EMAIL TEMPLATE RESTRUCTURING

OVERVIEW

This document describes the restructuring of stored email templates in release 6.0, version 2012-01. The primary reason this restructuring was implemented was so that user groups other than the admin group could be permitted to create, edit and delete email templates.

Previously, email templates could be created and edited only via the admin Setup menu, restricting their access to administrators. In light of the new email marketing enhancement, we wanted to extend the ability to create, edit and delete templates to other user groups, such as marketing and sales employees. These abilities are now controllable via group permissions and can be set for each group depending on need.

The previous interface for managing email templates was also not optimized for handling a large number of templates. To make it easier to search, view, and control access to templates, we have moved them into a special table with many of the standard table options in EW – so they can now be searched, mass edited, and so on.

Email templates for a given EW table can now be accessed more directly by going to the table, moving the mouse to the email icon, and clicking the Manage Templates option:

Access to this option is controlled by a new permission control for each table in the Group Permissions wizard.

Email templates can also still be edited by administrators through the Setup > Email > Go to Rule/Workflow Emails button.

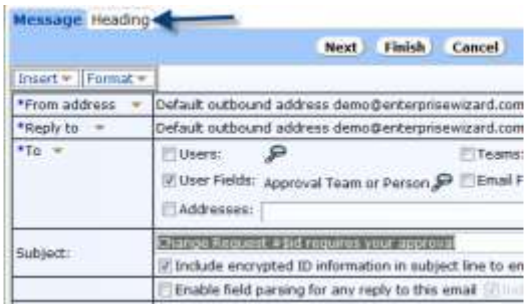
To summarize, benefits of this enhancement include:

- Groups other than admins can manage email templates
- New access to permissions for email templates in group permissions wizard allows fine tuned access control over create/edit/delete and visibility of specific templates through publication
- Standard EW Search and table views help users to find the correct template more quickly and permit a large number of stored templates to be managed effectively
- New fields in the template table for name, description, publication and availability to teams provide visibility control and scalability

Knowledgebases created in version 6.0 and higher will use this new email template functionality instead of the old template functionality. Version 5.0 and earlier customer KBs will be upgraded automatically to the new email template structure when the KB is upgraded to the new EnterpriseWizard release.

New Fields in the Email Templates Table

New fields have been added to enable better management of template information and access to the templates. These fields have been added to a new tab called Heading that appears in the Email dialog:



The fields on this tab are:

By default, the Template Name is set to the subject line of your existing templates during the upgrade. A more detailed description field is optional.

The Published field is used in group permissions just as it is for Reports. Groups may be allowed to only view/use templates in which Published is Yes. By default all existing templates, as well as any new templates you create, are given a No value in this field.

The "Make this active for" field controls which templates are displayed (their subject line is displayed) in the active template dropdown when a user mouses over the Email icon for a table:

During the upgrade, all existing templates are made active for all teams, in order to preserve the one-click access to templates when populating them manually into emails that was possible in release 5.0 and earlier. It may be desirable to make several of your older templates active for **no** teams to reduce the list of quick access templates to those that are actually relevant to manual use. This can be done efficiently via mass edit.

To do so, go to the Manage Templates screen and in the table view, select the templates you want to remove from the drop-down list, then click Mass Edit.

On the Select Fields tab, choose the Active Template field:

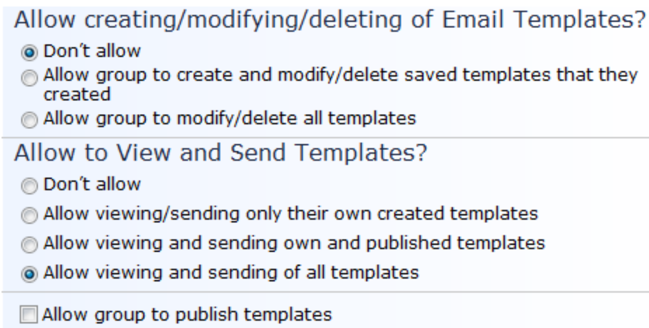
On the next screen choose any teams or no teams, and choose to overwrite values. Proceed through the wizard and hit Finish. Note that you can also use mass edit to publish multiple templates at once.

With the new functionality, you may want to create a new default view for email templates that shows some of these these new fields. It may be particularly helpful to see the Published field if you are giving some groups access only to published templates. The upgrade does not modify your default view. Note that changing the view in one table will change it for the email templates for all tables.

SETTING PERMISSIONS FOR EMAIL TEMPLATES

A new permission option has been added to the Group Permissions Wizard to control access to Email Templates for each group of users and each table.

To access these permissions, from within the KB, click Setup > Access > Manage Groups > Edit the group you wish to set permissions for, open the Table tab > Select the table you wish to set the template permissions for > Email Templates. You will see the following options:



The default settings for existing tables reproduce the access provided in previous releases. The admin group has full access, while staff and other groups have the access shown above. They are not allowed to create or modify stored templates, but they are allowed to insert any template into an outbound email on a table where they can send email.

To give a staff group the ability to create templates from the email icon mouseover, choose the second radio button in the first option above. Typically only the admin group should have the third button selected, but you may wish to give some groups this ability on their own tables.

Note that this permission tab applies only to the table that was selected on the Table tab, not to all tables. So some groups may be permitted to manage templates for one table but not others.

Note on early release of version 6.0: The Email Templates table is currently (as of 2/3/2012) visible in the table tree, although it cannot be edited in any way that a normal table can. Its presence in the tree was intended to permit different global record and field level permissions to be provided to groups to interact with email templates. If the Email Templates table is visible, then the permissions given to a group there provide the **maximum** permissions for interacting with email templates – if they do not have record level permission to create a template there, for instance, then the individual table permissions accessed through the Email Templates tab will not give them that permission. In an upcoming release this table will be removed from the tree and all groups will be given global record and field level permissions in the background, so that the Email Templates tab in the Group Permissions wizard will be the sole determinant of what they can do and see for a specific table.

CREATING/EDITING TEMPLATES

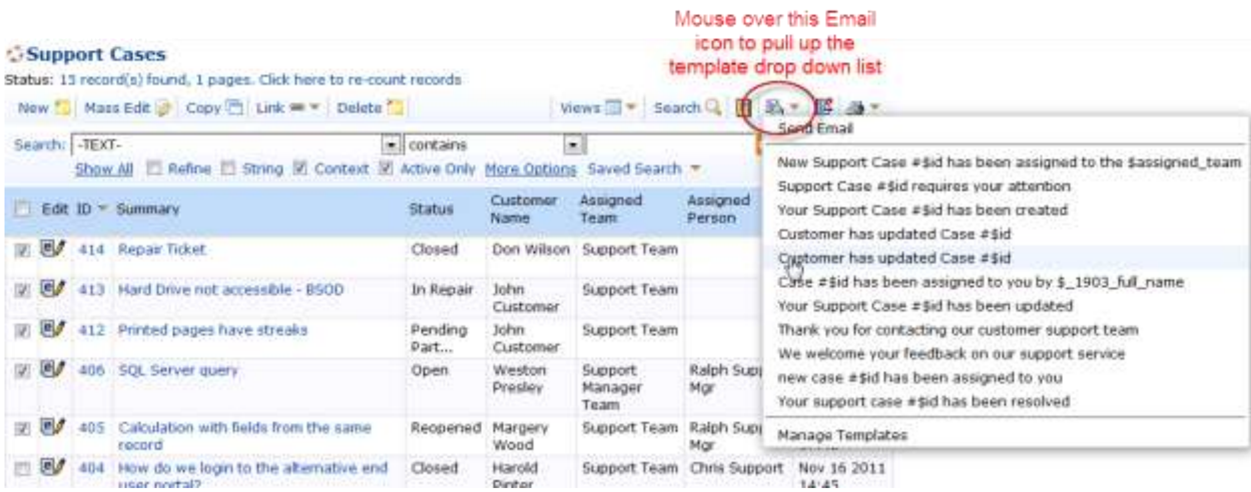
Users with access to templates can create, edit, and delete (if permitted) email templates from a few different places now.

1) Email templates can now be created and managed from within the table itself. Click on the table in the left pane, mouse over the email icon and click Manage Templates to display the table view of existing templates for the table.
2) When creating an email action in a rule, the new view of templates will appear when defining a new email action, and templates can be created or edited from there.

3) From the Setup > Email > Go to Rule/Workflow Emails menu, the new table view of email templates is displayed.

Inserting a Template into a Manually Sent Email

The method for inserting a template into a manually sent email has changed slightly for staff users. It is recommended that if you have templates that you frequently want to send manually, you edit the template as needed to make it active for your teams, which will cause it to appear in the list on the email icon drop-down:

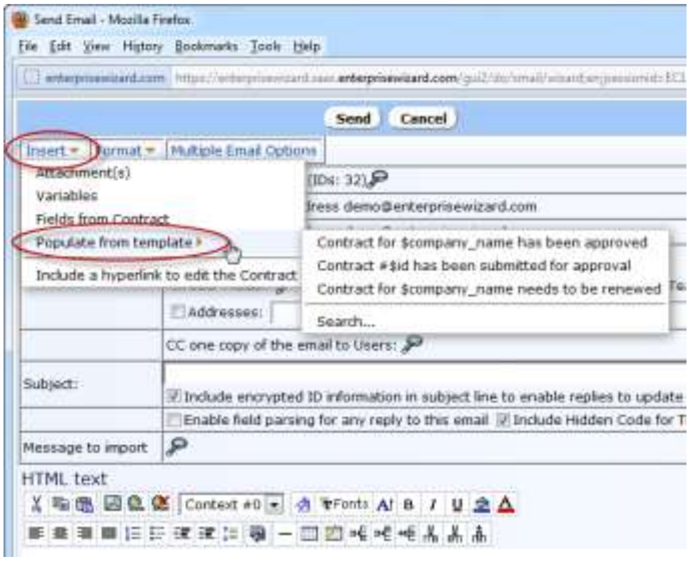


Mousing over the email icon in the action bar will bring up a drop down menu with three options:

- Send Email
- List of saved templates that can be sent with one click (the list contains only those templates that are active for your team)
- Manage Templates

Sending a Template Not Defined as Active or a New Email

The **Send Email** option brings up a blank email dialogue, just as clicking the email icon did previously. It is possible to select a stored template from here that was not on your drop-down list by mousing over "Insert" in the upper left corner, and choosing the option "Populate from template" from the drop down list.



You will again see the active templates listed for selection, or you can click on “Search” below the list to bring up the search dialogue for all templates:

You can enter a search term to search all fields of the template or use the Advanced Search link to search within specific fields.

Or you can just click the Go button without entering any criteria to see all templates and browse through them. You can sort the results by any column in the view.

Once you have identified the template you want, just select it and click the Import/Replace button to populate it into the email dialogue.

Sending an Active Template

To send a saved template on the drop-down list, simply click on it (after selecting the record(s) to which it should be sent). This will bring up the template filled out and ready to send. Click Send to send the email as is, or make any edits you need prior to sending it.

Note that you could create some generic templates with minimal data pre-filled in, such as the included fields or your email signature and use such a template as the basis for your own manual emails.

Viewing and Managing Templates

The Manage Templates menu item brings up the table view of the email templates for that particular table in order to create, edit, or delete templates:

CONCLUSION

The restructure of the email template storage and permissions provides the ability for management of email templates by staff members other than the system administrator, which enables the use of EnterpriseWizard for efficient and effective email distribution to support various business requirements, such as marketing campaigns by a marketing group, support notifications from the support group, etc.

It also provides the scalability and control that will support processes involving large numbers of email templates and rules.