RCS Newsletter

User's Guide

Document Revisions

Date	Revision	By
December 15th, 2011	1	Miguel Senosiain
December 29th, 2011	2.0	Miguel Senosiain
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General Description

The aim of this project is to fulfill with all the features of a Newsletter, including mailing lists management, registration and un-registration system, confirmations, newsletter articles history and online newsletter visualization. powered by a group of fully configurable and scalable porlets that can be used in any Liferay portal.

Some of the main features are:
- Mailing list management
- Import/Export Subscribers
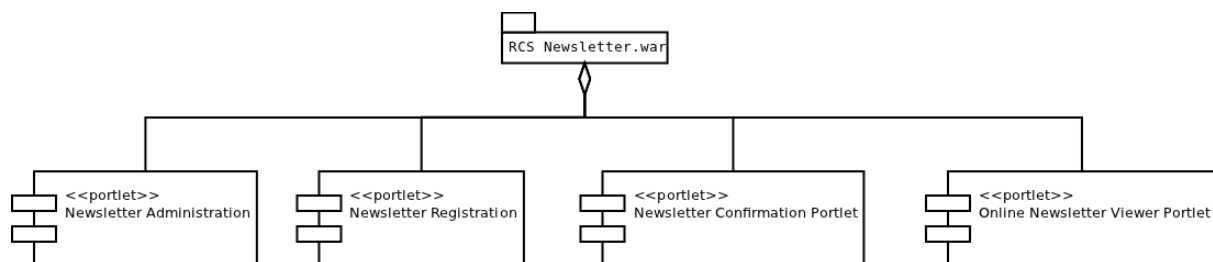- Newsletter history
- On line newsletter viewer

Architecture

Fig 1: Newsletter architecture

- **Newsletter Administration**:is a **Control Pane**l portlet. You can't decide where to instantiate it. It will be instantiated automatically into the Control Panel / <Your site> section. ie: Control Panel / Rotterdam CS
- **Newsletter Registration:** using this portlet, you will register for a newsletter, you may deploy it in wherever page you want.
- **Newsletter Confirmation**: this portlet MUST be deployed to the Home page of the portal. Its used to confirm that a user has been registered for the newsletter successfully.
- **Online Newsletter Viewer**: this portlet is used to read the subscribed newsletters in the portal page directly.

Installation

Firs things first. Deploy the RCS Newsletter into your portal. There are several ways to accomplish this. Here is one.
1. Log in as an admin user and go to **Control Panel.**
2. In the left panel, under Server category select **Plugins Installation.** Plugins Installation Page is shown.

3. Select **Portlet Plugins** in the top of the page. Click on **Install More Portlets** button.
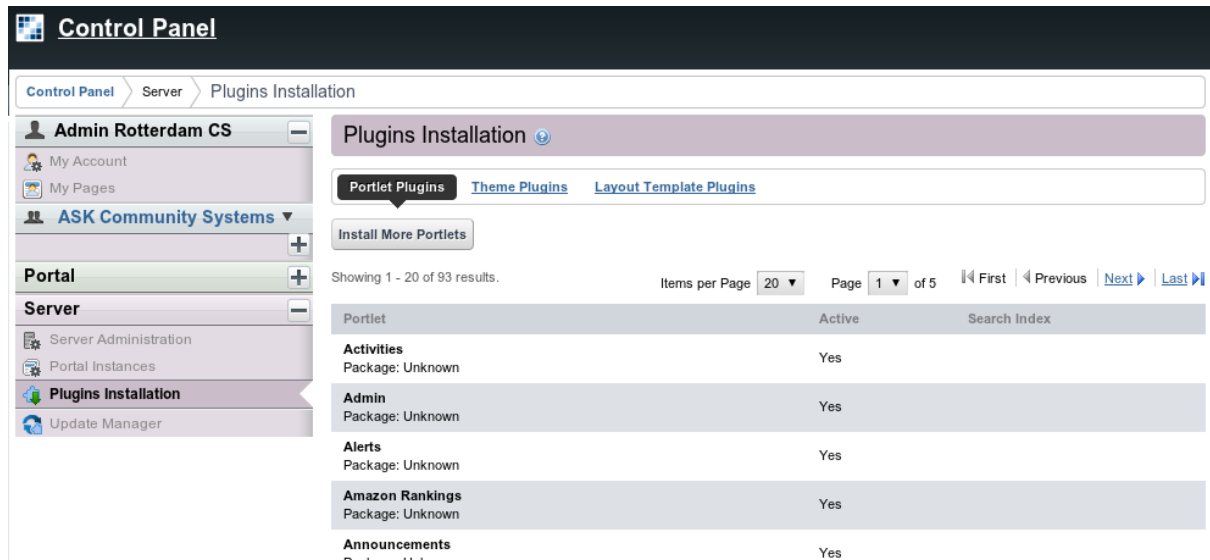

Fig 2: Portlet Plugins list.

4. Select **Upload File** in the top of the displayed page. Click on **Choose File** button, in order to get the file **newsletter-portlet.war** uploaded from your computer.
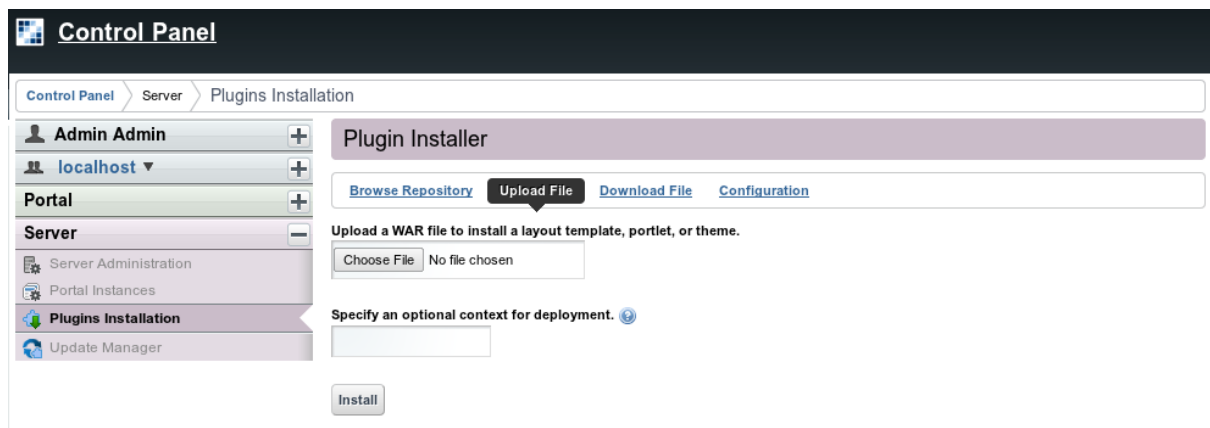

Fig 3: Upload a new WAR file.

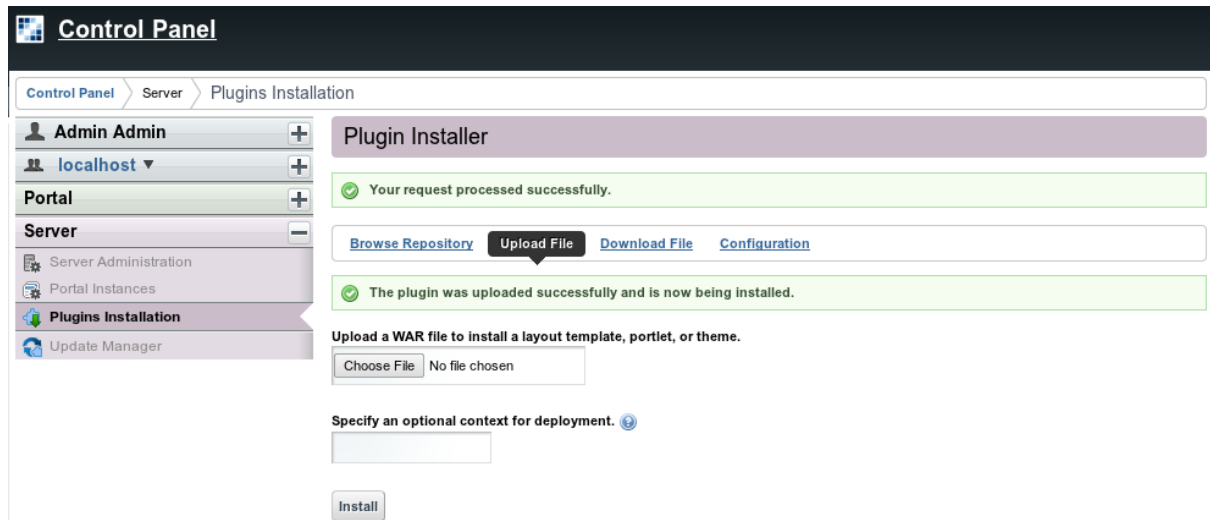5. Once the file is selected click on the **Install** button

Fig 4: WAR uploaded.

Once the newsletter is installed you can start configuring it.

Setting up the portal to use RCS Newsletter

In order to use RCS Newsletter, the following configuration must be set in portal-ext.properties file[1]

```
journal.article.types=rcs-news,rcs-press-release,rcs-events,rcs-newsletter,rcs-general
```

Changing the default database

The RCS Newsletter is working with Postgres DBMS by default but is possible to work with another DBMS. One way to accomplish this is to download the RCS Newsletter portlet war file. The other one is to install it through Liferay control panel.

To do it with the war file, the following steps are required:

1. Download RCS newsletter portlet war file.
2. Open this file with some uncompress tool.
3. Edit file liferay-persistence.xml at rcs-newsletter-portlet/WEB-INF/
4. Replace this line:

    <prop key="hibernate.dialect">org.hibernate.dialect.PostgreSQLDialect</prop>

    for this one (e.g to work with MySQL):

    <prop key="hibernate.dialect">org.hibernate.dialect.MySQLDialect</prop>

---

[1] The portal-ext.properties file should be located at <LIFERAY_HOME>/Liferay-portal-X.X.X/portal-ext.properties

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To do it trough control panel, the following steps are required:

1. Install RCS Newsletter portlet.
2. Shutdown tomcat instance
3. Update file liferay-persistence.xml located at <liferay-installation-folder>/tomcat-6.0.x/webapps/rcs-newsletter-portlet/WEB-INF/
4. Replace this line:

   ```
   <prop key="hibernate.dialect">org.hibernate.dialect.PostgreSQLDialect</prop>
   ```

   for this one (e.g to work with MySQL):

   ```
   <prop key="hibernate.dialect">org.hibernate.dialect.MySQLDialect</prop>
   ```
5. Start tomcat instance.

The link below contains a list of available dialects.
http://docs.jboss.org/hibernate/stable/annotations/api/org/hibernate/dialect/package-summary.html

Configuring Pages

1. Log in as an admin user and go to **Control Panel.**
2. In the left panel select **Pages**.
3. In the name field you must enter "**online-newsletter**". This is because the Online Newsletter Viewer needs to be instantiated in a page named like this.
4. Select **Hidden** checkbox.
5. Leave other values as default.
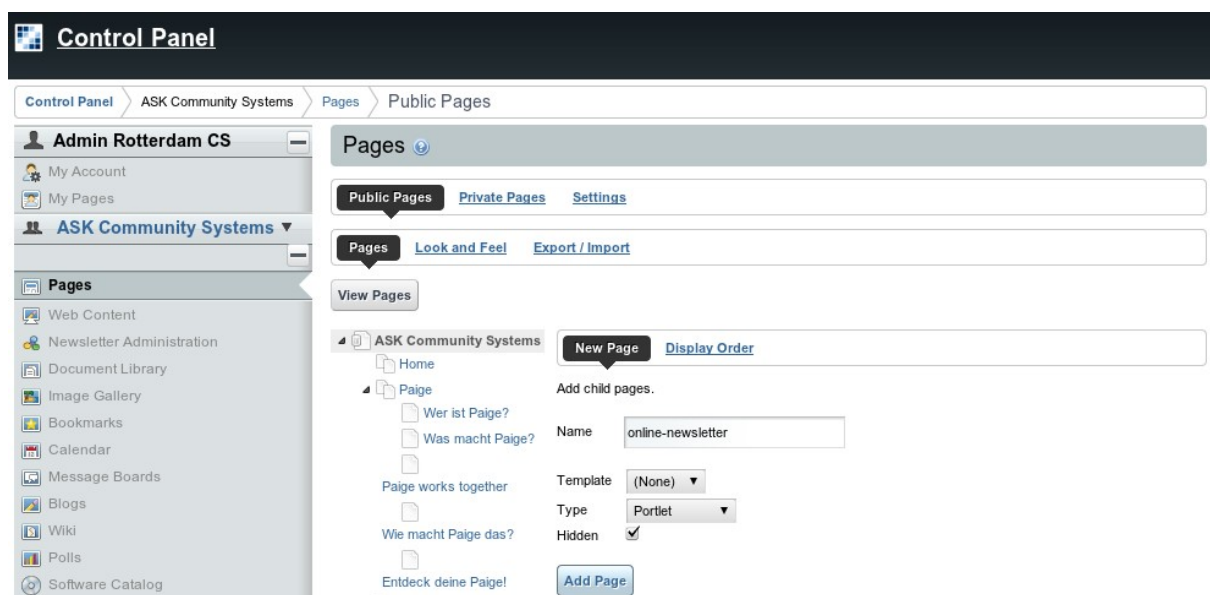6. Click on **Add Page** button.

Fig 5: Add online-newsletter.

Instantiating RCS Newsletter Portlets

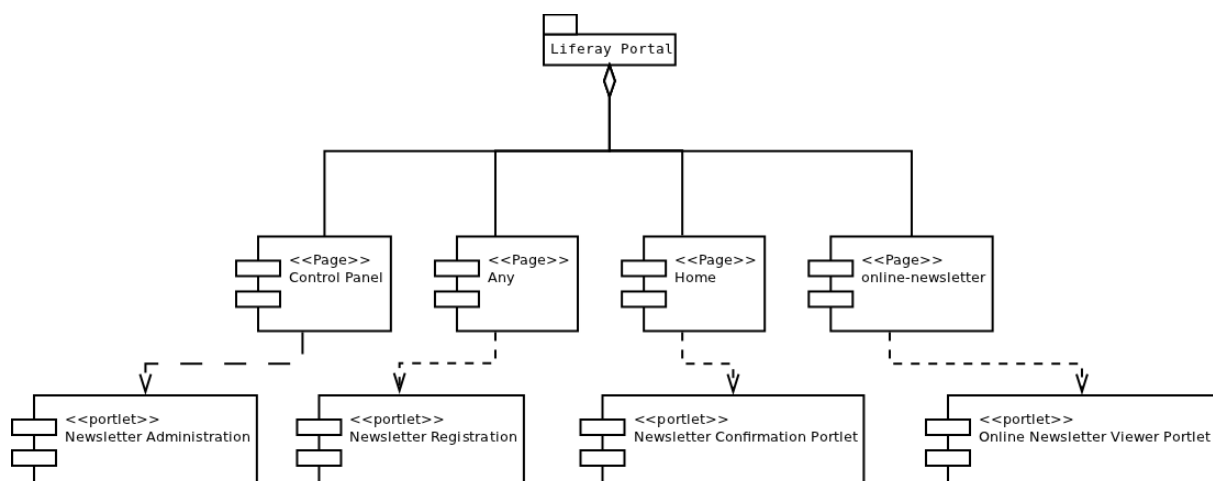The application's portlets should be instantiated as described in the diagram below.

Fig 6: RCS Newsletter portlets, as they should be instantiated.

1. Log in as an admin user.
2. On the top menu bar select **Add.** Click on **More...**
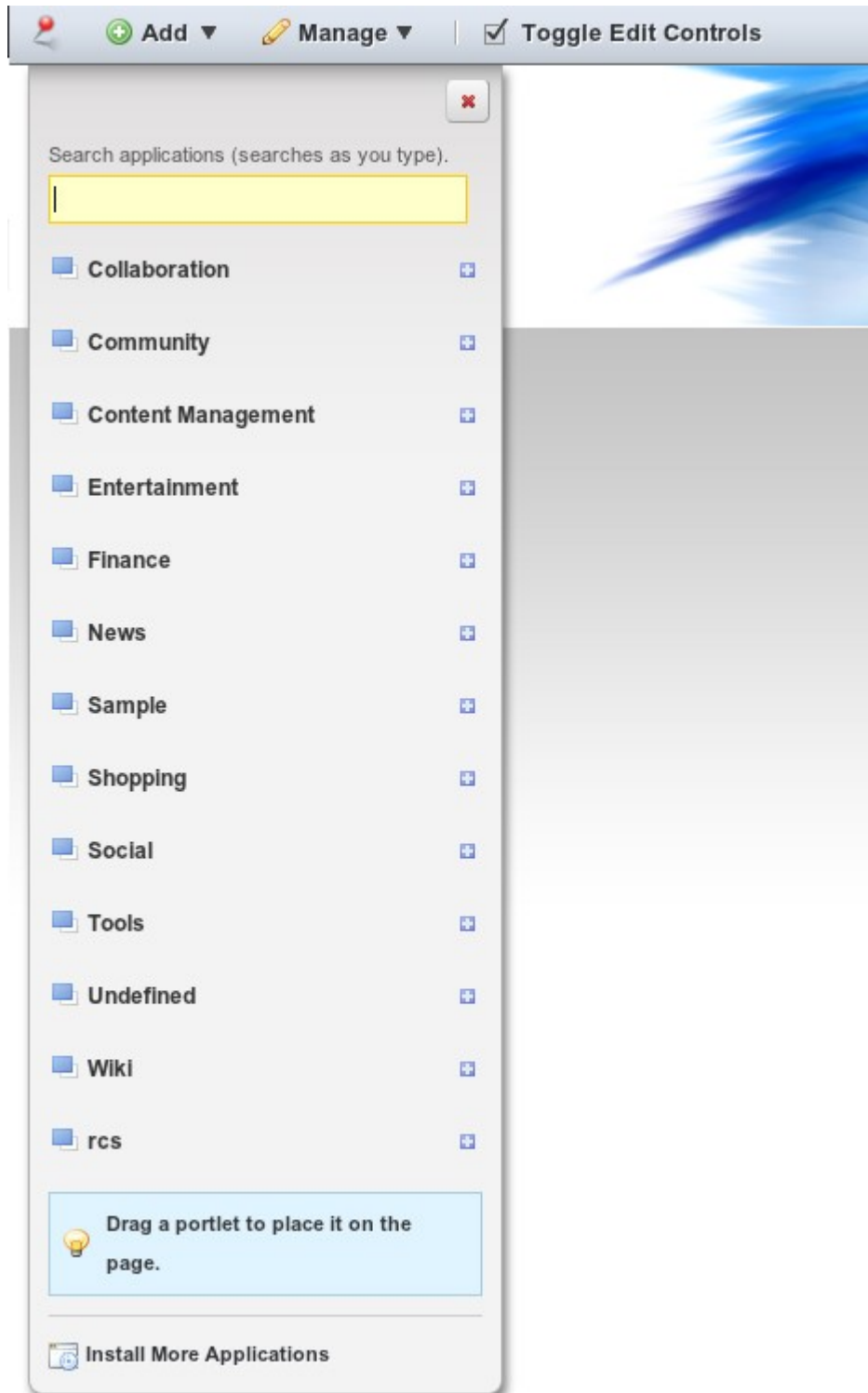

Fig 7: Portlet Plugins list.

3. Expand the **rcs** category.

4. To instantiate a portlet, just drag and drop it from the list into the page you want it to be displayed.
5. On the portal's **home page** you must instantiate "**Newsletter Confirmation Portlet**". This portlet default state is hidden so you won't see any changes in the home page.
6. Instantiate **Newsletter Registration Portlet** in any page of the portal, or create one for it.
7. Instantiate **Online Newsletter Viewer Portlet** in the page created earlier for it (online-newsletter).

Newsletter configuration

The **Newsletter Administration** section has four tabs: **Lists**, **Subscribers**, **Mailing** and **Archive**. Each one of this tabs, is used to configure different aspects of the RCS Newsletter. To access the **Newsletter Administration** page follow the steps described below.
1. Log in as an admin user and go to **Control Panel.**
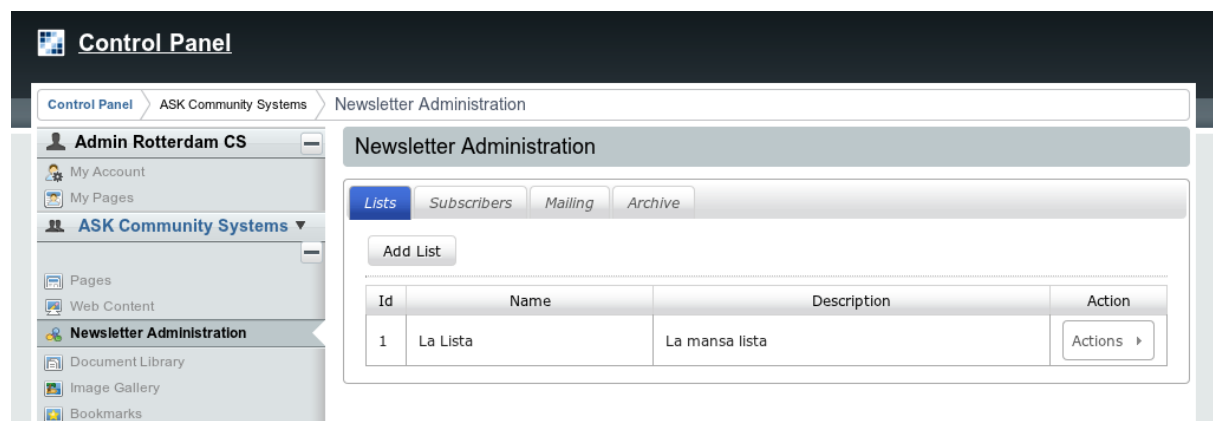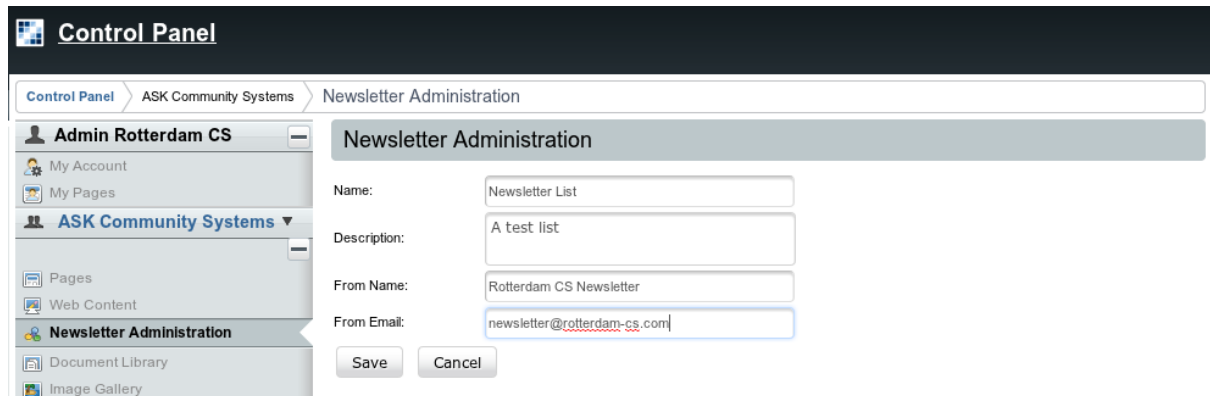2. Select **Newsletter Administration** in the left panel.

Fig 8: Newsletter Administration.

Lists tab

The **Lists** tab is used to create, update and remove the mailing lists for which newsletters will be sent.

Adding a list.
1. Click on **Add List.**
2. Enter a **name** for the list, its **description** the **name** that will be sending the newsletter and the **email address** used for sending the newsletter. When done, click **Save** button. You can create many list as you want.
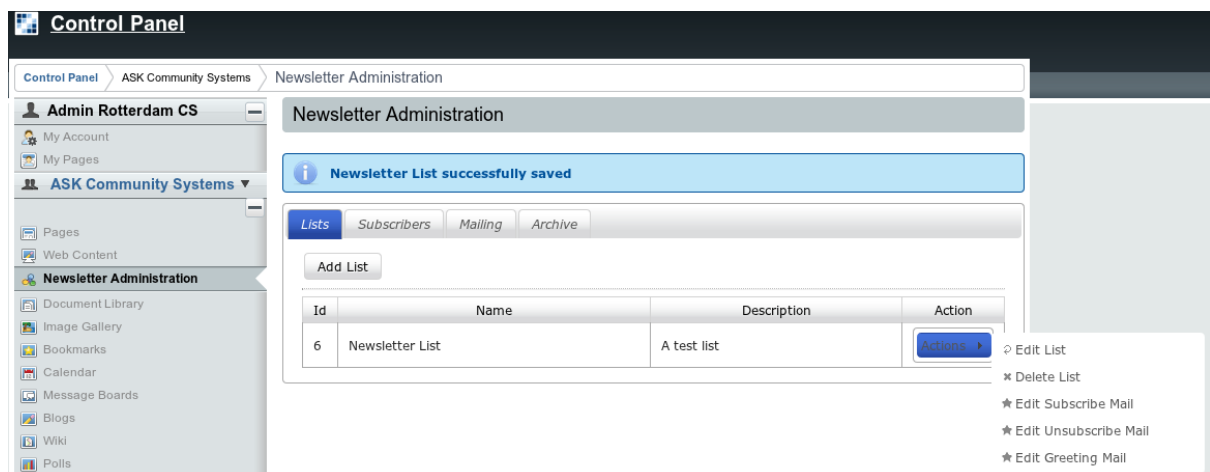
Fig 9: List creation.

Configuring the list's subscribe, unsubscribe and greeting emails bodies.

1. In the list you wish to configure, click on **Actions** button and select the menu item for the email type you want to configure.

Fig 10: List Actions.

2. Configure the list to have the three required emails: **Greeting, Subscribe, Unsubscribe.** If you click on **Help** button, a list of tokens (and their description) that should be inserted in the email to be sent to the registered recipients, is shown.

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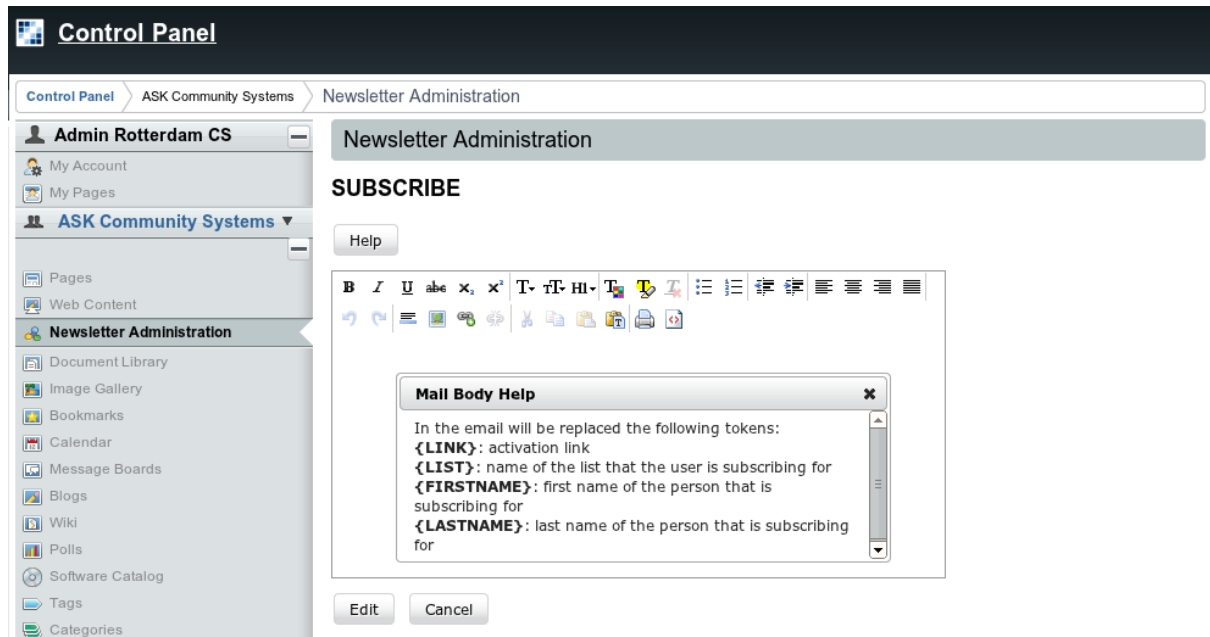
Fig 11: Email edition help window.

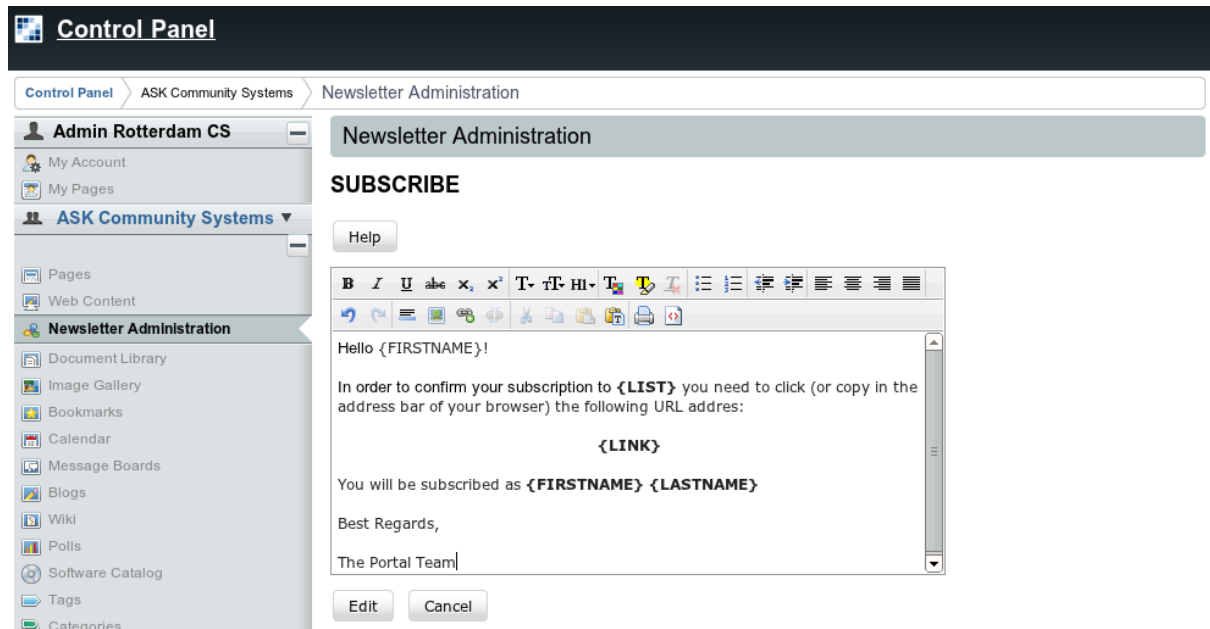3. Edit the email body using the tools in the editor window.

Fig 12: Subscribe email message creation.

Note: Remember to include the token **{LINK}**, so the user can confirm his registration.

4. Repeat steps 5, 6 and 7 in order to create the email messages for **Greeting** and **Unsubscribe** actions. Remember that the **Help** button displays the tokens that should be included in the email message body.

Updating or Deleting a list.

1. In the list you wish to update or delete, click on **Actions** button and select the appropriate menu item for the action you are trying to perform.

Subscribers tab

In this tab you'll see the subscribers of each list displayed in a grid. Also, you can choose either to display or not, the inactive subscribers of each list.
Also in this tab you can import or export subscribers into/from a list.

Exporting subscribers

1. In the **Subscribers** tab click on **Export subscribers to excel** button. An Excel file is downloaded, with the following columns:
● id: the internal ID of the subscriber.
● Name: subscriber's name.
● Last Name: subscriber's last name.
● Email: subscriber's registered email address.

Importing subscribers

The Excel file to be imported, must have the following columns:
● Name: subscriber's name.
● Last Name: subscriber's last name.
● Email: subscriber's registered email address.

1. In the **Subscribers** tab, click on **Import Subscribers** button.
2. Choose a **List**, onto which the subscribers will be imported, or all list.
3. Click **choose file**, and browse for the Excel file containing the subscribers data.
4. Click **Import** button.

Note: Instead of creating a new Excel file, you can use a downloaded earlier with up to date data. (The value of the id column isn't necessary and its recommended to leave it blank)

Templates tab

In this tab is where you manage the templates used to create a mailing.
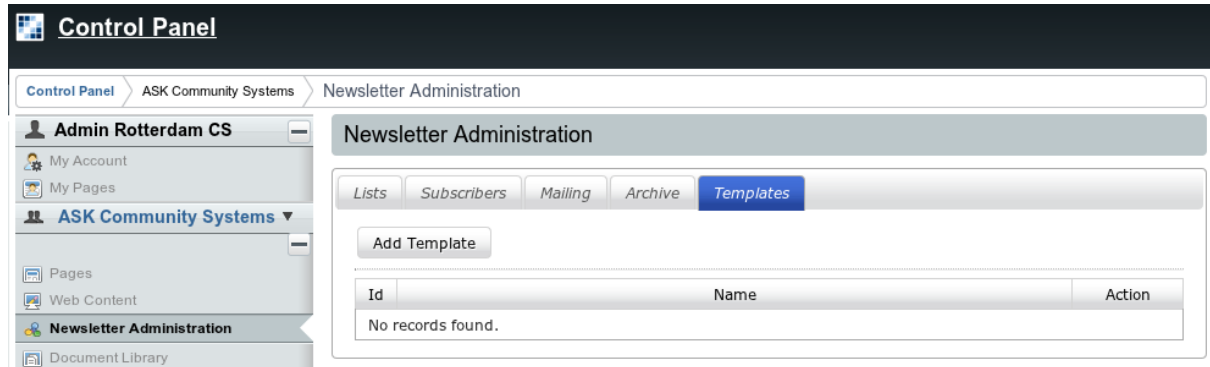
Fig 13: Templates tab.

Adding a template:

1. Log in as an admin user and go to the **Control Panel**.

In the left panel choose **Newsletter Administration** and go to **Templates** tab.

Click on **Add Template** button.

Fill **Name** field with the name of the template you are creating, e.g. *Common template*.

Click on **Help** button, a list of tokens (and their description) that can be inserted in the email to be sent to the registered recipients, is shown.

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Fig 14: Templates Help window

2. Copy one of the **[block] [/block]** sections and paste it on the editor. Each block will be replaced with an article when you create a mailing, you have to create at least one block.

3. Remove the format of the pasted block. Select it and click on the **Remove Format** button in the editor's toolbar.

Fig 15: Remove format

Mailing tab

In this tab is where you select the content and send a newsletter.

Adding Web Content to the Newsletter
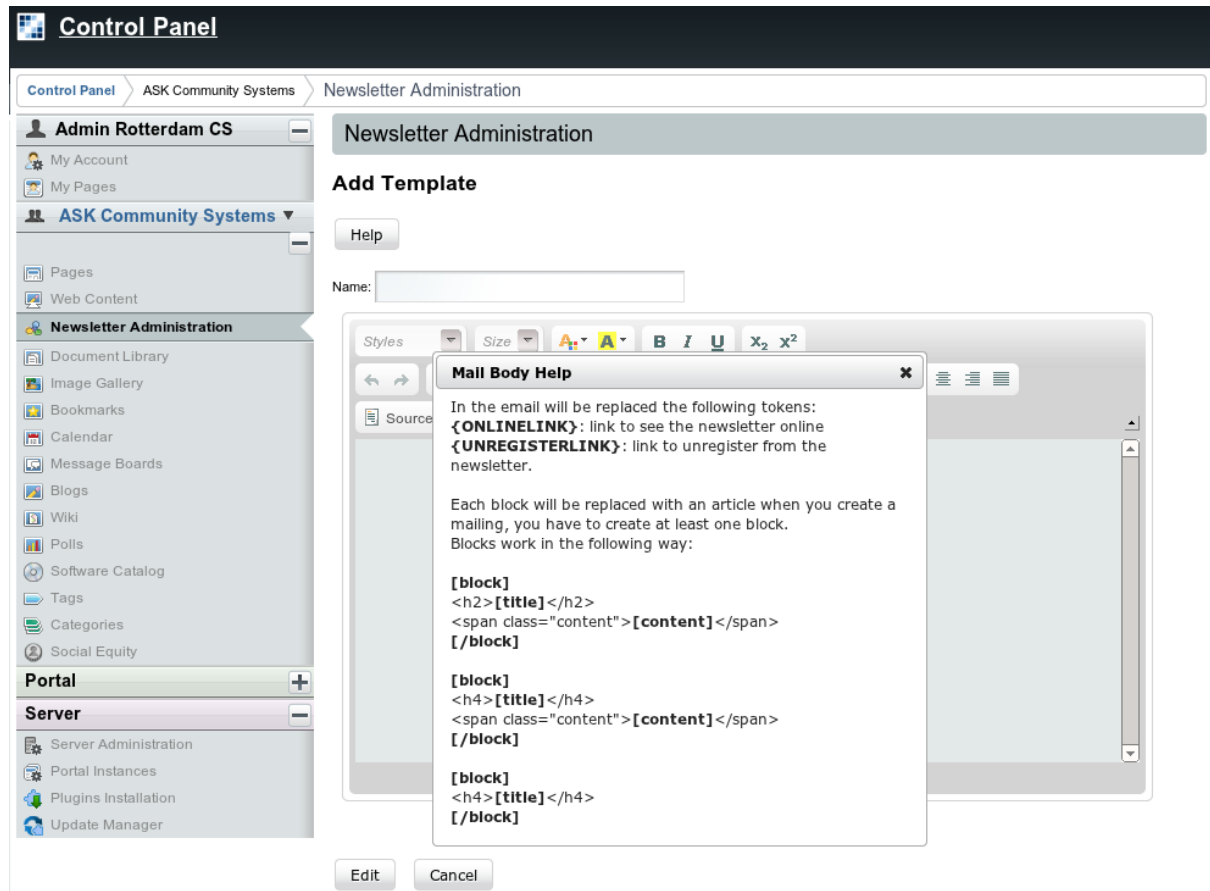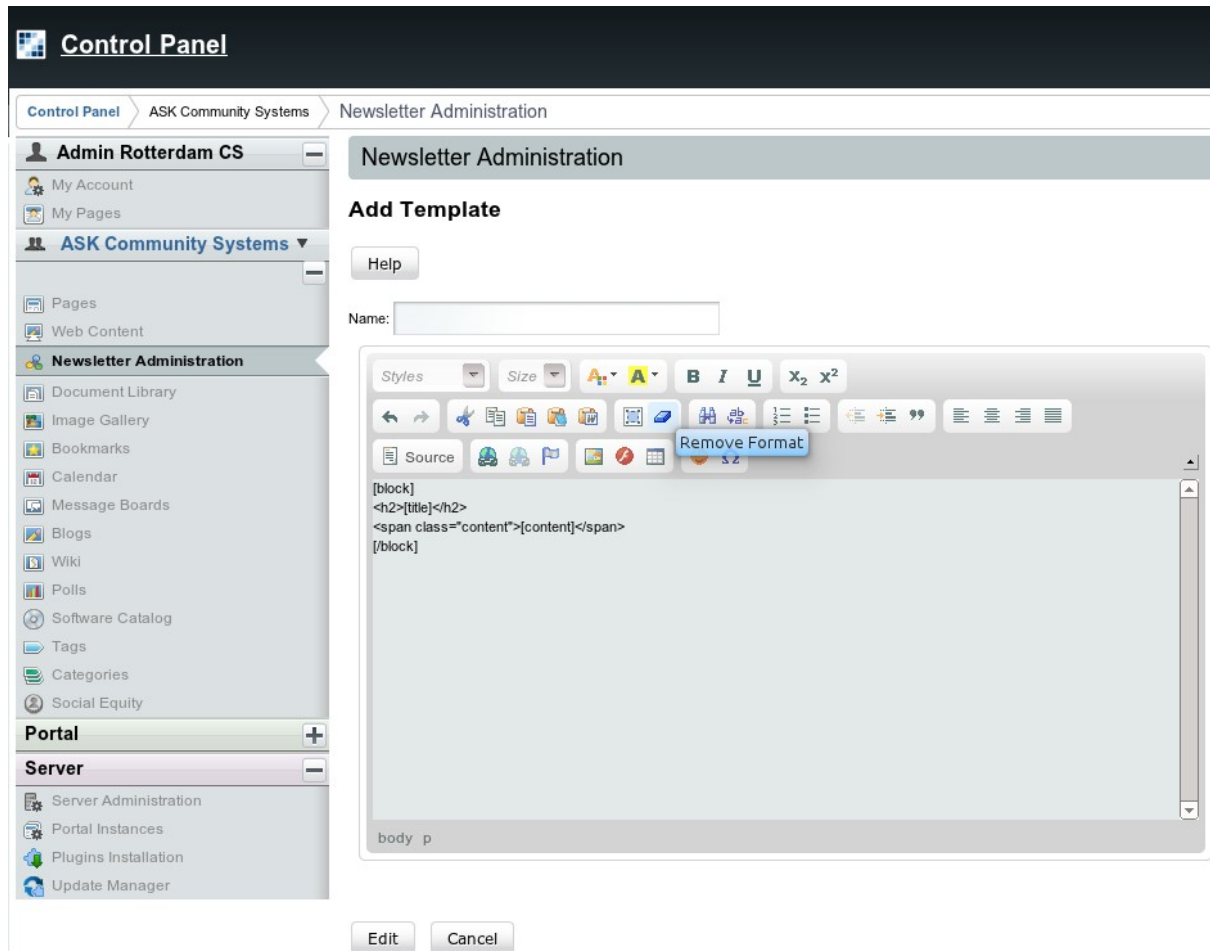
Once you have configured your portal the steps to add a web content to be used in a mailing are as follow:

1. Log in as an admin user and go to the **Control Panel**.
2. In the left panel select **Web Content**.
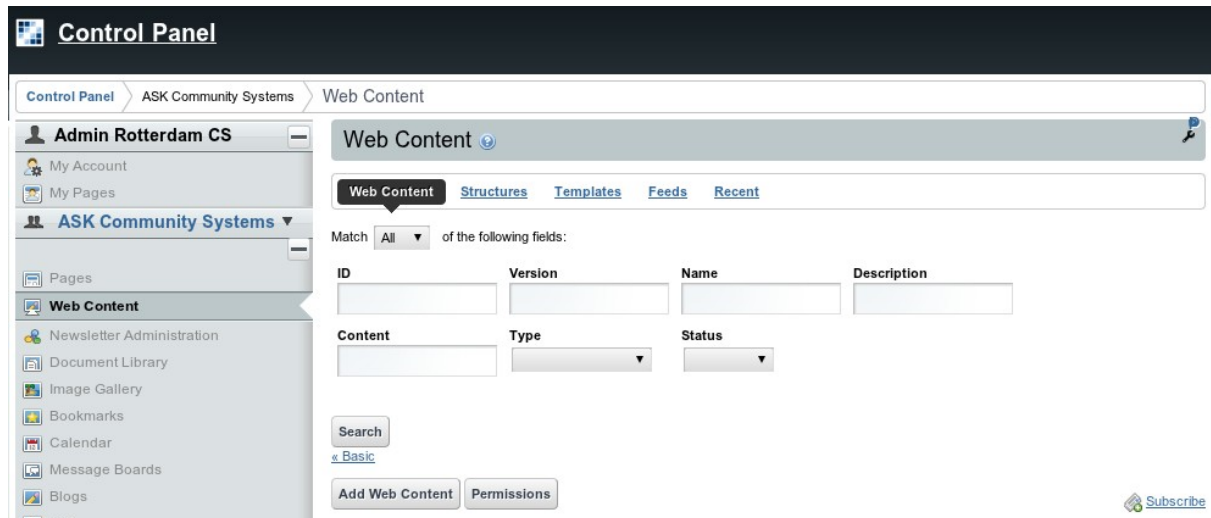
Fig 16: Web Content Main form.

3. Click on **Add Web Content** button.
4. Fill **Name** field with the name you want to give to the web content that will be used in the newsletter mailing.
5. Edit the web content using the editor.

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Fig 17: Adding Web Content.

6. In **Categorization** section choose at least one of the following methods.
   - **Type**: choose *rcs-newsletter*
   - **Categories**: You'll need to create a category in **Control Panel > Categories**, name it *newsletter*.
   - **Tags**: Just type *newsletter*.

Fig 18: Web Content Editor - Categorization Section.

7. Click on **Publish** button.

Creating a mailing.

1. Log in as an admin user and go to the **Control Panel**.
2. In the left panel choose **Newsletter Administration** and go to **Mailing** tab.
3. Click on **Add Mailing** button.
4. Type the name of the mailing to be sent in the **Name** field.
5. Choose the list where the mailing will be sent from the **List** dropdown.
6. From the **Template** dropdown, choose a previously created template.
7. Select an article for each block added to the selected template.
8. Click on **Add Mailing** button.

Fig 19: Add Mailing.

Sending the newsletter

1. Select the radio button for the mailing you want to send and click on **Send Newsletter** button. Optionally you can fill a test email address and click on **Send Test** button, in order to see how the email is displayed.

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3024 EZ Rotterdam
tel: +31 (0)88 RDAM 010
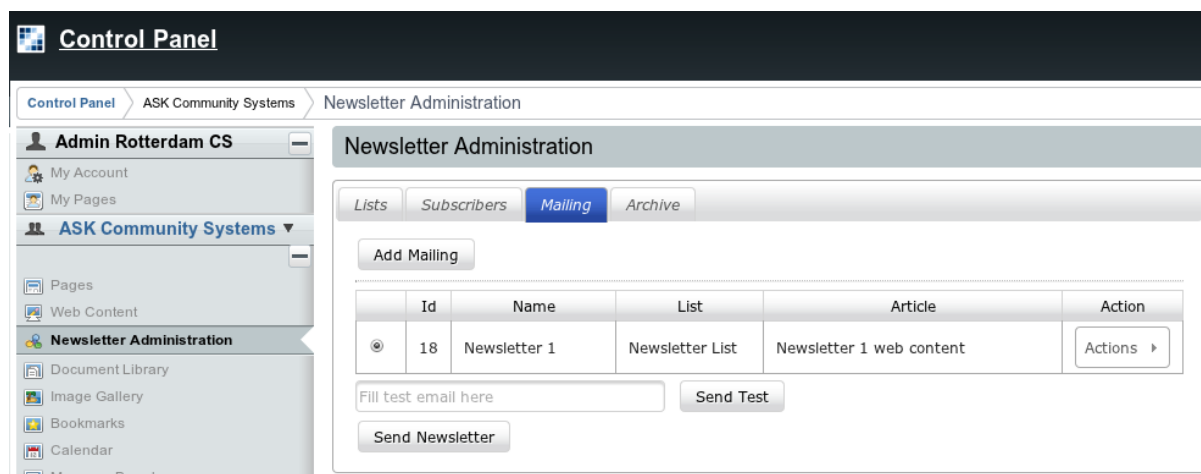fax: +31 (0)88 RDAM 011

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Fig 20: Send Newsletter.

2. In the **Send Newsletter** confirmation window, review the data shown and if you agree with it, tick **I understand the risks involved in this action** checkbox and click on **Send Newsletter** button. Otherwise click on **No, please take me back** button.
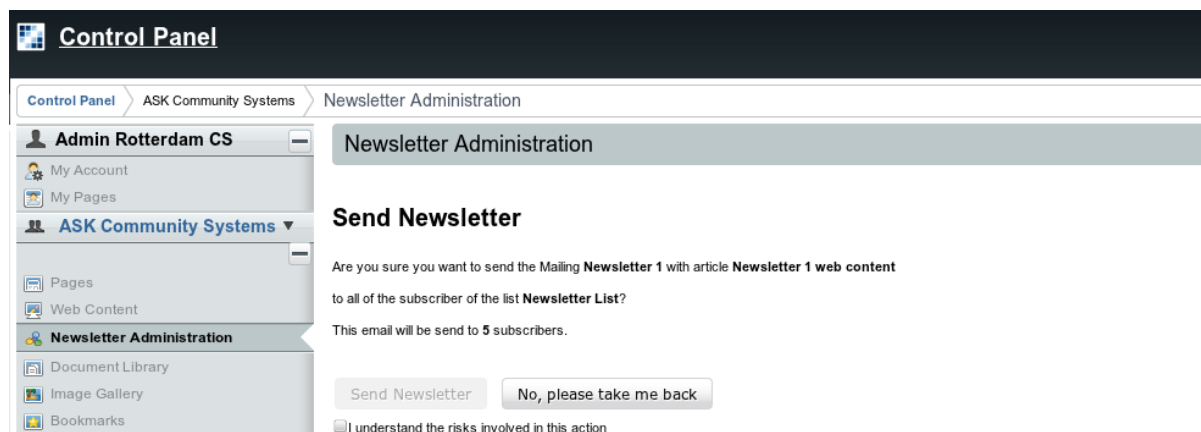
Fig 21: Newsletter confirmation.

3. The newsletter is svheduled to be sent and its moved from **Mailing** tab grid to **Archive** tab grid.

Archive tab

In this tab is where the newsletters sent previously are stored.
It contains a grid with the following structure:
- Id: Is the internal ID of the newsletter.
- Name: Contains the name of the archived newsletter.
- List: The list to which the newsletter was sent.
- Date: The date where the newsletter was sent.
- Action: A menu from where you can choose to see what was sent in the newsletter.

Configure Newsletter Registration Portlet

Let's suppose that you want to have two different news letters in your site, one about wines and another about food.

RCS Newsletter allow your users to register in any amount of newsletters you define in your site.

In order to accomplish this you need to have as many **Newsletter Registration Portlet** instances (each one associated to a list) as newsletters you wish to have.

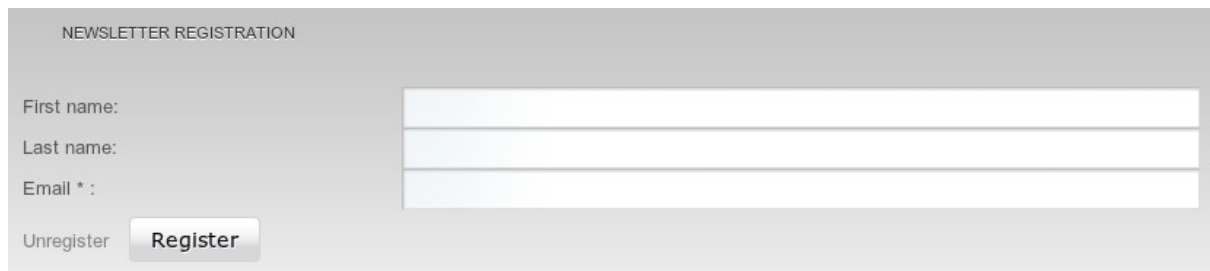1. Log in as an admin user and go to the page that host the instance you want to configure**.**

Fig 22: Newsletter Registration Portlet.

2. Click on the wrench tool icon, a menu will expand, select **Preferences.**
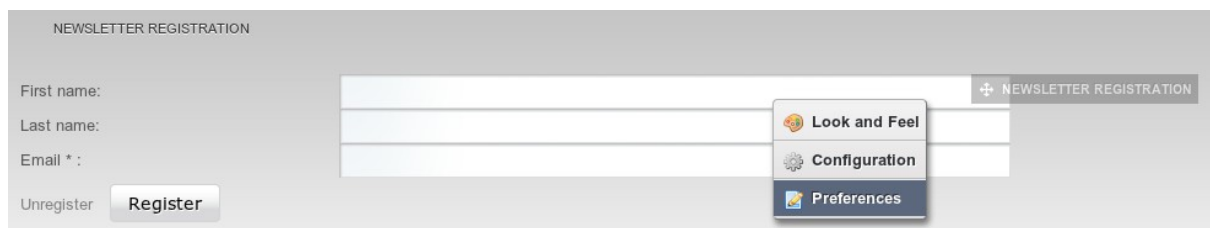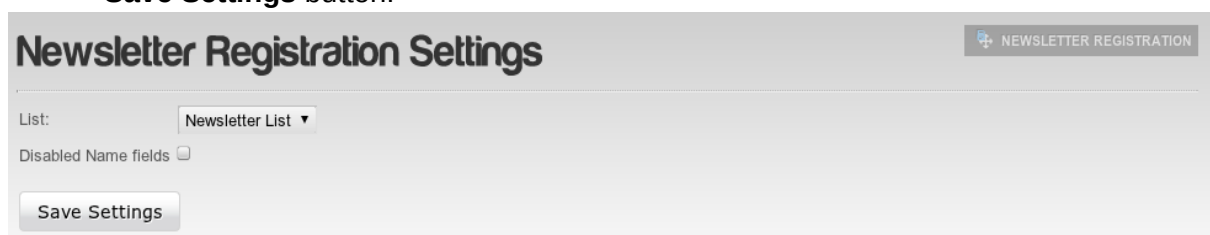

Fig 23: Preferences menu of Newsletter Registration Portlet.

3. In the **Newsletter Registration Settings**, select the list to associate to the portlet from the **List** dropdown. Optionally, you can choose not to require the Name and Last Name of the user by ticking **Disabled Name fields** checkbox. When done click **Save Settings** button.

4. In order to return to the normal view just click back in **Preferences** in the wrench tool icon, like in step 2.

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Upgrading from 2.0 version

In order to accomplish this, the first you need to do is to uninstall the rcs newsletter portlet 2.0 and install the rcs newsletter portlet 2.1.
Then you need to run the following script in your liferay database

"Alter table newsletter_mailing drop column articleid;"

After you running this script you are able to use the new version of the portlet.

Change Log

Changes applied in version 2.1.3:

1 - Send journal articles based on a templates Fixed

Note: There is still a problem with this because there is bug in Liferay 6.1 version .
To fix it you need to do this:
* Use Liferay 6.2+
* Fix the bug and recompiled Liferay.
        A - Download the Liferay portal code.
        B - Modificate Line 147 of BaseTransformer.java to:
            TemplateParser = (TemplateParser) InstanceFactory.newInstance (
            PortalClassLoaderUtil.getClassLoader (),
            templateParserClassName);(reference)
        C - Compiled
        D - Replace the BaseTransformer.classin your server for the new file
compiled.

2 - Dutch translation completed

3 - Unnecessary warn message removed

4 - Bug in portletfaces bridge 2.0.1 Fixed : Multiple organization problem

5 -Help template in NL fixed

6 -Add/edit template title fixed