



Lyris ListManager 10 Getting Started

Spring 2010, Version 1.0

Table of Contents

About Lyris ListManager	2
Logging In	2
ListManager Interface	3
Changing the User Password	4
Switching the List	4
Content	5
Creating Content	5
Mailings	7
Creating Mailings	7
Testing Mailings	9
Approving Mailings	10
Mailing to a Segment	11
Scheduling Mailings	12
Reports	13
Viewing Reports	13
Table and Chart Options	13
Table Options	13
Chart Options	14
Logging Out	15

About Lyris ListManager

Lyris ListManager is used to efficiently manage e-mail delivery to large numbers of recipients. This handout introduces users to the ListManager interface and provides instructions on how to change the user password, switch the mailing list, create content, send mailings, and view reports.

Logging In

In order to access the ListManager web interface, users are required to log in.

NOTE: The system automatically logs users out after 60 minutes of inactivity.

To log into ListManager:

1. Open a web browser.
2. Type <https://list.calstatela.edu> in the **Address** bar and press the **Enter** key. The **ListManager Login** page displays (see Figure 1).
3. Type the user's full CSULA e-mail address, including the domain name, in the **User Name** text box.

NOTE: If the account is in the CSLA domain, type *username@cslanet.calstatela.edu*; if the account is in the NIS domain, type *username@exchange.calstatela.edu*.

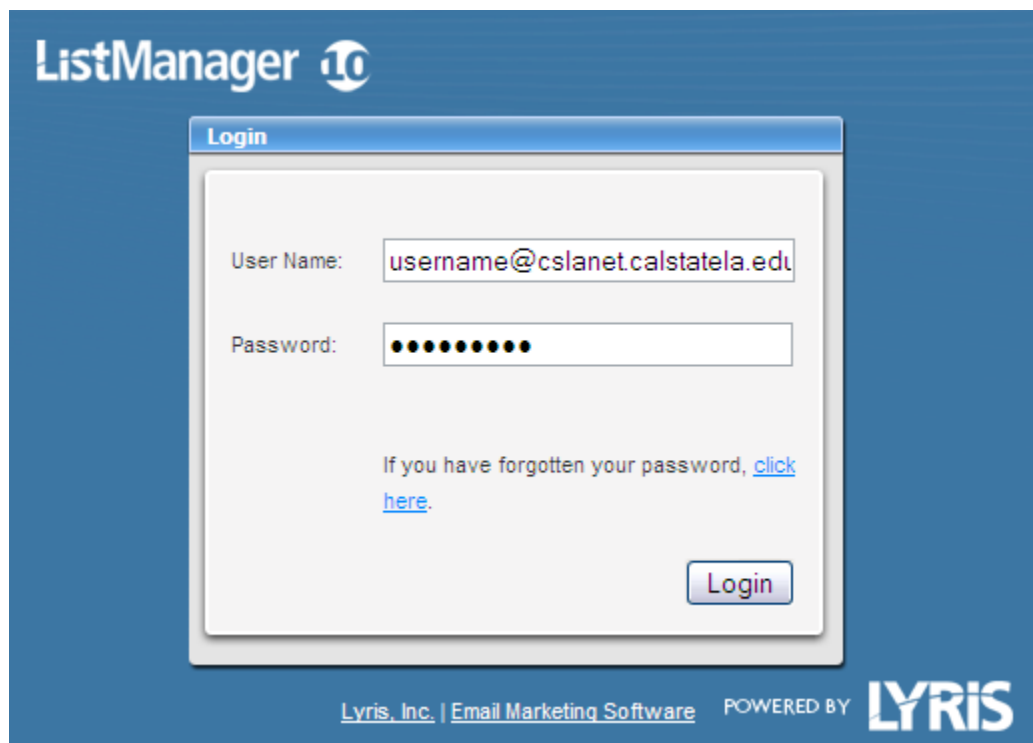


Figure 1 – ListManager Login Page

4. Type the password provided by Information Technology Services (ITS) in the **Password** text box.
5. Click the **Login** button. The ListManager home page displays.

NOTE: Users with more than one list are logged into the last list worked on.

ListManager Interface

The ListManager home page is the first page displayed upon log in (see Figure 2 and Table 1). The home page provides shortcuts to commonly performed tasks.

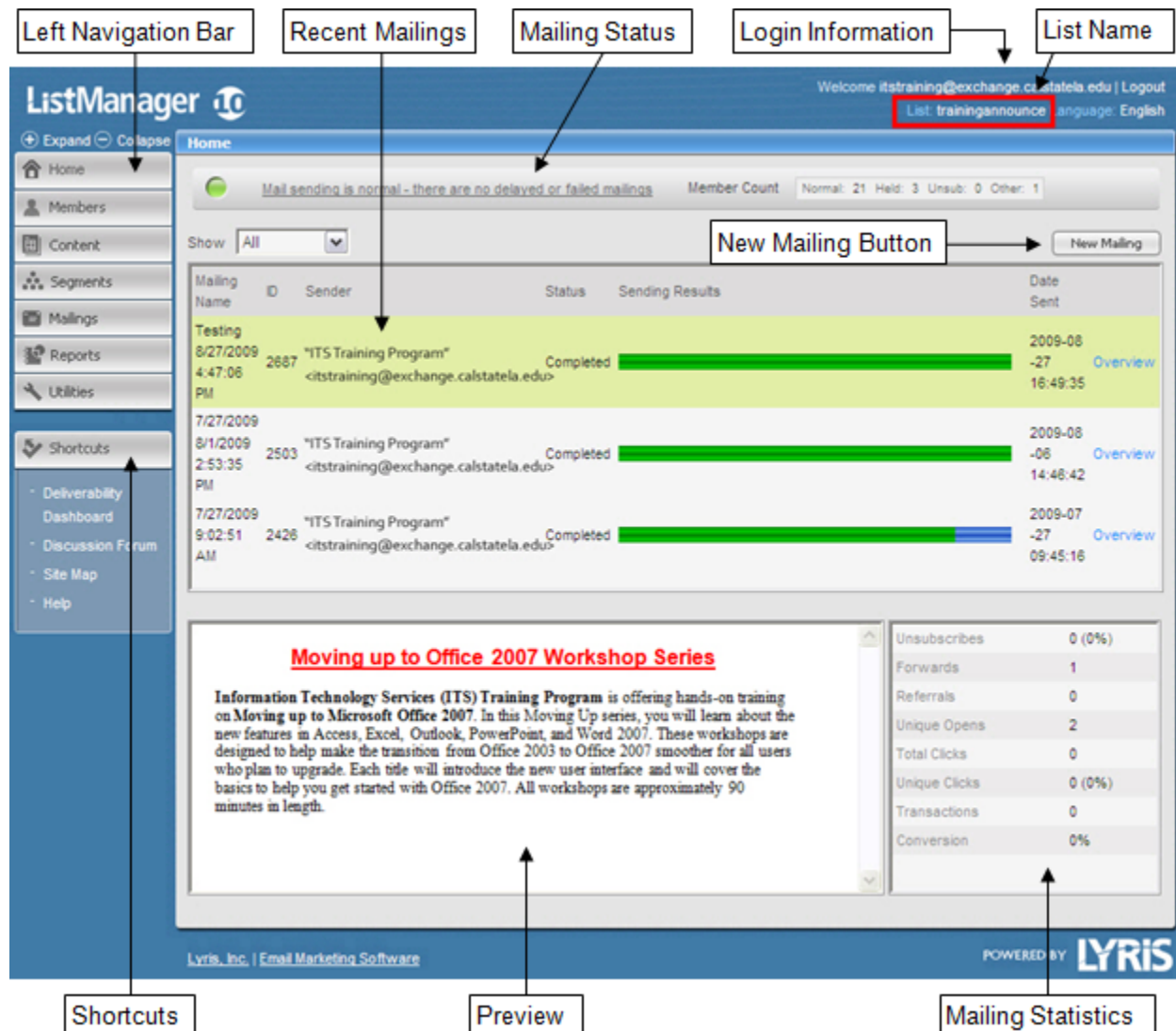


Figure 2 – ListManager Home Page

Table 1 – ListManager Home Page Elements

Item	Description
Left Navigation Bar	Allows access to different features of ListManager through the <i>Home</i> , <i>Members</i> , <i>Content</i> , <i>Segments</i> , <i>Mailings</i> , <i>Reports</i> , and <i>Utilities</i> tabs.
Recent Mailings	Displays information about the most recent mailings, including the sender, the current status, and the date sent.
Mailing Status	Provides feedback about mailings (e.g., status about delayed or failed mailings).
Login Information	Displays the current list name, the language, and the user name.
List Name	Used to switch the mailing list.
New Mailing Button	Allows the creation of a new mailing.

Item	Description
Shortcuts	Displays links to commonly performed tasks.
Preview	Displays a preview of the mailing selected in the <i>Recent Mailings</i> area.
Mailing Statistics	Displays statistical information about mailings such as the number of unsubscribes, forwards, referrals, unique opens, total clicks, unique clicks, transactions, and conversions.

Changing the User Password

After logging into ListManager, users can change the ITS-provided password to something easier to remember.

To change the user password:

1. In the left **Navigation** bar, click **Members** and select **View Members**. The **View Members** page displays.
2. Click the e-mail address under the **Email** column. The **Edit Member** page displays.
3. Click the **Settings** tab.
4. Enter the new password in the **Enter New Password** text box.
5. Re-enter the new password in the **Verify New Password** text box.
6. Click the **Save** button. The **Change Password for These Accounts** page displays.
7. Select the list that the password change applies to. For users with more than one list, hold down the **Ctrl** key to make multiple selections.
8. Click the **OK** button.

Switching the List

Users are always logged into a single list. Users with more than one list can select a different list to work with.

To switch to a different list:

1. Click the list name next to **List** located in the upper-right corner of the window (see Figure 2). The **Change List** page displays the user's available lists.
2. Click the name of the desired list under the **List Name** column.

Content

Content is the message to be sent. The advantage of creating content instead of entering the message into every mailing is that it can be created once and then used as a template in multiple mailings.

Creating Content

Users can create content by typing the message directly into ListManager, by copying and pasting content already created in another application such as Microsoft Word, or by creating and using templates. This handout covers how to create content by typing or copying and pasting content.

To create content:

1. In the left **Navigation** bar, click **Content** and select **New Content**. The **Create New Content** page displays (see Figure 3).
2. On the **Essentials** tab, enter a name in the **Content name** text box. This name is not seen by message recipients, so label the content in a way that will help identify it later on the **Content** main page. This field is limited to 200 characters.
3. Enter a description for the content in the **Description** text box. This description is not seen by message recipients, so describe the content in a way that will help identify it later on the **Content** main page. This field is limited to 100 characters.

The screenshot shows a web-based form titled "Create New Content". It features a tabbed interface with the "Essentials" tab active. The form contains several text input fields: "Content name" with the value "Microsoft Office 2007 Workshops", "Description" with "Workshop descriptions, schedule, duration, requireme", "From" with "ITS Training Program" <itstraining@cslanet.calstatela, "To" with the placeholder "%%nameemail%%", and "Subject" with "Moving Up to Microsoft Office 2007 Workshop Series". Each of the "From", "To", and "Subject" fields has an "Insert Field" button to its right. At the bottom of the form are four buttons: "Preview", "Save", "Create Mailing", and "Cancel".

Figure 3 – Create New Content Page

4. Enter the e-mail address of the message sender in the **From** text box. By default, the user's name and e-mail address appear in this text box. To send a message on behalf of a department, enter the full department name enclosed in quotation marks followed by the department e-mail address enclosed in angle brackets (see the first example in the note below).

NOTE: Below are a few examples of valid entries for the **From** field:

- "ITS Training Program" <itstraining@cslanet.calstatela.edu>
- itstraining@cslanet.calstatela.edu
- ITS Training Program <itstraining@cslanet.calstatela.edu>
- itstraining@cslanet.calstatela.edu (ITS Training Program)

5. The default value in the **To** text box is set to **%%nameemail%%**, which merges the name and e-mail address of each recipient. It is not recommended to change the default setting.

NOTE: The **To** field only indicates the *format* in which the recipient's information will be displayed in the e-mail message. It does not indicate the actual message recipient; that is determined by the selected list or segment.

6. Enter a subject in the **Subject** text box. Message recipients will see this text as the subject of the message.
7. Click the **HTML Message** or **Text Message** tab.

NOTE: Users can create a text-only message, an HTML-only message, or a message that includes both text and HTML.

- Create a text message if the recipients' e-mail clients can only read a message in plain text.
 - Create an HTML message if the recipients' e-mail clients can read HTML.
 - Create a message that includes both text and HTML if the recipients in the list have different types of e-mail clients. Creating this type of a message ensures that recipients who can read HTML will see only HTML, but those who cannot will see the plain text message.
8. Enter the message to be sent in one of the following ways:
 - Type the message directly into the **HTML Message** or **Text Message** box.
 - Copy content already created in another application such as Microsoft Word and paste it into the **HTML Message** or **Text Message** box. When pasting content into the **HTML Message** box, a dialog box displays asking to clean the text before pasting. Click the **Cancel** button to paste the text with the existing formatting.
 9. To add an attachment, click the **Advanced** tab and then click the **Attach File** button. On the **Attach File** page, click the **Browse** button, locate and select the file to be attached, and then click the **Attach** button.
 10. Click the **Save** button to save the content. The **View Content** page displays (see Figure 4).

NOTE: The **View Content** page displays all the content created for a particular list. In addition, this page allows users to preview, edit, copy, and delete content. The **View Content** page can be displayed at any time by clicking **Content** in the left **Navigation** bar and selecting **View Content**.

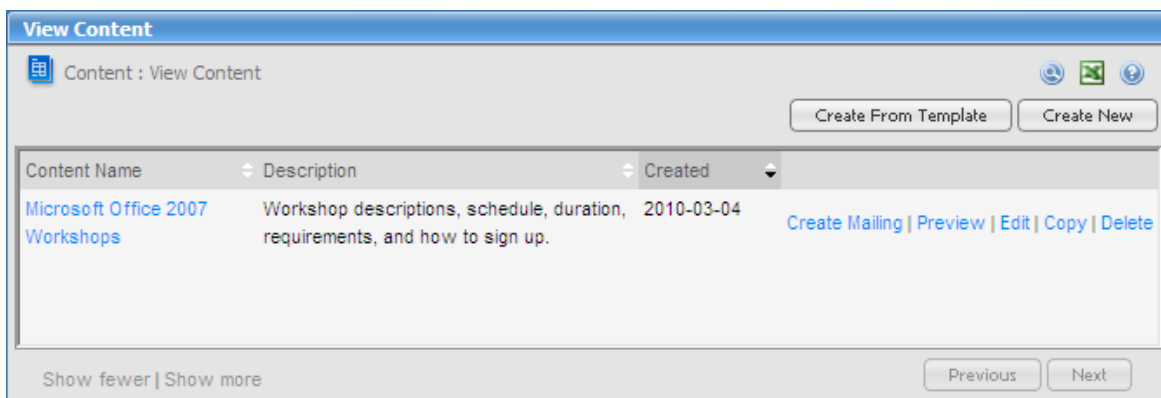


Figure 4 – View Content Page

Mailings

A mailing is a message sent to either the entire list or to particular segments of the list. Before sending a mailing, users can test it to see what the message will look like and schedule a delivery time.

NOTE: Users will be provided with pre-created lists and segments depending on their roles.

Creating Mailings

Users can create a new mailing by typing the message directly into the mailing, by copying and pasting content already created in another application such as Microsoft Word, or by importing content that has already been created in the Content area of ListManager.

To create a new mailing by importing pre-made content:

1. In the left **Navigation** bar, click **Mailings** and select **New Mailing**. The **New Mailing** page displays (see Figure 5).

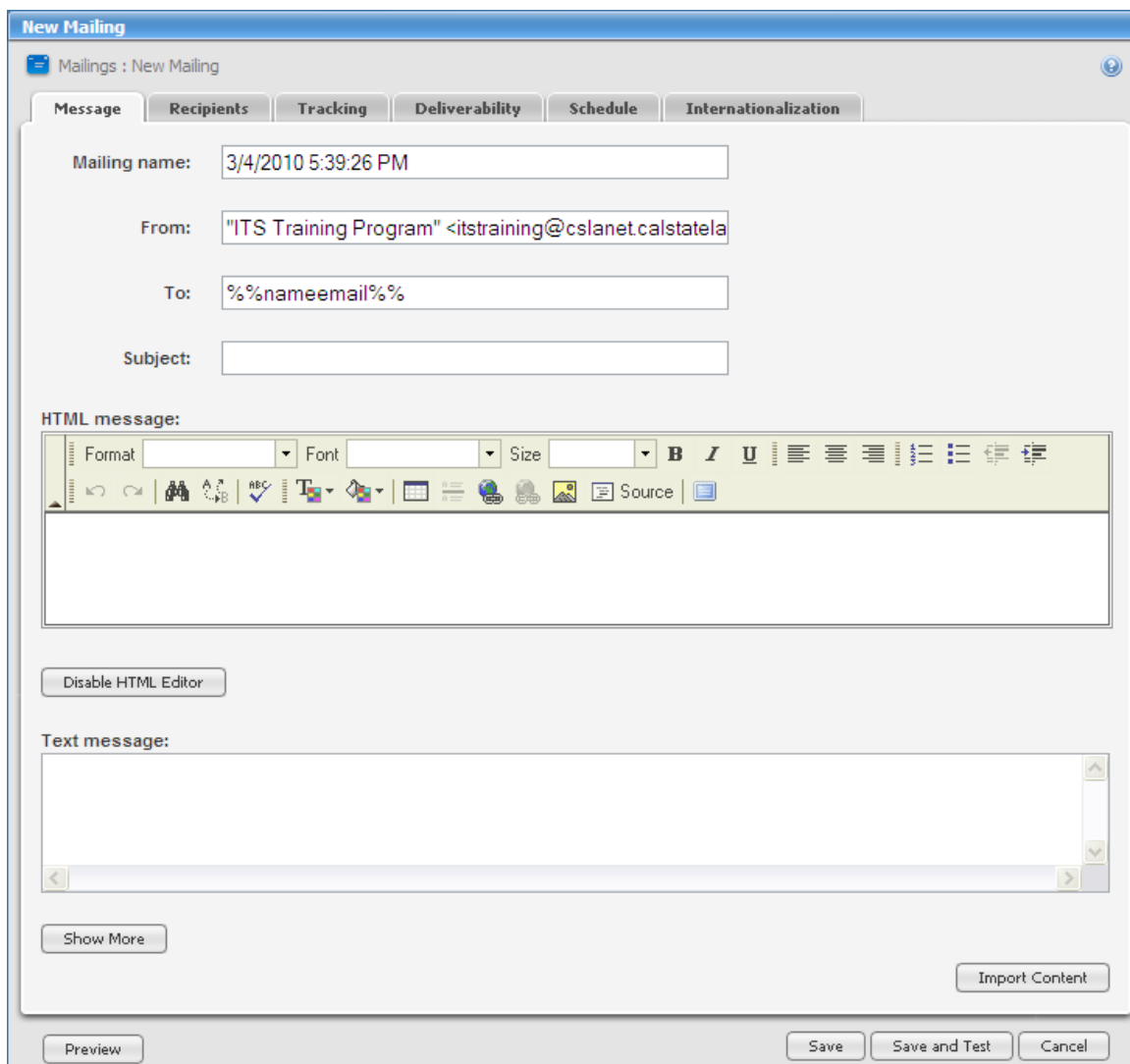


Figure 5 – New Mailing Page

2. Click the **Import Content** button in the lower-right corner of the page. The **Import Content** page displays (see Figure 6).

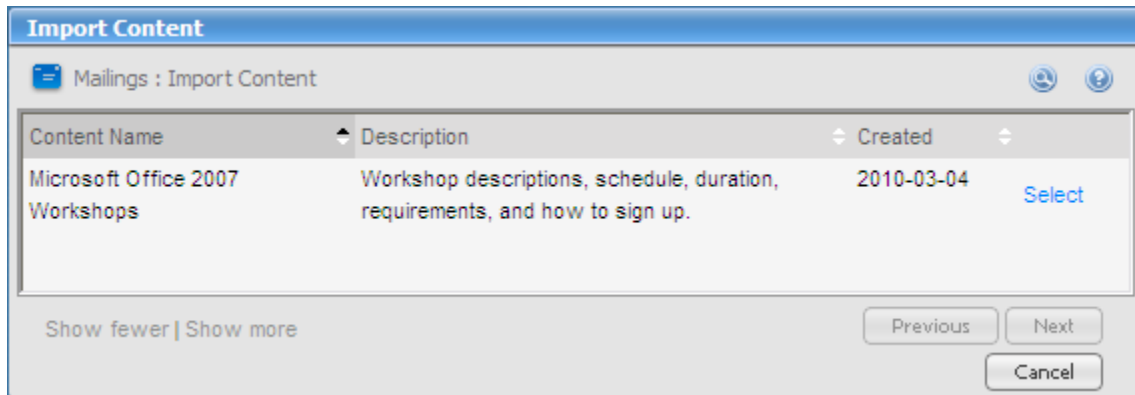


Figure 6 – Import Content Page

3. Click the **Select** link next to the content to import it into the mailing. The imported content displays on the **New Mailing** page (see Figure 7).

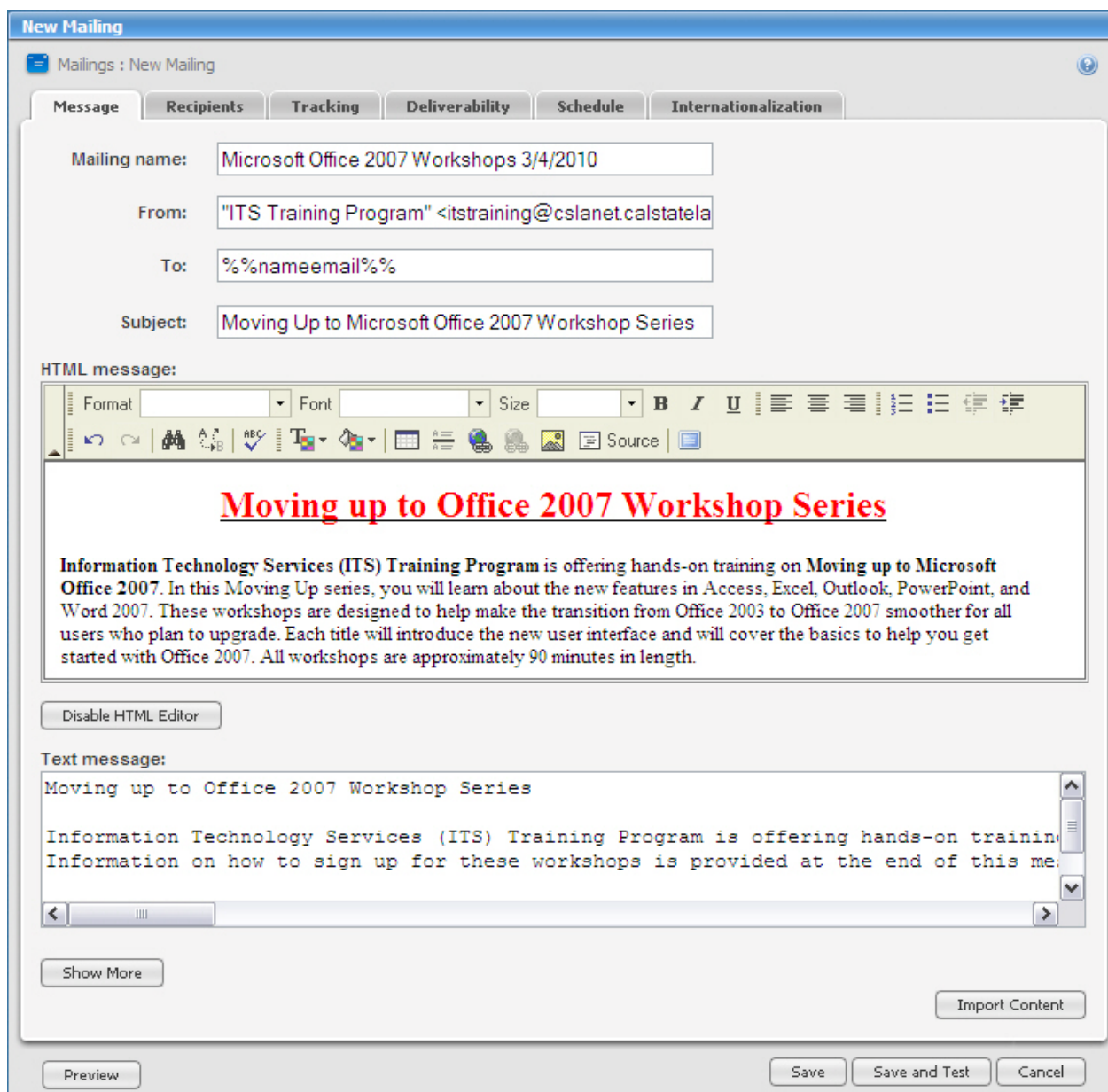


Figure 7 – New Mailing Page with Content

4. Click the **Preview** button in the lower-left corner of the page to preview the message in the ListManager interface.
5. Click the **Go Back** button to return to the **New Mailing** page.

To create a new mailing by typing or copying and pasting content:

1. In the left **Navigation** bar, click **Mailings** and select **New Mailing**. The **New Mailing** page displays (see Figure 5).
2. On the **Message** tab, enter a name in the **Mailing name** text box. This name is not seen by message recipients, so label the mailing in a way that will help identify it later. This field is limited to 70 characters.
3. Enter the e-mail address of the message sender in the **From** text box. By default, the user's name and e-mail address appear in this text box.

NOTE: Below are a few examples of valid entries for the **From** field:

- "ITS Training Program" <itstraining@cslanet.calstatela.edu>
 - itstraining@cslanet.calstatela.edu
 - ITS Training Program <itstraining@cslanet.calstatela.edu>
 - itstraining@cslanet.calstatela.edu (ITS Training Program)
4. The default value in the **To** text box is set to **%%nameemail%%**, which merges the name and e-mail address of each recipient. It is not recommended to change the default setting.
NOTE: The **To** field only indicates the *format* in which the recipient's information will be displayed in the e-mail message. It does not indicate the actual message recipient; that is determined by the selected list or segment.
 5. Enter a subject in the **Subject** text box. Message recipients will see this text as the subject of the message.
 6. Enter the message to be sent in the **HTML message** box and/or the **Text message** box in one of the following ways:
 - Type the message directly into the **HTML message** or **Text message** box.
 - Copy content already created in another application such as Microsoft Word and paste it into the **HTML message** or **Text message** box. When pasting content into the **HTML message** box, a dialog box displays asking to clean the text before pasting. Click the **Cancel** button to paste the text with the existing formatting.
 7. Click the **Preview** button in the lower-left corner of the page to preview the message in the ListManager interface.
 8. Click the **Go Back** button to return to the **New Mailing** page.

Testing Mailings

Before sending a mailing, users can test it to see exactly what the message will look like to message recipients.

NOTE: When testing a mailing, ListManager creates the message for a random recipient from the user's list. However, instead of sending the mailing to the member, it sends it only to the user.

To test a mailing:

1. Click the **Save and Test** button on the **New Mailing** page after creating a new mailing. The **Test Mailing** page displays (see Figure 8).

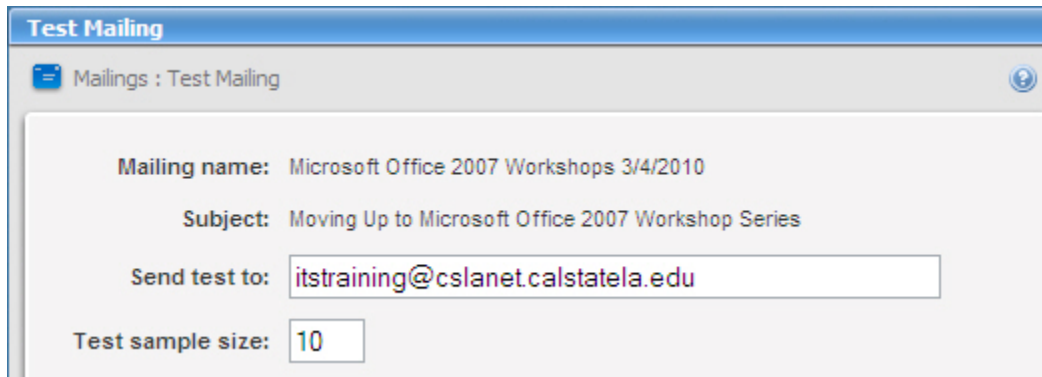


Figure 8 – Test Mailing Page

2. In the **Send test to** text box, enter the e-mail addresses to receive the test messages, separated by commas.
3. In the **Test sample size** text box, specify the number of test messages to send.
4. Click the **OK** button.

Approving Mailings

Once a mailing is created and saved, it is added to the *Need Approval* page where it can be edited, if necessary, retested, scheduled for delivery, or sent.

To approve and send the mailing:

1. In the left **Navigation** bar, click **Mailings**, point to **Approval**, and select **Need Approval**. The **Need Approval** page displays (see Figure 9).

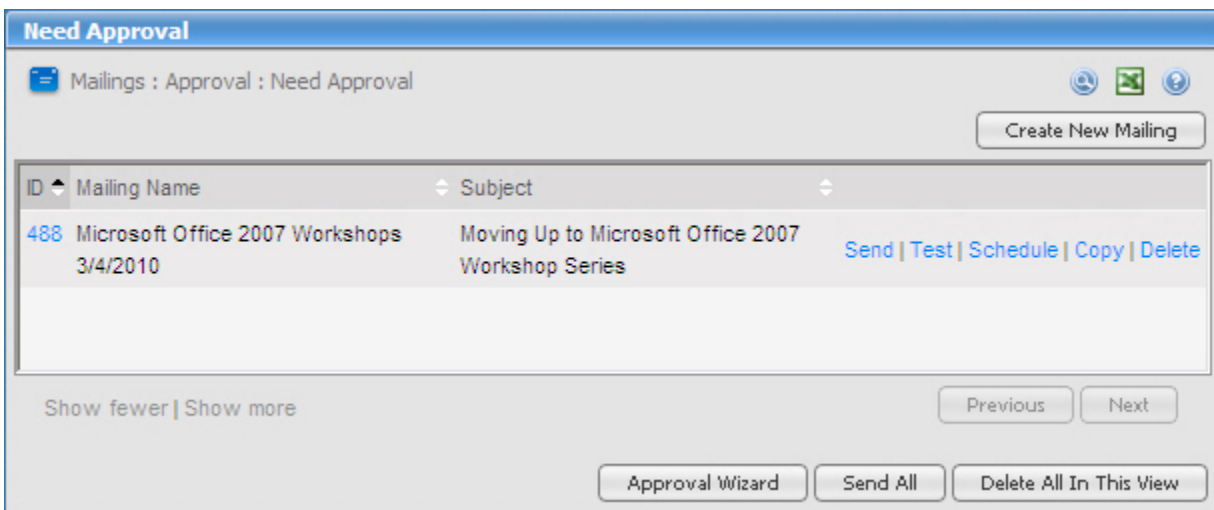


Figure 9 – Need Approval Page

2. To review the mailing, click the ID number to the left of its name. The **Edit Mailing Needing Approval** page displays.
3. Click the **Send Now** button. The **Send Mailing Now** page displays.
4. Click the **OK** button to send the mailing.

NOTE: To send a mailing without first reviewing it, click the **Send** link next to the mailing on the **Need Approval** page (see Figure 9).

Mailing to a Segment

A segment is a subset of a list. By default, a mailing is sent to the entire list the user is logged into. Users can select to send the mailing to one or more segments instead of the entire list. Users will be provided with pre-created lists and segments depending on their roles.

To send a mailing to a segment:

1. Create a new mailing, but before saving the message, click the **Recipients** tab (see Figure 10).

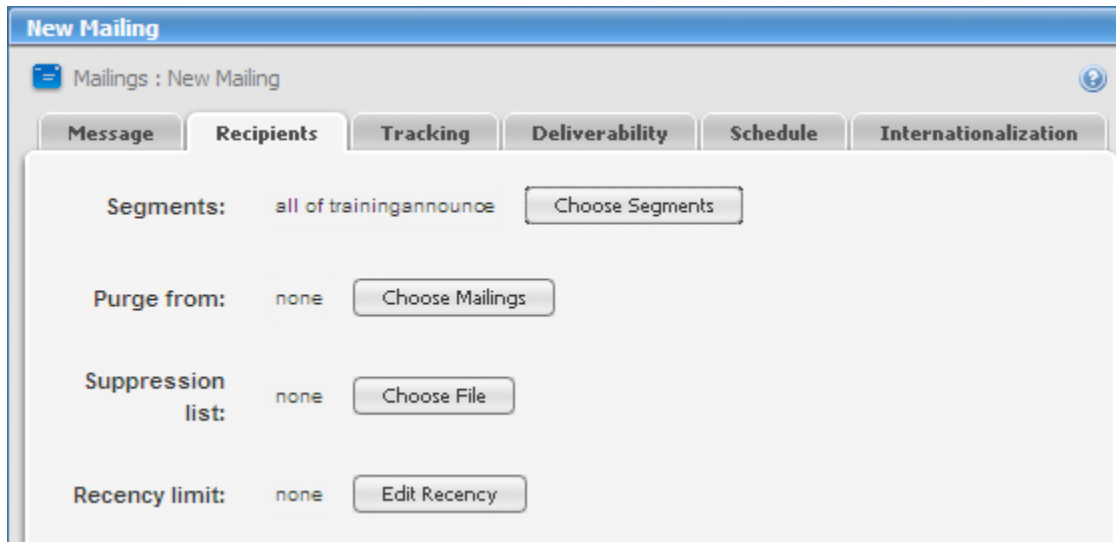


Figure 10 – Recipients Tab

2. Next to **Segments**, click the **Choose Segments** button. The **Choose Segments** page displays (see Figure 11).

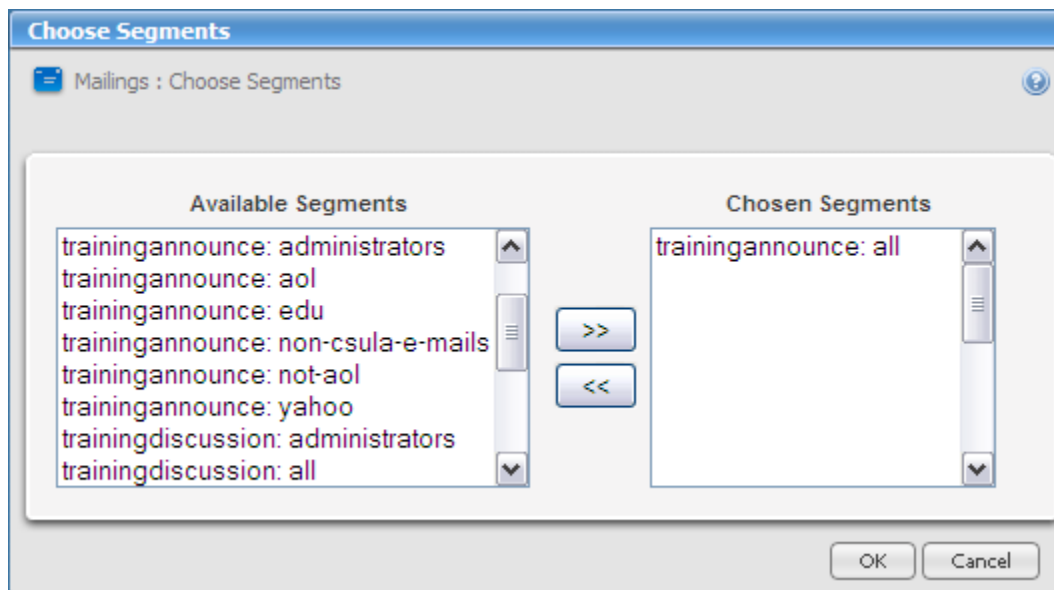


Figure 11 – Choose Segments Page

3. Select the segment that should receive the mailing from the **Available Segments** list box, and then click the transfer button **>>** to move it to the **Chosen Segments** list box. Hold down the **Ctrl** key to make multiple selections.
4. Click the **OK** button.

5. Continue composing the message.
6. When finished, click the **Save** or the **Save and Test** button.

Scheduling Mailings

By default, mailings wait for approval to be sent. A mailing can be scheduled for delivery at a specific date and time. A recurring mailing can also be created to have the same mailing be resent every day, week, or month. Recurring mailings should be thoughtfully prepared and scheduled for delivery to avoid being considered spam by the recipients.

To schedule a mailing:

1. Create a new mailing, but before saving the message, click the **Schedule** tab (see Figure 12).
2. Next to **Send when**, select the **schedule for** option and type the date and time the message should be sent in the text box, or click the drop-down calendar and select the date and time.
3. By default, the date and time shown in the message will be the date and time it is scheduled to be sent. If the message should show the date when it was created, select the **no** option next to **Rewrite date when sent**.

NOTE: To schedule a recurring mailing, in the **Resend after this many days** text box, type the number of *days* ListManager should wait before resending the message. For example, enter 1 to send it every day; enter 7 to send it every week.

4. Continue composing the message.
5. When finished, click the **Save** or the **Save and Test** button.

The screenshot shows the 'New Mailing' dialog box with the 'Schedule' tab selected. The 'Send when' section has two radio buttons: 'wait for approval' (unselected) and 'schedule for' (selected). The 'schedule for' option is followed by a text box containing '2010-03-05 10:30:00' and a calendar icon. Below this is a format string 'yyyy-mm-dd hh:mm:ss'. The 'Rewrite date when sent' section has two radio buttons: 'yes' (selected) and 'no' (unselected). The 'Resend after this many days' section has a text box. The 'Don't attempt after date' section has a text box and a calendar icon, followed by a format string 'yyyy-mm-dd hh:mm:ss'. At the bottom, there are four buttons: 'Preview', 'Save', 'Save and Test', and 'Cancel'.

Figure 12 – Schedule Tab

Reports

Once the mailing has been sent, users will want to know how successful it was. ListManager offers extensive reporting and charting on mailings and list membership.

Viewing Reports

To see the available reports:

1. In the left **Navigation** bar, click **Reports**.

NOTE: Although ListManager limits the number of data points displayed in the charts, all the data for the selected report can be viewed and downloaded by selecting the table option for the report, and then clicking the disk icon.

Reports are grouped as follows:

- **Deliverability Dashboard:** Displays five different graphs that provide information about deliverability.
- **Report Dashboard:** Provides a variety of information in graphic format about recent mailings and member lists.
- **Mailing Overview:** Provides an overview of the success and failure rates of individual mailings or campaigns.

Table and Chart Options


Tables in ListManager display a number of icons that allow users to change how the data is displayed as well as save the data on the user's computer. Clicking the Help icon  provides access to context-sensitive help.

Table Options

Table 2 lists the different options that are available for tables.

Table 2 – Table Options




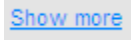


Button/Link	Name	Description
	Toggle button	Changes the sort order of a table, from a-z to z-a, for example, or from most recent to least recent. Clicking the top triangle makes the sort order ascending (a-z); clicking the bottom triangle makes the sort order descending (z-a). Sort options vary depending on the table.
	Spreadsheet button	Downloads the current table in comma separated values (CSV) format. CSV files can be opened and edited with many programs such as Excel.
	Next button	Shows the next page of results.
	Show more link	Shows more results for a table, or increases the size of the field. Repeatedly clicking this button shows increasingly more lines.
	Show fewer link	Shows fewer results for a table, or shrinks the size of the field.

Chart Options

Certain pages in ListManager include icons which allow users to view data in different ways.

Click the **Line Chart** icon  to display data as shown in Figure 13.

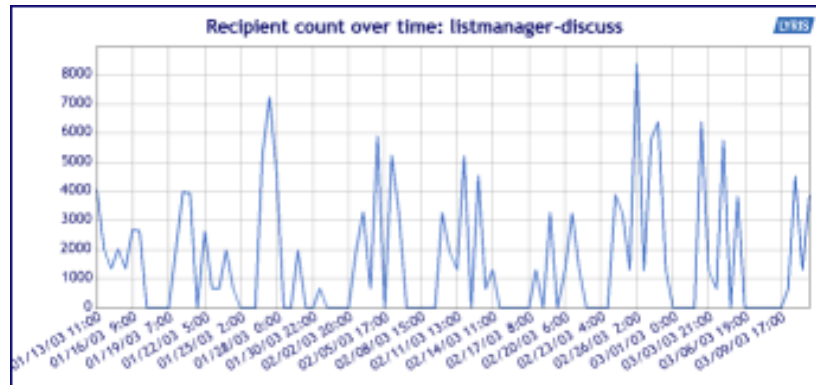


Figure 13 – Line Chart

Click the **3D Line Chart** icon  to display data as shown in Figure 14.

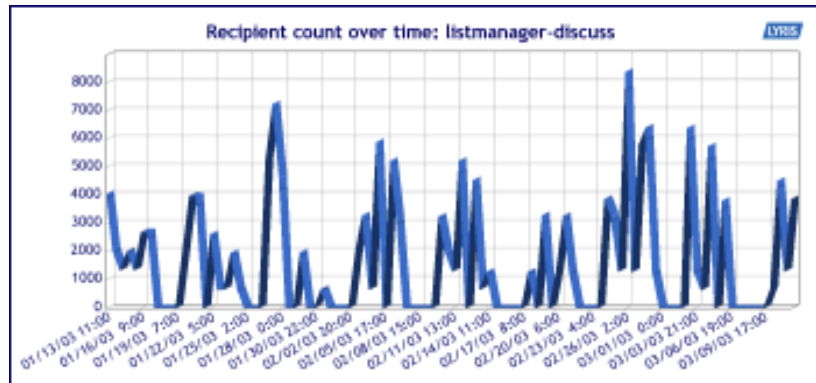



Figure 14 – 3D Line Chart

Click the **Bar Chart** icon  to display data as shown in Figure 15.

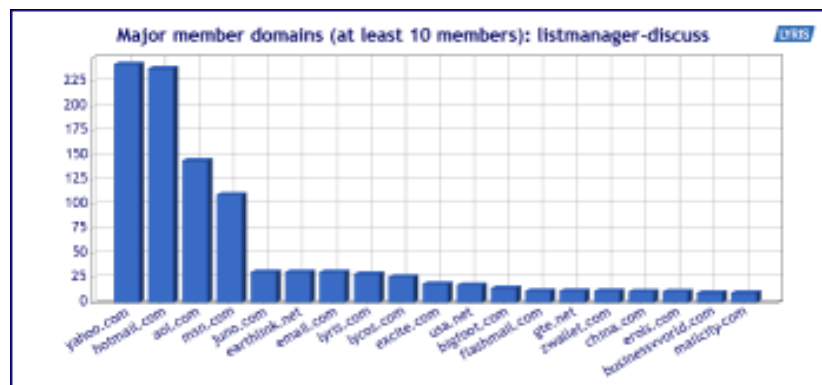



Figure 15 – Bar Chart

Click the **Pie Chart** icon  to display data as shown in Figure 16.

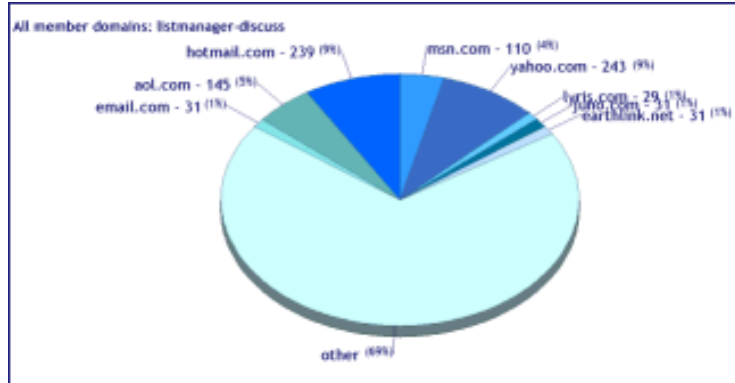


Figure 16 – Pie Chart

Click the **Table** icon  to display data as shown in Figure 17.

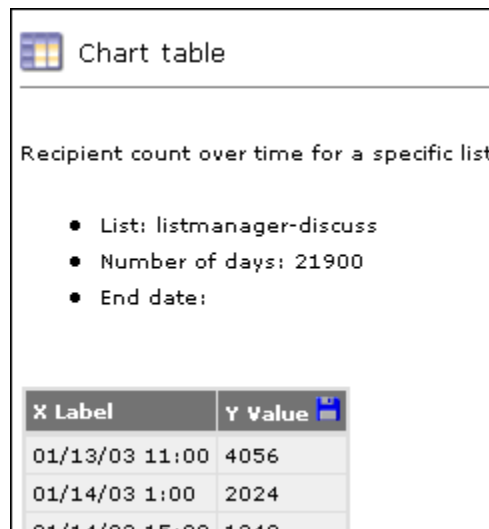


Figure 17 – Chart Table

Logging Out

Logging out ends the ListManager session.

NOTE: For security reasons, it is recommended that users close all browser windows after logging out of ListManager.

To log out of ListManager:

1. Click the **Logout** link from the **Login Information** area located in the upper-right corner of the window (see Figure 18).

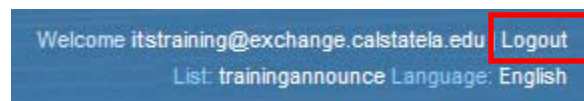


Figure 18 – Login Information Area