

SharePartXXL Newsletter WebPart for Microsoft SharePoint

Version 1.1.0.5

SharePartXXL International GmbH
Deutschherrnstr. 15-19
90429 Nuremberg /Germany

URL: <http://www.SharePartXXL.com>
Email: info@SharePartXXL.com

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2. Screenshot Overview

The screenshot displays the SharePointXXL Newsletter WebPart interface. On the left is a navigation sidebar with links to Home, Extranet, View All Site Content, Documents, Lists (Subscriber, Newslettertype, Newsletter, Log), Discussions (Team Discussion), Sites (Extranet), People and Groups, and a Recycle Bin. The main content area is divided into several sections:

- Newslettertype**: A table listing newsletter types.

Title	Sender Name	Sender Email	Edit
Company News	Sales	sales@SharePartXXL.com	
Product News	Sales	sales@SharePartXXL.com	
- SharePartXXL Newsletter WebPart - Subscribe/Unsubscribe**: A form for subscribing to newsletters.

Please fill out the following form to subscribe to the corresponding newsletter.

Email *:
 Format *:
 First Name:
 Last Name *:
 Gender:
 Newsletter: ☒ Company News ☒ Product News
- Subscriber**: A table listing subscribers.

Email	Format	First Name	Last Name	Gender	Verified	Salutation	SharePoint User	Edit
smith@company.com	TEXT	Joh	Smith	Male	Yes	Dear Mr. Smith	Smith, Joh	
- Newsletter**: A table listing newsletters.

Title	Subject	SentDate	Edit
Company News 10/2007	Company News October 2007		
- SharePartXXL Newsletter WebPart - Sending**: A section for sending newsletters.

Newsletter to send:

☒ Choose from not sent
☐ Choose from all
- Log**: A table showing the log of newsletter activities.

Created	Category	Email	Event	Newsletter Type	Newsletter	Additional Information
10/4/2007 10:58 AM	Subscription	smith@company.com	Subscriber Subscribed	Product News		TEXT
10/4/2007 10:58 AM	Subscription	smith@company.com	Subscriber Subscribed	Company News		TEXT
10/4/2007 10:58 AM	Subscription	smith@company.com	Subscriber Registered			

WebParts from top to bottom:

- List of newsletter types
- Subscribe / Unsubscribe WebPart
- Subscriber List
- Newsletter List
- Sending WebPart
- Log List

Remark: All lists and WebParts can be placed on different pages with different access rights; this screen is a sample configuration only.

3. Benefits

- Complete out-of-the-box Microsoft SharePoint-based newsletter management solution
- No additional tools needed if you already use Microsoft Windows SharePoint Services or Microsoft Office SharePoint Server
- Saves time and reduces potential errors during export / import if external tools are used
- Several newsletter types can handle different topics, target groups or languages on one site
- Uses placeholders and simple templates for personalization
- Easy customization with additional custom fields
- Whole administration with list edit functionality of MS SharePoint
- Two separate WebParts for subscription and administration to be placed on different pages
- Easy installation and activation as usual for SharePoint WebParts

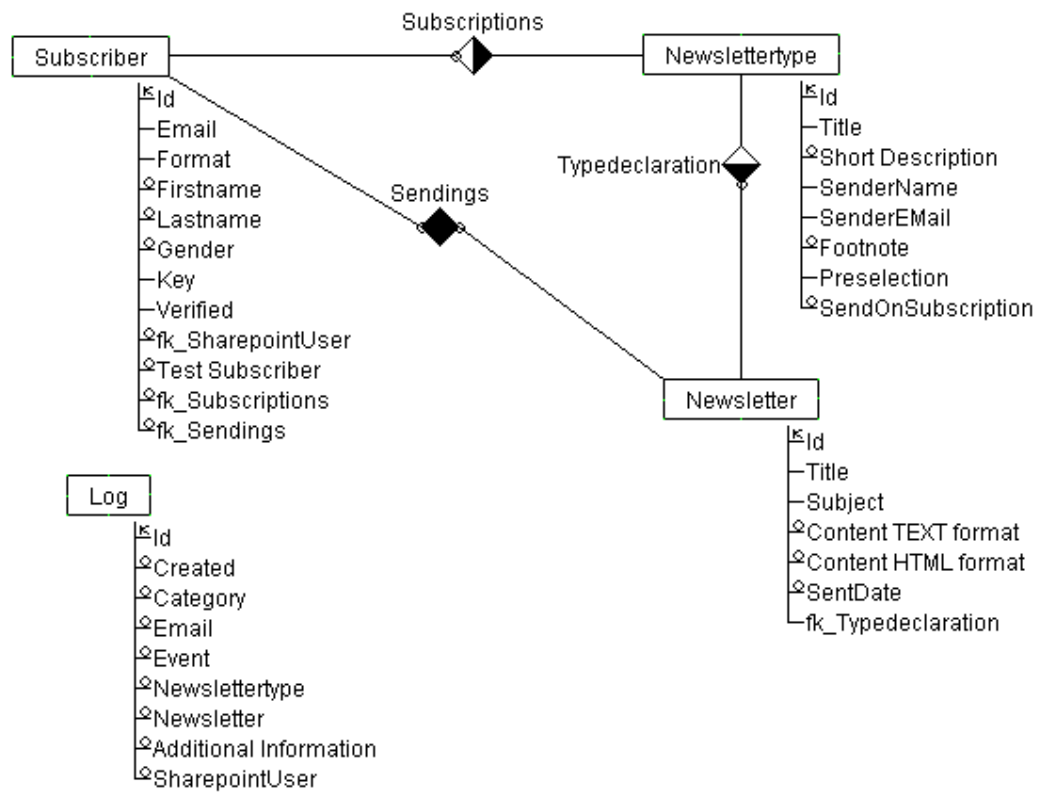
4. Features

- Newsletter subscription functionality on dynamic generated input form
- Double-opt-in support for subscription workflow (can be deactivated)
- Sending customized newsletter (including attachments)
- Sending status for each sent newsletter
- Automatic generation and validation of required lists and views
- Multilingual support depending on language setting of the site collection in MS SharePoint; Upgradeable with the help of resource files
- Implementation as SharePoint "Feature"
- Using SharePoint right management and server settings
- Support of column referencing placeholders in newsletter body text and subject
- Sending process works in different thread via SMTP service
- Sending of test newsletters supported
- Optional configuration which lists SharePartXXL WebPart uses
- Optional protocol of every subscribe-, unsubscribe and sending event
- Optional newsletter sending after user subscribed to a newsletter type (NEW!)

5. Components of solution "SharePartXXL.Newsletter.wsp"

- Manifest.xml (Definition of Solution, declaring assembly and Feature manifest)
- SharePartXXL.Sharepoint.Newsletter.dll (Core assembly)
- \SharePartXXLNewsletter:
 - Elements.xml (Declaration of sending and subscription WebPart)
 - Feature.xml (Declaration of resource- and schema files)
 - NewsletterSending.webpart
 - NewsletterSubscription.webpart
- \SharePartXXLNewsletter\ListTemplates:
 - Newslettertype.xml (Definition of Template, Field and Content Type)
 - Newsletter.xml (Definition of Template, Field and Content Type)
 - Subscriber.xml (Definition of Template, Field and Content Type)
 - Log.xml (Definition of Template, Field and Content Type)
- \SharePartXXL Newsletter\Newslettertype:
 - Schema.xml
- \SharePartXXL Newsletter\Subscriber:
 - Schema.xml
- \SharePartXXL Newsletter\Newsletter:
 - Schema.xml
- \SharePartXXL Newsletter\Log:
 - Schema.xml
- \SharePartXXL Newsletter\Resources:
 - Resources.resx (English language resources for Schema and Feature Definition)
 - Resources.de-DE.resx (German language resources for Schema and Feature Definition)
- \CONFIG\Resources
 - SharePartXXLNewsletter.resx (English language resource files for WebPart API)
 - SharePartXXLNewsletter.de-DE.resx (German language resource files for WebPart API)

6. Data Model



7. Functionality

WebParts Overview

Sending WebPart ("Master")

- Functionality of generating and verifying required Lists and Views
- Serving further configuration attributes of newsletter feature
- Functionality to send a newsletter

Subscription WebPart ("Slave")

- Uses configuration from Master WebPart
- Generates subscription and administration form for subscribers
- Functionality to subscribe to one or more newsletter

WebParts Details

Sending WebPart

- When loading, WebPart looks for "Subscriber", "Newslettertype" and "Newsletter" lists. If they are not present, they will be generated automatically.
- Stored list names could be changed from administrator user. So it is possible to connect the WebPart to other lists.
- Required list fields and views will be checked – if not present, an error message will be shown.
- All Lookup fields (references from one list to the other) will be generated dynamically. They are checked for consistency on every load. If they do not exist or are not referenced to a list other than defined in the WebPart settings, a new Lookup field is generated.
- After initialization administrator user can define the newsletter types with "Edit" functionality in list "Newslettertype".
- The newsletter instances could be stored in "Newsletter" list. Every newsletter must be assigned to a newsletter type.
- For sending one special newsletter, WebPart shows up a list of all available or all not already sent newsletters.
- When clicking the Send Button the selected newsletter will be sent to all users subscribed to corresponding newsletter type.
- An optional summary email will be sent to the user who started the sending.

Subscription WebPart

- When added to page a Message: "Input Path to WebPart Sending" will be shown. Information of lists the WebParts uses are stored in Sending WebPart so Subscription WebPart must get the right URL for looking up these settings.
- An input form will be generated depending on fields in Subscription view of Subscriber list. The form contains user information (regarding the required field attribute) and a checkbox list showing all available newsletter types.
- When user submits the form a new entry with flag "not verified" in Subscriber list is done an email with activation link is sent. (Double-Opt-In must be activated)
- With this activation link subscriber user will be linked to same Page the WebPart is placed on. Depending on parameter in the URL the WebPart will show an administration view and sets "verified" flag in Subscriber list.
- If checkbox "Send On Subscription" of subscribed newslettertype is checked the last sent newsletter will be sent to new subscriber.

8. Installation

Requirements

- MOSS/WSS 2007
- Installation requires administrative rights

Steps

- Copy "SharePartXXLNewsletter.wsp" into c:\wsp (for example)
- Enter command window
- Switch to directory where stsadm.exe is located
(for example C:\Program Files\Common Files\Microsoft Shared\web server extensions\12\BIN)
- Enter (not copy and paste): stsadm -o addsolution -filename c:\wsp\SharePartXXL.Newsletter.wsp (keep window open)
- Go to SharePoint 3.0 Central Administration (Start -> Administrative Tools)
- Deploy "sharepartxxl.newsletter.wsp" solution (Tab Operations -> Global Configuration -> Solutionmanagement)
- Go back to command window and enter (not copy and paste) stsadm -o copyappbincontent (this will copy SharePartXXL Resource files to "App_GlobalResources¹" directories)
- On your SharePoint "root" Page go to "Site Actions" -> "Site Settings" -> "Site Collection Features" activate "SharePartXXL Newsletter"
- Add "SharePartXXL Newsletter WebPart – Sending" on a "secure" page (accessible only for administrator users)
- Add "SharePartXXL Newsletter WebPart - Subscribe/Unsubscribe" on a page, accessible for your subscriber (e.g. site with anonymous access)
- Go to next chapter and configure both WebParts. Fill out at least required, bold marked parameter.

¹ Default: C:\inetpub\wwwroot\wss\VirtualDirectories\80

9. Configuration

Sending WebPart settings

Configuration:

- **Subscription WebPart Page URL:** URL to page where subscription WebPart is placed (URL without parameter!)
- **SMTP Client Hostname:** Name of SMTP Client your newsletter mails should be send from – default: localhost
- **Subscriber list name:** Title of subscriber list (default: Subscriber)
- **Newslettertype list name:** Title of Newslettertype list (default: Newslettertype)
- **Newsletter list name:** Title of Newsletter list (default: Newsletter)
- **Log list name:** Title of Log list (default: Log)
- **Internal Link Base URL:** When using links or images in your html newsletter that points to content on your server it won't work correctly. SharePoint automatically changes these links to relative URLs. To avoid this behavior you can set the "Internal Link Base URL" that will be set in front of these URLs.
- **License:** Input field to enter content of your license file. If this field is left empty WebPart works in Demo Version
- **Activate Double-Opt-In:** When checked subscriber must confirm his email address with the help of an activation email
- **Use Email from AD exclusively:** When checked subscriber user must be signed in. Email Address will be used from SharePoint "MySettings" and cannot be changed
- **Send status mail:** If checked, a summary mail with status information is sent to sender user when finished sending all newsletters

Configuration

Subscription WebPart Page URL
 ...

SMTP Client Hostname

Subscriber list name

Newslettertype list name

Newsletter list name

Log list name

Internal Link Base URL

License

☒ Activate Double-Opt-In

☐ Use Email from AD exclusively

☐ Send status mail

Logging

☐ Log Sendings

☐ Log Subscriptions

Logging

- **Log Sendings:** Sending Command and every sent newsletter will create a new entry in Log list.
- **Log Subscriptions:** Registration (new user was added to subscriber list), Subscription (user subscribed or unsubscribed to a newsletter type) and Verification (user confirmed his email address) will create a new entry in Log list.

Subscription WebPart

Configuration:

- **Sending WebPart Page URL:** URL to site with Sending WebPart (without parameter!)

Subscription Form

- Subscription Text: Text that is displayed in Subscription form on top of the input fields
- Subscription Submitted Text
- Subscription Finished Text: Text that is displayed when using confirming link for activating the subscription
- Edit Subscription Text
- Edit Subscription Submitted Text
- Changed Email Text
- Changed Email Finished Text
- Unsubscribe Finished Text
- Invalid URL Text
- Newsletter Selection Render Mode: If you have many newsletter types you can set "'DropDown'" instead of "Checkbox".
Remark: "Preselection"="Forced" will not work (-> page 13)

Subscription Email

- **Sender Name**
- **Sender Email**
- Activationemail Subject
- Activationemail Bodytext
- User Changed Email Subject
- User Changed Email Bodytext

Configuration	
Sending WebPart Page URL	<input type="text" value="http://localhost/default.aspx"/>
Subscription Form	
Subscription Text	<input type="text" value="Please fill out the following for"/>
Subscription Submitted Text	<input type="text" value="Thanks for your subscription -"/>
Subscription Finished Text	<input type="text" value="Thank you very much - you s"/>
Edit Subscription Text	<input type="text" value="You can subscribe, unsubsrib"/>
Edit Subscription Submitted Text	<input type="text" value="Thank you very much your ch"/>
Changed Email Text	<input type="text" value="You changed your email. Soor"/>
Changed Email Finished Text	<input type="text" value="Your email was changed succe"/>
Unsubscribe Finished Text	<input type="text" value="You successfully unsubscribed"/>
Invalid URL Text	<input type="text" value="URL invalid - please register a"/>
Newsletter Selection Render Mode	<input type="text" value="Checkbox"/>
Subscription Email	
Sender Name	<input type="text" value="Sales"/>
Sender Email	<input type="text" value="sales@sharepartxxl.com"/>
Activation email subject	<input type="text" value="Newsletter Activationmail"/>
Activation email bodytext	<input type="text" value="[Salutation],[NewLine]You sub"/>
User Changed Email Subject	<input type="text" value="Confirm your changed email a"/>
User Changed Email Bodytext	<input type="text" value="[Salutation],[NewLine]You cha"/>

Set SharePoint rights

System Account must have write permission to the site where the sending WebPart is placed on.

Go to "Site Actions" -> "Site Settings" -> "Advanced permissions".

If you inherit rights you can either change permission on parent site, or stop inheriting. To do this click on "Actions" -> "Edit Permissions".

Add new User "SHAREPOINT\system" and give him permission "Design". In case user is already in list, check entry and click on "Actions" -> "Edit user permissions".

If subscriber has access to the site where the lists and Sending WebPart are placed, be sure that they can only view their own entries! Therefore set for **all four lists** in "Settings"

-> "List Settings" -> "Advanced settings" as shown in screenshot below.

Read access: Specify which items users can read

☐ All items

☒ Only their own

Edit access: Specify which items users can edit

☐ All items

☐ Only their own

☒ None

Attachments to list items are:

☐ Enabled

☒ Disabled

Display "New Folder" command on the New menu?

☐ Yes

☒ No

Allow items from this list to appear in search results?

☐ Yes

☒ No

10. Usage

Define your Newsletter Types

- Add newsletter types to list Newslettertype

Home > Newslettertype > New Item

Newslettertype: New Item

[Attach File](#)
* indicates a required field

Title *	<input type="text"/>
Short Description	<input style="width: 100%;" type="text"/> <div style="text-align: right;"> <input type="button" value="Up"/> <input type="button" value="Down"/> </div>
Content will be displayed as Tooltip in subscription form	
Sender Name *	<input type="text"/>
Sender Email *	<input type="text"/>
Footnote	<input style="width: 100%;" type="text"/> <div style="text-align: right;"> <input type="button" value="Up"/> <input type="button" value="Down"/> </div>
Preselection *	<div style="border: 1px solid #ccc; padding: 2px;">False</div>
Send on Subscription	<input type="checkbox"/> <p style="font-size: small;">If checked user will receive last sent newsletter on subscription to this newsletter type</p>

- If you choose Preselection = "True" then the corresponding newsletter type is preselected in subscription form. Use "Forced" if subscriber must not deselect it.

Make subscriptions

- The subscription form will show columns from Subscription view of Subscriber list and all available newsletter types.

SharePartXXL Newsletter WebPart - [Subscribe/Unsubscribe](#)

Please fill out the following form to subscribe to the corresponding newsletter.

Email *	<input type="text"/>
Format *	<div style="border: 1px solid #ccc; padding: 2px;">HTML</div>
First Name	<input type="text"/>
Last Name *	<input type="text"/>
Gender	<div style="border: 1px solid #ccc; padding: 2px;">Male</div>
Newsletter *	<input type="checkbox"/> Product News <input type="checkbox"/> Company News

- After submitting the subscription form, an email with activation link will be sent. (If Double-Opt-In is activated)
- Using this link, subscription will be finished.
- You can add subscriber in Subscriber list directly. Note: Don't forget to set verified flag! If you mark a subscriber as "Test subscriber" he will receive a newsletter by clicking on "Send to Test Subscriber" in Sending WebPart.

Create your newsletter

- Create new newsletter list item
 - Fill out title for internal identification
 - Field Subject will appear in newsletter email subject
 - Insert the TEXT and HTML Version
 - Assign the newsletter type under Typedeclaration
 - Optionally you can attach one or more files
- If "Attach File" does not appear check List Settings of Newsletter list. Under "General Settings" -> "Advanced Settings" Attachments must be enabled.

Home > Newsletter > New Item

Newsletter: New Item

OK

Cancel

Attach File

* indicates a required field

Title *

Company News 08/2007

Subject *

Company News August 2007

Content TEXT format

Content HTML format

TypeDeclaration *

Company news ▼

OK

Cancel

Send your newsletter

- To send a newsletter go to Sending WebPart

SharePartXXL Newsletter WebPart - Sending ▼

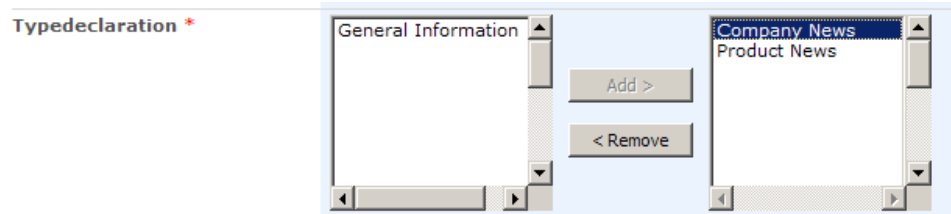
Newsletter to send:

☒ Choose from not sent
☐ Choose from all

- Dropdown box contains either not already sent or all newsletters
- Select the newsletter you want to send
- View TEXT and HTML Preview by clicking on Preview buttons
- Click on "Send to Test Subscriber" will send selected newsletter to your email address (in TEXT and HTML version) and to all subscriber with attribute "Test Subscriber" checked. A newsletter can be sent more than one time to the same testsubscriber
- Click on "Send to Subscriber" will send selected newsletter to all subscriber that subscribed to corresponding newsletter type and have not already received the newsletter (this information is stored in subscriber list, in column "Sendings")

11. Customization

- Adding columns in Subscriber list AND Subscription view will result in new input fields of subscription form
- Setting "Require that this column contains information" to "Yes" will lead to an required Field in subscriber input form
- Columns in Newslettertype, Newsletter and Subscriber list can be accessed in Newsletterbody text with [ColumnName] (for Example [Lastname])
- Formula for Salutation column can be customized in Subscriber List Settings
- If you want to display a column other than "Title" in Newsletter Dropdown, you can can do this by editing the Newslettertype Subscription View. Just change the order of the columns – the first one will be displayed.
- To send one newsletter to subscriber of different newsletter types, you can change Column "Typedeclaration" in Newsletter list settings and check "Allow multiple values".



Now you can assign more than one newsletter type to a newsletter. The newsletter will be sent to all subscribers that subscribed to at least one of the assigned newsletter types. Newsletter type attributes (Sender Name/Email, Footnote) is taken from the entry that is at first position of list ("Company News" in screenshot example).

- You can group your Newslettertypes in Subscription form:

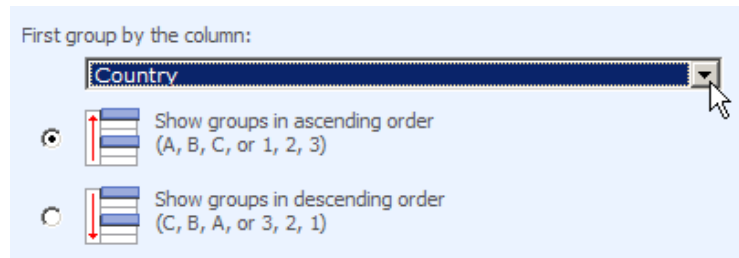
SharePartXXL Newsletter WebPart - Subscribe/Unsubscribe

Please fill out the following form to subscribe to the corresponding newsletter.

Email *	<input type="text" value="rainer.duemmler@contentxxl.de"/>
Format *	<input type="text" value="TEXT"/>
First Name	<input type="text"/>
Last Name *	<input type="text" value="Smith, Joh"/>
Gender	<input type="text" value="Male"/>
Country	<input type="text" value="Germany"/>
Newsletter *	<input type="text" value="Germany"/> <input type="text" value="USA"/> <input type="text" value="Choose from all"/>

- Create a new column in Newslettertype list (e.g. Country)
- Assign a value for each entry you made

- Edit Subscription View of Newslettertype list and set the corresponding column under "Group By"



- In Subscription WebPart a new DropDown Box with all Groups will be displayed

12. Logging

Subscription

If you have activated "Log Subscriptions" in Sending WebPart the following events are logged:

- *Subscriber Registered*: Event that happens when a user subscribes the first time for one or more Newsletter types. This is the same as a new entry in subscriber list is done.
- *Subscriber Subscribed*: When user subscribes to a newsletter type.
- *Subscriber Verified*: When Double-Opt-In is activated and user confirms his email address by clicking on confirmation link
- *Subscriber Unsubscribed*: When user unsubscribed to a newsletter type
- *Subscriber EMail Changed*: When user changed and has confirmed his new email address

Using views you can analyze the log file. The automatically created view "Subscriptions" groups by Event and filters by category Subscription.

It sums up how many subscribers registered, changed their email address and how many subscribe and unsubscribe events happened.

To get the effective amount of subscriptions you just have to calculate the difference between Subscribe and Unsubscribe events. To get more specific results you can group by Newsletter types, too.

You can display additional columns like the IP Address that is also logged.

Home > Log	
Log	
New	Actions
Created	
+	Event : Subscriber EMail Changed (1)
+	Event : Subscriber Registered (1)
+	Event : Subscriber Subscribed (3)
+	Event : Subscriber Unsubscribed (2)

Sending

If you have activated "Log Sendings" in sending WebPart the following events are logged:

- *Command: Send to subscriber*: When sending user clicks on button: "Send to Subscriber"
- *Command: Sent to test subscriber*: When sending user clicks on button: "Send to Testsubscriber"
- *Newsletter sent*: When a newsletter was sent to a subscriber

The automatically created view "Sendings" groups by Event and Newsletter and filters by category Sending and Test Subscriber.

It sums up how many send commands were executed and newsletters were sent to users other than Test Subscriber.

Home > Log	
Log	
New	Actions
Created	
+	Event : Command: Send to subscriber (1)
+	Newsletter : Company News 10/2007 (1)
+	Event : Command: Sent to test subscriber (1)
+	Newsletter : Company News 10/2007 (1)
+	Event : Newsletter sent (3)
+	Newsletter : Company News 10/2007 (3)

13. Deinstallation

- Delete all lists based on Type: Newsletter, Newslettertype and Subscriber
- Remove WebParts from sites
- Retract **and Remove** SharePart Newsletter solution in SharePoint 3.0 Central Administration
- With file Explorer go to all your application directories (e.g. C:\Inetpub\wwwroot\wss\VirtualDirectories\80\) into App_GlobalResources directory and delete the following Resourcefiles:
 - SharePartXXLNewsletter.resx
 - SharePartXXLNewsletter.de-DE.resx

14. Limitations

- In Demo version newsletter can only be sent if you have less than 25 entries in subscriber list
- For subscription form only column type "Single line of text" and "Choice, Drop-Down Menu" are supported currently
- Attribute names of WebPart settings only in English

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