

Arts Mailing List System (AMLS) user training

Arts Instructional Support & Information Technology

Julie Syenave, Project Manager

Leanna Chow, Programmer / Quality Assurance Analyst



THE UNIVERSITY OF BRITISH COLUMBIA

Arts Instructional Support & Information Technology

Faculty of Arts

Agenda

- **AMLS overview**
- **Guidelines**
- **AMLS technical training**

AMLS overview

What is Arts Mailing List System (AMLS)?

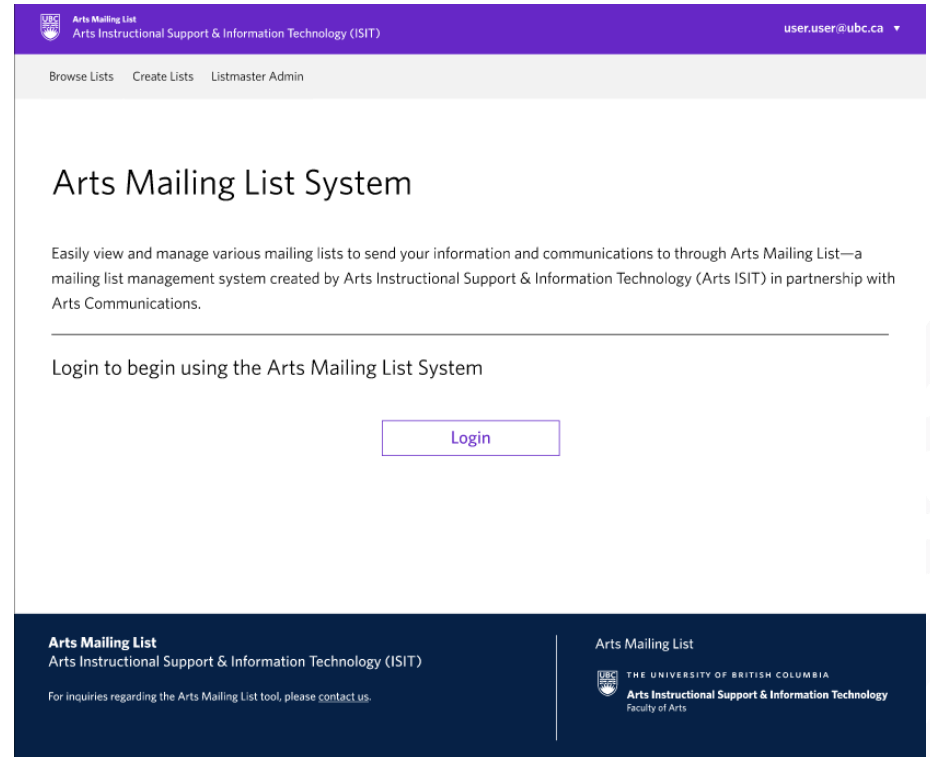
The **Arts Mailing List System (AMLS)** is a mailing list system for the Faculty of Arts, allowing the creation and maintenance of targeted mailing lists for faculty, staff, and student groups.

There are 2 types of lists:

- Manually populated
- Automatically populated from Workday HR(/Student)

For both types, you can combine existing mailing lists.

Link: <https://lists.arts.ubc.ca/sympa>



The screenshot shows the Arts Mailing List System (AMLS) login page. At the top, there is a purple header with the UBC logo, the text "Arts Mailing List Arts Instructional Support & Information Technology (ISIT)", and a user profile "user.user@ubc.ca". Below the header is a navigation bar with "Browse Lists", "Create Lists", and "Listmaster Admin". The main content area has the title "Arts Mailing List System" and a description: "Easily view and manage various mailing lists to send your information and communications to through Arts Mailing List—a mailing list management system created by Arts Instructional Support & Information Technology (Arts ISIT) in partnership with Arts Communications." Below this is a horizontal line and the text "Login to begin using the Arts Mailing List System". A "Login" button is centered below the text. At the bottom, there is a dark blue footer with the UBC logo, "Arts Mailing List Arts Instructional Support & Information Technology (ISIT)", a link "For inquiries regarding the Arts Mailing List tool, please contact us.", and the UBC logo with "THE UNIVERSITY OF BRITISH COLUMBIA Arts Instructional Support & Information Technology Faculty of Arts".

Pilot phase

At the start, the tool will only be accessible and used by a select number of people:

- Arts Communications
 - Katya Roxas – Listmaster
 - Michelle Ho
- Arts I&I
 - Kate Book
 - Zoe Zhou
- Arts Dean's Office
 - Violet Addams
 - Claudia Chan
 - Vicki Ferguson
 - Evan Eschelmuller
 - Ginger Dhamrait

After the pilot phase, we will assess opening up the tool to other unit and departments from the Faculty of Arts

User access roles

Privileged* and Basic Owners

- Edit list details
- Manage list owners and moderators*
- Manage subscribers of lists
- Add/delete subscribers
- Apply list sending setting*
- Apply list receiving setting
- Approve messages sent using a list
- Edit notification templates
- Manage archives
- View logs

Moderators

- View list information
- Approve messages sent using a list
- View logs

Listmaster

- Access to all features and settings available to all user roles
- Create lists
- Combine lists
- View and delete closed lists
- Edit user emails
- Impersonate a user's account
- Manage add/delete subscriber privileges
- Access all lists in the system

Guidelines

Use of AMLS

- AMLS is a mailing list system that can be **used by units in the Faculty of Arts** to manage targeted **mailing lists for faculty, staff, and students**. Unlike UBC Mailing Lists, AMLS is **integrated with Workday**, which allows recipient lists to be **automatically updated** based on current student and employee data.
- AMLS can also be used to create **manual mailing lists**, but should not be used for personal mailing lists. The mailing lists created in AMLS **need to have added value** for the entire unit/department or for the Faculty in its entirety.
- AMLS provides **flexibility**, so even large mailing lists can **accommodate exceptions** and be customized according to user needs.
- AMLS includes bulk **import and export functions** for simple integration with **complementary tools**, such as for example Envoke.

Unsubscription

If your email is **mandatory** (Emails that recipients are required to receive. These can be emails with official announcements, or requests for the completion of crucial actions), you may send it as is. Mandatory emails are emails that require the user to read and/or perform an action on.

If your email is **non-mandatory** (Emails that users are not required to receive. These can be emails for promotional content, such as newsletters or sales), you are required to provide users with the **option of unsubscribing** from your mailing list.




Below language will have to be included in the footer of all non-mandatory emails:

*"You are receiving this email because you are subscribed to the **[Mailing List Name here]** mailing list. If you no longer wish to receive these emails, forward this message to **[list owner email]** with a message asking us to remove you from our mailing list"*

List owners are required to **fulfil removal requests within ten days of receipt.**

Request a mailing list

A process has been defined for the request of the creation of new mailing lists:

1. A request for the creation of a new mailing list goes through the **request form** on the Arts  website.
2. Based on defined criteria, such as origin of request, communication goals and target audience, the **request will be evaluated** by Arts . When needed, Arts Communications can be consulted.
3. Once the request is validated, Arts  will **create the mailing list** based on provided settings and assign owners (min 2 privileged owners).
4. The owner then **checks the setting and adds the appropriate users** (co-owners, moderators and subscribers for the manual lists)

Any updates of existing mailing list also goes through the creation of a ticket in ServiceNow.

AMLS technical training

What will be covered?

1. Logging in
2. Browse and access lists
3. Edit list details
4. Edit Sending and Receiving permissions
5. Edit list access privileges
6. Edit automated message templates
7. Manage subscribers
8. Manage unsubscribers
9. Manage blocked users
10. Manage moderators
11. Manage owners
12. Manage archives
13. View logs
14. Manage message requests

Logging in

To access the Arts Mailing List System (AMLS), you will need to be a Listmaster or a Privileged owner, Basic Owner, Moderator of an existing list.

- Go to <https://lists.arts.ubc.ca/sympa>
- Click on the Login button
- Enter your CWL credentials

Browse and access lists

You will only see lists that are made visible in the index by an owner, or if you are an Owner or Moderator of a list. Your access role will be indicated in brackets beside the list address.

- Click on **Browse & Edit Lists**
- Use the search bar to type the name or address of the list, filter by alphabet, or browse through the list index
- Click on the list address that you would like to view or manage

You will be directed to the **List Home**

Edit list details

Edit the list name as it appears on the list index and list management pages and set its visibility in the list index.

- From the left menu, go to **Settings > General > Details**
- Under **List Name**, enter the name of your list
- Under **List Visibility**, select one from the following:
 - Show list in list index
 - Hide list from the list index
(Note: hiding the list applies to non-subscribers and subscribers only.)
- Click **Apply Changes**

As an owner you can **delete a mailing list**. It is important to remember that once a mailing list has been deleted, it cannot be restored!

Edit sending and receiving permissions

Decide who will be allowed to send messages to a list and who will receive replies to the messages.

- From the left menu, go to **Settings > General > Sending and Receiving**
- Under **Sending**, select an option*
 - Options that indicate “moderated” mean that messages will be held for review for approval before being sent out or rejected.
- Under **Receiving**, select an option
 - If “Other email address” is selected, an email field will appear below for you to fill
- Click **Apply Changes**

*Privileged owners only

Edit list access privileges

Edit who can view the list information, who can subscribe, and determine the access of list owners and moderators.

- From the left menu, go to **Settings > General > Privileges**
- Apply available options under each section:
 - **List Information Visibility** – determine who can view the list information from the “List Home” page
 - **Invite Subscribers** – determine who can invite people to subscribe to the list
 - **Review Subscribers*** – determine who can review the list of subscribers
 - **Owners: Type** – determine the default profile selected when adding an owner
 - **Owners: Email Notification*** – determine if an email will be sent to the owner notifying them that you have added them to the list
 - **Owners: List Visibility*** - determine if the owner’s name will appear in the list index
 - **Moderators: Email Notification*** - determine if an email will be sent to the moderator notifying them that you have added them to the list
 - **Moderators: List Visibility*** - determine if the moderator's name will appear in the list index
- Click **Apply Changes**

*Privileged owners only

Edit automated message templates

Customize the automated notification messages that are sent from the system.

- From the left menu, go to **Settings > General > Notification Templates**
- Edit messages for any of the following:
 - **Welcome message** - sent to new subscribers
 - **Rejection message** - when a message is rejected by list moderator, a notification can be sent to the original author
 - **Deletion message** - sent to users when you remove them from the list using the DEL command (unless you select the Quiet option)
 - **Virus infection message** - sent to the sender of a message in which a virus was found
- Click **Save** after editing each message

Manage subscribers

Add, delete, or modify subscribers to this mailing list. Subscribers of this list receive emails sent to the mailing list email address.

- From the left menu, go to **Settings > Users > Subscribers**
- On this page you can do the following
 - **Add subscribers individually**
 - **Add subscribers in bulk**
 - **Synchronize subscribers:** Synchronize all mailing list data with the most recent data sources. This option is only visible for combined mailing lists
 - **Subscriber Index:** You can:
 - Search subscribers
 - Edit subscriber information
 - Unsubscribe a user
 - Delete a subscriber
 - Export subscribers

Manage unsubscribers

Only deleted subscribers, initially **originating from a data source**, will appear in the unsubscriber index table. Unsubscribers of this list will not receive emails sent to the mailing list email address.

To restore deleted subscribers:

- From the left menu, go to **Settings > Users > Unsubscribers**
- Under the **Unsubscriber Index**, check the boxes beside the email addresses that you would like to restore
- *Optional: Check the box beside “Quiet (do not send email notification)”*
- Click **Restore selected email addresses**

Manage blocked users

Add, delete, or modify blocked users from this mailing list. Blocked users are prevented from sending emails to this mailing list.

- From the left menu, go to **Settings > Users > Blocked Users**
- In the field provided, you can:
 - **Add blocked users** – enter one mail address per line, include an asterisk (*) to indicate any string from that domain (example: *@spammer-domain.com)
 - **Delete blocked users** – remove them from the existing list
 - **Modify existing blocked users** – make direct edits to the existing list
- Click **Save Changes**

Manage moderators

Add, delete, or modify moderators of the mailing list*.

If the mailing list is moderated, messages posted to the list will first be passed to the moderators, who will decide whether to distribute or reject it.

- From the left menu, go to **Settings > Users > Moderators**
- On this page you can do the following
 - Add a moderator
 - Edit a moderator
 - Delete moderators

*Privileged owners only, however all owners can view the list of moderators.

Manage owners

Add, delete, or modify owners of the mailing list*.

- From the left menu, go to **Settings > Users > Owners**
- On this page you can do the following
 - Add an owner
 - **Basic owners** of this list have the ability to manage subscribers of this list. They may review subscribers and add, delete, or modify email addresses from the mailing list.
 - **Privileged owners** of the list can also manage subscribers of this list, but they can also assign other owners and moderators for the mailing list and are able to make more edits to the list settings.
 - Edit an owner
 - Delete owners

*Privileged owners only, however all owners can view the list of owners.

Manage archives

Download or delete message archives sent during a selected month.

- From the left menu, go to **Settings > Archives**
- From the drop-down menu, select a month or months by holding down the ctrl key + right click
- Click one of the following options:
 - **Download** – You will receive a zip file containing folders for each month selected. Each file is a message that was sent in that month. They will not have an extension; however, you can open them with a plain text editor (ie: Notepad or TextEdit)
 - **Delete** – Performing this action is irreversible, so ensure that you have downloaded a copy of the selected archive(s).

View logs

View historical records of usage patterns, user activities and operations logs within this mailing list.

- From the left menu, go to **Settings > Logs**
- Use any of the following filters for your search:
 - **Search by** – Email or Message ID, then enter an applicable value in the field “Matching with:”
 - **Search date from** – click on “Calendar” to select a date
 - **To** – click on “Calendar” to select a date
 - The date filters are independent from each other, so you do not have to select a date for both.
 - **Search by type** – select an option
- Click **View**

Manage message requests

For moderated lists, all messages have to be approved by one of the assigned moderators before it is distributed to the entire mailing list.

After sending a message to a list:

- subscribers are notified by email that their message will be moderated
- moderators will receive an email notice with the requested message for review
- From the left menu, go to **Settings > Requests > Messages**
- On this page you can do the following:
 - View, distribute or reject an individual message
 - Bulk distribute or reject messages
 - Manage rejection messages



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