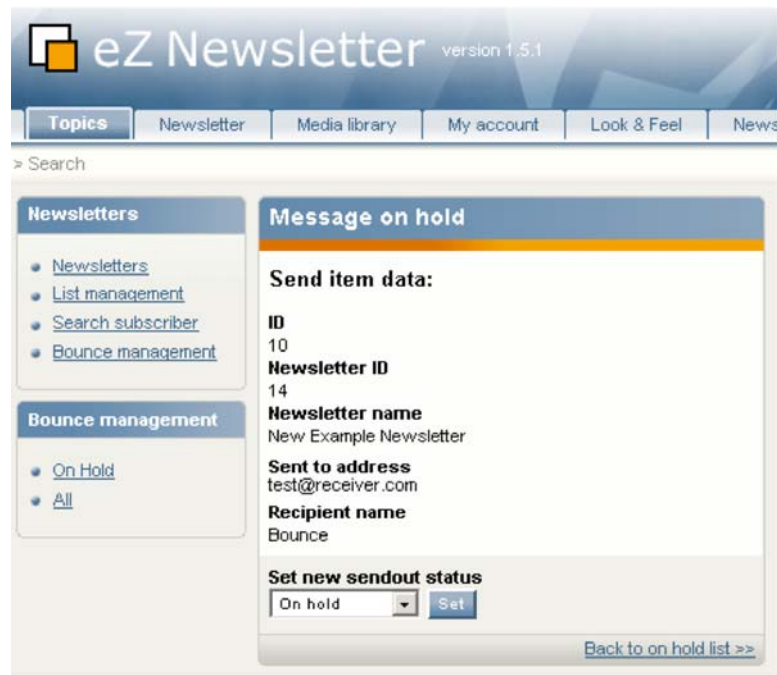
Figure 10.3: Message on hold

Select the new sendout status for the bounced subscription in the dropdown list. Then, click the **Set** button to save.

The sendout statuses are described below:

● **Send mailing**
The corresponding newsletter will be re-sent to the subscriber. If the email address does not bounce that time, the status will be set to "Send" and the bounce item will be removed from the list.

● **Mark as sent**
The newsletter will not be re-sent to the user and the bounce item will be removed from the list.

● **On hold**
This is the default bounce status. The subscription is disabled until further modification.

11. Media library

When creating newsletter articles and newsletter issues, image objects are required. Images can be stored in the media library. Select the **Media library** tab in the top menu to navigate to the library.
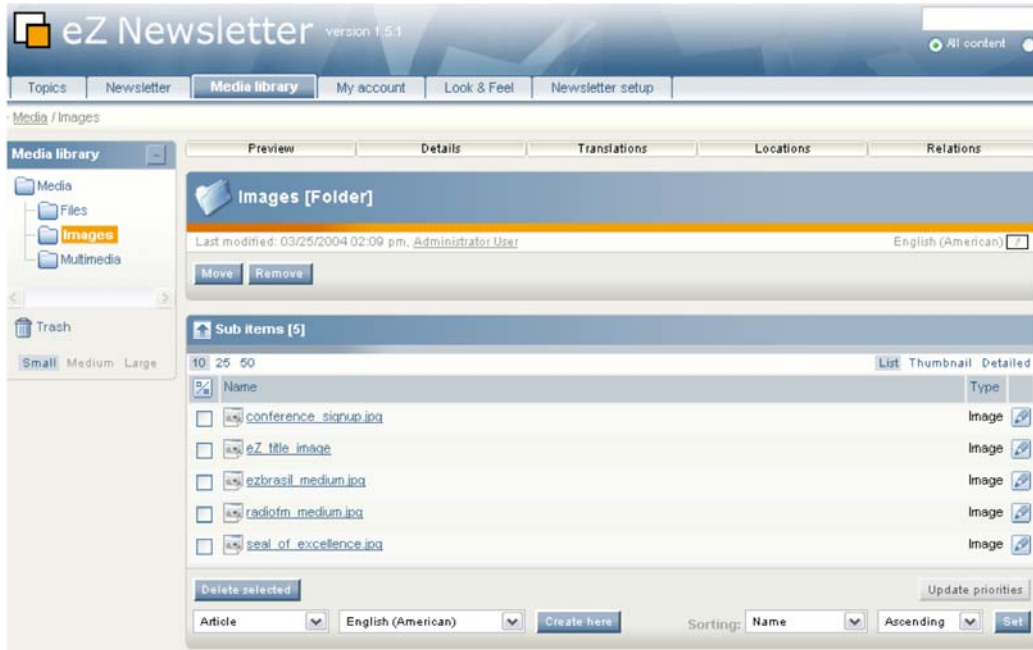
Figure 11.1: Media library tab

11.1. Adding content

To create a new media object, select the desired media type (or class) from the dropdown list at the bottom of the page, then click the **Create here** button.

Note that you can optionally create folders to organize your gallery. Then, you can select the folder and create media objects in that folder.

The input form for an image is shown below:

Figure 11.2: Adding a new image

The following fields must specified:

- **Name**
  Enter the name of the image.

- **Caption**
  Enter a short description of the image.

- **Select file**
  Click the **Browse** button to select the image to upload from your local file system.

Click the **Send for publishing** button to store the image file in the eZ Publish media library.

Once an image is uploaded, you can add it to newsletter articles and issues.

12. Statistics and response analysis

12.1. Viewing newsletter sendout and request statistics

For each created and sent newsletter, the system counts the number of subscribers who received the newsletter and its articles.

Figure 12.1: Newsletter archive

The **# sent** column reflects the total number of sent newsletters. The **# read** column shows the number of subscribers who have opened at least one article for that particular newsletter.

12.2.   Viewing article sendout and request statistics

Figure 12.2: Article sendout and request statistics

Whenever an article is sent out with a newsletter, the send counter is increased (as shown in the **Sendout** column). The **Reads** column shows the count of all article pageviews – this is incremented whenever a subscriber clicks on a link in a newsletter to read the full view of an article. Both values together can reflect how interesting the article was.

13. Security hints

A lot of security concepts are built-in to eZ Newsletter.

Note the following recommended security practices to keep your eZ Newsletter installation secure.

- **Your password**
  To prevent unauthorized access to the system, do not share your password or store it where it can be easily found (for example, as a text file on the server).

  You can change your password by selecting the **My account** tab in the top menu, then clicking the **Change password** link in the left menu. Try to use a longer password with the combination of numbers and uppercase and lowercase letters.

- **Log out**
  Always close the system by logging out when you are finished with the task at hand. Click the **Logout** link in the right menu to do so.

- **Close your browser**
  We additionally recommend that you always close browser window after logging out successfully. Do this especially if you are working on a public computer or other unsecured location.

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