CbMailing – User Guide

CbMailing version to which this document relates: 2.3

What is it?

It is a Joomla! component add on to the Community Builder (CB) system intended to allow flexible e-mailing to defined user lists.

It currently works with the Joomla! 1.0.X stream.

How is it used?

In summary, the site administrator must install the component into an already working Joomla! and CB system. Next, he/she will need to define one or more CB lists. Then he/she needs to configure CbMailing according to his/her needs. Next, some permissions need to be created (within CbMailing) to allow members of CB list X to send to members of CB list Y (X and Y could be the same). Lastly, the site administrator can choose to enable the front end so that registered users (or whoever is deemed appropriate with front end access) can access the CbMailing facility.

Installation

CbMailing 2.3 is installed as a standard Joomla! 1.0.X component, that is using "Installers" / "Components". Once installed successfully, it will be listed in the installed components list and will add a new menu to the administrator Components menu. This menu has three options: "Send mailing", "Manage permissions" and "Configure".

Configuration

There are many ways in which a mailing system that interacts with CB *could* work, so a number of configuration options have been devised for CbMailing to allow it to be a flexible as possible (or as possible as time allows for an open source software project).

The configuration is split in to three sections: front end controls, mailing method controls and debug controls.

Front end controls

The settings that *only* affect the behaviour of CbMailing when accessed via the Joomla! front end (that is, just the sending of an e-mail to a list), are:

> "*Allow attachments*" – it may not be desirable to allow front end users the option of adding an attachment to e-mails sent out. Back end CbMailing users are always allowed to add an attachment, where the hosting system permits this (there is a PHP setting

"file_uploads" that may prohibit the use of attachments for all types of CbMailing access).

"*Allow HTML*" – some system administrators do not like HTML formatted e-mails to be sent, so CbMailing offers the site administrator the opportunity to stop HTML being sent. If a user enters HTML entities (sometimes referred to as "tags" – this may not be correct use of the term tag, but it is not the role of this document to correct this!) and HTML mode is not selected, those entities will be removed.

"*Allow signature override*" – one facility CbMailing offers is to define a "system wide" e-mail signature. There can be some good reasons for stopping front end users from being able to remove this from outgoing e-mails.

Mailing mechanism

There are a number of controls available over how e-mails are sent out to users, where "how" relates to the internal mechanisms used for e-mail delivery. There are several factors that affect why a particular combination of settings might be appropriate which include (but are almost certainly not limited to):

- the server's PHP configuration. Most, if not all, hosting providers implement some form of PHP processing overhead management that means that PHP scripts will only be able to run continuously for a limited period of time before either the PHP Zend engine, the web server or even some other mechanism simply stops the processing ungracefully. Depending how e-mail delivery is configured in the environment, it may be that, for example, attempting to send individual e-mails to a large number of recipients exceeds this processing limit, in which case, choosing the option to send one e-mail only to all recipients is less likely to suffer the same problem.
- E-mail delivery configuration. This can be configured in many places (outside of CbMailing): within Joomla!, within an e-mail server hosted on the same physical (or virtual) server as the web server or on another system entirely. The configuration may not allow attachments, may limit the numbers of destination addresses in the To: and BCC: fields, may prohibit simple address spoofing (such as making the apparent sender's address one in a domain entirely outside of the hoster's environment, say) and so on.

The choice of the following settings should take into account the above (and probably other) factors, although eventually some actual experimentation may be required to determine what works for a given site and server / PHP / web server / Joomla! configuration.

The settings CbMailing allows to control over the delivery mechanisms are as follows:

Method "*One e-mail for the whole list*" - This specifies that when the e-mail is sent, only one e-mail is actually sent with the list of recipients defined in the To: and BCC: fields. This is useful where PHP processing times are limited since it is much quicker to prepare

and send one e-mail with 100 recipients than it is to prepare and send 100 e-mails with one recipient each. However, this option may not work in all environments, such as those where the number of recipients in To: or BCC: is limited (by externally configured factors).

Method "*One e-mail per list entry*" – This specifies that when the e-mail is sent, each recipient receives an e-mail specifically to them. This option is useful where it is necessary to have the recipient's address in the To: field, but where it is not desired to have all the other recipients' addresses revealed to each other. The downside is that with large lists, later recipients in the list may not receive an e-mail because the PHP script processing takes too long and is terminated by system process management controls (see earlier discussion).

Send from "*The person logged in*" - This specifies that when the e-mail is sent, the e-mail appears to come from the person logged in. This is useful where e-mail clients do not use "reply to" specified addresses (some auto-responders do this).

Send from "*A specific address*" – This specifies that when the e-mail is sent, it appears to come from the address details that are specified in the adjacent boxes. This is useful where one or more mail servers do not allow spoofed sending addressed to be used and thus the sending e-mail address in the site's own DNS domain must be used.

Reply to "*No one*" – It is not required to specify a reply to address, so setting this to no one allows this to remain undefined.

Reply to "*The person logged in*" - This specifies that when the e-mail is sent, the e-mail appears to come from the person logged in. This is useful when you have to specify a From address within the site's own DNS domain (perhaps for anti-spam control reasons) but wish to have replies sent back to the person logged in and sending the e-mail via CbMailing.

Reply to "*A specific address*" – This specifies that when the e-mail is sent, is appears to come from the address details that are specified in the adjacent boxes. This is useful where it is desired to have replies coming back to one address, perhaps for auditing or control reasons.

Send to "*The list addresses*" - This specifies that when the e-mail is sent, the e-mail's To: is populated with addresses from the selected list. Where only one e-mail is being sent (see above, "Method"), then the To: field is compiled as a single list containing all the recipient addresses. When one e-mail per list entry is selected,

each successive e-mail sent has a single To: recipient set to be the next person in the user selected list.

Send to "*A specific address*" – This specifies that when the e-mail is sent, it is sent to the address details that are specified in the adjacent boxes. This is necessary when using the BCC settings to deliver to list entries, as there must be a recipient address defined in the To: field of the e-mail.

BCC recipients "*No one*" – It is not required to specify any blind carbon copy addresses, so setting this to no one allows this to remain undefined.

BCC recipients "*The list addresses*" - This specifies that when the e-mail is sent, the e-mail is silently sent to the e-mail addresses contained in the user selected list. This is useful where it is not desired for recipients to see each other's e-mail addresses. If the method selected (see above) is one e-mail for the whole list, then a list of address is compiled and inserted in the BCC: field. If the method selected is one e-mail per user, then each successive e-mail has the next entry in the list specified in the BCC: field.

BCC recipients "*A specific address*" – This specifies that when the e-mail is sent, it is sent to the address details that are specified in the adjacent boxes. This is useful where it is desired to a copy of the e-mail always to one address, perhaps for auditing or control reasons.

Multiple e-mail addresses – Community Builder allows any number of additional e-mail address fields to be defined for a user. This option specifies whether CbMailing is to attempt to send to all the e-mail addresses defined for each user. *Note: CB itself does no checking on the validity of such additional e-mail addresses, so mail delivery mail fail for unclear reasons if a user has defined one of these e-mail addresses in a particular invalid way that the underlying (non-CbMailing) mailing processes are unable to handle. CbMailing also does no validity checking since this is considered to be to big a processing overhead and, logically, should really be the role of CB to do (i.e. to only allow validly formatted e-mail addresses to be entered into e-mail address defined fields).*

Signature – This specifies that when the e-mail composition form is presented to the user, it is pre-populated with a site standard signature. If the earlier option for front end users is set such that the signature cannot be overridden, the signature is merely displayed below the message entry box and is automatically appended to the message when the message is prepared for sending.

Include blocked users – This specifies that when the e-mail is sent, e-mail addresses corresponding to blocked users are still included in the recipient list. This is useful where a site administrator does not want certain recipients to be able to log in, but still wants to include them in the e-mail list. If the site allows users to send themselves a new password, then simply setting an unknown password is not sufficient to keep them from logging in – blocking them seems to be the only way.

Debugging

As there are quite a few options for setting how mail delivery is achieved, having some visibility of what is happening would seem to be useful to the site administrator. To this end, there is the option to have a silent debug copy of all e-mails sent to a specified address. The debug configuration options are:

Send a debug copy of e-mail? – Ticking this option enables the silent sending of a copy of every e-mail to the specified address.

Send from "*Address, name*" – This specifies that when the debug e-mail is sent, these are the address details to use as the apparent sender.

Send to "*Address, name*" – This specifies that when the debug e-mail is sent, these are the address details to use as the recipient.

Title of debug copy of e-mail – This specifies that when the debug e-mail is sent, what the subject should be set to.

To aid debugging, there is a facility within the administration "Manage permissions" function to display a list of who can e-mail whom.

Some example configuration combinations

If the hosting server *does* limit PHP execution times, the user lists are long and the all users know each other, then configuring CbMailing as follows would be appropriate:
    Method – one e-mail for the whole list
    From – the logged in user
    To – the list
    BCC – no one
    Reply to – no one

If the hosting server does not limit PHP execution times and there are no, or weak, anti-spam measures, then:
    Method – one e-mail per list entry
    From – the logged in user
    To – the list
    BCC – no one
    Reply to – no one

If the hosting server *does* limit PHP execution times, the user lists are long, the users do not know each other and anti-spam (e-mail address

spoofing) measures are in place, then configuring CbMailing as follows would be appropriate:

       Method – one e-mail for the whole list
       From – a specified e-mail
       To – a specified e-mail
       BCC – the list
       Reply to – the logged in user

Managing Permissions

The ability to e-mail several or larger numbers of users at the same time should almost certainly be restricted to limited numbers of users of the site. To that end, CbMailing implements a relatively simple system of permissions management: users belonging to one CB list can be permitted to use CbMailing to e-mail members of other CB lists (including their own if desired). The membership of the lists themselves is entirely managed using the standard CB list management tool and not within CbMailing.

The following screen shot shows a system with a number of permissions already configured:

The CbMailing part of the screen is divided in to two areas: the upper part showing existing permissions and the lower part where new permissions are selected.

In the upper region, users who are members of the list in the left hand column can e-mail to the list on the same line in the right hand column. For example, in the site shown above, members of "A Coaches" and "E-mail All" may e-mail to the "A Coaches" list.

To remove an existing permission, tick the check box on the relevant permission line and click the Delete button (top right).

To add a new permission, select the list to which users belong that may do the sending in the list on the left in the lower part of the screen, select the list to which the first list may send on the right and then click the Save button (top right). It will be noticed that there are more list entries in the left hand list box than in the right. This is because CbMailing includes CB lists that are *not* published for the list able to gain the permission, in order to allow the creation of lists that are not visible to front end users, but that can still be managed using the standard CB list management tool. In the example above, the list "E-mail All" is not a published list and thus cannot be seen from the front end using standard CB features, but if the user logged in (to the Joomla! front end) is a member of the "E-mail All" list, then he / she can e-mail the "Members List", the "A Coaches" and "B Coaches" lists. In this example site, "E-mail All" membership is defined by whether a CB field called "Member of E-mail All" (a CB tick box field) is ticked. This CB field is set not to be visible to the users and is thus only under the control of back end users.

In version 2.3, a new facility was introduced to help the system administrator check that the permissions work as expected. By ticking one or more check boxes on the permissions line, a button labelled "List members" (top right) is available that will show the from and to details for each of the selected permissions. Be advised that the output is not paged, so all the results will appear on one page. If many permissions lists are selected or the contents of a list are long, this will take long to process and make the results page, itself, long. If the option of mailing multiple e-mail addresses is enabled, these will be shown, too, on the same line as the name, username and primary e-mail address of the relevant users.

Making CbMailing available to the front end

CbMailing is a component that does have (optional) front end access. If front end access is not provided then only back end users can e-mail to the permissions lists defined.

To enable CbMailing front end access, simply create a menu link to a Component and choose CbMailing as the component.

Sending e-mails

The form to send an e-mail is simple in that only the following fields need to be completed:

- The CB list to which the e-mail will be sent. This should only show those lists to which the logged in user has CbMailing permissions allocated (derived by looking at the lists to which that user belongs himself/herself).
- A tick box to set if HTML formatting included in the text is to be preserved.
- The subject.
- If attachments are available and permitted (control of which only applies to the front end), then the local browser's system's path to the file (along with a file chooser button). A message is also displayed with the expected maximum attachment file size included – this is the size as stored on the source computer as opposed to when attached (which will almost certainly grow due to MIME encoding).
- The message text including the signature text, except in the front end if the signature has been set not to be over ridden. In the latter case, the signature text is displayed below the message text box and appended to the e-mail when CbMailing compiles and sends it.

Clicking the Send button (top right) sends the mail (after uploading an attachment if there is one). In the standard Joomla! message location, there should be a display along the lines of "Number of users to whom e-mail was sent: X (Total in list: Y/Z)" where X is the number of recipients in the list where CbMailing deems sending was successful. If "/Z" is displayed then Y is the number of users, Z is the total number of defined e-mail addresses to which delivery was attempted. For example, if there were 10 users in the system and there were three additional CB e-mail address fields defined, but only 2 users had set any value (and in all three), then Y would be 10 and Z would be 16 (10 + 2 * 3).

Translation

For those implementers wishing to translate CbMailing to something other than UK English, then they should refer to
`…/components/com_cbmailing/language/default_language/default_language.php`
where all displayed strings are contained.

In version 2.3, a French (fr-FR) translation was first provided, thanks to Lionel Charrier.