LISTSERV® 16.0
Customization Manual

www.lsoft.com

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Preface

Every effort has been made to ensure that this document is an accurate representation of the functionality of LISTSERV®. As with every software application, development continues after the documentation has gone to press so small inconsistencies may occur. We would appreciate any feedback on this manual. Send comments via email to: MANUALS@LSOFT.COM

The following documentation conventions have been used in this manual:

- Menus, options, icons, fields, and text boxes on the screen will be bold (e.g. the **Help** icon).

- Clickable buttons will be bold and within brackets (e.g. the **[OK]** button).

- Clickable links will be bold and underlined (e.g. the **Edit** link).

- Directory names, commands, and examples of editing program files will appear in `Courier New` font.

- Some screen captures have been cropped and/or edited for emphasis or descriptive purposes.

- This symbol denotes a new feature for LISTSERV 16.0.

Unicode (UTF-8) Support, Phase 1

A major new feature in LISTSERV 16.0 is the implementation of the first phase of Unicode support. LISTSERV's Unicode support is based on UTF-8 encoding. The long-term goal is for everything in LISTSERV to be a UTF-8 encoded string unless explicitly tagged otherwise. Because this is not a simple implementation, and because going to UTF-8 will undoubtedly break some customer scripts and applications, the road to full support for UTF-8 will be an ongoing, careful journey.

The first phase of the implementation revolves around these areas: the template processor, the message (job response) code, archive searches, and individual commands with support for UTF-8 (for now, only the LIST command is affected). The next phases will continue to roll out with the upcoming versions of LISTSERV.

Section 1 LISTSERV Template Types

1.1 Skins

SKIN is an advanced configuration template. When entering any section of the Web interface, this template is processed before anything else is rendered on the page. The majority of SKIN should not be edited by users. It contains default settings for the Web interface, URLs used by the navigational system, and other internal variables required for proper functioning of the Web interface. Some options can be customized by the site administrator. These include whether or not login cookies should expire, whether or not mail-merge features should be made available, and whether or not list owners should have a support link available on their dashboards. All icons are also defined in SKIN, which can be customized if desired.

In addition, the Global Skins (SKIN) template now contains an option to force the browser to use a specific character set for cases where the browser's auto-detect feature fails to use the correct character set. This variable, DEFAULTCHARSET, can be defined for the site as a whole or for particular lists that are known to use a specific character set. To set, simply change the default setting of 0 to the appropriate charset, such as ISO-8859-5.

Figure 1-1 Global Skins Template

1.2 Stylesheet

STYLESHEET-GLOBAL contains the CSS used by the Web interface. This template can be customized by the site administrator, and is where fonts, colors, backgrounds, and other non-graphical site-wide elements can be changed.

1.3 Entry Pages

The entry pages (usually named –MAIN, which are often used to contain the template code for the entire section in previous versions of LISTSERV) are now used to only set variables that instruct WA which components to use when rendering the page. These pages should not be edited for customization purposes.

1.4 Layout Templates

The layout templates, which begin with the prefix LAYOUT-, are global templates that determine the makeup of every section of the Web interface. They are high-level templates that define where to insert various components, such as headers, trailers, navigation bars, and list selectors.

See Section 3.1 Global Layout Templates for more information on these templates.

1.5 Body Templates

The body templates, which begin with the prefix BODY-, can be either global or section-specific. They determine the appearance and makeup of components used throughout the Web interface. Some of the BODY templates are highly relevant for customization, particularly the global ones. Virtually all customization can be done in LAYOUT and BODY templates, combined with the stylesheet. Examples of useful BODY templates are BODY-GLOBAL-HEADER (contains the LISTSERV top banner), BODY-GLOBAL-TRAILER (contains the bottom banner) and BODY-GLOBAL-NAV-MAIN (contains the main navigation bar).

See Section 2.1 Global Header Template, Section 2.2 Global Trailer Template, and Section 3.8 Global Navigation Templates for more information on these templates.

1.6 Object Templates

The object templates, which begin with the prefix OBJECT-, can be either global or section-specific. They are advanced templates and contain components that allow users to interact with WA. Examples include checkboxes, pull-down menus, buttons, links, and table-rendering code. Many OBJECT templates contain advanced processing logic and conditions. OBJECT templates should not be edited for customization purposes.

1.7 Text Templates

The text templates, which begin with the prefix TEXT-, contain virtually all the text used throughout the Web interface. Unlike previous versions of LISTSERV where text was interspersed with the HTML code, LISTSERV has now separated all text from the design, allowing site administrators and list owners to translate pages in one place, without having to search for the text among HTML code. TEXT-GLOBAL contains text variables used throughout the Web interface. These variables include the text in the navigation bar, the list selector, error messages, and other common phrases and words. In addition,

each section has its own section-specific text template, which contains only the text used by that section.

1.8 Login Templates

The login templates are global templates that can be customized by the site administrator. They contain the text, fonts, colors, and other formats that can be changed for the login and password pages of the Web Interface.

1.9 Archive Templates

The archive templates contain the text, fonts, colors, and other formats used throughout the LISTSERV Archives.

1.10 Help Templates

The help templates, which begin with the prefix HELP-, instruct WA which helptext to display for each section. They don't contain the text itself and should not be edited.

1.11 Helptext Templates

The helptext templates, which begin with the prefix HELPTEXT-, contain the actual text that is shown when the user clicks on the **Help** icon for a section/page or for a specific field. Each section of the Web interface has its own helptext template. If customization or translation of helptext is desired, then these are the templates where it can be done.

1.12 HTML Newsletter Templates

The default HTML templates, which begin with the prefix HTMLMAIL, contain pre-defined formats for newsletters. See Section 4 Creating Customized Newsletters for information on using these templates.

Section 2 Useful Templates for Customization

Most customization involves changing certain site-wide elements to coincide with an organization's colors and graphical profile. With LISTSERV, this can be done by changing a small number of global templates. This section gives examples of some of the more common customization tasks and the templates in which it can be done.

2.1 Global Header Template

The Global Header template (BODY-GLOBAL-HEADER) contains the top banner. Many organizations like to maintain a uniform graphical profile and wish to customize their LISTSERV servers with their own top banners. The contents of this template can be replaced in its entirety with a custom banner. The one aspect to consider is that the banner also embeds a Help icon (+IM OBJECT-GLOBAL-HELP), which offers users access to section-specific help. Organizations who intend to replace the entire top banner should consider incorporating this icon into their own banners to continue providing users with the same option.

Figure 2-1 Global Header Template

Note: The navigation bar is completely separate from the top banner, which means that customizing this template does not affect the functionality of the menus.

2.2 Global Trailer Template

The Global Trailer template (BODY-GLOBAL-TRAILER) contains the bottom banner, which contains the name of the LISTSERV server and the icons for LISTSERV, CataList, and the integrated F-Secure Anti-Virus service, if available. As with BODY-GLOBAL-HEADER, the bottom banner can be replaced in its entirety with a custom bottom banner.

Figure 2-2 Global Trailer Template
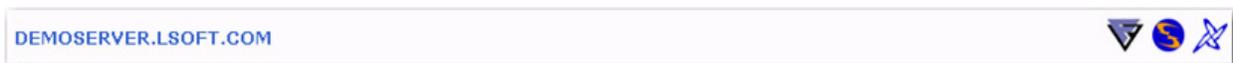
2.3 Global Help Header Template

The Global Help Header template (BODY-GLOBAL-HELP-TOP) contains the top banner for all section-specific help pages. This template can be edited to give all the help pages a custom look.

Figure 2-3 Global Help Header Template

2.4 Global Stylesheet Template

All non-graphical HTML elements of the Web interface are controlled by one global stylesheet. This stylesheet (STYLESHEET-GLOBAL) can be fully customized to change fonts, colors, sizes, backgrounds, and so on.

Note: The font sizes can be controlled by each individual user though the **Preferences** section. In order to maintain this functionality, font size changes should be set using the FONTSIZE variables in SKIN instead.

2.5 Global Text Template

If an organization wants to translate all or parts of the Web interface into another language, then the best place to start is this template. The Global Text template (TEXT-GLOBAL) contains global text variables used throughout the Web interface. Each text variable is on its own line. Each line starts out with the name of the variable in uppercase letters followed by the text that is inserted every time the variable is called. The names of the variables should not be changed, only their values. Even if organizations do not intend to do translating work, this template contains two variables in particular that can be useful to customize. T-DEFAULTTITLE is the text that is inserted inside the <TITLE> tag on all pages and is displayed in the browser. T-DEFAULTDESC allows organizations to insert a description of the LISTSERV site. If defined, this description is shown on the server archive index page, right after the server name. This is a good place to describe your organization, terms and conditions of the service, or display contact information.

2.6 Body of Server Archive Index Template

The Body of Server Archive Index template (BODY-AI) controls the appearance of the server archive index, which also acts as the home page for the LISTSERV server.

Figure 2-4 Body of Server Archive Index Template

2.7 Body of Archive Index Page Templates

These templates (BODY-A1 and BODY-A1-BOTTOM) control the appearance of the list archive index, which also acts as the home page for the list. This template can be customized for the entire site or on a list-by-list basis.

Figure 2-5 Body of Archive Index Page Template
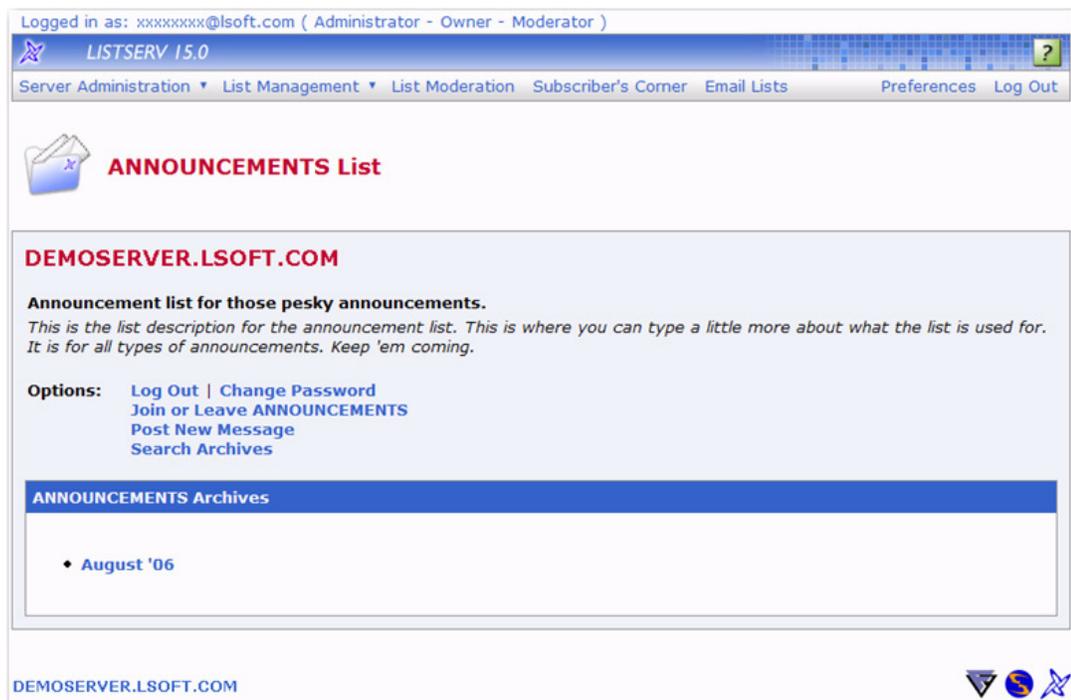
Section 3 Templates for Advanced Customization

M ost basic customization can be done using the templates described in Section 2 Useful Templates for Customization. For more advanced users, the following templates provide further possibilities. Solid knowledge of HTML and template processing directives is required for some of the more advanced customization tasks.

3.1 Global Layout Templates

The Global Layout templates (LAYOUT-GLOBAL, LAYOUT-GLOBAL-TOP, LAYOUT-GLOBAL-BOTTOM, and LAYOUT-GLOBAL-HELP) define how and where BODY template components are inserted. LAYOUT-GLOBAL provides a high-level structure for all sections of the Web interface. LAYOUT-GLOBAL-TOP and LAYOUT-GLOBAL-BOTTOM do the same for sections that are divided into a top and a bottom, where data is inserted after the top portion and before the bottom. LAYOUT-GLOBAL-HELP provides a high-level structure for the help pages. Editing the global LAYOUT templates can be useful if organizations want to remove sections of the Web interface altogether (for example, removing the bottom banner from being shown on any page), or if they want to rearrange the order in which the BODY components are inserted. LAYOUT templates are also useful if organizations want to add their own custom content blocks, such as additional banners, disclaimers, instructions, or contact information. If content is added into the global LAYOUT templates, then it will be inserted in the same place on every section of the Web interface.

LAYOUT-GLOBAL: Basic Order of Content Blocks

```
<html>
<head>
<title>&+T-DEFAULTTITLE; - &+BROWSER-TITLE;</title>
+IM &+STYLE; - Stylesheet (STYLESHEET-GLOBAL)
+IM &+JAVASCRIPT; - Javascript (JAVASCRIPT-GLOBAL)
</head>
<body>
+IM &+LOGGEDIN; - Login Info (BODY-GLOBAL-LOGGEDIN)
+IM &+HEAD; - Header (BODY-GLOBAL-HEADER)
+IM &+MENU; - Navigation Bar (BODY-GLOBAL-NAV-MAIN)
+IM &+PAGETITLE; - Page Title and Icon (BODY-GLOBAL-PAGETITLE)
+IM &+BODY-MESSAGE; - LISTSERV Status/Error Messages
+IM &+BODY-GLOBAL-LISTSELECTOR; - List Selector
+IM &+BODY-OPTIONS; - Checkboxes and Options
+IM &+BODY-TEMPLATE; - Main Content
+IM &+WTRAILER; - Trailer (BODY-GLOBAL-TRAILER)
+IM &+MENUBOTTOM; - Pull-Down Menus (BODY-GLOBAL-NAV-MAIN-BOTTOM)
</body>
</html>
```

3.2 Global Tabs and Global Body for Tabbed Pages Templates

These global BODY templates (BODY-GLOBAL-TAB and BODY-GLOBAL-TABBODY) determine the appearance of tabbed pages. The TAB template contains the HTML and logic for drawing the tabs themselves, while TABBODY contains the body below the tabs.

Note: The TAB template is particularly advanced because of the conditional logic for determining which tabs are active and how the surrounding tabs should be drawn based on where the active tab is located.

Figure 3-1 Global Body for Tabbed Pages Template

3.3 Global Steps and Global Body for Stepped Pages Templates

These global templates (BODY-GLOBAL-STEP and BODY-GLOBAL-STEPBODY) determine the appearance of pages with steps (currently only the List Creation section). As with tabbed pages, the STEP template contains the steps themselves, while STEPBODY contains the content area below the steps.

Figure 3-2 Global Body for Stepped Pages Template
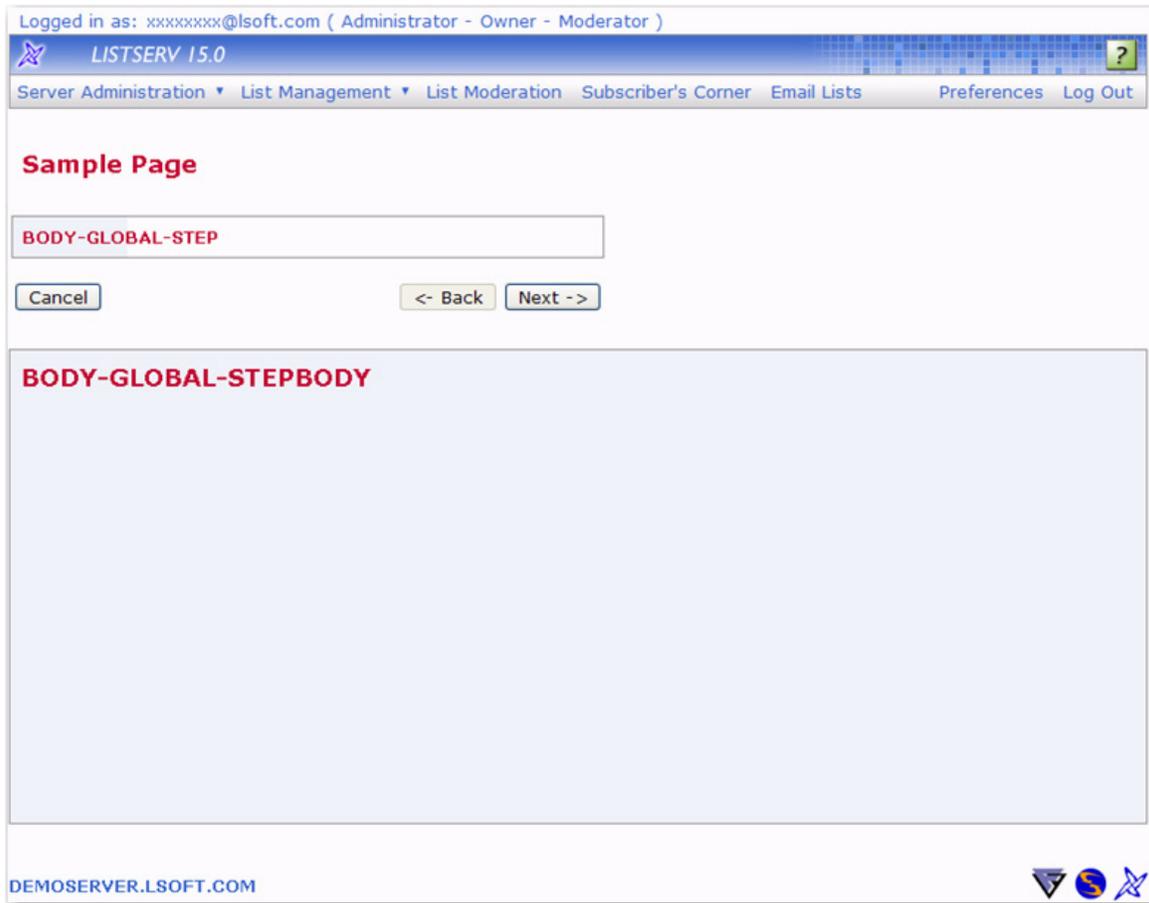
3.4 Global Body for Untabbed Pages and for Untabbed Pages (Divided) Templates

These global templates (BODY-GLOBAL-NOTABBODY and BODY-GLOBAL-NOTABBODY-UNENDED) determine the appearance of pages without tabs or steps, which is the majority of the Web interface. The UNENDED template is used by sections that contain a top and bottom, where data is inserted after the top portion and before bottom.

Figure 3-3 Global Body for Untabbed Pages and for Untabbed Pages (Divided) Template
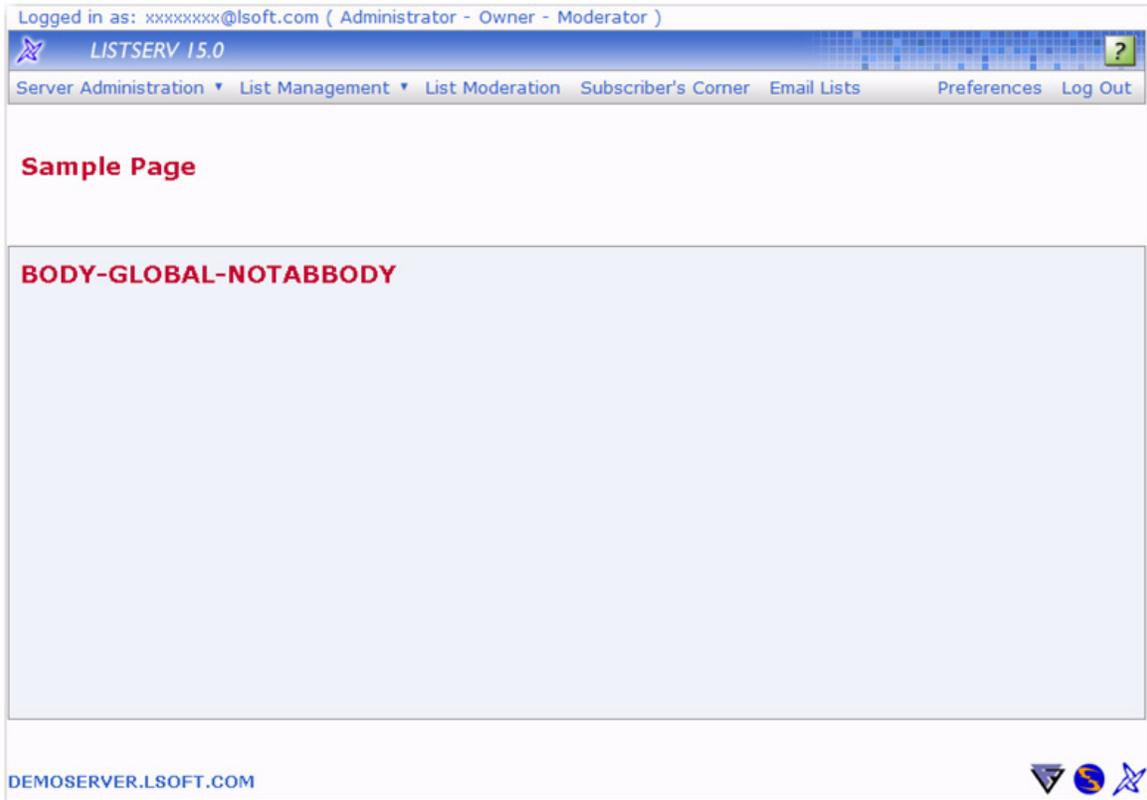
3.5 Global Body for Blank Pages and for Blank Pages (Divided) Template

These global templates (BODY-GLOBAL-BLANK and BODY-GLOBAL-BLANK-UNENDED) determine the appearance of pages that are not boxed or surrounded by any tables. The UNENDED template is used by sections that contain a top and bottom part.

Figure 3-4 Global Body for Blank Pages and for Blank Pages (Divided) Template
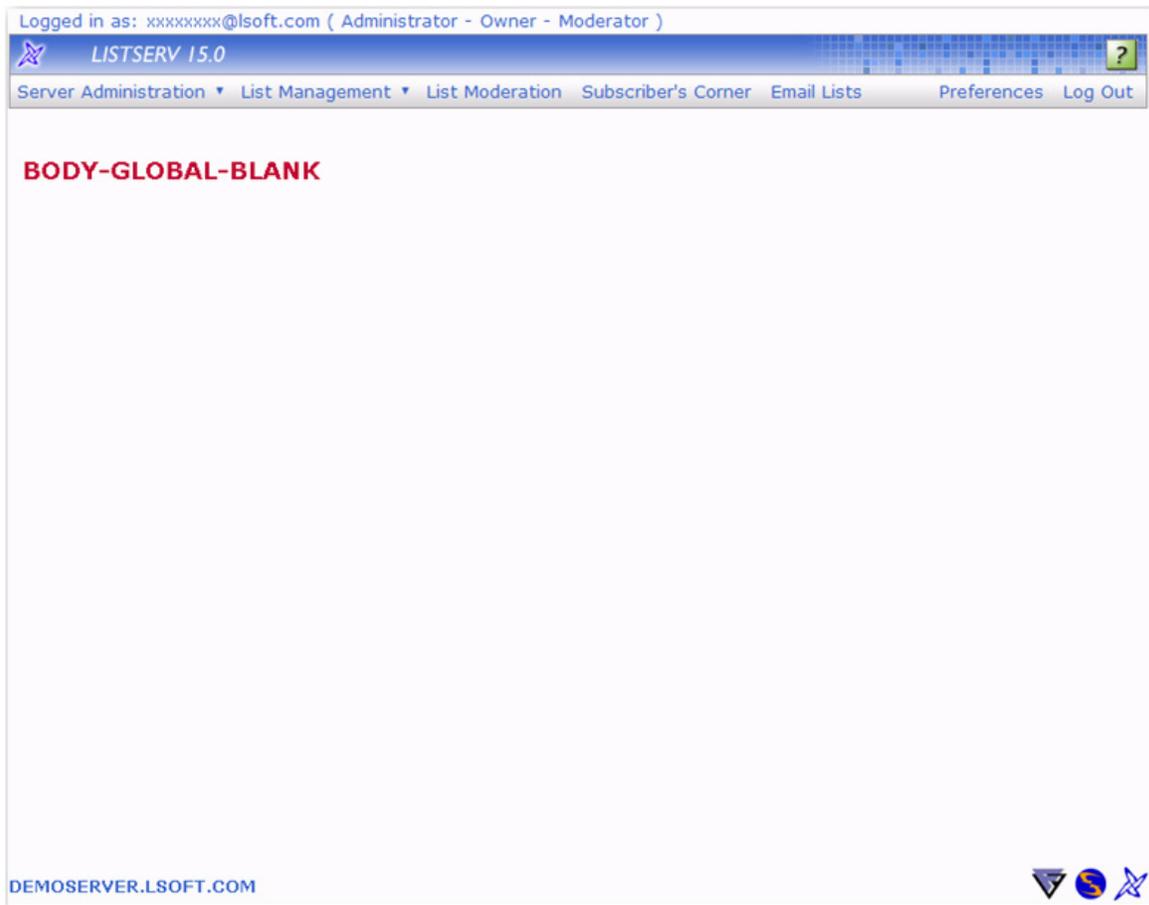
3.6 Global Body for Boxed Pages Template

This global template (BODY-GLOBAL-BOX) contains the design of boxed pages, which include the Register LISTSERV Password, Change Password, and Login screens.

Figure 3-5 Global Body for Boxed Pages Template

3.7 Global Tables for Dashboards Templates

These global templates contain the design for the Server Administrator and the List Owner dashboards. BODY-GLOBAL-DASHBOARD contains the outer table, while BODY-GLOBAL-DASHBOARD-TABLE contains the inner component tables.

Figure 3-6 Global Tables for Dashboards Templates
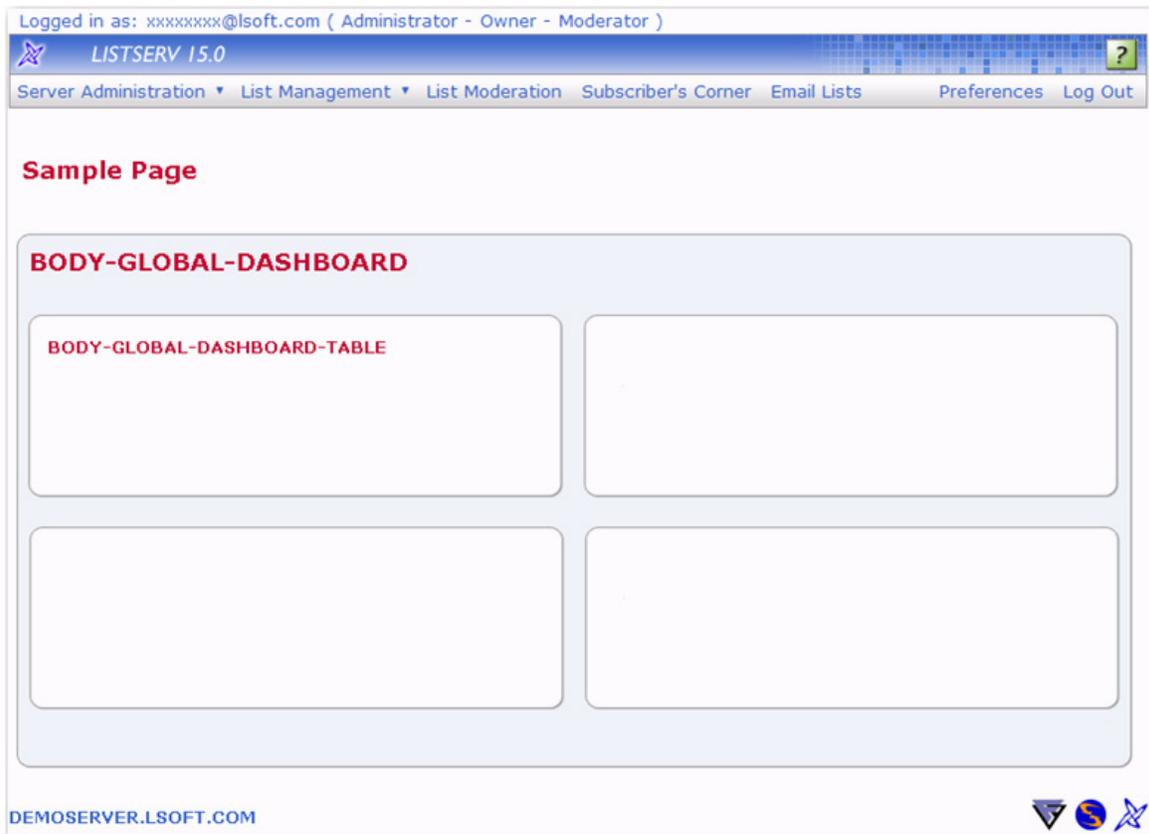
3.8 Global Navigation Templates

The Global Navigation template (BODY-GLOBAL-NAV-MAIN) contains the top-level navigation bar.

Figure 3-7 Global Navigation Template

Note: The actual menus are located in individual OBJECT-GLOBAL-NAV- templates and are embedded by the Global Navigation Pulldowns template (BODY-GLOBAL-NAV-MAIN-BOTTOM).

3.9 Global Login Information Template

This template (BODY-GLOBAL-LOGGEDIN) contains the part at the top of each page where the user's email address and privileges are spelled out.

Figure 3-8 Global Login Information Template

3.10 Global Page Title Object Template

This template (BODY-GLOBAL-PAGETITLE) is inserted at the top of each page and displays the section header, any active list names, and the corresponding icon.

Figure 3-9 Global Page Title Object Template

Section 4 Creating Customized Newsletters New

Creating professional looking HTML messages is easier than ever with the HTML Editor in LISTSERV 16.0, which comes with ready-to-use content templates that let you fill in the predefined areas with your own text and images.
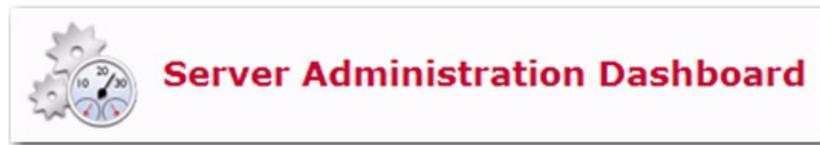
To access the Newsletter Template wizard, go to the List Archives screen, the Archives Index screen, or the Archive Browsing screen for the list you want to post the newsletter to, and then click on the **Newsletter Template** option.

4.1 Selecting a Template

To select a newsletter template, click the **[Select]** button associated with the template you want to use as your content. The Select Template screen will refresh with the selected template displayed in the **Template Selected** box.

To edit a template, click the **Easel** icon. The Edit Newsletter Template screen opens, which is where you can make any changes necessary.

Notes: If you decide to edit an existing, default newsletter template on this screen, then you will no longer be able to edit colors on the Content Definition screen. Any color modifications should instead be done on this screen.

You can also edit the default templates using the Web Template Editor. For details, see Section 4.5 Using the HTML Mail Template Gallery.

If you've made changes to a default template, and you'd like to undo those changes, click the **Revert** icon associated with that template.

To create a new template based on a default template, simply edit that template.

To create an all new template, click on the **Create New Template** option. The Create New Template screen opens, which is where you enter the content for the template.

To delete template, click on the **Recycling Bin** icon associated with that template.

To refresh the newsletter template gallery, click the **Refresh Gallery** option.

To edit the profile for all of the newsletters, click on the **Edit Newsletter Profile** option. The Edit Newsletter Profile screen opens, which is where you can enter any changes you'd like to make to your newsletter profile. These changes will be applied to the entire newsletter template gallery and will be associated with your user account only.

Note: The newsletter's profile fields can also be set in your preferences on the Newsletter Profile Preferences tab.

The **Newsletter Drafts** section at the bottom of the screen contains any previously saved drafts. To continue working on an existing draft, click on the draft's subject. To delete the draft, click on the **Recycling Bin** icon associated with that draft.
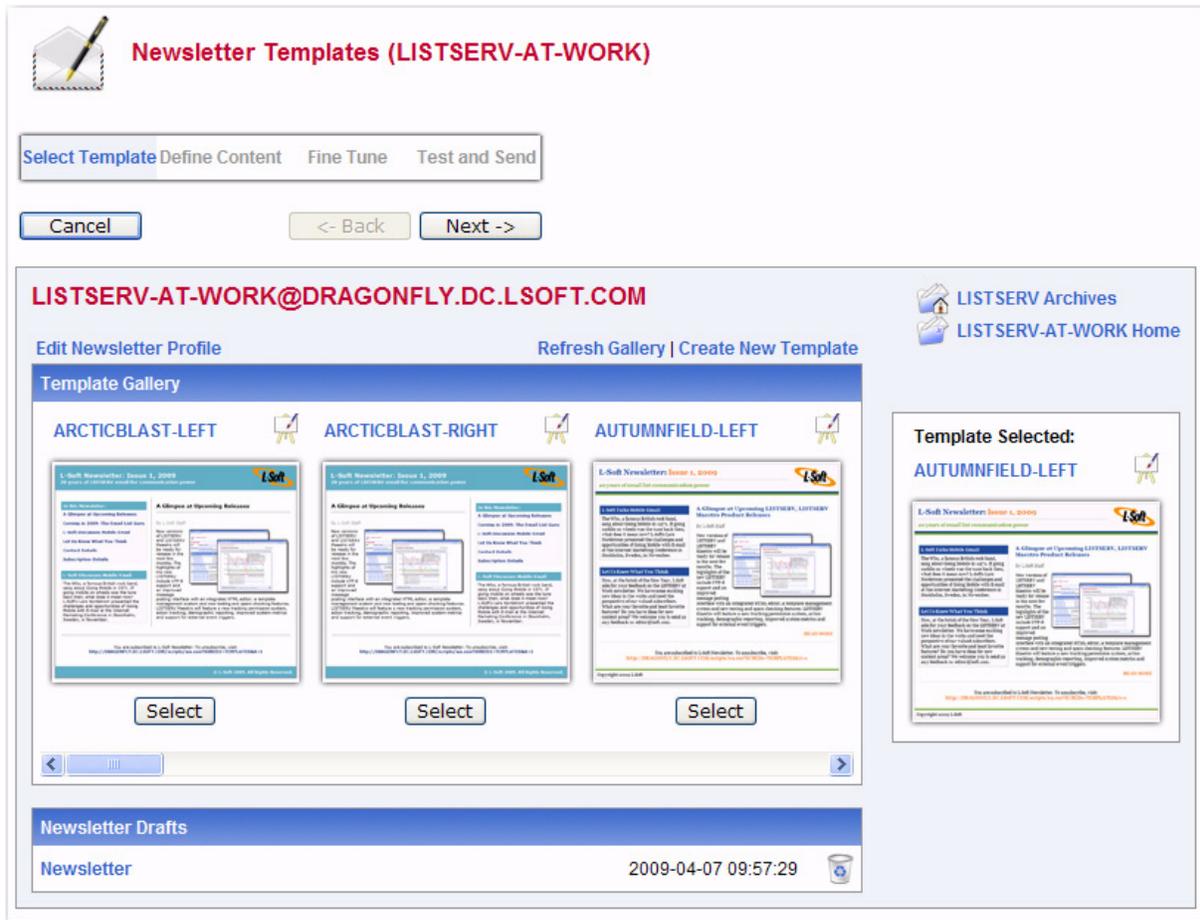
Note: Drafts are automatically deleted after 30 days.

Once you've selected the newsletter template you want to work with, click the **[Next]** button to continue.

To cancel the selection of the newsletter template and refresh the screen, click **[Cancel]** .

Figure 4-1 Selecting a Newsletter Template

4.2 Defining the Content

The Define Content screen is where you "fill in the blanks". The templates were designed to make defining newsletters quick and easy; the majority of the options, settings, and coding are already in place. The only work left for you is to give the newsletter a customized feel by filling in special template placeholders.

The following fields are available at the top of the screen:

- **Your Name** – This field is automatically filled with the email address associated with your user account. To change this, simply delete the email address and enter your name as you wish it to appear in the **From** field of the email header of the newsletter. The email address that will be used in the **From** field is the one that is logged into LISTSERV and may not be changed.

- **Subject** – The subject line for the newsletter.

- **Template** – If you want to change the template you are currently using, click this drop-down menu and select a new template from the drop-down list.

- **News Items** – Enter the number of news items you want to have in your newsletter. This will determine the amount of news item placeholders you will need to define. The maximum number allowed is 99.

- **Feature Items** – If available, enter the number of feature items you want to have in your newsletter. This will determine the amount of feature item placeholders you will need to define. The maximum number allowed is 99.

To view the template in HTML format, click **HTML Part**. To view the text alternative, click **Text Alternative**.

In the placeholders list, any placeholder without a value supplied is marked with a red x; these placeholders will require your attention. Placeholders where a value has already been supplied are marked with a green checkmark.

Note: If you leave a placeholder blank, then this content will not appear in the newsletter; however, there are some exceptions such as headers and text since they are expected to be defined. If you want to remove a header for a news item or feature item, simply adjust the value for those items in the appropriate field above.

The type and amount of placeholders available for definition will vary depending on the type of template and the number of news and/or feature items you have entered. The following placeholders are always available for definition and can also be defined in your newsletter profile:

&*NEWSLETTER; – This placeholder is used for the name of your newsletter.

&*ADDRESS; – This placeholder is used for the address of your organization.

&*PHONE; – This placeholder is used for the phone number of your organization.

&*CONTACT; – This placeholder is used for the contact email address of your organization.

&*WEBSITE; – This placeholder is used for a Website URL of your organization.

&*SLOGAN; – This placeholder is used for a slogan for your organization.

&*LOGO; – This placeholder is used for a logo of your organization.

&*FOOTER; – This placeholder is used for a short footer for your newsletter.

&*LEGAL; – This placeholder is used for any legal disclaimers, company registration numbers, or similar information for your newsletter.

&*SELFLINK; – This placeholder will be automatically replaced with a link to view the newsletter in a browser and does not need to be defined on this screen. This placeholder is only available for lists with archives.

Additional placeholders are available, depending on template, and are numbered according to how many news and feature items you have chosen for your newsletter. These additional placeholders include:

&*HEADLINEn; – This placeholder is used for the headline of the news item.

&*BYLINEn; – This placeholder is used for the byline of the news item. If you don't want to use a byline, you can leave this placeholder blank.

&*IMAGEn; – This placeholder is used for an accompanying image or graphic for the news item. If you don't want to use an image, you can leave this placeholder blank. When including images, they need to be uploaded to a public server before creating your newsletter. You should then enter the URL of the images, including the http:// or https:// part in the Contents field. It is recommended that you resize the

images that you want to use to an appropriate size before uploading them although it is possible to resize them further on the Fine Tune screen if needed.

&*TEXTn; – This placeholder is used for the body text of the news item.

&*URLn; – This placeholder is used for the URL to a Web page if subscribers want to read more. If you don't want to use a URL, you can leave this placeholder blank. Since the URLs are hyperlinked from the newsletter, remember to enter the whole URL, including the http:// or https:// part as appropriate.

&*FEATUREHEADn; – This placeholder is used for the headline of the feature item, which are usually placed in a narrower side column in the newsletter.

&*FEATURETEXTn; – This placeholder is used for the body text of the feature item, which are usually placed in a narrower side column in the newsletter.

The placeholder that is currently selected in the placeholder list is highlighted both in the placeholder list and in the template preview pane. You can also move the mouse over the preview pane to see and select placeholders.

To define the selected placeholder, enter its value in the **Contents** text box below the template preview pane. Click **[Update]** to fill the placeholder.

*Figure 4-2 Defining the Newsletter Content*

To re-define the colors used for the placeholders, click on the **View Colors** options. The placeholders list is replaced with the placeholder colors list. Select the placeholder color you want to re-define, and then enter the RGB color value in the **Color** field. To view a color palette to help you select the color, click on the **Color Picker** icon, and then click on the color you want to use. The color for that particular placeholder will be updated.

To return to the placeholders list, click **View Placeholders**.

To preview the newsletter, click the **View in New Window** option.

Figure 4-3 Re-Defining Placeholder Colors
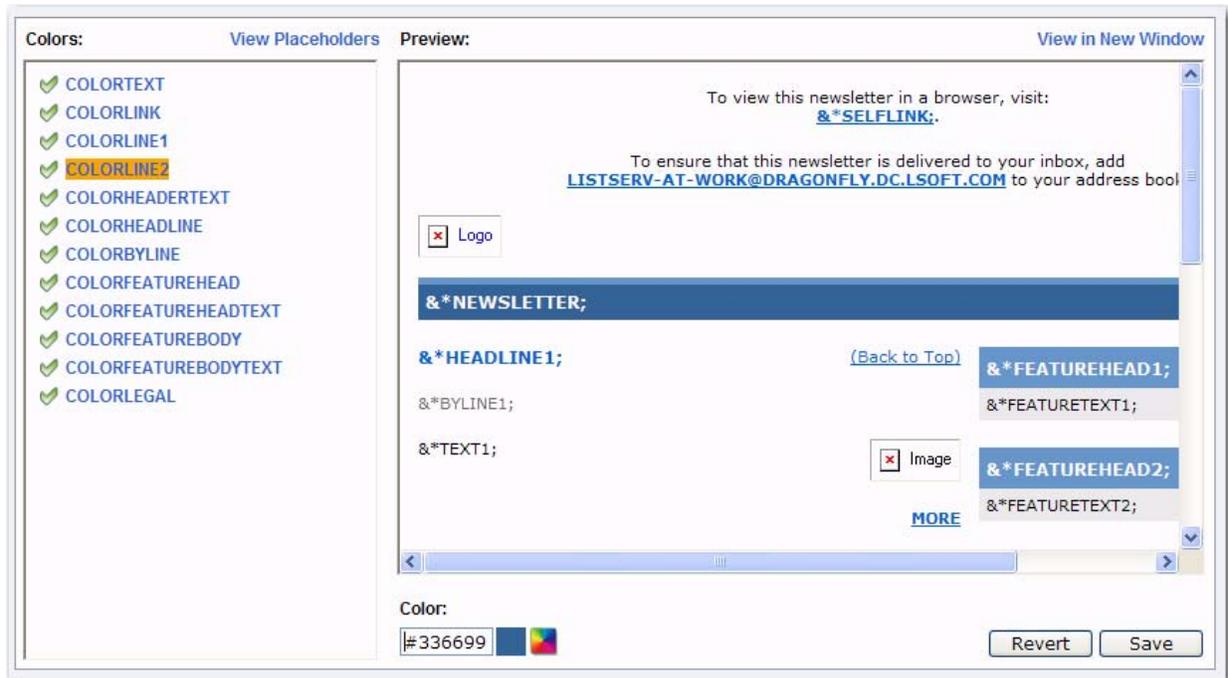
Once you are done filling out the placeholders, click **[Save]**. This makes your updates and changes permanent, and places a copy of the newsletter in the **Newsletter Drafts** section.

Note: Drafts are automatically deleted after 30 days.

To undo your changes, click the **[Revert]** button. The template will revert back to the previously saved version of the template (or the default version if no saved version is available).

Once you are finished defining the content of the template, click the **[Next]** button to continue.

To cancel the definition of the newsletter and return to the Select Template screen, click the **[Cancel]** button. If you have a saved draft version of your newsletter and you click **[Cancel]**, then the saved version will still be available in the **Newsletter Drafts** section.

To return to the Select Template screen without canceling your work, click **[Back]**.

4.3 Fine Tuning the Newsletter

For those who are familiar with HTML, LISTSERV gives you the ability to expand your limits and design profession-looking HTML newsletters that go above and beyond the everyday standards.

Note: Any changes you make on this tab will be lost if you use the **[Back]** button.

The following fields are available at the top of the screen:

*   **Your Name** – This field is automatically filled with the email address associated with your user account. To change this, simply delete the email address and enter your name as you wish it to appear in the **From** field of the email header of the newsletter. The email address that will be used in the **From** field is the one that is logged into LISTSERV and may not be changed.

*   **Subject** – The subject line for the newsletter.

*   **Content-Type** – This drop-down menu is read-only unless the advanced options are activated (see below). If available, you can re-define the format of the newsletter.

To view and define the advanced options, click the **[Show Advanced]** button. The following options are available:

*   **Charset** – Use this drop-down menu to select the charset (character set) of the newsletter. If your newsletter requires a charset that is different from the default charset for LISTSERV (UTF-8), then you can use the drop-down menu to select the matching one before you type or paste in your content. This selection will not translate one charset to another. It is used to sync the charset of the original newsletter with LISTSERV so that it can be encoded correctly for sending.

*   **RSS Abstract** – Many lists allow subscribers to read postings through RSS feeds. LISTSERV automatically creates RSS abstract from the text part of the message. By default, LISTSERV uses a maximum of 500 and a minimum of 250 words for an implicit RSS abstract. These default numbers can be changed either for the entire site or on a list-by-list basis. However, this option also allows you to create explicit RSS abstracts, which can be HTML or text of any length. To provide an explicit RSS abstract, simply enter text here in the **RSS Abstract** text box. To use your text or HTML part in its entirety for the RSS abstract, click the **Use as RSS Abstract** icon next to either the **Plain Text Content-Type** or **HTML Content-Type** section; the content will be automatically copied into the abstract text area.

*   **Attachments** – Use the **[Browse...]** button to find your file on a local drive. Click the **[Attach]** button to attach your file to your outgoing message. The attachment will be listed in a table beneath the **Attachments** field. To delete an attachment, simply click the **[Delete]** button associated with that particular item in this table.

Notes: Each list can have its own rules for accepting or rejecting messages with attachments. The **[Browse...]** and **[Attach]** buttons will function regardless of individual list settings. As a result, your newsletter may be rejected or stripped of its attachment by the list. Be sure to check with the list owner if you have any questions.

Attachments can now be stored as a download instead of being distributed to the list. For details, see the Web Interface User's Manual.

Figure 4-4 Fine Tuning the Newsletter - Advanced Options

In the **Plain Text Content-Type** section, you can edit the plain text for the newsletter. Any changes you make in this section are not automatically made in the HTML section. Therefore, if you want these changes in the HTML section as well, you will need to manually enter them.

In the **HTML Content-Type** section, you can edit the HTML part of the newsletter. Any changes you make in this section are not automatically made in the Plain Text section. Therefore, if you want these changes in the Plain Text section as well, you will need to manually enter them.

If you have JavaScript enabled, then the **[HTML Editor Mode]** button will be available. This button opens a WYSIWYG-style editor in place of the HTML source code text box.

Note: If you have already entered HTML code into the text box before you launch the editor, the editor will parse and rewrite the existing HTML code, which may introduce changes to the code. To return to the HTML source code text box, click the **[Source Code Mode]** button.

To preview your HTML newsletter, click on the **Preview** icon on the HTML Editor toolbar. The message will open in a new window, letting you preview the finished product.

Figure 4-5 Fine Tuning the Newsletter - HTML Editor
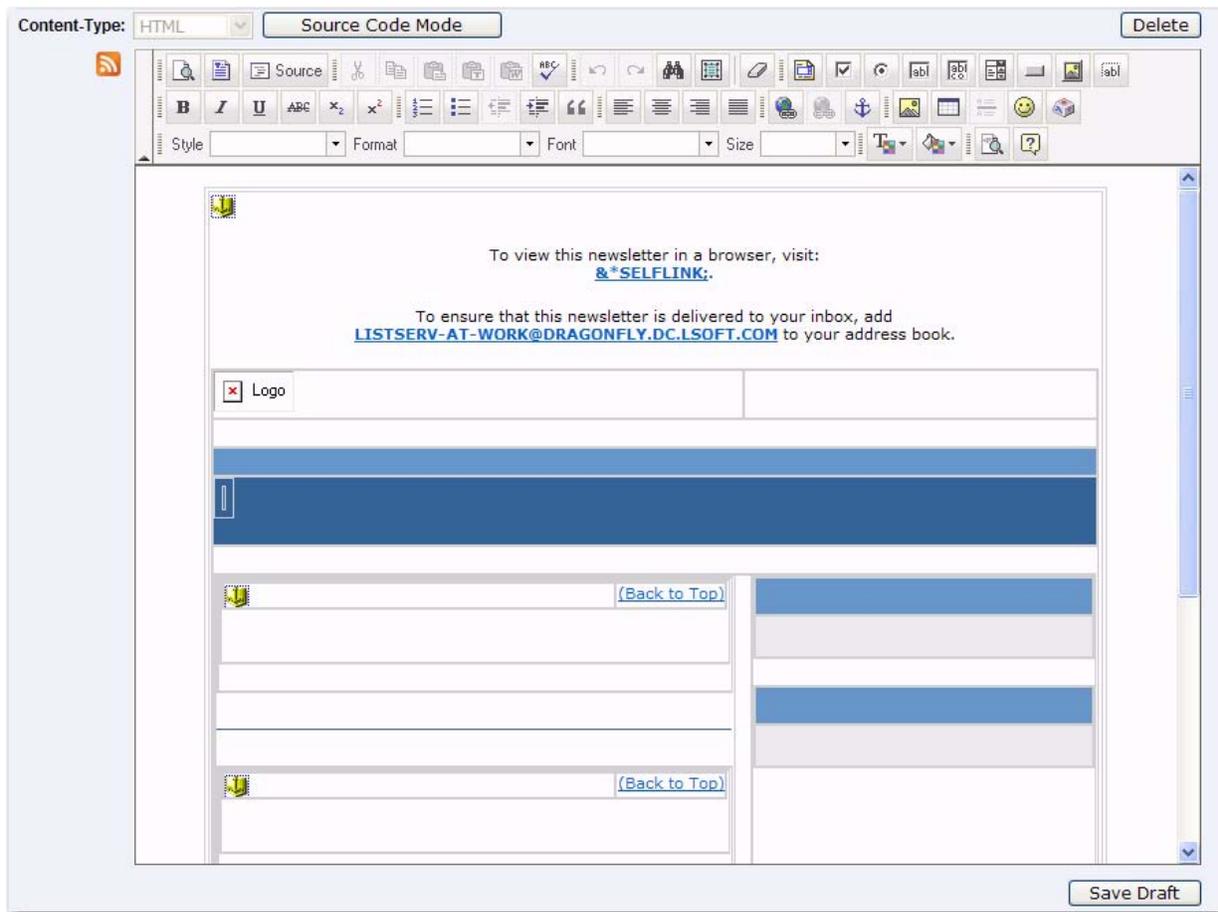
If you have started working on a newsletter and want to continue at a later time, you can click the **[Save Draft]** button to save a draft of the message. The subject line, the text part, and the HTML part are all stored. However, advanced options, such as attachments and RSS abstracts are not stored with the draft. The drafts, which are identified by their subject lines and shown with a timestamp, will be listed in the **Newsletter Drafts** section. When you return to the Newsletter Template wizard, you can just click on the subject line to retrieve the draft. To delete existing drafts, just click on the **Recycling Bin** icon next to the draft that you want to delete. Existing drafts are deleted automatically when you have posted them to the list.

Important: The draft you save on the Fine Tune tab will not be the same draft you may have saved on a previous tab. Therefore, you may want to change the subject to reflect the version you are saving.

Note: Drafts are automatically deleted after 30 days.

4.4 Testing and Sending the Newsletter

When constructing a newsletter and before sending it to a list, you can send a test message to make sure that the results are satisfactory. This kind of test delivery can be particularly useful when creating HTML newsletters because email clients vary in their degree of HTML support. Sending a test message allows you to double-check that the newsletter is rendered as you intended. If necessary, you can make adjustments to your newsletter before posting it to the list.

The following options are available on this screen:

- **Your Name** – This field is automatically filled with the email address associated with your user account. To change this, simply delete the email address and enter your name as you wish it to appear in the **From** field of the email header of the newsletter. The email address that will be used in the **From** field is the one that is logged into LISTSERV and may not be changed.

- **Subject** – The subject line for the newsletter.

- **Schedule Delivery** – Select whether you want the newsletter to be delivered immediately or at a specific time and date. The input format of the **Delivery Date** field is **yyyy-mm-dd**. The input format of the **Delivery Time** field is **hh:mm:ss**, using the 24-hour clock. The time zone used is that of the LISTSERV server. If you enter a delivery date or time that has already passed, then the newsletter will be delivered immediately.

- **Test Addresses** – Enter the email addresses of those who will be receiving the test. Make sure to include your email address so you can view the newsletter as well. If you had entered delivery test email addresses in your Newsletter Profile, then these addresses will appear here.

- **Content Analysis** – If your LISTSERV license includes technical support, then you can use this button to check your message and evaluate the likelihood that it will be deemed to be spam by recipient mail systems. LISTSERV will connect to a hosted service at L-Soft, which runs the email message through SpamAssassin. The results will be shown on the screen. If necessary, you can then make adjustments and run the test again.

- **Send Tests** – Use this button to send a test message to the test addresses.

- **Back** – Click this button if you want to navigate back and make changes.

- **Send** – Click this button to send the newsletter once you are done testing it and are satisfied with its content and appearance.

Figure 4-6 Testing and Sending the Newsletter

4.5 Using the HTML Mail Template Gallery

The HTML Mail Template Gallery allows the list owner or the site administrator to select a template style for the list or the site as a whole.

To select a side-wide default template, click on the **Server Administration** menu, select **Customization**, and then select **Mail Templates**. The Mail Template Editor opens.

To select a default template for a list, click on the **List Management** menu, select **Customization**, and then select **Mail Templates**. The Mail Template Editor opens. Click the **Select List** drop-down menu, and then select the list to define the default template for. The Mail Template Editor refreshes with the HTML Mail Template Gallery displayed.

In the HTML Mail Template Gallery, select an HTML mail template by clicking the **[Select]** button associated with the template you want to use. The screen will refresh with the selected template displayed in the **Mail Template Style** box.

To edit a template, click the **Easel** icon. The Edit HTML Mail Template screen opens, which is where you can make any changes necessary. If you have made changes to a default template and would like to undo those changes, click the **Revert** icon associated with that template.

To create a new template based on a default template, simply edit that template and change the template name before clicking the **[Save]** button. The template will now be saved with the new name.

To create a new template from scratch, click on the **Create HTML Mail Template** option. The Create HTML Mail Template screen opens, which is where you will enter the content for the new template. See the special documentation on that screen to learn more about the format of the HTML mail templates.

Tips: When creating new templates, make sure that the template name starts with HTMLMAIL- and it will be automatically included in the list of available HTML mail templates within the editor.

If you are creating a newsletter template, you are required to have both an HTMLMAIL- and a TEXTMAIL- template (for the alternative text part). If you do not want the alternative text to be part of your newsletter you can always leave the TEXTMAIL- template blank and delete it on the Fine Tune tab when using the Newsletter Templates wizard.

To delete a template, click on the **Recycling Bin** icon associated with that template.

To refresh the mail template gallery, click the **Refresh Gallery** option.

Figure 4-7 Mail Template Editor

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