



Content Library 7.0 User's Guide

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Introducing Content Library

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About Content Library

e-Dialog Content Library[™] lets you submit, manage, and control content to use in your e-mail campaigns. Content includes message copy, HTML, and images to use in mailings. You can reuse text and HTML content from one campaign to another.

When you have created your content, you then store it in the Content Library, which is hosted by e-Dialog.

Content Submission Process

The content submission process can include the following steps:

- 1 Your organization prepares the content.
- 2 You submit the content.
- 3 (optional) Your e-Dialog Professional Services team reviews the content.

Your interaction with e-Dialog is determined by the terms of your contract agreement. This step might not be required. Once content is validated, you cannot change it without submitting a request to your e-Dialog Professional Services team. You can change content until deployment.

Limiting Access to Content

By default, when you create a content item, all users have permission to read and write (edit) the content item. However, you can limit access to the content item by providing read-only access to some users, while granting other users read and write permission. Any user who has write permission can change the user permissions for that content item.

The following table illustrates the actions that users with read-only and read/write permission can perform.

Action	Read-only permission	Read and write permission
See a list of content items	yes	yes
Create content items	yes	yes

Clone the content item	yes	yes
Set or change content item permissions	no	yes
Delete the content item	no	yes
View links in a content item	no	yes

System Requirements

Precision Central 7.0 requires:

- Microsoft Windows or Apple Macintosh OS X*
- ♦ Adobe Flash Player 9.0.28 or newer
 - Adobe Flash Player is required only for Insight Builder, User Management, Precision Dashboard and Data Director.
- One of the following Web browsers:
 - § Internet Explorer 7 (http://www.microsoft.com/downloads/) on Windows
 - § Firefox 3 (http://www.mozilla.com/en-US/firefox/) on Windows and Macintosh OS X*

Customization for Your Organization

e-Dialog configures Precision Central applications to meet your organization's specific preferences. Also, to accommodate the different access needs of individual users, e-Dialog sets up individual profiles based on user name. Your Professional Services Account Team helps to configure these preferences during your initial set-up process.

For example, your organization may want to provide certain employees with the ability to upload new audiences and assign these audiences to new users. On the other hand, others may only have the ability to upload a new audience solely for their own use. Or, some employees may not be able to send final e-mails, while other are allowed to do so.

Note: As a result of the modular approach, some of the functionality described in this document may not apply to you.

Starting Content Library

To start Content Library:

- 1 Log in to Precision Central.
- 2 Do one of the following:
 - § In the Content Tab of Campaign Builder, click Insert Content Object.
 - § From Precision Central, select Utilities > Content Library.

See Setting Your Default Application in Introducing Precision Central 7.0 for instructions on specifying which application appears when you log in to Precision Central.

^{*} The middle scroll button of a Macintosh mouse may not work consistently in Precision Central 7.0. This is a known issue in Adobe Flash Player.

Navigating in Content Library

Whether you are looking at a list of content items or editing an individual piece of content, you can see where you are using the breadcrumb navigation at the top of the screen.



Getting a List of Content

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Viewing the Content List

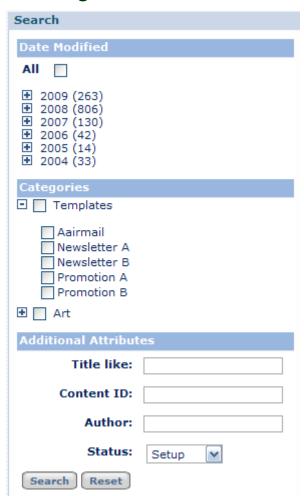
When you start Content Library, the content list appears. The first 25 content items appear on the first page, with each subsequent 25 items on each additional page.



To navigate through the list, use the arrows as follows:

Click	To go to
•	The next page
4	The previous page
N	The last page
M	The first page

Filtering the Content List



You can narrow the list of content items by using the search criteria, including the date when content items were most recently modified, categories that content is assigned to, the content item name, ID, and status. When you specify multiple criteria, the content objects that appear in the list meet all of the criteria you specify.

Note: When you view the content list, the most recent search criteria you entered is used to filter the list. You can specify different search criteria or click **Reset** to view the entire list.

Search by date modified

To search for content items that were most recently modified within specific months, select those months from the Date Modified search filters. Search by years and then by month. To see all content items, click the **All** check box.

Note: When you click **All**, only the content items for which you have write permission appear in the content item list.

Search by category

To search for content items associated with particular categories, select those categories from the Categories search filters. You can specify multiple categories for your search. You can also click the + next to a category and search for values of a category.

Search by name

To search by name, in the Additional Attributes search filters you can enter partial names in the Title like text box. The search is not case-sensitive. For example, if you enter "te," the search results can include content items named "test1," "mytest," and "Technical." When you enter "test" and "TEST," Content Library returns the same result.

Search by content ID

To search by content ID, enter the ID in the Content ID text box in the Additional Attributes search filters.

Search by author

To search by author, enter a portion of or all of the name of the person who created the content in the Author text box in the Additional Attributes filters.

Search by status

To search for content items that have a particular status, select the status from the Additional Attributes search filters. The status can be:

- ♦ Setup
- Active
- Archive
- Locked
- Deleted
- Any

The meaning of each status is determined by each e-Dialog client. The status provides a way to organize content.

Note: If you select **Any** as a search criterion, the list of content includes content items that have been deleted.

Sorting the Content List

To sort the list by name, when modified, or ID, click the appropriate column heading. To sort in reverse order, click the column heading again.



Selecting Content Items

Note: If you do not have write permission for a content object, you cannot select it. You can click the check box only for content items for which you have write permission.

To select a content item, click the check box to its left. You can select multiple items. To select all items on a page, click the check box at the top of the check box column.

If you have read and write permission, you can *change the properties* (on page 34) of multiple content items by selecting the items, and then clicking **Properties**. Similarly, you can delete multiple content items by selecting them and then clicking **Delete**.

If you have only read access to a content item, you can preview it, but you cannot edit it, change its properties, or delete it.

Previewing Content Items

To see what a content item looks like, click Preview

Exporting the Content List

You can export either the entire content list or the list of selected content items to a Microsoft Excel spreadsheet.

To export the entire list, click Export All.

To export selected content items:

- 1 Select the content items to export.
- 2 Click Export Selected.

Creating Content

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Creating a Content Object

You can create a text, HTML, or image content object.

Note: Images are not stored in the Content Library. Instead, the URL that points to the image, along with any properties, is stored.

To create a text or HTML content object:

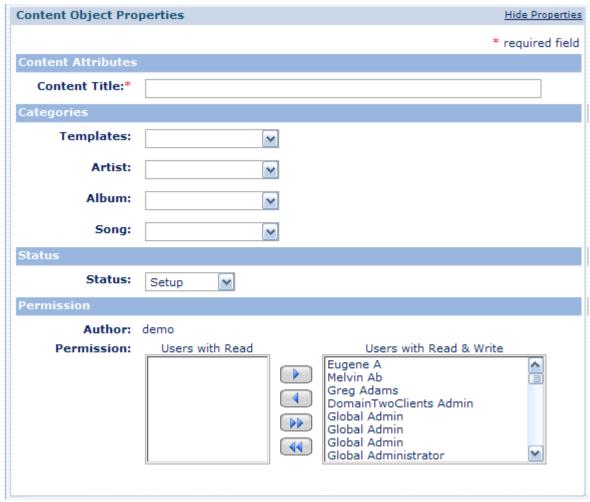
1 Click New.

The editor appears:



2 Click Show Properties.

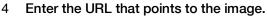
The Content Object Properties pane appears:

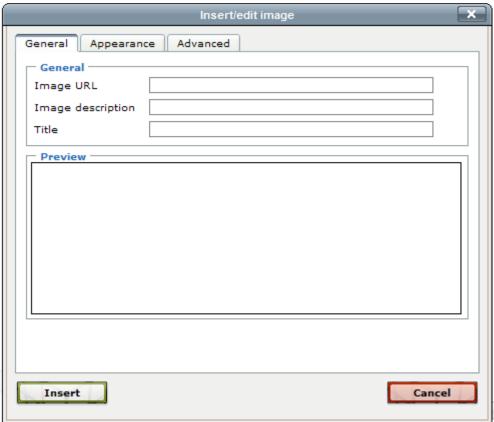


- 3 Enter the content title in the Content Title text box.
- 4 Select the categories to use to organize the content.
- 5 Select the status from the Status drop-down.
- To change a user's permission from read and write to read-only, use the arrows to move the user from the **Users with Read & Write** column to the **Users with Rea**d column.
- 7 Enter or copy *HTML* (on page 23) or *text* (on page 21) into the Content Library Editor or Advanced Editor.
- 8 Click Save.

To add an image to the Content Library:

- 1 Click New.
- 2 Click Advanced Editor.
- 3 Click .

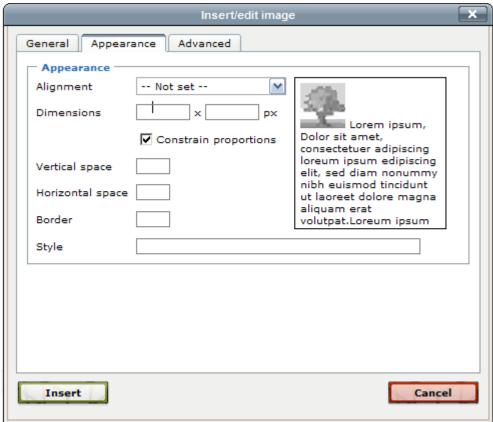




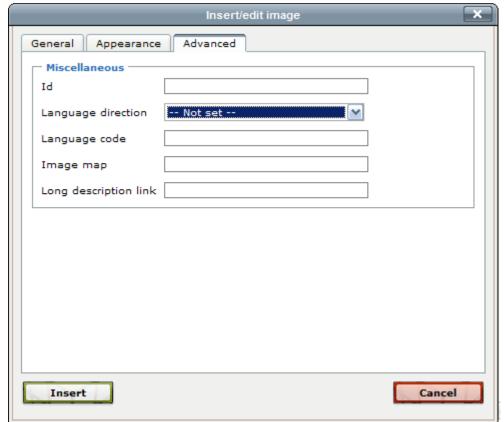
5 Enter a description of the image and the image title.

The value you enter as the Title appears in the HTML source as <img title="title you enter". The value you enter as Image description is the alternate text that appears if the image is missing and appears in the HTML source as <img alt="image description".

6 (optional) Click the Appearance tab to change the appearance of the image.



7 Change the alignment, dimensions, space around, border and style of the image.



8 (optional) Specify other properties of the image by clicking the **Advanced** tab.

- Specify the image ID, whether the language goes from left to right or right to left, the language code to use, the image map, and a link to the long description of the image.
- 10 Click Insert.

Preparing Text Content

To prepare text content:

- 1 Use the software of your choice to create the text content, including:
 - § The Content Library Editor or Advanced Editor
 - § A third-party word processor application, ensuring that you save the content as plain text
 - § A plain text editor such as Notepad
- 2 Ensure that you text content follows the *text content guidelines* (on page 21) and your organization's standards.

Guidelines for Text Content

The following guidelines are intended to help you to create text content that renders consistently across most major e-mail clients:

Use supported character sets

In general, you should use only ASCII characters in text content for maximum compatibility with e-mail clients. Replace non-ASCII characters (for example, superscript symbols such as TM) with ASCII equivalents. For example, replace TM with (TM).

For international e-mail requiring multi-byte character sets, contact your Account Team.

Organize the content

Text based e-mail clients do not support any copy formatting or HTML code (other than the <A> tag for links). Instead, you can use a string of asterisks or dashes to visually organize the copy and improve the appearance of the layout. For example:

SPECIAL OFFER - 30% OFF

Use hyperlinks in text

To insert a hyperlink in the Text layout, use the same syntax as for HTML without any formatting or anchor tags attributes, as follows:

http://images.ed4.net/images/htdocs/placeholder.htm

Although the Text format does not support display names, using this syntax with the URL as the display name allows you to give these links report names in the Links Tab. You can then use the report names for tracking purposes in text e-mail clients that do display hyperlinks.

e-Dialog recommends that you avoid placing hyperlinks in the middle of sentences or paragraphs in your text copy. Below are examples of proper and improper link placement:

Proper link placement

Link placed on its own line:

HTML	Text

The stereo is on sale for \$199.	The stereo is on sale for \$199.	
Buy it now!	Buy it now at:	
Also, check out our great deals on	http://www.stereo.sale.@sample.com	
CDs.	Also, check out our great deals on CDs	

Improper link placement

Link placed in the middle of a sentence:

HTML	Text
The stereo is on sale for \$199	The stereo is on sale at http://www.stereo.sale@sample.com
when you purchase speakers.	for \$199 when you purchase speakers. There is also a
There is also a great deal on CDs.	great deal on CDs.

Preparing HTML Content

To create HTML content for the cell:

- 1 Use the software of your choice to create the HTML code, including:
 - § The Content Library Editor or Advanced Editor
 - § A third-party visual editor (for example, Microsoft® FrontPage® or Adobe® Dreamweaver®)
 - § A plain text editor, for example, Notepad
- 2 Ensure that the HTML is valid, appears as expected, and follows the *guidelines for HTML content* (on page 23) and your organization's standards.

Guidelines for HTML Content

The following guidelines are intended to help you to create HTML code that renders consistently across most major e-mail clients.

Specifying formatting

- Do not use <BODY> tags to control formatting. Body tags are stripped out or ignored by most Web based e-mail clients.
- Use inline styles to control HTML typeface:
 .
- ♦ Use the tag instead of <div>, , or tags.
- ◆ Do not use fractional font sizes such as 12.5px.
- Avoid placing images inside tags.

Using JavaScript

Do not use JavaScript.

- Ensure there are no <script type=javascript > bits of code in the template.
- Remove or comment out all onMouseover, onMouseout calls.

Using cascading style sheets (CSS)

♦ Avoid using CSS.

If you must use CSS, use it sparingly and only to format text. Inline styles render consistently across major e-mail clients. Inline styles in font tags can be an effective method for controlling the appearance of your text. For example:

```
<font style="font-family:Arial,
Verdana,Helvetica,sans-serif;
font-size:12pt;</pre>
```

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```
font-color:#000000">
Insert copy here.
</font>
```

- Do not use styles to control:
 - § Table borders and padding
 - § Image float positioning

Using tables

- ◆ Limit the width of your HTML tables to 600 pixels to minimize horizontal scrolling, especially in web based e-mail clients.
- Define elements with:

```
border=0 cellpadding=0 cellspacing=0.
```

- Only define width in the tag.
- Define elements with:

```
valign=top align=left.
```

- Avoid defining height properties.
- ♦ Avoid defining width in tags. Instead, let a spacer image control width.
- Do not define elements with a class. Instead, let a spacer image and inline style control margin and font style.
- Avoid using in empty elements. Instead, use a spacer image.

Specifying unsubscribe and forward-to-a-friend links

Use the following syntax for unsubscribe and forward to friend links:

```
To unsubscribe, <a href="_UNSUBLINK__" style="font-color: #000000" target="_blank">click here</a>.

To forward this e-mail to a friend, <a href="_FTFLINK__" style="font-color: #000000" target="_blank">click here</a>.
```

Note: The font color can be anything you choose.

 Style a hyperlink either by styling the anchor tag as shown above, or by surrounding the display text with a styled tag.

Including images

- Define height and width properties for all images.
- ♦ Do not resize images in HTML.
- Treat photo realistic images as jpg.
- Treat lines, text, shapes, and solid color imagery as gif.
- Link images by placing the image tag in place of the display text.
- Set the border size to 0.
- Include an <alt> tag to display text if the image is missing.

Using the spacer image

Use the spacer image, which is a transparent 1x1 pixel image, to set width and height properties.

Preparing Images

To create image content for the cell:

- 1 Use the software of your choice to create the image.
 - You can save the image in any of the popular formats, including JPG, PNG, GIF, and so on. Save photo realistic images as JPG. Save lines, text, shapes, and solid color imagery as GIF.
- 2 Ensure that the image is smaller than 2 megabytes and follows your organization's standards.

Using the Content Library Editor

To specify the text and HTML content for a content item, you can use either the Content Library Editor or the Advanced Editor. You can enter content in the Content Library Editor or create it in another editor and paste it into the Content Library Editor.

To use the Content Library Editor:

- 1 Do one of the following:
 - a) Click New to create a content item.
 - b) Click the content item to edit.
 - c) Click Clone while editing a content item.
- 2 Click Text to enter text content.



- 3 Enter or paste the text content into the text area.
- 4 (optional) Click **Preview** to see how the text content appears.
- 5 Click **HTML** to enter the HTML content.



- 6 Enter or paste the HTML content into the text area.
- 7 (optional) Click Preview to see how the HTML content appears.
- 8 Click Save.

Using the Advanced Editor

To create content, you can use either the Content Library Editor or the Advanced Editor.

To start the Advanced Editor:

- 1 Do one of the following:
 - a) Click New to create a content item while viewing the Content Library content list.
 - b) Click the content item to edit while viewing the Content Library content list.
 - c) Click Clone while editing a content item in Content Library.

- d) In Campaign Builder, navigate to the Content Tab.
- 2 Click Advanced Editor.

To create content using the Advanced Editor:

- 1 Select the type of content to create, either Text or HTML.
- 2 Enter the copy.



- 3 To enter a link in text content, click
- 4 To incorporate HTML tags in HTML content, use the *buttons on the toolbar* (on page 26). Although you can enter HTML tags manually, the buttons on the toolbar ensure that your HTML contains closing tags for each opening tag and that the tags do not contain typos. For a brief description of a button, hover over it with the mouse.
- 5 Click Apply Changes.

Notes

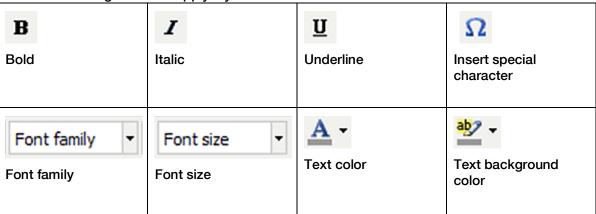
- When you change the border size of an image, the image editor automatically resets the border color to black. You can control the border color by specifying a style.

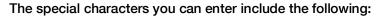
Advanced Editor Toolbar Buttons

The following tables show the toolbar buttons:

Copy formatting

Use the following button to apply styles to text.



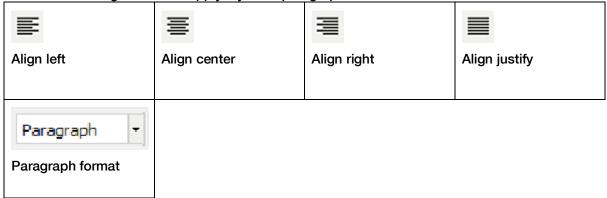




When you use the HTML Source Editor to edit text, enable Word wrap to be able to see the content without scrolling; this has no effect on the content.

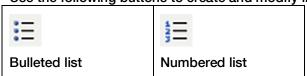
Paragraph formatting

Use the following buttons to apply styles to paragraphs.



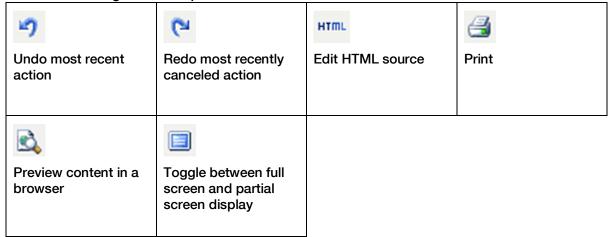
HTML Lists

Use the following buttons to create and modify lists.



Actions

Use the following buttons to perform common actions.



Links

Use the following buttons to create and remove links.



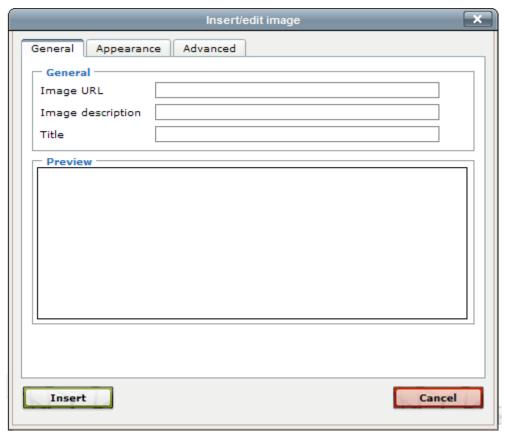
When you insert a link, you specify the URL, the report name, and the categories to associate with the link. The report name is the report that tracks the effectiveness of the link in eReports. You can also disable reporting on the link.

Images

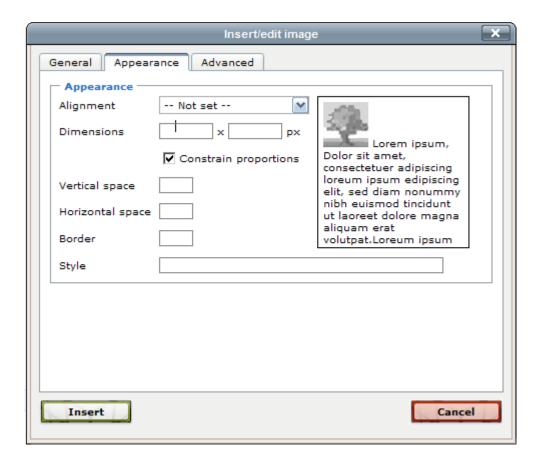


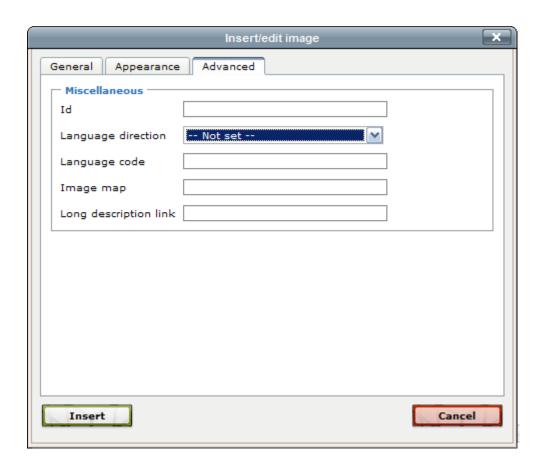
Insert or edit an image

You can specify the appearance of the image, including alignment, size, the amount of space around the image, whether there is a border around the image, and how text appears around the image.



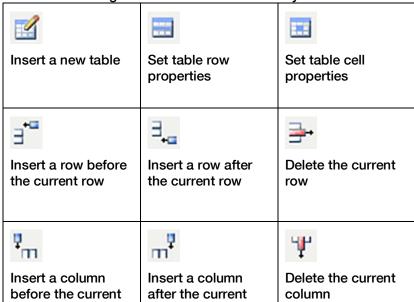
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Tables

Use the following buttons to create and modify tables.



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column	column	
Split merged table cells	Merge table cells	

When you insert a table, you can specify the number of columns and rows as well as the appearance of the table.

Splitting merged table cells restores the table structure to its previous state, but does not return cell contents to the previous state.

Submitting Content

When you have entered or pasted the text and HTML content into the Content Library Editor or Advanced Editor, you click **Save** to add it to the Content Library.

When you have created your content object(s), you then e-mail your e-Dialog Account Team to notify them that the content is ready. To ensure that they use the correct content, include the content object ID(s) in your e-mail.

Modifying Content

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Editing Content

If you have write permission and the content you want to edit is not locked, you can edit the content and its properties.

To edit content properties:

- 1 Go to the Content Library Object List.
- 2 Select at least one content item by clicking the check box next to it.
- 3 Click Properties.
- 4 Click the content item title or content ID in the content list.
- 5 Select OK.

To edit content:

- 1 Go to the Content Library Object List.
- 2 Click the Content Title or Content ID of the content object to edit.
- 3 Use the Content Library Editor or the Advanced Editor to modify your content.
- 4 (optional) Click **Preview** to see what the content looks like in your browser.
- 5 Click Save.

To edit an image:

- 1 Go to the Content Object Library Object List.
- 2 Select the Content Title or Content ID of the content item that contains the image to edit.
- 3 Click Advanced Editor.
- 4 Highlight the image.



- 5 Click 🍑
- 6 Edit the properties of the image that you want to change.
 - You can change any property of the image, including the link that points to it.
- 7 Click Update.
- 8 Click Apply Changes.

Editing Links

To edit the links in content:

- 1 In the Content Object List, click the name of the content whose links to edit.
- 2 Click View Links.



3 (optional) Click the plus sign to view the text and HTML versions of a link on separate rows.



- 4 Edit the target or report name.
- 5 Edit the report name or check the DNR check box to exclude any information about the link in a report.
- 6 Click Save.

To exit without making changes to any links, click Close.

Specifying Content Properties

To specify the content properties:

- 1 Click the check box next to the content object(s) whose properties you want to change.
- 2 Click **Properties** to view the Properties panel.
- 3 Select the categories to associate with the content.
 - To be able to organize content and determine the effectiveness of mailing campaigns, you can associate content with categories. Although you associate content with categories when you create content, you can also later modify the categorization.
- 4 Select the status.

- When you create content, the status is Setup.
- 5 Specify which users can only read or can both read and write content items by moving them into the Users with Read or Users with Read & Write columns. Although you can assign permissions when you create a content item, you can later change those permissions. Only users who have both read and write permission for a content item can grant or deny access for that item to other users.
- 6 Click OK.

Cloning Content

You can use an existing content item as the basis for a new content item by cloning the original item.

When you clone a content item, the	is/are in the cloned content item
content name	different
content ID	different
status	the same
permissions	different
categories	the same
text content	the same
HTML content	the same

Deleting Content

To delete a content object:

- 1 Go to the Content Object List.
- 2 Click the check box next to any content objects to delete. You can select multiple content objects to delete.
- 3 Click Delete.

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