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• **introduction**

→ **documentation**

the purpose of this manual is to describe the use and implantation of web sites using the GenB Contents Manager.

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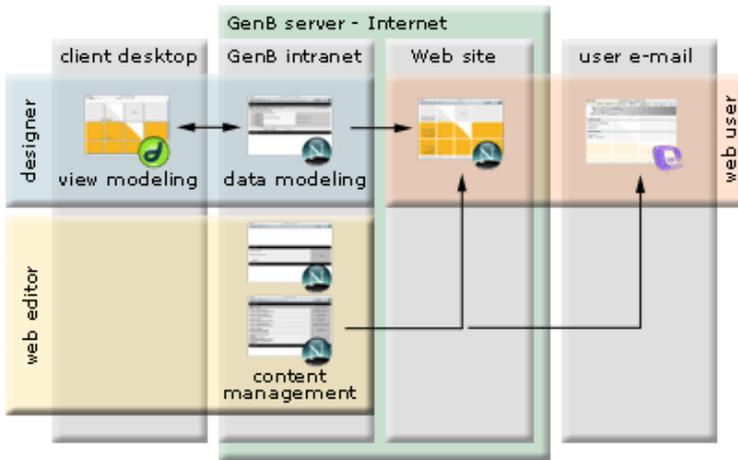
• **introduction**

→ **introduction to GenB**

GenB is a WCM (Web Content Management).

GenB facilitates content incorporation and maintenance (text, pictures, documents, ...) for the Web site and in turn facilitates user navigator interaction mechanisms (sending and collecting contents from forms, e-mail distribution of information to users, distribution list management ...).

In the diagram below, the different spaces in which GenB operates (vertical bars) and the different user profiles involved in the implementation, production/exploitation of the web site (horizontal bars) are shown:



user profiles

- **designer**: Throughout the creative process and web site setup, the designer defines the data templates (templating) and the web pages to handle managed contents (view modeling).
- **web editor**: the editor, using the GenBnet content management intranet, takes over control of contents. With the exclusive use of an Internet navigator, the editor has access to the content management functions "published on" or "coming from" the web site.
- **web user**: The user "navigator" can access the managed content web site, and, for example, fill out record forms (that can be managed later from GenBnet), subscribe to information bulletins (that can be sent from GenBnet), access restricted access information sites (users are authorized from GenBnet), contribute to the contents of the web site itself (for example, by participating in a discussion forum), etc...

what is GenB?

GenB is a tool provided as an ASP (Application Service Provider) service. There are no user tasks or costs associated with installation, maintenance, updating, control of backup copies or setting up firewalls. GenB complements the classic web accommodation or e-mail management services.

the management intranet

GenB enables users with no prior experience to perform creative and content maintenance tasks with the exclusive use of a navigator. For management of contents related to its web site, GenB provides a management "intranet" accessible from any Internet access point.

• introduction

→ basic concepts

the use of the **GenB** web contents management service enables total or partial control of your web site contents (contents based on: texts, pictures, documents, ...).

with **GenB** the contents are managed through the use of databases; so that changing content is completely separated from the way in which it is presented.

to proceed with a change in content, it is not necessary to edit the pages of your web site, just manage the contents with the aid of **GenBnet**, the on-line site contents manager.

the basic concepts involved in the use of the GenBnet contents manager are described in detail below ..

user

access to the contents management site **GenBnet** is limited to authorized users.

to access GenBnet you must have a user name and password to identify yourself. GenB allows to manage different users and to assign different privileges by managing roles (see [users management](#)).

record

GenB organizes the contents in records. Each **record** is based on a "data template" that profiles the type of information that it is to be managed.

a representation on paper of the equivalent to a record would be the information on an "index card" where the data template would define the representation of the data and the way in which the different fields on the "card" must be filled in.

each "data template" allows data on one or several **records** to be handled:

- a list in GenB is built up from a list of records in a "data template".
- a detail view is made with a record from a "data template".

(see [manage contents \(common operations\)](#)).

templates

access by a user with the right to modify data templates may modify the "templates" in the Contents Management site.

in GenB the "data templates" define the form used to enter the contents in each of the records from which the lists, detail views and forms are built up to collect and store information from the web site.

NOTE: alteration of a "template" requires in most cases adaptation of the web pages in charge of representing the information. Use the options "Managing templates ..." with caution (Managing ... templates).

• work area

→ [access the GenB data manager](#)

Access to GenB data manager is possible from any Internet access point. The only tool necessary is a web navigator (GenBnet is compatible with most navigators on current platforms).

access to GenBnet is possible from the access space provided by your distributor or from the generic address <http://www.inte.es/genbnet>

on access the management site, the system presents an identification screen requesting user name and password

<p>Username <input type="text"/></p> <p>Password <input type="password"/></p> <p><input type="button" value="accedir"/></p> <p>Forgot Password?</p>	<p>Login</p>
---	---------------------

NOTE: after identification, the system validates the work session indefinitely until there has been no activity for about 45 minutes, or until the user closes the navigator application or clicks on the "exit" link.

at the foot of the login page you will find the link **Forgot Password**. This link brings you to the "password recovery" process form:

<p>Password Recovery for GenBnet</p>
<p>How to recover your GenBnet access info:</p> <p>1.- Please enter your email address. 2.- Press "remind me" button.</p> <p>The system will safely send to you all access data associated to this given email.</p>
<p>Email address <input type="text"/></p> <p><input type="button" value="remind me"/></p>

if the given email address has login information associated to it, then the system sends a secure mail with the login information requested to the owner of this data.

• work area

→ GenBnet center

the GenB work site has a "center" page where you can access the different management areas or modules from. The whole page is accompanied by a location bar at the top which uses the "breadcrumbs" or "Ariadna's thread" navigating system to identify the location and making it easy to turn back to previous pages by clicking on the titles shown in the leading thread.

depending on the profile assigned to the user, the management site provides more o less functionalities.

an example of access to the center page for a user with an administrator profile could be:

exit > central	Demo S.A.: Sr. Demo
<ul style="list-style-type: none"> ☰ Homepage ☐ Managing generic page templates 	Generic Pages
<ul style="list-style-type: none"> ☰ news ☐ Managing registries templates 	News
<ul style="list-style-type: none"> ☰ Products ☰ Offers ☰ Services ☐ Managing product templates 	Product
<ul style="list-style-type: none"> ☰ Subscriptions ☐ Managing registries templates 	Registries/Requests
<ul style="list-style-type: none"> ☰ Extranet users ☐ Managing authentication templates 	Authentication
<ul style="list-style-type: none"> ☰ Monthly newsletter ☰ Magazine ☐ Managing newsletter templates 	Newsletters
<ul style="list-style-type: none"> ☰ Managing distribution lists 	Distribution lists
<ul style="list-style-type: none"> ☰ Poll management 	Poll
<ul style="list-style-type: none"> ☰ XML import/export ☰ Organization profile ☰ My user profile ☰ Users ☰ Roles ☰ E-mail administration ☰ Stats 	Administration

an example of access to the same center page for a user with an editor profile for most of the sites might be:

exit > central	Demo S.A.: Demo2
<ul style="list-style-type: none"> ☰ Homepage 	Generic Pages
<ul style="list-style-type: none"> ☰ news 	News
<ul style="list-style-type: none"> ☰ Products ☰ Offers ☰ Services 	Product
<ul style="list-style-type: none"> ☰ Subscriptions 	Registries/Requests
<ul style="list-style-type: none"> ☰ Extranet users 	Authentication
<ul style="list-style-type: none"> ☰ Monthly newsletter ☰ Magazine 	Newsletters
<ul style="list-style-type: none"> ☰ Managing distribution lists 	Distribution lists
<ul style="list-style-type: none"> ☰ Poll management 	Poll
<ul style="list-style-type: none"> ☰ My user profile ☰ Users ☰ Stats 	Administration

navigation throughout the manager is very similar in most of the sections accessible from the center page. In general, a list is accessible from the center page and from the list to the detail view or modification form.

Data modification form

Agency **Inte** Intranet style **Basic 2**

Organization **Demo S.A.** Identifier **068828f898efa8d5f610ec3**

Managed languages: **English** **Castellano** ----- -----

Web domain http:// **inte.es/demo/** Web directory: **www.demo**
 www alias http:// **www.demo.org**
 www.demo.net

Email domain @ **inte.es** Internal email user: **inte**

active modules:

- Authentication
- News
- Newsletters
- Generic pages
- Generic product
- Generic registries
- Polls
- Accounting
- Admin. email
- Stats
- Xml import/export
- Users
- Data templates
- Roles
- Newsletter lists
- Newsletter newsletters distribution
- Content manager Style control
- Organization configuration

[GenB configuration of site Demo S.A.](#)

NOTE: if the user in the session is the main user or administrator, a link called "Site configuration data will appear at the foot of the form ... (GenB configuration of site ...) Where the main access and configuration data for the set of services is detailed.

parameter description "Organization profile" form

Agency: [informative] Managing agency / GenB service distributor.

Intranet style: [required] Style/appearance of the GenBnet contents management site.

Organization: [optional] company name. The content of "Organization" appears in the GenBnet page headers.

Identifier: [informative] unique user identifier "UID". The "UID" is used in the integrating process to identify all the "preview template" pages whose content is managed by GenB.

Managed languages: [required] languages in which the contents are managed. The GenB system enables contents to be handled in up to four different languages. As many languages as the public access web site uses will be selected.

Web directory: [required] physical location of the web pages managed by GenB. (informative field for internal use).

Web domain: [required] main web address for accessing the web pages managed by GenB.

www alias: [optional] alternative web addresses for access to web pages managed by GenB.

NOTE: changes in "Web domain" and "www alias" have a 24-hr activation time. Changes in or new domain names must be accompanied by the corresponding server configuration for DNS names as provided by the registering entity.

Email domain: [informative] e-mail domain associated with the domain used by GenB. The use of modules such as "newsletter" requires designation of a user and e-mail domain for the use of distribution lists.

Internal email user: [informative] user name associated with the e-mail domain used by GenB (informative field for internal use).

Active modules: [informative] list of modules available in GenB showing those in service or contracted by the organization (active = black circle).

• user management

→ data and user preferences

access to the user data screen "My user profile" is available in the "Administración" zone, at the GenBnet "center" page:



when you click on the link "My user profile" you access the user data and preferences form with which you are working:

A screenshot of the "User modification form" for user "demo2". The form includes fields for Username, Password, Status, Name, Surname, E-Mail, Cms language, Date format, and Roles. The user is currently "enabled" and has the role of "basic editor".

Username: demo2		Creation date: 12-11-2003 09:29	
Password: [masked] = [masked]		Modification date: 01-20-2006 20:04	
Status: <input type="radio"/> disabled <input checked="" type="radio"/> enabled		Created by: Main Admin	
		Modified by: Main Admin	
Name: Editor		Surname: Demo	
E-Mail: demo@demo.com			
Cms language: English		Date format: mm-dd-yyyy	
Roles: basic editor			

Buttons: save changes, ok

if the user in session has privileges to administer users, this will be able to assign roles and to modify the treatment of the different managed languages:

A screenshot of the "User modification form" showing additional options for language and role management. It includes a section for "User languages" with radio buttons for hidden, visible, and editable states for different languages. It also includes a "Roles list" and "Roles assigned to user" section with arrows for moving roles between the two lists.

Username: demo2		Creation date: 12-11-2003 09:29	
Password: [masked] = [masked]		Modification date: 01-20-2006 20:04	
Status: <input type="radio"/> disabled <input checked="" type="radio"/> enabled		Created by: Main Admin	
		Modified by: Main Admin	
Name: Editor		Surname: Demo	
E-Mail: demo@demo.com			
Cms language: English		Date format: mm-dd-yyyy	
User languages:			
eng:	<input type="radio"/> hidden	<input type="radio"/> visible	<input checked="" type="radio"/> editable
dan:	<input type="radio"/> hidden	<input checked="" type="radio"/> visible	<input type="radio"/> editable
ach:	<input checked="" type="radio"/> hidden	<input type="radio"/> visible	<input type="radio"/> editable
Roles list:		Roles assigned to user:	
<ul style="list-style-type: none"> aaa admin basic editor my page news editor newsletter editor 		<ul style="list-style-type: none"> basic editor 	

Buttons: save changes, ok

"My user profile" form parameters description

Username: [required] Name used for access to GenBnet. The username must have a minimum length of 4 characters and not use extended characters such as spaces, punctuation, accents, ñ, ç ...

Password: [required] character chain used as a password for access to GenBnet. The password must have a minimum length of 4 characters and not use extended characters such as space, punctuation, accents, ñ, ç ... (to avoid typing errors you must fill in the two fields with the same password).

NOTE: the "login" access control system distinguishes between capitals and small letters in the username and password fields.

Status: [required] option for activating or deactivating access of a user to GenBnet.

Name: [required] user name. The content "name" is shown in the GenBnet page header.

Surname: [required] user's surname. The content "surname" appears in the GenBnet page header.

Cms language: [required] Language to be used by the user in the GenBnet contents management site.

Email: [optional] e-mail address exclusively for internal use for communication with the GenB support team.

Roles: [required] set of roles assigned to the user.

NOTE: If you do not have editing privileges for any 'Users' record, the system will not let you modify the roles field.

• user management

→ managing roles

the GenB contents management site allows access by users with different profiles or work functions. Each user must have a set of roles that profile the functions that he can perform.

the GenBnet Roles management site allows a set of limitation policies to be defined for each of the desired work roles. Each user can have as many roles associated as necessary.

in the adoption of multiple roles, GenBnet always applies the most restrictive policies. For example, two policies for the same read function, if the first is for access to "any" record and the second is access to "own" records, the prevailing policy will be the second because it is the most restrictive.

NOTE: GenBnet has a total access role "admin" assigned to the basic user or administrator. This role cannot be modified or removed and will always be associated, at least, with the administrator.

in the "Administración" zone in the GenBnet "center" page there is a link to role management



by clicking on "Roles" you access the role list:

exit > central > roles list Demo S.A.: Sr. Demo

Role list from 1 to 4 of a total of 4

Name	Description
admin	Acceso total
basic editor	Basic editor
news editor	news editor journalist
newsletter editor	newsletter editor tasks

[Insert new Role](#)

Name	Description		
admin	Acceso total		
basic editor	Basic editor		
news editor	news editor journalist		
Function	Area	Templates	Property
read	News	news	any
create	News	news	any
edit	News	news	own
remove	News	news	own
newsletter editor	newsletter editor tasks		

when you click on the icon  next to each role, the set of policies associated with it drops down.

at the end of the list there is a link for access to the new role initialization form: link **insert new role**  [Insert new role](#).
 the role modification/insertion form is accessed by clicking on the name of the role or on "Insert new role":

Role modification form. : news editor

Name	news editor	Creation date:	11-12-2003 19:51
		Modification date:	11-12-2003 19:52
Description	news editor journalist	Created by:	Sr. Demo
		Modified by:	Sr. Demo

Policies for the role news editor

Function	Area	Templates	Property	✖
<u>read</u>	News	news	any	✖
<u>create</u>	News	news	any	✖
<u>edit</u>	News	news	own	✖
	News	news	own	✖

<ul style="list-style-type: none"> function <li style="background-color: #e0e0e0;">✓ read create edit remove 	Newsletters ▾	* Monthly newsletter Magazine	any ▾
---	---------------	-------------------------------------	-------

description role form parameters

Name: [required] Short name used to designate the role.

Description: [optional] short text describing the role.

Policies: [required] list of policies applicable to the role. Every policy is defined by four parameters:

Function: indicates which operations the policy affects. The different types of function are: -. read -. create -. edit -. remove

Area: section or module the policy affects. Values available for this parameter are the set of GenB modules operational for the organization plus a wildcard '*' to indicate that the policy will affect the total set of Areas available.

Templates: Parameter for specifying the policy application field. The values available for this parameter are the set of Data templates associated with the module selected in "Area". For those areas not based on data templates, only the wildcard option '*' appears.

Property: the "Property" parameter designates the scope of the policy in so far as the authorship or property of the affected records. "Property" could have the values:

- . any: The policy is applicable to the records of any author/user.
- . own: The policy is restrictive, being applicable to only those records created by the user himself.
- . None: the policy is totally restrictive. This option converts the policy in limitation, denying access to a function, area and designated templates.

NOTE: access restriction or limitation policies always prevail over less restrictive policies. Policy application order in the set of roles assigned to a user is always from less to more limitation or restriction.

• managing contents (common operations)

→ **list of records**

access management of records or content pages from the GenBnet "center" space. The most common record list format is the module:

- Authentication.
- Generics (Generic pages).
- News.
- Products.
- Registries.

exit >> **central** >> listing Products Demo inc.: Editor Demo

List of Products from 1 to 8 of a total of 8

Products [v] in any state ... [v] search add criterion

<u>Internal reference</u>	<u>Name</u>	<u>Group</u>	<u>Date</u>	<u>State</u>	<u>Preview</u>
pippo	pippo	Bonorum	07-28-2005	Published	eng da
prod001	Product 1	Bonorum	08-18-2005	Published	eng da
ref.0101	Lorem ipsum	Finibus	02-03-2003	Published	eng da
ref.0101	Lorem ipsum	Bonorum	02-03-2003	Published	eng da
ref.0101	Lorem ipsum	Finibus	02-03-2003	Published	eng da
ref.0101	Lorem ipsum	Finibus	02-03-2003	Published	eng da
ref.0101	Lorem ipsum	Finibus	02-03-2003	Published	eng da
ref.0102	Lorem ipsum	Bonorum	01-01-2004	Published	eng da
				published	eng da
				any state	eng da

[Insert new: Products](#)

the list page has different areas and functions:

a first area is the **horizontal information bar**, where the records listed and total number of records are shown.

under the information bar there is a **searcher** or record selector. The first drop down menu in the search enables you to select one of the various templates or types managed (each module may have different record formats available, e.g., in "news", a press release content template and a different template for internal news can both be managed). The searcher text input field enables searches for chains of text within the "text" content of records. The second drop-down menu enables the search to filter by publication status:

- Standby.
- Published.
- Retired.

the "add criterion" button expands the search form adding until 6 search fields, enabling you to design complex search filters:

List of Products from 1 to 1 of a total of 1

Products [v] in any state ... [v] if all criteria are meet [v] search add criterion

Name [v] Contains [v] ppo

Description [v] Does not contain [v] Bonorum

Date [v] is equal or greater than [v] 07-28-2005 remove last criterion

<u>Internal reference</u>	<u>Name</u>	<u>Group</u>	<u>Date</u>	<u>State</u>	<u>Preview</u>
pippo	pippo	Bonorum	07-28-2005	Published	eng da
				published	eng da
				any state	eng da

[Insert new: Products](#)

on any list page you will find:

the **list header** indicates the contents in each column. Each descriptive label is a "link" for selecting the criteria for **sorting the list**.

the **"Preview"column** enables you to go to the detail page and/or list of records viewed. The links in each row lead to detail views and the links located at the end of the list of records link with "list views".



NOTE: if the "Preview" links are not activated it could be because:

- 1) there is no detail or list view.
- 2) incorrect configuration of the main data template.

link go to **modification of record content form**. Each row in the list corresponds to a content record. Each record has a link to the form in the first column **internal reference** to facilitate modification/deletion of the data it contains. (see **the contents form**).

link **insert new record** [Insert new: ...](#) (Insert new: ...) At the end of the list there is a link to access the record initialization form. (ver **contents form**)

simultaneous management of registries

ref.0101	Lorem ipsum	Finibus	02-03-2003	Published	eng da
ref.0102	Lorem ipsum	Bonorum	01-01-2004	Published	eng da
Open simultaneous management of registries				published	eng da
Insert new: Products				any state	eng da

if you have user privileges to perform edit/delete actions over the listed records, a link called **Open simultaneous management of registries** will appear at the foot of the list.

when you click on the link, the set of simultaneous options drops down:

<input checked="" type="checkbox"/>	ref.0101	Lorem ipsum	Finibus	02-03-2003	Published	eng da
<input checked="" type="checkbox"/>	ref.0102	Lorem ipsum	Bonorum	01-01-2004	Published	eng da
↳ Check all Uncheck all <input checked="" type="checkbox"/> set all checked to 'Standby' <input type="checkbox"/> set all checked to 'Published' <input type="checkbox"/> set all checked to 'Retired' <input type="checkbox"/> remove all checked						
☐ Close simultaneous m.				published	eng da	
☒ Insert new: Products				any state	eng da	

this set of options allows you to:

- **set all checked to 'Standby'**. Action that will update all selected records of this list to state Standby
- **set all checked to 'Published'**. Action that will update all selected records of this list to state Published
- **set all checked to 'Retired'**. Action that will update all selected records of this list to state Retired
- **remove all checked**. Action that will delete all selected records (after confirmation)

• managing contents (common operations)
→ contents form

access the contents form from the list page by clicking on the link of an existing record (to modify it) or clicking on the "Insert new" link: ... (to insert a new record).

below is a sample contents form:

[exit](#) >> [central](#) >> [listing News](#) >> [detail](#) Demo inc.: Main Admin

News modification form. eng da

Date: <input type="text" value="06-13-2004"/>	Creation date: 03-22-2005 20:20
State: <input checked="" type="radio"/> Standby <input type="radio"/> Published <input type="radio"/> Retired	Modification date: 08-29-2005 09:33
Internal reference: <input type="text" value="Fusce congue"/>	Owned by: Editor Demo &→&
	Modified by: Main Admin

Title eng: <input type="text" value="Fusce congue, augue vitae adipiscing scelerisque"/>	
Title da: <input type="text" value="Fusce congue, augue vitae adipiscing scelerisque"/>	

News_text

B I U S
 x₂ x²

Fusce congue, augue vitae adipiscing scelerisque, ligula **dolor** pharetra mi, ut laoreet justo neque ut erat. Sed ultricies nonummy lacus. Curabitur dictum quam sed purus. Etiam tincidunt tincidunt metus. Morbi dapibus magna eu pede. Aenean placerat nulla vel massa. Donec in libero. Praesent mauris pede, viverra non, interdum quis, scelerisque at, purus.

Nunc felis. *In pulvinar consectetur sapien*. Suspendisse potenti. Donec et massa. Praesent fermentum neque a wisi. Nullam ac orci vitae risus tincidunt aliquam. In et justo congue purus vestibulum volutpat. [Proin imperdiet justo](#) quis arcu porta venenatis. Phasellus facilisis, wisi ac condimentum laoreet, urna lorem nonummy lacus, eu ullamcorper eros purus in dui. Ut nisl arcu, pretium in, luctus eu, fermentum non, est. Donec viverra sodales lacus.

Path: [body](#)

Picture

cards01.gif [3 Kb] [100x70]



common fields

all contents forms begin with a first block of common fields:

Date: [required] for content date. The date field may be used to sort lists and can be shown in the public access web site.

NOTE: the format of "Date" is dd/mm/yyyy

Creation date: [informative] field for informing on the date and time of record.

Modification date: [informative] field for reporting the date and time of the last modification of the record.

Owned by: [informative] field for reporting the user author of the record.

Modified by: [informative] field for reporting the user author of the last change made in the record.

Status: [required] field for setting the record publication status. Status possible:

- Standby.
- Published.
- Retired.

NOTE: Standby and Retired status do not allow the final user to list or view the contents of the record on the web site. Only the integrator, explicitly during page setup, can activate access to unpublished entries.

Internal reference: [optional] field for a record reference or name. This field is always visible in the management lists and can be used to establish sorting criteria.

personalized fields

personalized fields depend on the record template or format.

NOTE: All modules can be arranged in different record formats pre-defined in the web site setup process.

e.g., the "news" module could be used to manage a content template for "press releases" and a totally different template for "internal news".

types of personalized field could be:

type of field	description
short text	maximum length of text 100 characters.
text	unlimited length text
closed list	closed list of values
open list	maximum length of text 100 characters. Always appears accompanied by a drop-down menu with all the values used in the set of records of the template in hand.
image	picture file management field. Types admitted are: 'image/gif', 'image/pjpeg', 'image/jpeg', 'image/png', 'image/x-png', 'application/x-shockwave-flash'
document	document file management field. Types admitted are: 'video/quicktime', 'video/x-msvideo', 'application/x-troff-msvideo', 'video/avi', 'video/msvideo', 'video/x-ms-asf', 'application/x-mplayer2', 'video/x-ms-asf', 'video/x-ms-asf-plugin', 'application/x-zip-compressed', 'application/zip', 'application/pdf', 'application/msword', 'application/vnd.ms-excel'
related record	field to show and relate information from other records from different templates.

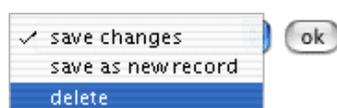
content form actions

insert record

if it is a form where a new record is to be entered, the only option available is "insert record".

if changes are to be made in an already existing record, you may choose between "save changes", "save as new record" or "delete" record.

NOTE: a change in a field does not imply that the new contents have been saved. You must "save changes" for them to be stored in the database.

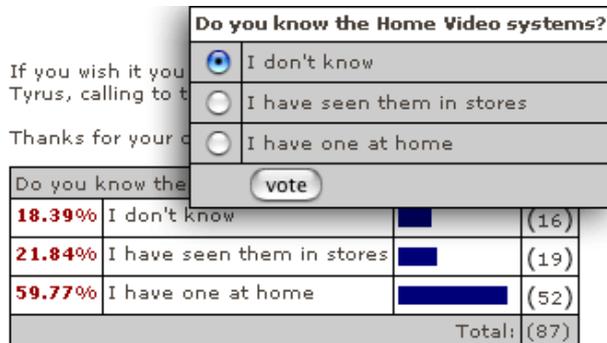


NOTE: the option "save as new record" will not duplicate picture or document type contents in the new record.

• specific actions depending on the section or module (specific operations)

→ "poll" module: polls

the GenB "Poll" module enables voting grids to be managed. The polling system allows user opinions to be collected at the same time it provides a graphic preview of the results in real time:



manage poll contents

to manage the contents of polls go to the GenBnet center page and click on the link "Poll management":

id.	Date - Status	Language	Questions and answers
1	21-11-2003 - Published	<input type="checkbox"/> cas	¿Conoce los sistemas Home Video? 1 No los conozco! 2 Los he visto en tiendas 3 Tengo uno en casa Add answer
		<input type="checkbox"/> eng	Do you know the Home Video systems? 1 I don't know 2 I have seen them in stores 3 I have one at home Add answer
			Add a new question in another language
Add new poll			

the management site shows a list with the set of polls managed.

Each poll is made up of three types of elements:

- 1.- The poll identifier: made up of a unique code for each poll with the date and publication status.
- 2.- the question: The question that is the purpose of the poll. In the list there is a section for each language in which the question is asked.
- 3.- the answers: each of the options or answers associated with a question. They are grouped in the list by language.

add a new poll

to add a new poll proceed to:

- 1.0.- in the list, click on **Add new poll** Add new poll.
 - 1.1.- give date and publication status desired.
- 2.0.- add the question: in the list, click on **Add a new question in another language** Add a new question in another language.
 - 2.1.- fill out the "question" form. (for further details see form description).
- 3.0.- add the answers to the question: in the list, click on **Add answer** Add answer.
 - 3.1.- each option or answer is identified by a number that enables the different languages in the poll to be matched.
- 4.0.- repeat points 2.0 a 3.1 for each of the languages managed.

NOTE: take care that the option numbers in the different answers match in the different languages worked with.

below the forms used in making up the polls are described in more detail.

to access the main poll identifier form click on:

id.	Date - Status
1	21-11-2003 - Published

poll data form

Modification form: poll

Date Creation date: 21-11-2003 20:36
 Modification date: 21-11-2003 20:36

Status Standby Published Retired Created by: Demo Demo
 Modified by: Demo Demo

Date: [required] date Field.

NOTE: the value of this field does not affect the validity or expiration of a poll, but is used only for organization purposes in the GenBnet site, although it can be shown for information only in the public access web site.

Status: (Status) [required] field for setting the poll publication status. Status possible:

- Standby.
- Published.
- Retired.

NOTE: Standby and Retired statuses do not allow the final user to access the poll

to access a question form, click on the link to the language used:

<input type="checkbox"/> eng	Do you
	<u>1</u> I do
	2 I ha

question data form

Modification form: Question

Language eng

Question

Explanation results

Language: (Language) [informative] language to be used in the question.

Question: (Question) [required] text field for the question in the language selected.

Explanation results: (Explanation of results) [optional] field for explanatory text to accompany the graphic presentation of results provided after voting.

to access the answer form, click on the option number corresponding to the answer desired:

eng	Do you know the Home
	<u>1</u> I don't know
	2 I have seen them

answer data form

Modification form: Answer text

Language eng

Answer number (num votes) 1 (16)

Answer text

Language: (Language) [informative] language to be used in the answer.

Answer number: (Answer number) [required] option number or answer selected.

NOTE: if the form is for insertion, the option number is a drop down input field. The values that it can have are the list of option numbers in other languages not used in the current language, plus the "new" option to indicate that a new option or new answer different from those already existing is being added.

Answer: (Answer) [required] text field for the answer in the language selected.

• specific actions depending on the section or module (specific operations)

→ "newsletter" module: introduction

the "newsletters" module is for managing and sending newsletters by e-mail. A newsletter may be understood as any type of occasional or periodic announcement, information bulletin, etc.

the "newsletters" module allows different newsletter templates to be handled (each template can be understood as a type of notice with different contents), and within each newsletter template the system allows different records to be generated (what in a publication would correspond to "different editions" or "different issues").

by clicking on one of the newsletter template links:

<ul style="list-style-type: none"> GenB Newsletter Newsletter Todo 	Newsletters
<ul style="list-style-type: none"> @ Management of mailing lists ➤ Management of mailing campaigns ☐ Setup of your mailing system 	E-Mail Marketing

you access the newsletter list page, in this example the "GenB Newsletter" template. In this list each row corresponds to a newsletter editions:

List of GenB Newsletter from 1 to 6 of a total of 6			
<u>Internal reference</u>	<u>Date</u>	<u>State</u>	<u>Preview</u>
2006:Maig	02.05.2006	Published	cas eng cat
2006:Març	20.03.2006	Published	cas eng cat
2005:Octubre	04.10.2005	Published	cas eng cat
2005:Abril	14.04.2005	Published	cas eng cat
2004:Julio	01.07.2004	Published	cas eng cat
2004:Mayo	01.05.2004	Published	cas eng cat
☐ Open simultaneous management of registries		published	cas eng cat
☐ Insert new: GenB Newsletter		any state	cas eng cat

[➤ Management of 'GenB Newsletter' mailing campaigns](#)

from this space you can carry out the following operations:

- **add new records** "editions" of a particular newsletter template.
- **modify, delete or duplicate** already existing editions.
- **preview the newsletter** in a navigator window.
- **jump to the campaign management** to prepare a mailing

add new newsletter records

to add a new newsletter click on the link [Insert new: ...](#) (Insert new: ...) of the newsletter template in which you wish to work.

2004:Mayo

[Open simultaneous management of registries](#)

[Insert new: GenB Newsletter](#)

modify, delete or duplicate already existing editions

to modify, delete or duplicate an already existing record or edition, click on the link located in the first column.

NOTE: on inserting or modifying contents, the system takes you to a contents management form. (see [contents management \(common operations\) - the contents form](#)).

Internal reference

2006:Maig

2006:Marc

2005:Octubre

preview the newsletter

to preview the final composition of a newsletter just as it will be seen by the final receiver in the form of an e-mail, click on the link in the "Preview" column of the record and language desired:

search add criterion

Date	State	Preview
02.05.2006	Published	cas eng cat

specific actions depending on the section or module (specific operations)

→ "newsletter" module: create a selfmanaged mailing list

the e-mail lists for sending newsletters can be made manually from the distribution list management site (see ["newsletter" module: managing static distribution lists](#)) or by the e-mail extraction technique in GenB module records. the requirements for extracting e-mails are:

- have Newsletter module editor privileges.
- the data records from which the e-mail is to be extracted must have the e-mail field correctly identified as "email" type.

a list of records in which there is an "email" field is shown below:

List of Subscriptions from 1 to 5 of a total of 164

Subscriptions in any state ... search add criterion

Language	Name	Surname	Email	Creation date	State
eng	Lorem	Blachnio	ipsum@post.pl	19.12.2006	Standby
eng	Dolor sit	Amet	amet@yahoo.co.in	18.11.2006	Standby
eng	Donec	Lorem	ipsum2@yahoo.com	06.11.2006	Standby
eng	Lee	Lorem	lee@lorem.co.uk	17.10.2006	Standby
eng	Amet	Ipsum	ipsum@yahoo.com	20.09.2006	Standby

[Open simultaneous management of registries](#)

[Insert new: Subscriptions](#)

Page 1 of 33 1 2 3 4 5 6 7 8 9 10 »

use this query to maintain the mailing list: new ok

before, add filters to your list

List of Subscriptions from 1 to 5 of a total of 67

Subscriptions Standby if all criteria are meet search add criterion

Language is eng

Email Contains @ remove last criterion

Language	Name	Surname	Email	Creation date	State
eng	Lorem	Blachnio	ipsum@post.pl	19.12.2006	Standby
eng	Dolor sit	Amet	amet@yahoo.co.in	18.11.2006	Standby
eng	Donec	Lorem	ipsum2@yahoo.com	06.11.2006	Standby
eng	Lee	Lorem	lee@lorem.co.uk	17.10.2006	Standby
eng	Amet	Ipsum	ipsum@yahoo.com	20.09.2006	Standby

[Open simultaneous management of registries](#)

[Insert new: Subscriptions](#)

Page 1 of 14 1 2 3 4 5 6 7 8 9 10 >

use this query to maintain the mailing list: new ok

the drop-down menus allows create or modify one already existing list.

when you click on "ok" the system takes you to the distribution list modification/initialization form:

Mailing list incorporation form.

Description: GenB demo list Creation date: 28.12.2006 17:25
Modification date: 28.12.2006 17:25

Recipients coming from 'Subscriptions' where the publication state is : Standby if all criteria are meet: Language is 'eng', Email contains '@' Owned by: Editor Demo
Modified by: Editor Demo

Right now there are 67 records, of which 66 are different emails. [show listing](#)

Include additional list of emails (add one email per line).
 NOTE: the mailing system, before sending, will remove all email duplicates inside a mailing list.

Exclude list of emails you want to manually exclude from this mailing list (add one email per line).

[insert mailing list](#)

description of "Distribution list" form fields

- specific actions depending on the section or module (specific operations)

→ "newsletter" module: managing static mailing lists

to create, maintain and personalize the distribution lists, click on the "Management of mailing lists" link in the center page:

<p>@ Management of mailing lists</p> <p>➤ Management of mailing campaigns</p> <p>☞ Setup of your mailing system</p>	<p>E-Mail Marketing</p>
---	--------------------------------

when you click on the link you see a list of distribution lists available:

Description	Creation date	Modif. date
Tasques Inte	24.05.2006 09:01	24.05.2006 18:55
GenB demo list	08.05.2006 10:05	03.08.2006 16:48
Subscriptors [eng]	08.05.2006 09:58	08.05.2006 09:58
Subscriptors [cat]	08.05.2006 09:58	08.05.2006 09:58
Subscriptors [cas]	08.05.2006 09:58	08.05.2006 09:58

[Mailing list incorporation form.](#)

in this list, by clicking on the link located in "Date" for a given distribution list, you can modify an existing record (distribution list).

at the end of the list is the "Distribution list incorporation form".

by clicking on a modification or insertion link, you access a style form:

Mailing list incorporation form.

<p>Description GenB demo list</p> <p>In order to prepare a mailing list with recipients coming from one of your managed contents: go to the listing; filter it according to your needs; and once you obtain the search results, use the mailing list form you have in the footer.</p> <p>NOTE: the form used to create or update mailing lists only appears when your managed content model has a field of type "E-mail"</p>	<p>Creation date: 28.12.2006 17:25 Modification date: 28.12.2006 17:25</p> <p>Owned by: Editor Demo Modified by: Editor Demo</p>
<p>Include</p> <p># from my personal address book lorem@ipsum.com dolor@sit.com amet@donec.com</p> <p># from my office database dolor@amet.com sinec@lorem.com</p>	<p>additional list of emails (add one email per line).</p> <p>NOTE: the mailing system, before sending, will remove all email duplicates inside a mailing list.</p>
<p>Exclude</p>	<p>list of emails you want to manually exclude from this mailing list (add one email per line).</p>

[insert mailing list](#)

description of "Distribution list" form fields

- specific actions depending on the section or module (specific operations)

→ "newsletter" module: send a newsletter

newsletters are sent from "Management of mailing campaigns" section the requirements for sending newsletters are:

- Have Newsletter module editor privileges.
- Have at least one distribution list.

to access to the campaign management click on the link "Management of mailing campaigns":

how to manage the e-mailing

<p>@ Management of mailing lists</p> <p>➤ Management of mailing campaigns</p> <p>☐ Setup of your mailing system</p>	<p>E-Mail Marketing</p>
---	--------------------------------

the campaigns management is carried out from the section "Marketing e-mail" you will find in the central area of GenB.

by pressing the link "Management of mailing campaigns" we access to the listing of existing campaigns, in the foot page you will find also the link "Campaign incorporation form":

Campaigns from 1 to 5 of a total of 5

Description	Subject	State	Starting	End	Sends	Creation date	Modif. date
<u>Enviament de Tasques</u>	inte: tasques	finalized	18.12.2006	18.12.2006	12	24.05.2006	18.12.2006
<u>GenB newsletter [cat]</u>	GenB newsletter	finalized	09.05.2006	09.05.2006	366	08.05.2006	09.05.2006
<u>GenB newsletter [eng]</u>	GenB newsletter	off	00.00.0000	00.00.0000	0	08.05.2006	20.12.2006
<u>GenB newsletter [cas]</u>	GenB newsletter	standby	00.00.0000	00.00.0000	0	08.05.2006	03.08.2006
<u>Testing</u>	circular GenB	off	03.08.2006	03.08.2006	2012	08.05.2006	18.08.2006

[Campaign incorporation form.](#)

the 5 steps of an e-mailing

Campaign form.

Stages in the management of this campaign

1. Configure the campaign
2. Prepare the recipients queue.
3. Sending tests.
4. Start/Stop the sending process.
5. Campaign finalized.

save this campaign configuration
 prepare mailing queue
 save as a new campaign
 remove this campaign

1. configure the campaign

Campaign form.

Stages in the management of this campaign

1. Configure the campaign
2. Prepare the recipients queue.
3. Sending tests.
4. Start/Stop the sending process.
5. Campaign finalized.

Creation date: 08.05.2006 19:16
Modification date: 20.12.2006 22:13

Owned by: Editor Demo
Modified by: Editor Demo

Description

From (name) From (email)

Reply to (name) Reply to (email)

Subject

html format individualized campaign

Body

Link when body comes from web page Complete URL address of your web page used as body

Send message to selected mailing lists

- Subscriptors [cas]
- Subscriptors [cat]
- Subscriptors [eng]
- GenB demo
- Tasques Inte

[Display the mailing-server options](#)

[show the log of events](#)

use this drop down menu to select the action and press the 'ok' button

the first step in the process is campaign configuration. In this stage, format and contents of the email mailing are decided.

form field description:

Description: [required] field to be used internally to reference by name this campaign.

From (name): [required] descriptive name that accompanies the sender's e-mail address.

From (email): [required] sender's e-mail address.

Reply to (name): [required] descriptive name that accompanies the reply-to e-mail address.

Reply to (email): [required] reply-to e-mail address.

Subject: [required] Text that will head the e-mail with the newsletter sent.

html format: [optional] when selecting this option, we will inform to the mailing server that our message contains html code.

individualized campaign: [optional] when selecting this option, we will inform to the mailing server that each sent message needs to be referenced with the receiver GenB data

Mailing server options

Hide the mailing-server options

SMTP Server	<input type="text" value="mail.demo.eu"/>	Name of the Mail Exchanger, for example mail.domain.com The mailing system needs a SMTP Mail Exchanger to be able to deliver the emails
SMTP Port	<input type="text" value="25"/>	The default port number for SMTP servers is 25
SMTP server requires authentication	<input checked="" type="checkbox"/>	
SMTP User	<input type="text" value="global@demo.eu"/>	Account ID and password for your SMTP server when it requires authentication.
	SMTP Password	<input type="password" value="*****"/>

Usually are the same settings you use for your receiving mail server.

save this campaign configuration

2. Prepare the recipients queue

- save this campaign configuration
- ✓ prepare mailing queue
- save as a new campaign
- remove this campaign

3. Sending tests.

Correct operation:
The preparation of the queue of email recipients has finished.

<p>Stages in the management of this campaign</p> <ol style="list-style-type: none"> 1. Configure the campaign 2. Prepare the recipients queue. 3. Sending tests. 4. Start/Stop the sending process. 5. Campaign finalized. 	<p>Creation date: 08.05.2006 19:16 Modification date: 30.12.2006 14:10</p> <p>Owned by: Editor Demo Modified by: Editor Demo</p>
<p>State of the campaign standby</p> <p>Processed messages 0</p> <p>Queued messages 77 view queue of recipients</p> <p>Total messages 77</p>	
<p>Description <input type="text" value="GenB newsletter [eng]"/></p>	
<p>Send test to <input type="text" value="demo@demo.eu"/> Number of emails to send <input type="text" value="1"/> [from 1 to 10]</p>	
<p>+ show the main data of the campaign</p> <p>+ Display the mailling-server options</p>	
<p><input type="button" value="send test message"/> <input type="button" value="ok"/> refresh displayed data</p>	<p>use this drop down menu to select the action and press the 'ok' button</p>
<p>+ show the log of events</p>	

description of "Sending tests" form fields

Correct operation:
Sending process started.

<p>Stages in the management of this campaign</p> <ol style="list-style-type: none"> 1. Configure the campaign 2. Prepare the recipients queue. 3. Sending tests. 4. Start/Stop the sending process. 5. Campaign finalized. 	<p>Creation date: 08.05.2006 19:16 Modification date: 30.12.2006 14:10</p> <p>Owned by: Editor Demo Modified by: Editor Demo</p>
<p>State of the campaign sending</p> <p>Processed messages 30</p> <p>Queued messages 77 view queue of recipients</p> <p>Total messages 77</p>	
<p>Description <input type="text" value="GenB newsletter [eng]"/></p>	
<p>+ show the main data of the campaign</p> <p>+ Display the mailling-server options</p>	
<p><input type="button" value="stop the mailing delivery"/> <input type="button" value="ok"/> refresh displayed data</p>	<p>use this drop down menu to select the action and press the 'ok' button</p>
<p>+ show the log of events</p> <p>+ show the errors log</p>	