User Manager,
Mailing List Manager,
Communication Manager,
and Campaign Manager Documentation

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User Manager

User manager will allow you to administrate the users that have access to your site and to dotCMS backend.

Actions that you can perform are:

- Create, search, consult, edit, and delete users.
- Add and remove tags from users.
- Create mailing lists.
- Create filters to search users.
- Load new users from a file.

Those actions will be described in next sections.

Roles needed

To have access to User Manager portlet you will need one of these roles:

- User Manager Administrator
- User Manager Editor
- Mailing List Administrator

Groups that have those roles associated are:

- User Manager
- Marketing

Configuring optional search fields

User searches are driven by fields that will always be available on User Manager portlet, but it is possible to select additional fields that should be configured through the edit option of this portlet.

To fulfill this configuration, you should access to Portlet option in Admin portlet. This will take you to a page with the content shown in Figure 1.

ADMIN

Company - Portlets | Users - Groups - Roles

PORTLETS

Portlet Name	Edit	Status	Indexed	Required Roles
Address Book	Edit	Active	False	Power User, User
Admin	Edit	Active	False	Administrator
Amazon Rankings	Edit	Active	False	Administrator, CMS User, Power User, User
Analog Clock	Edit	Active	False	Power User, User
Banner Ads	Edit	Active	False	CMS Administrator, CMS User
Blogs	Edit	Active	True	Power User, User
Bookmarks	Edit	Active	False	Power User, User
CMS Maintenance	Edit	Active	False	CMS Administrator
CSZ Search	Edit	Active	False	Power User, User
CVS	Edit	Active	False	Power User, User
Calculator	Edit	Active	False	Power User, User
Calendar	Edit	Active	False	Power User, User
Campaign Manager	Edit	Active	False	Campaign Manager Admin, Campaign Manager Viewer, Campaign Manager Editor
Categories	Edit	Active	False	CMS Administrator, CMS User
Category Groups	Edit	Active	False	CMS Administrator
Chat	Edit	Active	False	Power User, User
Chemistry	Edit	Active	False	Power User, User
Communications Manager	Edit	Active	False	Campaign Manager Admin, Campaign Manager Editor
Company News	Edit	Active	True	Power User, User
Conference Registrations	Edit	Active	False	CMS Administrator
Conferences	Edit	Active	False	CMS Administrator
Containers Manager	Edit	Active	False	CMS Administrator
Content Management System	Edit	Active	False	CMS Administrator, CMS User
Content Manager	Edit	Active	False	CMS Administrator, CMS User
Unit Converter	Edit	Active	False	Power User, User
User Click History	Edit	Active	False	CMS Administrator, CMS User
User Comments	Edit	Active	False	CMS Administrator
User Filter Manager	Edit	Active	False	User Manager Administrator, User Manager Editor
User Manager	Edit	Active	False	CMS User, User Manager Administrator
Virtual Links	Edit	Active	False	CMS Administrator, CMS User
WSRP Proxy	Edit	Active	False	
Weather	Edit	Active	False	Power User, User
Web Form Reports	Edit	Active	False	CMS Administrator
Web Proxy	Edit	Active	False	Power User, User
Website Browser	Edit	Active	False	CMS Administrator, CMS User
Wiki	Edit	Active	True	Power User, User
Wiki Display 1	Edit	Active	False	Guest, Power User, User
Wiki Display 2	Edit	Active	False	Guest, Power User, User
Wiki Display 3	Edit	Active	False	Guest, Power User, User
Wiki Display 4	Edit	Active	False	Guest, Power User, User
Wiki Display 5	Edit	Active	False	Guest, Power User, User
Words	Edit	Active	False	Power User, User
Workflow Tasks	Edit	Active	False	CMS Administrator, CMS User
Wysiwyg Editor	Edit	Active	False	CMS Administrator, CMS User

Figure 1. Editing User Manager portlet

Click on Edit link for User Manager and you will have access to its setting options as shown in Figure 2.

Figure 2. User Manager portlet settings

Search Fields section will allow you to add or remove optional fields. Use left and right arrow buttons to move the fields between Current (fields being shown) and Available (fields not being shown) lists.

Click on save button to make your changes permanents, or click on cancel button to abort the changes.

Once your changes have been saved, every user in the system that have access to the User Manager portlet will view the optional search fields you have just selected.

Minimized view

Figure 3 shows minimized view for User Manager portlet. The fields being shown are the ones configured by default.

Figure 3. Default search fields on minimized view

- Email address: this field will allow you to perform partial searches over user's email address.
- First name: this field will allow you to perform partial searches over users' first name.
- Last name: this field will allow you to perform partial searches over users' last name.
- Logged in: this field will allow you to perform searches either of those users that have logged in the back-end in a determined period of time, or since a given amount of days before the current date.
- Created: this field will allow you to perform searches either of those users that were created in a determined period of time, or since a given amount of days before the current date.
- Visited web site: this field will allow you to perform searches either of those users that have logged in the front-end in a determined period of time, or since a given amount of days before the current date. Figure 4 shows an example of calendar usage to define logged in, created, and visited web site date periods.
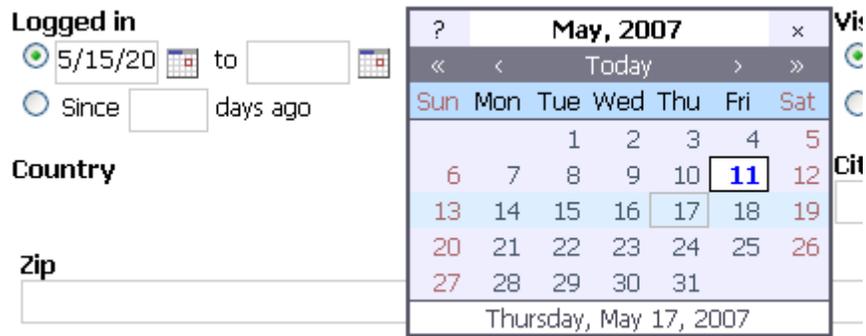
Figure 4. Calendar utility for logged in, created, and visited web site

- Country: this field will allow you to perform searches over the country associated to users' address. As shown in Figure 5, a drop down will show permitted values for this field.

Figure 5. Drop down list showing country options

- State: this field will allow you to perform searches over the state associated to users' address.
- City: this field will allow you to perform searches over the city associated to users' address.
- Zip: this field will allow you to perform searches over the zip code associated to users' address.
- Phone: this field will allow you to perform searches over users' phone number.
- Fax: this field will allow you to perform searches over users' fax number.

- Active: this field will allow you to perform searches over users' status. As shown in Figure 6, allowed values for this field are yes (for active users) or no (for non-active users).

Figure 6. Active field values

- Tag: Tags are descriptors that you can assign to users. They act as keywords and can be used to search for specific users easily. Figure 7 shows an example of tag suggestions: while you type your tag on the left input text box, right side text box will show you those tags already registered in the system that match what you are typing. If you enter multiple comma separated tags, search results will include only those users that have been assigned with every tag that you entered in your search.

Figure 7. Example of tag suggestion

Figure 8 shows the optional search fields that can be configured to be shown in User Manager portlet.

Figure 8. User Manager optional fields

- Middle name: this field will allow you to perform partial searches over user's middle name.
- Date of birth: this field will allow you to perform searches either of those users that were born in a determined period of time, or on a given date.
- Cell: this field will allow you to perform searches over users' cell number.

- Some other fields and categories can be defined and customized to be shown as optional fields, some examples are the ones being shown in

Figure 8: class year, indicated interest, test scores, GPA, class percentile, how heard, customer status.

Finally, you will be able to perform four different actions from the minimized view of this portlet:

- Clear form button: this button will allow you to clear the content of every search field.
- Search button: this button will execute the search according to the values entered for each field.
- Add new: this link will take you to a new screen where you will be able to create a new user. This option will be explained in detail in next sections.
- Load users: this link will take you to a new screen where you will be able to create new users using a CSV file as your source of information. This option will be explained in detail in next sections.

Search users

Search users screen, as shown in Figure 9, is composed by four sections: search fields, mailing list section, user filter section, and search results.

Figure 9. Search users screen

Search fields are the same ones reviewed in previous section.

A mailing list is a group of users that can be saved as, added to, or deleted from a named list. User manager will allow you to perform each one of those actions from its search user screen as indicated next.

- To save search results as a new Mailing List:
  - ○ After your search has been performed, enter the mailing list name on "New Mailing List" text box field.

o Select whether you desire or not to give permission to other users to subscribe to this mailing list from the frontend of the site. Choose the appropriate value for "Allow public to subscribe" check box.
o Click on "Save result as New List" button.
o Figure 10 shows the success message once the mailing list has been created.

Figure 10. Success message after saving a new mailing list or appending users to an existing one

- To add users to an existing list:
  o After your search has been performed, select the mailing list to which you want to add the new users using "Existing Mailing List" drop down.
  o Click on "Append results to a list" button.
  o You will be prompted for a confirmation as shown in Figure 11.
  o Success message is the same one in Figure 10.
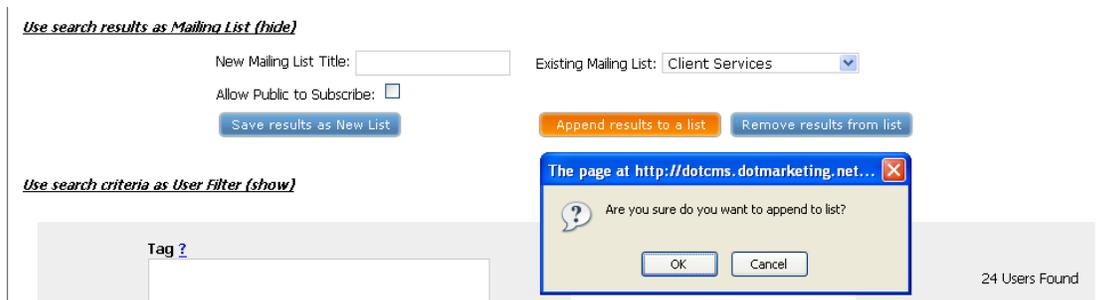
Figure 11. Confirmation to append users to Mailing List

- To remove users from an existing list:
  o After your search has been performed, select the mailing list from which you want to remove the users using "Existing Mailing List" drop down.
  o Click on "Remove results from list" button.
  o You will be prompted for a confirmation as shown in Figure 12.
  o Success message is as shown in Figure 13.
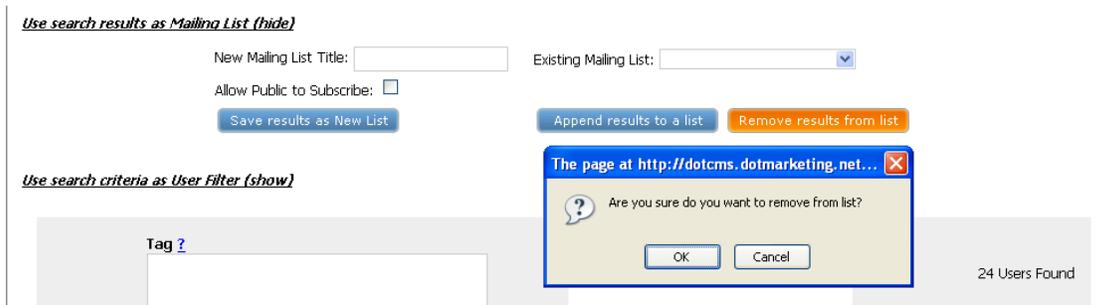
Figure 12. Confirmation to remove users from Mailing List
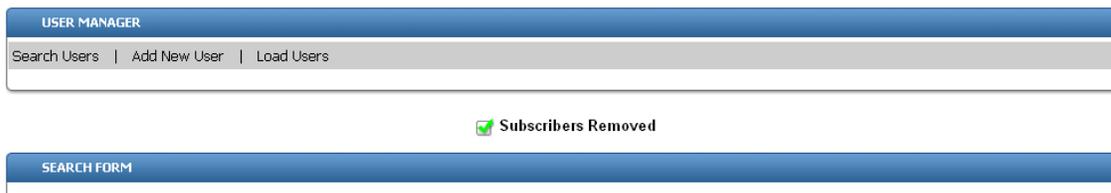
Figure 13. Success message after removing users from a mailing list

On the other hand, User Filters are not groups of users, but they are search criteria saved under a specific name. It means that you are allowed to save the values that you entered in the search fields to perform the same search whenever you need it again.

Contrary to Mailing List, which is a static list of users, User Filters will include users created after the search criteria is saved as long as they match that criteria.
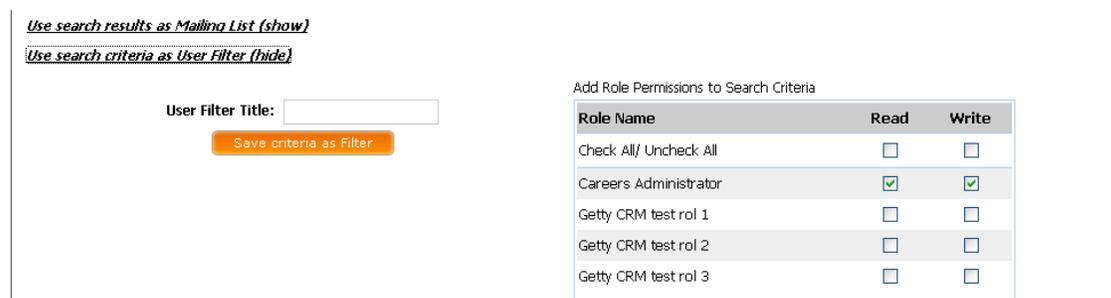
Figure 14. User filter creation

User manager will allow you to create new User Filters as shown in Figure 14. To do so you should:

- Enter the desired values in the search fields that will be part of the criteria and execute the search.
- Enter the name for the filter in "User Filter Title" text box
- Select permission access that you want to assign to the particular roles created in your system. Read permission will allow every user with the

specified role to see and execute the filter. Write permission, in addition, will allow them to modify and delete the filter.

- Click on "Save criteria as Filter" button. The success message shown in Figure 15 will be displayed.

USER MANAGER

View all Users Filters | Add New User Filter | Delete Selected

☑ **User Filter Saved**
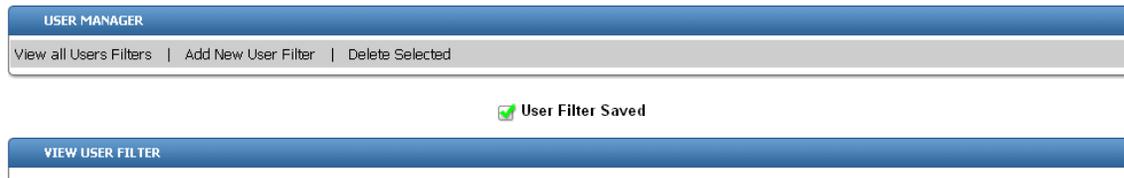
VIEW USER FILTER

Figure 15. Success message after saving an User Filter

Last section on Search Users screen is where you can see the results of your search. Figure 16 shows an example of search results.

Figure 16. Example of search results

Information being shown for each user in the search result is composed by:

- User's first name
- User's last name
- User's email address
- User's creation date

User Manager will allow you to perform a variety of actions either over particular users or over every user in the result. These actions are:

- Download search results to an Excel file. In order to perform this action, you will only need to click on "Download to Excel" link.

- Add/Edit groups button will allow you to change the groups associated to specifics user that you select from the search result. To do so, select the users that you wan to edit and click on "Add/Edit Groups" button, just as shown in Figure 17. Then do necessary changes on current and available lists and save your changes as shown in Figure 18. You will get success message shown in Figure 19.

Figure 17. Changing user's groups

Figure 18. Changing groups for selected users

Figure 19. Success message for group modifications

- Add/Edit roles button will allow you to perform a similar action to the one described prior, but this time regarding user's roles. Figure 20 shows "Add/Edit Roles" button to be clicked and selected users to be modified. Current and available roles will be displayed as shown in Figure 21. Finally, success message in Figure 22 will be visible after completing your changes.

Figure 20. Changing user's roles

Figure 21. Changing roles for selected users

Figure 22. Success message for role modifications

- Delete users button will allow you to eliminate users from your system. As shown in Figure 23, you should select the users to be deleted from the search result list. Once you click on "Delete Users" button, you will be prompted to confirm the action as shown in Figure 24. If confirmed, this action will display success message in Figure 25.
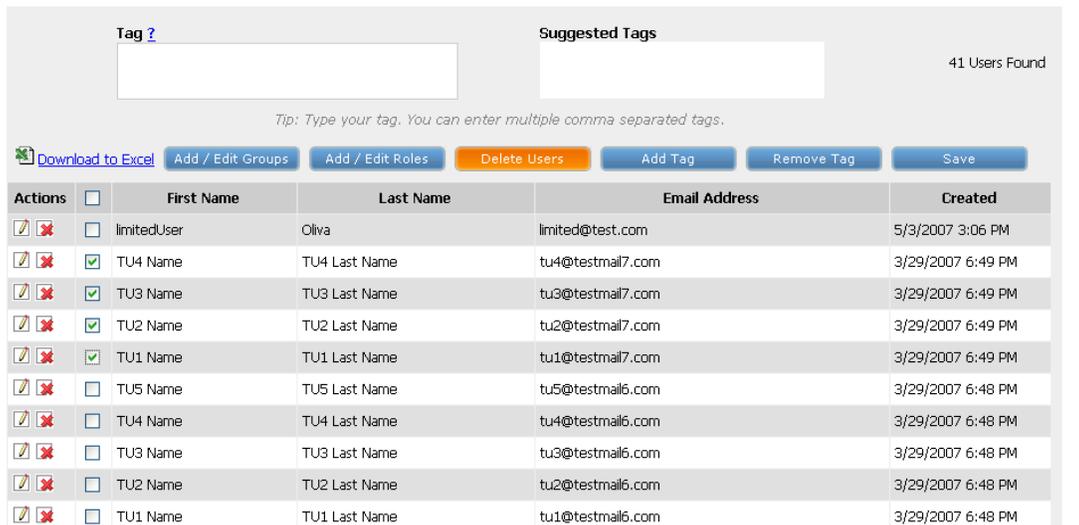

Figure 23. Selecting users to be deleted

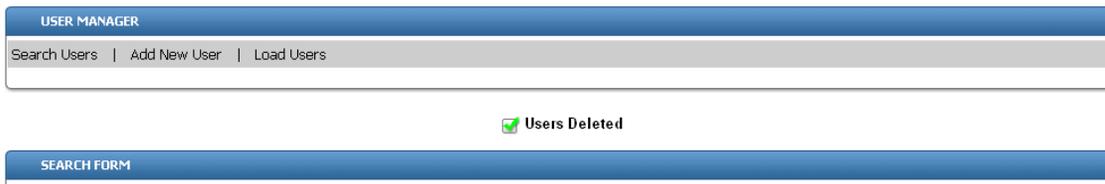**Figure 24.** Confirmation for user deletion

Figure 25. Success message for user deletion

- Add tag button will allow you to tag selected users with a new or an existing label. Suggested tags will be shown as mentioned on prior sections. To choose one of the suggestions you just have to click on them.

Every selected user will be tagged after clicking on "Add Tag" button as shown on Figure 26. Success message shown on figure 27 will be displayed to confirm this action.

Figure 26. Tagging selected users

Figure 27. Success message for user tagging

- Remove tag button will allow you to remove the association between users and labels on your system. As shown in Figures 28 and 29, the process is similar to that described just before.

Figure 28. Removing tags from selected users

Figure 29. Success message for tag removing

- There are two special operations that can be executed over individual users and that are identified by the icons under "Actions" column.

  - Click on edit user icon as indicated in Figure 30, and you will be taken to user's profile screen as shown in Figure 31.

Figure 30. Using Edit icon to get to user's profile information

Figure 31. User's profile screen

o Click on delete icon as indicated in Figure 32, and you will be prompted to confirm user deletion as shown in Figure 33. If you confirm the action, success message in Figure 34 will be displayed.

Actions	☐	First Name	Last Name	Email Address	Created
📝 ❌	☐	Sammy	Hendrick	sammy@dotmarketing.com	4/27/2007 10:09 AM
📝 ❌	☐	Client	Services	cs@dotmarketing.com	4/26/2007 5:40 PM
📝 ❌	☐	Armando	Siem	armando.siem@dotmarketing.com	4/3/2007 3:22 PM
📝 ❌	☐	Denise	Jacobs	denise@dotmarketing.com	3/23/2007 11:17 AM

Figure 32. Using Delete icon to eliminate a particular user from your system
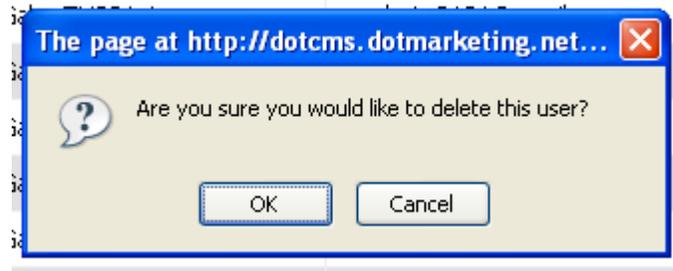
Figure 33. Confirming the deletion of the user
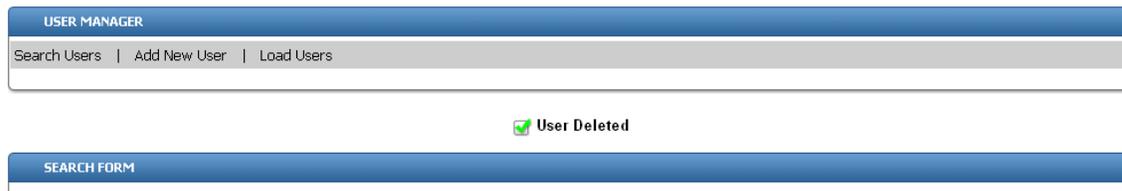
Figure 34. Success message for user deletion

- One last special functionality will allow you to select and/or unselect all the users in the search result as shown in Figure 35. Any of the actions just defined: Add/Edit Groups, Add/Edit Roles, Delete Users, Add Tag, and Remove Tag, will be applied only to those users that are selected.
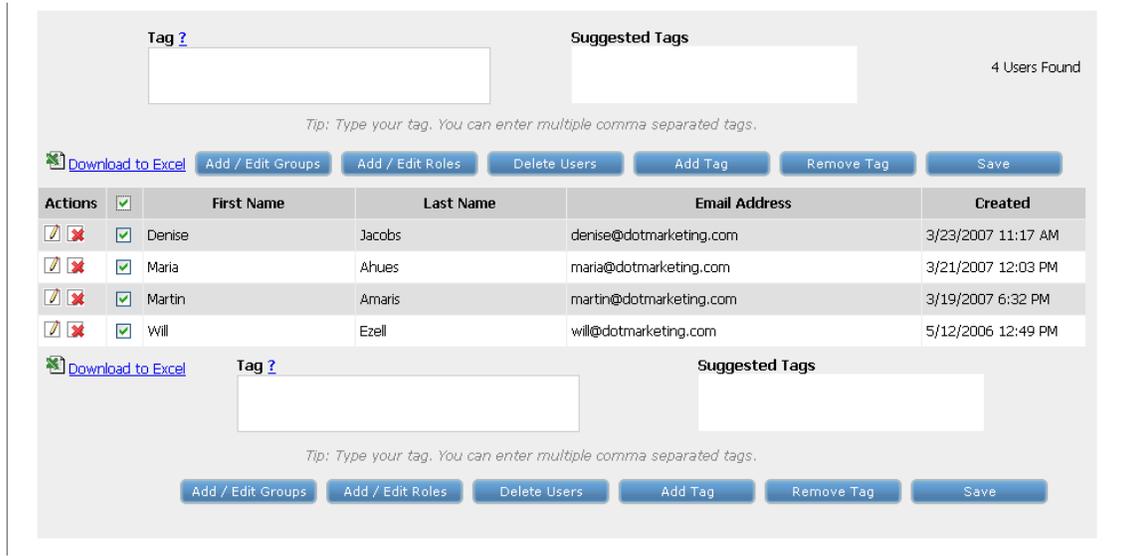
Figure 35. Selecting all users on search result

Add new user

Either by clicking on "add new" link on minimized view of User Manager portlet or by clicking "Add New User" link on sub navigation bar, you will have access to an empty form to introduce a new user's information, just as shown in Figure 36.

Figure 36. User information input screen

The information that will be requested while creating a new user can be divided as follows:

- Main profile
  - User's first name
  - User's middle name
  - User's last name
  - User's email address. This address will act as login for the user in most of the cases.
  - User's nickname
  - User's password

- "Random" button will allow you to randomly generate a password for the new user.
- Verify password field will be used to check the password introduced before.
- User's birthday
- User's gender

- Other user information is made up customized fields that you could associate to your new users. Examples of those fields are: User's prefix, User's suffix, User's title, School where user got his/her degree, User's graduation year.

- Address Phone
  - Type of address
  - Street
  - Additional street information
  - City
  - State
  - Country
  - Zip
  - Phone
  - Mobile
  - Fax

- Categories allow you to group users under common properties. Examples of categories you could create and customize according to your needs are: Relationship to institution, Client type, Customer status, How heard.

- Role permission will indicate which particular roles will have access to see or modify the information associated to the new user
  - Role name
  - Check/uncheck all will allow you to select or unselect all available roles.
  - Read permission will allow those users with the role to see the new user.
  - Write permission will allow those users with the role to see, edit, and delete the new user.

- Save button will allow you to create the user. After clicking on it, message on Figure 37 will be displayed.

Figure 37. Success message for user creation

- Cancel button will void the creation of a new user.

Load users

Instead of creating users individually, you will be able to upload several user's information to your system using this functionality.

As shown in Figure 38, you will be prompted to enter the path of a CSV file which contains the information to be uploaded to your system. You will be provided with a sample file and with additional information about its content by clicking on question mark or on "Click to download a csv sample file" link.

It will be possible for you to tag every new user being created using tag functionality just as explained before.

Also, you could either create a new Mailing List to group the users or add them to an existing one.

Role section will allow you to define the roles that will have access to these new users and the level of security of that access.

USER MANAGER

Search Users | Add New User | Load Users

LOAD USERS

Users (CSV File): [_____] Browse...
Ignore Column Headers: ☑

Need more info about file format ?

Click here to download a csv sample file

Tag your new users (optional) ?

[   ]

Tip: Type your tag. You can enter multiple comma separated tags.

Suggested Tags

Save or append your users to a Mailing List (hide)

○ New Mailing List Title: [_____]   ○ Existing Mailing List: [_____ ▼]

Allow Public to Subscribe: ☐

Select the roles from the list below that will have Read and Write permissions over the newly uploaded users.

Role Name	Read	Write	Role Name	Read	Write
Check All/ Uncheck All	☐	☐	Check All/ Uncheck All	☐	☐
Careers Administrator	☐	☐	martin role 36	☐	☐
Getty CRM test rol 1	☐	☐	martin role 37	☐	☐
Getty CRM test rol 2	☐	☐	martin role 38	☐	☐
Getty CRM test rol 3	☐	☐	martin role 39	☐	☐
KCO Administrator	☐	☐	martin role 4	☐	☐
martin role 3	☐	☐	martin role 5	☐	☐
martin role 31	☐	☐	martin role 6	☐	☐
martin role 32	☐	☐	martin role 7	☐	☐
martin role 33	☐	☐	martin role 8	☐	☐
martin role 35	☐	☐	martin role 9	☐	☐

Load Users

Figure 38. Load users screen

After clicking on "Load Users" button, the new users will be displayed as shown in Figure 39.

USER MANAGER

Search Users | Add New User | Load Users

☑ 5 Users Created

SEARCH FORM

Email Address	First Name	Last Name

Logged in
⊙ [ ] 🔲 to [ ] 🔲
○ Since [ ] days ago

Created
⊙ [ ] 🔲 to [ ] 🔲
○ Since [ ] days ago

Visit Web Site
⊙ [ ] 🔲 to [ ] 🔲
○ Since [ ] days ago

Country
Select Below ▾

State
[ ]

City
[ ]

Zip
[ ]

Phone
[ ]

Fax
[ ]

Active
[▾]

Tag ?
[   ]

Suggested Tags

Tip: Type your tag. You can enter multiple comma separated tags.

[Clean Form]   [Search]

Use search results as Mailing List (show)

Use search criteria as User Filter (show)

Tag ?
[   ]

Suggested Tags

5 Users Found

Tip: Type your tag. You can enter multiple comma separated tags.

📊 Download to Excel   [Add / Edit Groups]   [Add / Edit Roles]   [Delete Users]   [Add Tag]   [Remove Tag]   [Save]

Actions	☐	First Name	Last Name	Email Address	Created
📝 ❌	☐	TU1 Name	TU1 Last Name	tu1@testmail2.com	5/15/2007 7:32 AM
📝 ❌	☐	TU2 Name	TU2 Last Name	tu2@testmail2.com	5/15/2007 7:32 AM
📝 ❌	☐	TU3 Name	TU3 Last Name	tu3@testmail2.com	5/15/2007 7:32 AM
📝 ❌	☐	TU4 Name	TU4 Last Name	tu4@testmail2.com	5/15/2007 7:32 AM
📝 ❌	☐	TU5 Name	TU5 Last Name	tu5@testmail2.com	5/15/2007 7:32 AM

📊 Download to Excel

Tag ?
[   ]

Suggested Tags

Tip: Type your tag. You can enter multiple comma separated tags.

[Add / Edit Groups]   [Add / Edit Roles]   [Delete Users]   [Add Tag]   [Remove Tag]   [Save]

Figure 39. Newly loaded users

Mailing List Manager

Mailing List Manager will allow you to view, edit, and eliminate Mailing List registered in your system, as well as create new ones.

Roles needed

To have access to Mailing List Manager portlet you will need one of these roles:

- User Manager Administrator
- Mailing List Editor
- Mailing List Administrator

Groups that have those roles associated are:

- User Manager
- Marketing
- Marketing Editor

Minimized view

Minimized view for Mailing List Administrator is shown in Figure 40.

MAILING LIST MANAGER		
Title	**Subscribers**	**Public List**
20070222	50	false
Alert ML	3	false
Armando Test	1	false
CM-ML Gaby test	2	false
Do Not Send List	0	true
		all | new

Figure 40. Minimized view for Mailing List Administrator portlet.

Information being shown in this view is as follows:

- Title: it is the name assigned to the Mailing List when it was created.
- Subscribers: is the total number of users under the Mailing List.
- Public List: Indicates if its possible for any user to join the Mailing List.

Two actions are provided from this view of the portlet:

- "All" link will take you to the full list of Mailing Lists created in your system. We will see this view in next section.
- "New" link will allow you to create a new Mailing List with a process similar to that described on User Manager section.

Maximized view

Maximized view for Mailing List Manager provides a full list of every Mailing List in your system.

MAILING LIST MANAGER
View All Mailing Lists | Add New Mailing List

VIEWING MAILING LISTS

Actions	Title	Subscribers	Public
📝❌	Gaby test 1	10	false
📝❌	Gaby test 4	2	false
📝❌	Gaby test 6	4	false
📝❌	Gaby test 7	10	false
📝❌	Gaby test 8	10	false
📝❌	Gaby's user load test	5	false
📝❌	Lianis Test	4	false
📝❌	Load User test	0	false
📝❌	Ozzy test	1	false
📝❌	Salvador Test	1	false
◁ Previous			Next ▷

Figure 41. Maximized view for Mailing List Manager

As shown in Figure 41, information displayed on this view is similar to that provided on minimized view.

Actions are also similar except by four new ones:

- Edit icon will allow you to see and remove the users subscribed to this list or add new ones.
- Delete icon will allow you to delete a specific mailing list.
- Previous and next links will allow you to navigate among the mailing list being shown.

Two additional links are included in the sub navigation bar:

- View All Mailing Lists will take you to the list of all the Mailing List in the system from any screen on the maximized view of this portlet.
- Add New Mailing Lists will take you to the screen where you will be able to create a New Mailing List.

Add New Mailing List

The screen that will allow you to create a new Mailing List is shown in Figure 42.

Figure 42. Screen provided to create a new Mailing List.

This screen is the same one already explained on User Manager section.

Edit Mailing List

When you choose to edit a Mailing List, a screen similar to the one being shown in Figure 43 will display the information of the selected Mailing List.

Figure 43. Editing a Mailing List

Information that can be edited is:

- Title
- Allow public to subscribe option

Some actions are also provided to modify the mailing list:

- Delete list button will allow you to eliminate the currently displayed mailing list.
- Cancel button will void any change on editable information (except user deletion).
- Save button will make permanent any change on editable information.
- Check/Uncheck all will allow you to select or unselect every user belonging to the list.
- Remove button will allow you to delete selected users from the mailing list.
- Edit icon will take you to user's profile, so you will be able to modify its properties.

Communication Manager

Communication Manager will allow you to search, view, edit, and eliminate Communications in your system, as well as create new ones.

Roles needed

To have access to Communication Manager portlet you will need one of these roles:
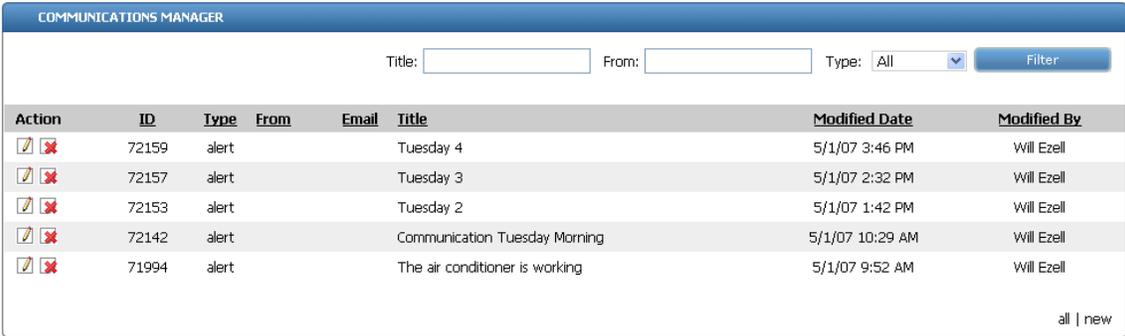
- Campaign Manager Admin
- Campaign Manager Editor

Groups that have those roles associated are:

- Marketing
- Marketing Editor

Minimized view

Figure 44 shows minimized view for Communication Manager.

Figure 44. Minimized view for Communication Manager.

Information being shown in this view is as follows:

- Id: is a unique number that identifies communications from each other.
- Type: it will indicate if the communication is an email, an external communication, or an alert to be shown to users when they log in your system's front end.
- From: it is the name that will be shown in sender information if the communication gets to the user via email.

- Email: is the email that will be shown in sender information if the communication gets to the user via email.
- Title of the communication.
- Date of last modification.
- User who modified the communication.

Five actions are provided from this view of the portlet:

- Filter communications will allow you to browse communications specifying values to match against title, from, and type fields. Figure 45 shows a detail of filter options.

Figure 45. Detail of communication search fields

- Edit icon will allow you to see and modify communication details.
- Delete icon will allow you to eliminate one specific communication.
- "All" link will take you to a full list of the communications on your system.
- "New" link will take you to a different screen where you could configure a new communication.

Maximized view

Maximized view for Communication Manager provides a full list of every Communication in your system.

Figure 46. Maximized view for Communications Manager

As shown in Figure 46, information displayed on this view is the same provided on minimized view.

Two new actions are provided:

- Previous and next links will allow you to navigate among the communications being shown.

Three additional links are included in the sub navigation bar:

- View All Communications will take you to the list of all the Communications in the system from any screen on the maximized view of this portler.
- Add New Communication will take you to the screen where you will be able to create a New Communication.
- Delete Selected will allow you to delete every communication selected on view all communication screen.

Edit Communication

The information that you will be able to edit is different according to type of Communication.

- Email: Figure 47 shows properties for Email Communications.

Figure 47. Email Communication

As deducted from its name, an Email Communication will be used from a campaign to send information to a user via email. Fields with required information for this type of communication are:

- o Communication title: the name associated to the communication.
- o From Name / Email: those fields will be shown in the email as the sender's name and the address.
- o Email subject.
- o Type of content: will allow you to choose between sending a HTML Page or a text entered through this screen.

- External: Figure 48 shows properties for External Communications.

An External Communication will also be sent as a email to those users associated to it through a campaign.

Figure 48. External Communication

- Alert: Figure 49 shows properties for Alert Communications.

An Alert Communication will be displayed as a pop up window when a user associated to it through a campaign logs in the front ent.

Figure 49. Alert Communication

Permissions will allow you to set the access of users under particular roles to this communication. Options are shown in Figure 50.

Figure 50. Permissions over Communications

Campaign Manager

Campaign Manager will allow you to search, view, edit, and eliminate Campaigns in your system, as well as create new ones.

Permissions needed

To have access to Campaign Manager portlet you will need one of these roles:

- Campaign Manager Admin
- Campaign Manager Editor
- Campaign Manager Viewer

Groups that have those roles associated are:

- Marketing
- Marketing Editor

Minimized view

Minimized view for Campaign Manager displays as shown in Figure 51.
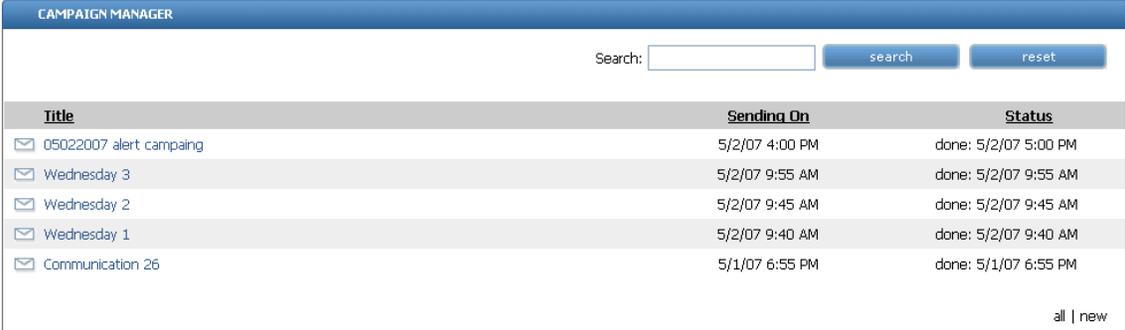
Figure 51. Minimized view for Campaign Manager portlet.

Information being shown in this view is as follows:

- Title: is the name assigned to the campaign when it was created.
- Sending on:
    - For non-recurrent campaigns this field will show the date when the campaign will be sent.

- o For recurrent campaigns this field will ask you to check recurrence details.
- Status: it will indicate either if the campaign is pending to be sent or if it has been sent already.

Three actions are provided from this view of the portlet:

- Search over campaign's title.
- "All" link will take you to a full view of every campaign created in the system.
- "New" link will take you to a different screen where you could create a new campaign.

Maximized view

Maximized view for Campaign Manager provides a full list of every Campaign in your system.

Figure 52. Maximized view for Campaign Manager

As shown in Figure 52, information displayed on this view is the same provided on minimized view.

Two new actions are provided:

- Previous and next links will allow you to navigate among the campaigns being shown.

Two additional links are included in the sub navigation bar:

- View All Campaigns will take you to the list of all the Campaigns in the system from any screen on the maximized view of this portlet.
- Add New Campaign will take you to the screen where you will be able to create a New Campaign.

You will also be able to click on each Campaign title to see its details.

Edit Campaign

Campaign edit screen has three tabs where you will be prompted to enter the information that will define a campaign behavior. As shown in Figure 53, those tabs are: Campaign Info, Permissions, and Recurrence.
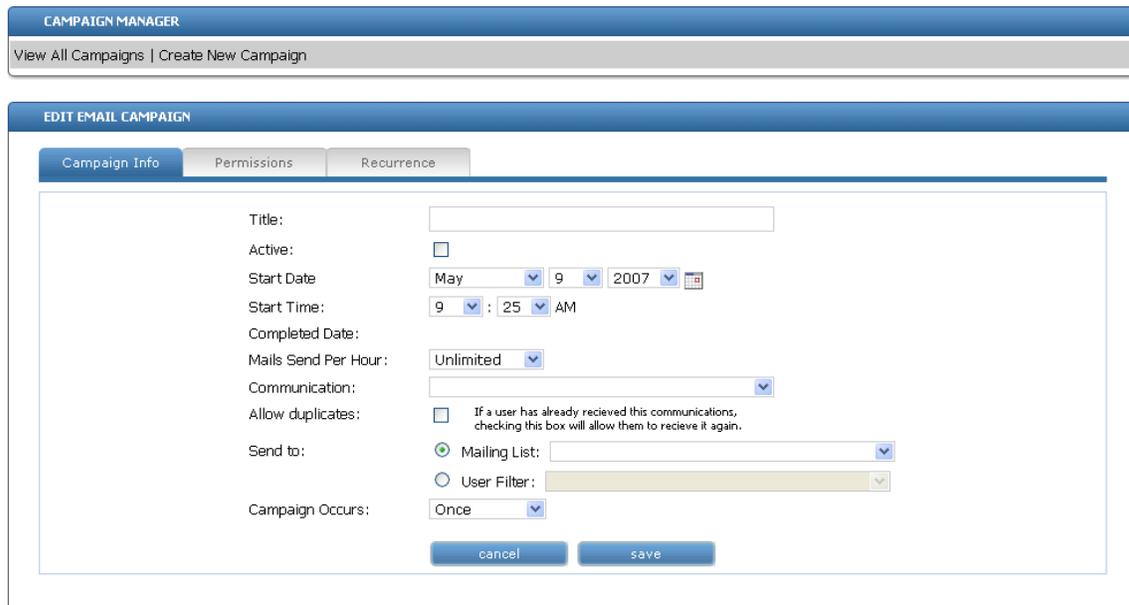
Figure 53. Editing a Campaign.

Campaign info tab will allow you to define this information:

- Title: is the name that will be assigned to campaign being created.
- Active: it defines whether or not the campaign is active to be sent.
- Start date: is the date when campaign must be sent.
- Start time: is the time when campaign must be sent.
- Completed date: this information will be available once the campaign has been sent.
- Mails send per hour: it defines the maximum number of emails that a campaign is able to send per hour since its star date until it has been completely sent. Figure 54 shows available options.

Figure 54. Options for mails per hour field.

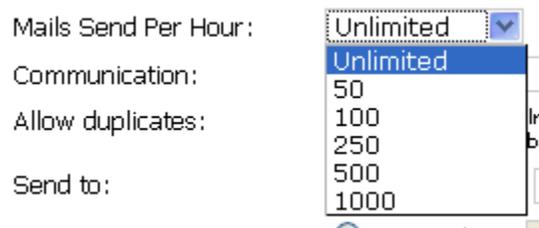- Communication: this field defines the content that will be send by the campaign. A list of available communications will be displayed for this drop down field as shown in Figure 55.
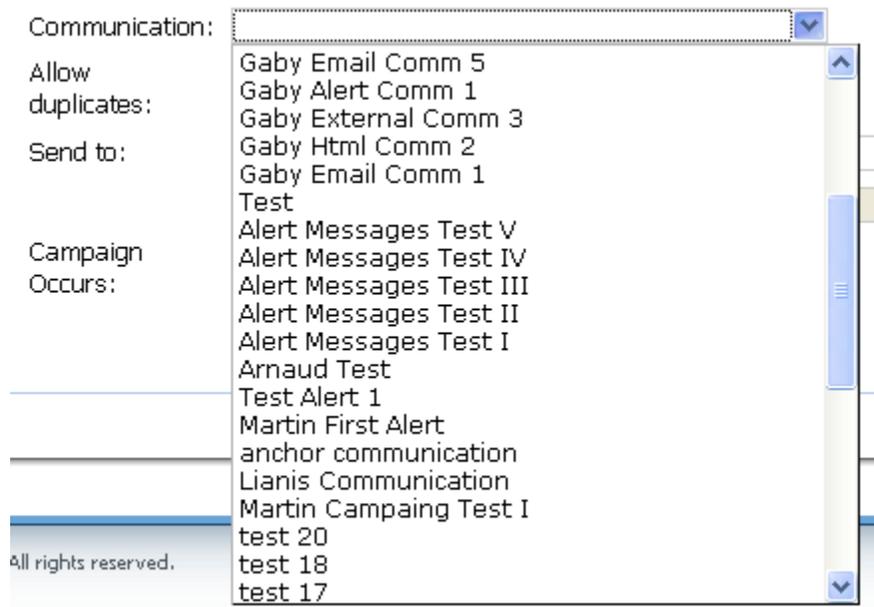

Figure 55. Communications drop down list.

- Allow duplicates: this field defines if a communication can be sent in a campaign more than one time to the same user.

- Send to: this is the group of users that will get the communication being sent by the campaign. There are two options to define this field: Mailing List, as shown in Figure 56, and User Filter, as shown in Figure 57.
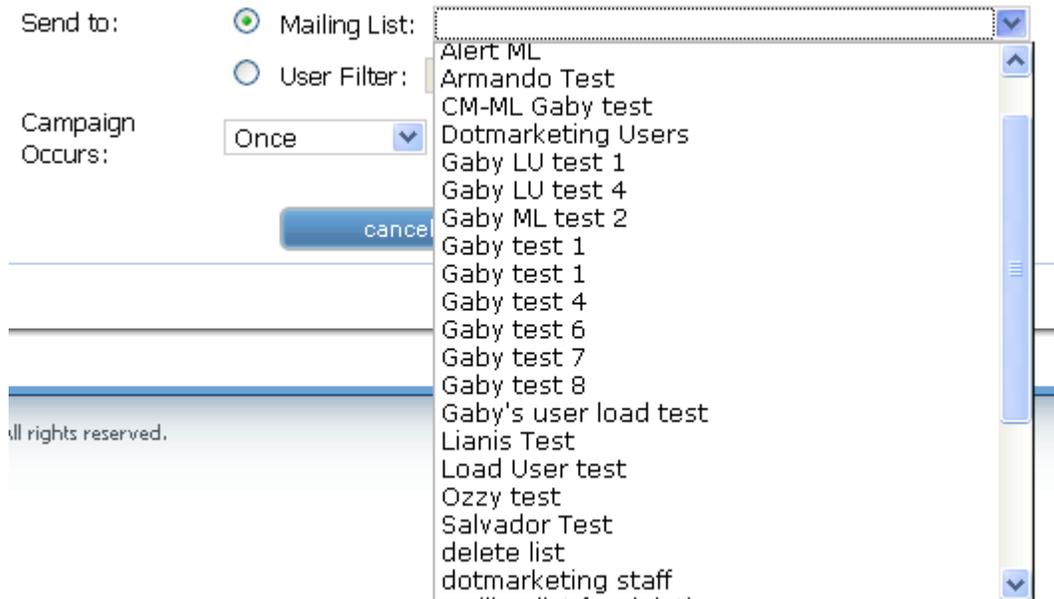
Figure 56. Using a Mailing List as recipient of a campaign.
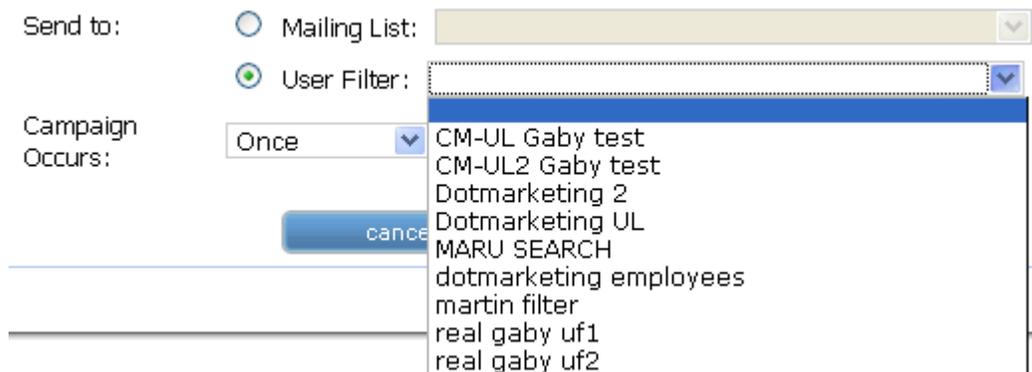
Figure 57. Using a User Filter as recipient of a campaign.

- Campaign occurrences: as shown in Figure 58, this field will allow.

Figure 58. Setting the way as a campaign occurs.

- Cancel button allows you to void the creation of a new campaign.
- Save button allows you to finish the creation of the new campaign.

As shown in Figure 59, Permissions tab is similar to ones seen before. You could use it to give access to particular roles in your system over the campaign being created.

Figure 59. Permissions tab for Campaigns.

When a campaign is set to recur, Recurrence tab will allow you to define when it should be sent. As shown in Figure 60, there a several ways to configure a campaigns recurrence.

Figure 60. Recurrence tab for Campaigns

- From/to dates: these dates define the range of days where campaign occurrences are desired to happen.

- At: it is the time of the day when campaign is desired to be sent. There are two different options:
  - At a specific hours
  - Between two hours according to periods specified on "each" option.
- Every: it is the day when campaign is desired to be sent. There are two different options:
  - A specific month, a specific day, a specific year, or the combination of these three fields.
  - Specific days of the week.
- Each period of hours or minutes on specified dates.

Cancel and Save buttons will allow you to void the changes you have done or to keep them.

Reports for sent campaigns

Once a campaign has been sent, a new tab named "View Report" will be available. In this tab, information about the status of the emails sent to every user will be shown.

As shown in Figure 61, email statuses are displayed in detail through clicking on three different links associated to users who have opened the campaign, users who have not opened the campaign, and every user the campaign has been sent to.
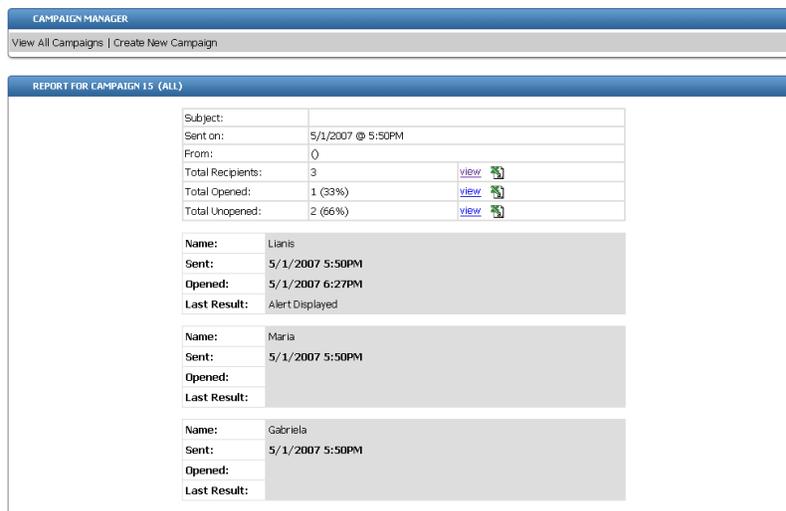

Figure 61. Reports for sent campaigns