
eZ Newsletter

Installation Guide

for installing eZ Newsletter on an existing eZ Publish site
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 manual

This guide aims to help experienced eZ Publish users to install the eZ Newsletter solution on an existing site (as opposed to on a new, newsletter-specific eZ Publish installation). This installation guide is aimed for eZ Publish version 3.9.x with the Website Interface.

The installation and configuration instructions in this guide should cover the most common eZ Publish configurations. For more customized sites, you may have to modify the information in this guide to suit your particular needs.

Appendix A is an overview of the fetch functions in eZ Newsletter, while Appendix B is a quick install guide.

1.3. Limitations of this manual

This manual 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 eZ Newsletter forum is located at: http://ez.no/developer/forum/extensions/ez_newsletter
- **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>
- **Download:** http://ez.no/download/add_ons/ez_newsletter/ez_newsletter_stable_releases
- **SVN:** <http://svn.ez.no/svn/extensions/eznewsletter/>

1.6. Contacting eZ

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

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terms known to be trademarks have been appropriately capitalized. We cannot attest to the accuracy of this usage, and usage of a term in this book should not be regarded as affecting the validity of any trademark or servicemark.

2. Installing eZ Newsletter

2.1. Download the packages

First, download the extension package from http://ez.no/download/add_ons/ez_newsletter/ez_newsletter_stable_releases. Extract the archive into a temporary directory. You only need to copy the extensions you want to use into your eZ Publish extension directory.

2.2. Explanation of the Extensions

2.2.1. eZ Newsletter

This extension provides the core functionality of the newsletter. It is used to create newsletters, manage subscriptions, count link clicks, send out the messages and parse the bounces.

2.2.2. eZ Newsletter builder

This extension is only needed when you want to use the custom editorial interface that is installed when you use the Setup Wizard to install eZ Newsletter. In this documentation we will concentrate on integrating the eZ Newsletter into the standard eZ Publish Administration Interface instead of adding another siteaccess.

2.2.3. eZ Label

This extension enables users to mark content objects with labels (for example to label all articles that should be included in the next newsletter).

2.2.4. eZ Newsletter designs

This extension contains three different newsletter designs for common newsletter use cases. It includes a layout for a company newsletter, a news site newsletter and a shop newsletter. The templates have been made for use with the content classes `newsletter_issue` and `newsletter_article`. To use the templates as-is, you must use these content classes. To use other content classes, you must customize the templates.

We recommend that you use the designs as a reference for your own newsletter designs.

Hint: when you create newsletter designs you should fall back to linked images in the HTML and to the HTML4 specification with limited CSS usage. This is recommended because of the limitation of many email clients when it comes to handling XHTML.

The example templates use some overrides based on sections that act as “mini” sites for the newsletters. If you use the templates on another eZ Publish site, you will probably want to disable the overrides and instead use direct links to the site content.

2.2.5. eZ Mailimport

This extension converts emails from a mailbox into eZ Publish content objects.

2.2.6. eZ Approve 2

This extension provides advanced approval functionalities for eZ Publish (not limited to eZ Newsletter). Its functionality is beyond the scope of this manual. For more information see: <http://ez.no/developer/contribs/workflow/ezapprove2>

2.2.7. eZ Newsletter classes, Newsletter structure and Newsletter demo content

The only component in this extension that might be required is the content classes `newsletter_issue` and `newsletter_article`. However, because you have already made a custom installation, we assume you are going to create custom classes as well. Otherwise you can install the class package with the package import in the Administration Interface.

2.3. Setting up the eZ Newsletter extension

2.3.1. Copy the extension

After unpacking the extensions (as described above), copy the extension `eznewsletter` to your eZ Publish extension directory (`.../ezpublish/extension/eznewsletter/`).

2.3.2. Import the sql schema

Because eZ Newsletter uses some custom tables, you must import the database schema (`eznewsletter/sql/mysql/eznewsletter.sql`) into your MySQL Database. For example:

```
mysql -u user -p ezdb < eznewsletter/sql/mysql/eznewsletter.sql
```

2.3.3. Add the newsletter tab to the Administration Interface navigation bar

To activate the newsletter tab in the Administration Interface siteaccess you must add the following setting to the `menu.ini` configuration file of your administrative siteaccess (located by default at `settings/siteaccess/ezwebin_site_admin/menu.ini.append.php`):

```
[TopAdminMenu]
Tabs[]=eznewsletter
```

The **newsletter** tab should be immediately visible in the Administration Interface.

2.3.4. Create the overrides for classes

For each content class that should be used as newsletter content you must create an override for the edit view. For example, when you create a content class named `mynewsletter` you have to add the following override to the administrative siteaccess:

```
[edit_mynewsletter]
Source=content/edit.tpl
MatchFile=edit_article.tpl
Subdir=templates
Match[class_identifier]=mynewsletter
```

To prevent users from accidentally choosing the wrong class when they create a new newsletter type, eZ Newsletter the class identifiers must also be in the `eznewsletter.ini` configuration file (usually located in `/settings/override/eznewsletter.ini.append.php`):

```
[NewsletterTypeSettings]
ClassLimitation[]=mynewsletter
```

2.3.5. Configure the default host

In the `eznewsletter.ini`, you can also add the URL of your public siteaccess. If you don't do this, you will need to build the URLs referring to the website in your templates.

```
[HostSettings]
defaulthost=http://www.example.com
```

This is needed because the cronjobs run in the context of the administration siteaccess, which makes it possible to have a preview of the newsletter in the Administration Interface. You can then access this by using the operator `eZDefaultHostname()`.

2.3.6. Create a template extension and your custom newsletter designs

If you imported the classes `newsletter_issue` and `newsletter_article` from the package `eznewsletter_classes.ezpkg` you can simply activate the extension `eznewsletter_designs`. Otherwise you must make a design extension that contains your custom newsletter layouts (called "newsletter designs").

To do this, create a design extension as normal. Add an INI-file `newsletterdesigns.ini.append.php` to your extension with these settings:

```
[Designs]
Design[]
Design[]=acme

[acme]
Description=The acme design
```

```
PreviewImage=acme_thumbnail.jpg
```

In the `Design` configuration block, define the identifier of the available newsletter designs. For each newsletter design you must create a section (named after the identifier) that will hold a descriptive name for the layout and the name of a preview image. Place the preview image in the image directory of your extension.

Now you can create the template. To do so you have to create a directory with the same name as the identifier you chose in the template folder (in this example `mynewsletter/design/mynewsletter/templates/acme/sendout`). Create a subdirectory called `sendout` that will contain the templates used during sendout.

To support sending out newsletters in different formats, the templates must be named `text.tpl` (for plaintext), `html.tpl` (make embedding possible), `linked.tpl` (often the same as `html.tpl` but without embedded images and attachments). (We strongly suggest you use links rather than embedded objects because of bandwidth usage and processing time.)

2.3.7. Create a subscription list and a newsletter type

Log in to the Administration Interface and click on the newsletter tab in the top menu.

Before you create a newsletter type, you must create a subscription list, because the newsletter types need to have at least one list assigned to them before you can store them.

After creating the list you can make your first newsletter type, associate it with the subscription list and select your custom design. The user handbook at <http://ez.no/doc/extensions/newsletter> contains more information on the user interface.

2.4. Configure the roles and policies

To enable site visitors to subscribe to newsletters and manage their newsletter subscriptions, and to count the clicks on the links in the newsletter they receive, you must set up two policies.

The first policy is `newsletter.subscribe`, which allows the user to subscribe to lists and manage their profile.

Second, you must give the anonymous role the policy `newsletter.read`. This module can be used for the links in the newsletters. Every time a user accesses an object via this module, he will be redirected to the content and in the background the click will be counted.

2.5. Setting up the cronjob

In the final step, set up a cronjob that processes the sendout. It is very important that you run the cronjob in the context of the admin siteaccess. Otherwise you can't be sure that the same template overrides are active, etc.

Unless you have a special setup you will simply define the siteaccess with the '-s' parameter for the cronjob scripts. For example, if your admin siteaccess is `ezwebin_site_admin` you would execute the cronjob like this:

```
php ./runcronjobs.php -s ezwebin_site_admin send_newsletter
```

You should execute the cronjob at an interval based on sendout amount, traffic and server performance. Usually an interval of 30 minutes or 1 hour is sufficient.

3. Further customization

You now should have a working newsletter system. To customize it further, refer to the comments in the extension INI files. If you have a large number of newsletter subscribers, consider using the `cluster_send` cronjob, which distributes the messages to multiple mailservers by SMTP.

4. Appendix A: fetch functions

4.1. Available fetch functions

Module: newsletter

Name	Summary
version	<i>Returns the version of the newsletter extension</i>
newsletter_type_count	<i>Fetches the number of newslettertypes</i>
newsletter_type_list	<i>Fetches a list of newslettertypes</i>
subscription_list_count	<i>Fetches the number of subscriptionlists</i>
list_subscriptions	<i>Fetches a list of subscriptionlists</i>
subscription_array_by_user_id	<i>Fetch all subscriptions of a given user id</i>
subscription_array_by_email	<i>Fetch all subscriptions for a given email</i>
subscription_by_id	<i>Fetch a subscription by subscription id</i>
active_subscriptions_by_user_id	<i>Fetch all active subscriptions of a given user id</i>
active_subscriptions_by_email	<i>Fetch all active subscriptions for a given email</i>
user_data	<i>Fetch the users data</i>
newsletter_count	<i>Fetch the number of newsletters</i>
newsletter	<i>Fetch a newsletter</i>
newsletter_by_object	<i>Fetch a newsletter by its contentobject id</i>
newsletter_by_hash	<i>Fetch a newsletter by its hash</i>
newsletter_list_by_type	<i>Fetch a list of newsletter for a given newslettertype</i>
newsletter_read_stat	<i>Fetch the statistics for a newsletter</i>
bounce_count	<i>Fetch the number of bounces</i>
object_stat	<i>Fetch the statistics for a contentobject</i>

onhold_count	Fetch the number of messages on hold
--------------	--------------------------------------

4.2. Fetch function documentation

This section contains a short overview of fetch functions that require parameters.

4.2.1. list_subscriptions

Name Type Required

offset integer no

count integer no

4.2.2. subscription_array_by_user_id

Name Type Required

user_id string yes

4.2.3. subscription_array_by_email

Name Type Required

email string yes

4.2.4. subscription_by_id

Name Type Required

id integer yes

4.2.5. active_subscriptions_by_user_id

Name Type Required

user_id string yes

4.2.6. active_subscriptions_by_email

Name Type Required

email string yes

4.2.7. user_data

Name Type Required

hash string yes

4.2.8. newsletter_count

Name Type Required

type_id integer no

4.2.9. newsletter

Name Type Required

id integer yes

4.2.10. newsletter_by_object

Name Type Required

contentobject_id integer yes

contentobject_version integer yes

published boolean no

4.2.11. newsletter_by_hash

Name Type Required

hash string yes

4.2.12. newsletter_list_by_type

Name Type Required

type_id integer yes

offset integer no

limit integer no

is_sent boolean no

is_draft boolean no

grouping boolean no

recurring boolean no

4.2.13. newsletter_read_stat

Name Type Required

newsletter_id integer yes

4.2.14. bounce_count

4.2.15. object_stat

Name Type Requiredcontentobject_id *integer yes*

4.2.16. onhold_count

Name Type Requiredstatus *integer yes*

5. Appendix B: Quick installation how to

1. Copy extensions

1. ezapprove2
2. ezlabel
3. ezmailimport
4. eznewsletter
5. eznewsletter_builder
6. eznewsletter_designs

2. Import database schemes

1. ezapprove2/sql/mysql/schema.sql
2. ezlabel/database/mysql/schema.sql
3. ezmailimport/sql/mailimport.sql
4. eznewsletter/sql/newsletter.sql

3. Import required newsletter packages

1. eznewsletter_classes-1.0-1.ezpkg
2. eznewsletter_structure-1.0-1.ezpkg
directly in /home -> creates /newsletter/...
3. eznewsletter_democontent-1.0-1.ezpkg
images in /media/images
articles in /newsletter/articles

4. Create newsletter related sections in Admin

1. newsletter_articles (ID: 8)
2. newsletter_inbox (ID: 9)
3. newsletter_repository (ID: 7)

5. Assign imported objects to newsletter sections

1. /newsletter/articles -> newsletter_articles
2. /newsletter/inbox -> newsletter_inbox
3. /newsletter/newsletter_repository -> newsletter_repository

legend:

new settings block has to be added
custom settings depending on the installation

6. Create and modify settings

1. in override
 1. eznewsletter.ini.append.php


```
[HostSettings]
defaultHost=http://www.ezp.com

[NewsletterAutomapping]
autoMapping=enabled
newsletter_issue[pretext]=pretext
newsletter_issue[posttext]=posttext
```
 2. site.ini.append.php


```
[ExtensionSettings]
ActiveExtensions[]
ActiveExtensions[]=eznewsletter
ActiveExtensions[]=eznewsletter_designs
ActiveExtensions[]=ezapprove2
```



```
ActiveExtensions[]=ezwebin
ActiveExtensions[]=ezdhtml
ActiveExtensions[]=ezodf
```

2. in user siteaccess

1. image.ini.append.php

```
...
AliasList[]=rotate
AliasList[]=shop_header_image
AliasList[]=companynewsletter_top_article_image
AliasList[]=newssite_top_article_image

...
[rotate]
Filters[]
Filters[]=image_magick_rotate

[shop_header_image]
Filters[]
Filters[]=geometry/scaledownonly=555;

[companynewsletter_top_article_image]
Filters[]
Filters[]=geometry/scaledownonly=150;150

[newssite_top_article_image]
Filters[]
Filters[]=geometry/scaledownonly=200;200
```

2. override.ini.append.php

```
[read_newsletter]
Source=node/view/full.tpl
MatchFile=view_newsletter.tpl
Subdir=templates
Match[class_identifier]=newsletter_issue
Match[section]=7

[newsletter_pagelayout]
Source=pagelayout.tpl
MatchFile=newsletter_pagelayout.tpl
Subdir=templates
Match[class_identifier]=newsletter_issue
Match[section]=7
```

3. site.ini.append.php

```
[DesignSettings]
SiteDesign=eZnewsletter_site
AdditionalSiteDesignList[]
AdditionalSiteDesignList[]=ezwebin
AdditionalSiteDesignList[]=base
```

3. in admin siteaccess

1. content.ini.append.php

```
[VersionView]
AvailableSiteDesignList[]
AvailableSiteDesignList[]=eZnewsletter_site
AvailableSiteDesignList[]=ezwebin_site
AvailableSiteDesignList[]=admin
```

2. design.ini.append.php

```
[StylesheetSettings]
CSSFileList[]
CSSFileList[]=filterbox.css
CSSFileList[]=head.css
```

3. eznewsletter.ini.append.php

```
[NewsletterSendout]
PreviewTransport=sendmail
Transport=sendmail
```

```
[NewsletterTypeSettings]
ClassLimitation[]
ClassLimitation[]=newsletter_issue
```

4. menu.ini.append.php

```
[TopAdminMenu]
# This list contains menuitems of the top menu in admin interface
Tabs[]
Tabs[]=content
Tabs[]=media
Tabs[]=users
Tabs[]=shop
Tabs[]=design
Tabs[]=setup
Tabs[]=my_account
Tabs[]=lookAndFeel
Tabs[]=eznewsletter
Tabs[]=eznewsletter_setup

[Topmenu_lookAndFeel]
NavigationPartIdentifier=ezdesign
Name=Look & Feel
Tooltip=Manage newsletters
URL[]
URL[default]=content/edit/54
Enabled[]
Enabled[default]=true
Enabled[browse]=false
Enabled[edit]=
Shown[]
Shown[default]=true
Shown[edit]=true
Shown[navigation]=true
Shown[browse]=false
```

5. override.ini.append.php

```
[article_list]
Source=node/view/full.tpl
MatchFile=editor_view/article_list.tpl
Subdir=templates
Match[section]=8

[idea_list_topics]
Source=node/view/full.tpl
MatchFile=editor_view/idea_list.tpl
Subdir=templates
Match[class_identifier]=folder
Match[section]=9

[browseArticles]
Source=content/browse_mode_list.tpl
MatchFile=editor_view/article_list_browse.tpl
Subdir=templates
Match[section]=8
```

6. site.ini.append.php

```
[ExtensionSettings]
ActiveAccessExtensions[]
ActiveAccessExtensions[]=ezlabel
ActiveAccessExtensions[]=eznewsletter_builder
ActiveAccessExtensions[]=eznewsletter_designs

[DesignSettings]
SiteDesign=site_admin
AdditionalSiteDesignList[]=admin
```

```
AdditionalSiteDesignList[]=eznewsletter_builder
AdditionalSiteDesignList[]=eznewsletter_designs
```

```
[ContentSettings]
```

```
CachedViewPreferences[full]=admin_navigation_content=0;admin_navigation_details=0;admin_navigation_languages=0;admin_navigation_locations=0;admin_navigation_relations=0;admin_navigation_roles=0;admin_navigation_policies=0;admin_navigation_content=0;admin_navigation_translations=0;admin_children_viewmode=list;admin_list_limit=1;admin_edit_show_locations=0;admin_leftmenu_width=10;admin_url_list_limit=10;admin_url_view_limit=10;admin_section_list_limit=1;admin_orderlist_sortfield=user_name;admin_orderlist_sortorder=desc;admin_search_stats_limit=1;admin_treemenu=1;admin_bookmarkmenu=1;admin_left_menu_width=13;filter_priority=0;filter_status=0;filter_audience=0;filter_locale=0;filter_label=0;filter_priority=0;filter_status=0;filter_audience=0;filter_locale=0;filter_label=0;filter_introduce_startyear=0;filter_introduce_startmonth=0;filter_introduce_startday=0;filter_introduce_endyear=0;filter_introduce_endmonth=0;filter_introduce_endday=0;filter_expire_startyear=0;filter_expire_startmonth=0;filter_expire_endday=0;filter_expire_endyear=0;filter_expire_endmonth=0;filter_expire_endday=0;filteroptions=1;
```

7. toolbar.ini.append.php

```
[Toolbar_admin_right]
```

```
Tool[]
```

```
Tool[]=admin_current_user
```

```
Tool[]=admin_bookmarks
```

```
Tool[]=label
```

4. in newsletter_builder extension

1. browse.ini.append.php

```
[AddRelatedImages]
```

```
StartNode=51 NodeID of images folder in Media
```

```
SelectionType=single
```

```
ReturnType=ObjectID
```

```
[AddRelatedFiles]
```

```
StartNode=52 NodeID of files folder in Media
```

```
SelectionType=single
```

```
ReturnType=ObjectID
```

```
[AddRelatedTopics]
```

```
StartNode=182 NodeID of articles folder in /newsletter
```

```
SelectionType=multiple
```

```
ReturnType=ObjectID
```

2. content.ini.append.php

```
...
```

```
#newsletter article image
```

```
ClassAttributeStartNode[]=345;AddRelatedImages ID of class attribute (Setup/Classes)
```

```
#newsletter article file
```

```
ClassAttributeStartNode[]=346;AddRelatedFiles ID of class attribute (Setup/Classes)
```

```
#newsletter issue image
```

```
ClassAttributeStartNode[]=356;AddRelatedImages ID of class attribute (Setup/Classes)
```

```
#newsletter issue main topics
```

```
ClassAttributeStartNode[]=357;AddRelatedTopics ID of class attribute (Setup/Classes)
```

```
#newsletter issue other topics
```

```
ClassAttributeStartNode[]=358;AddRelatedTopics ID of class attribute (Setup/Classes)
```

7. Adjust policies of anonymous users

1. Add the following policies:

1. Module: newsletter Function: subscribe Limitation: No limitations
2. Module: content Function: read Limitation: Limit to Sections: Media, newsletter_repository
3. Module: newsletter Function: read Limitation: No limitations