




NEWSLETTER AGGREGATOR FOR SHAREPOINT

TECHNICAL DOCUMENTATION

Torpedo – Serviços de Informática, Lda.

Torpedo.pt
19/03/2024

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		Revision No.: 1.0.1.58

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1 DOCUMENT VERSION HISTORY

Table 1 - Name and Document Content

DOCUMENT NAME	CONTENT
trpd_spo_newsletteraggregator_technicaldocumentation.pdf	Technical Documentation

1.1 VERSION HISTORY


Table 2 - Version History

VERSION HISTORY						
VERSION N°.	AUTHOR	DATE	REVISIONED BY	DATE OF REVISION	APPROVED BY	APPROVAL DATE
1.0.0.1	• Francisco Ferreira	28/11/2023	Bruno Teixeira	28/11/2023	Bruno Teixeira	28/11/2023
1.0.0.2	• Francisco Ferreira	03/01/2024	Bruno Teixeira	03/01/2024	Bruno Teixeira	03/01/2024
1.0.0.3	• Francisco Ferreira	17/01/2024	Bruno Teixeira	17/01/2024	Bruno Teixeira	17/01/2024
1.0.1.57	• Francisco Ferreira	29/01/2024	Bruno Teixeira	29/01/2024	Bruno Teixeira	29/01/2024
1.0.1.58	• Francisco Ferreira	19/03/2024	Bruno Teixeira	19/03/2024	Bruno Teixeira	19/03/2024


1.2 DISTRIBUTION

Table 3 - Distribution List

NAME	COMPANY	BOARD
trpd_spo_newsletteraggregator_technicaldocumentation.pdf	Torpedo.pt	Marketplace

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2 SUMMARIES

2.1 OBJECTIVE

Web Parts are modules of functionality that you can add to SharePoint Online. These modules are created by development teams and allow adding more functionalities to those already existing from in out-of-the-box SharePoint Online. The web parts are delivered in a package format (files with .sppkg extension), allowing to install several web parts in the customer's SharePoint Online tenant.

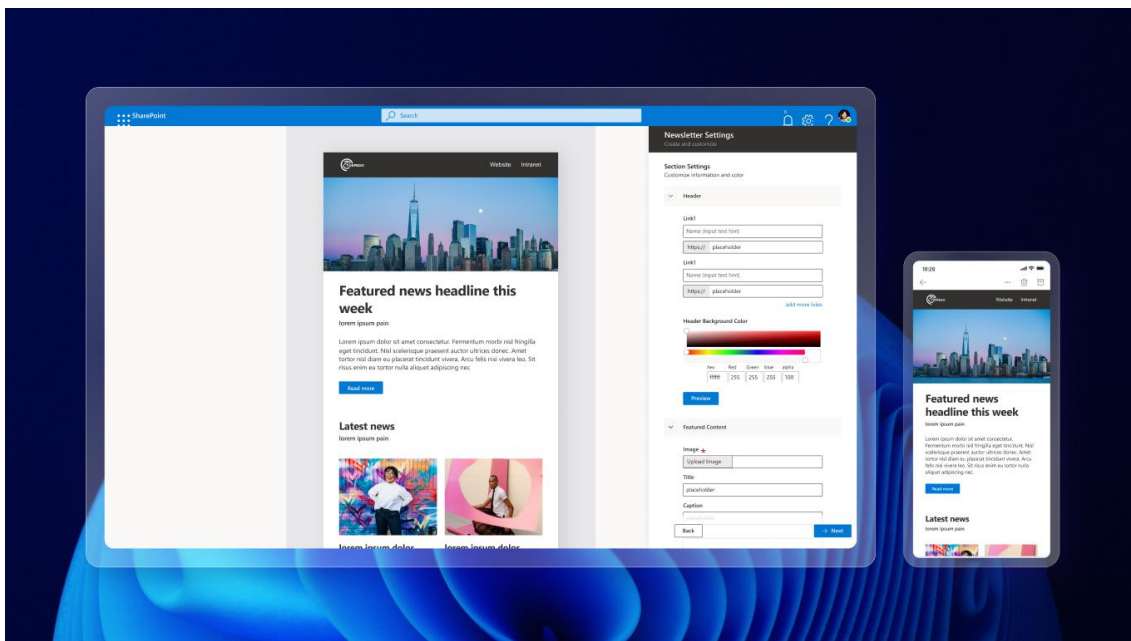



Figure 1 - Web Part Teaser

2.2 BRIEF DESCRIPTION OF THE PRODUCT


The **Newsletter Aggregator for SharePoint** is a robust and user-friendly tool designed to simplify the newsletter creation process within the SharePoint environment. With a simple and intuitive configuration menu, users can easily craft personalized newsletters, switch between two layout options, and preview their progress in real-time. This Web Part is ideal for users who want an efficient way to create, configure, and send newsletters to a specific target audience.

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Main features of the web part:

- **Intuitive Configuration Menu:** With a streamlined configuration menu, users can easily customize the newsletter's content and design according to their preferences and specific requirements.
- **Real-Time Preview:** Users can instantly preview changes made to the newsletter, ensuring the final appearance aligns with their expectations before sending.
- **Switch Between Two Layout Types:** The Web Part offers the flexibility to choose between two layout types, allowing users to select the style that best suits the content and purpose of the newsletter.
- **Section Customization:** Users can configure various sections of the newsletter, including headers, body text, images, call-to-action buttons, and more, ensuring the newsletter meets specific communication needs.
- **Recipient Selection Options:** Upon completing the newsletter creation, users have the option to select specific recipients to whom they want to send the newsletter, ensuring the message is targeted to the right recipients.
- **SharePoint Compatibility:** The Web Part seamlessly integrates with the SharePoint environment, allowing users easy access to SharePoint content and additional resources while creating newsletters.
- **Automated Sending Capabilities:** The Web Part allows users to send the newsletter to selected recipients with just a few clicks, ensuring the message is delivered efficiently and in a timely manner.

The **Newsletter Aggregator for SharePoint** is the perfect solution for users looking for a convenient and effective way to create and distribute personalized newsletters in their SharePoint environments. With its user-friendly interface and powerful features, this Web Part streamlines the entire process, from creation to sending, ensuring an engaging and appealing newsletter experience for the selected target audience.

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3 REQUIREMENTS

For the correct functioning of the **Newsletter Aggregator for SharePoint**, the following requirements are necessary:

- Microsoft SharePoint Online;
- Document library to save generated newsletters
 - Newsletters


Table 4 - Newsletters document library columns and data types

COLUMN	TYPE
Title	Single Line of Text
Description	Multiple Lines of Text
Emails	Single Line of Text
Published	Yes/No
NewsDescription	Multiple Lines of Text
Modified	Date and Time
Created	Date and Time
Created By	Person or Group
Modified By	Person or Group
Checked Out To	Person or Group

- Document library to save generated newsletters templates
 - Templates

Table 5 - Templates document library columns and data types

COLUMN	TYPE
Title	Single Line of Text
Modified	Date and Time
Created	Date and Time
Created By	Person or Group

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Modified By	Person or Group
Checked Out To	Person or Group

- Permission level for using the web part
 - Contributor or higher (permission to add, edit records in SharePoint lists);

Table 6 - Allowed permissions levels to using the web part


PERMISSION LEVEL	ACCESS RIGHTS
Contribute	Add, view, update and delete list items and documents
Edit	Edit, add, and delete lists; view, add and update list items
Full Control	Full control over the site, lists, libraries, and settings

- The permission level for installing the web part
 - Tenant Administrators;
 - Access to the SharePoint Application Center (app catalog) to deploy web parts;

Table 7 - Allowed permissions levels for installing the web part

PERMISSION LEVEL	ACCESS RIGHTS
Full Control	Full control over the site, lists, libraries, and settings

To know more about permissions on SharePoint Online click [here](#)

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4 INSTALLATION

The solution consists of a ".sppkg" file that will have to be added to the SharePoint Online Tenant's AppCatalog through the SharePoint Application Center.

Using a Tenant administrator account, access the SharePoint Online [application catalog](#).



Figure 2 -Add SharePoint App

Add the .sppkg file to be installed.

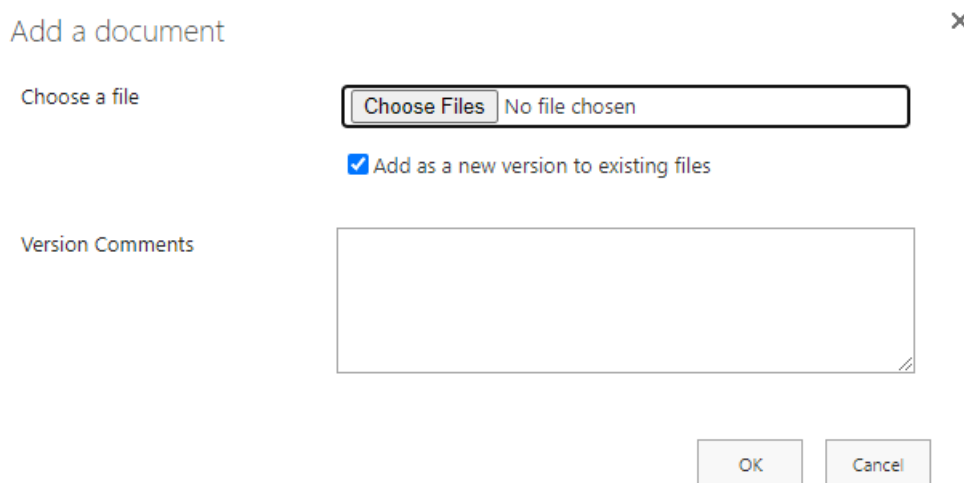



Figure 3 - Add .sppkg file to be installed

Enable the application to be available to all sites.

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Do you trust Newsletter Aggregator for SharePoint? ×

The client-side solution you are about to deploy contains full trust client side code. The components in the solution can, and usually do, run in full trust, and no resource usage restrictions are placed on them.



Newsletter Aggregator for SharePoint

This client side solution will get content from the following domains:

SharePoint Online

Make this solution available to all sites in the organization

If you clear this setting, users won't be able to add the web part to pages. The web part will continue to work if it was already added to pages.

Please go to the API Management Page to approve pending permissions. These are the permissions that need to be reviewed: Microsoft Graph, User.Read.All


Figure 4 - Enable the app to be available to all sites

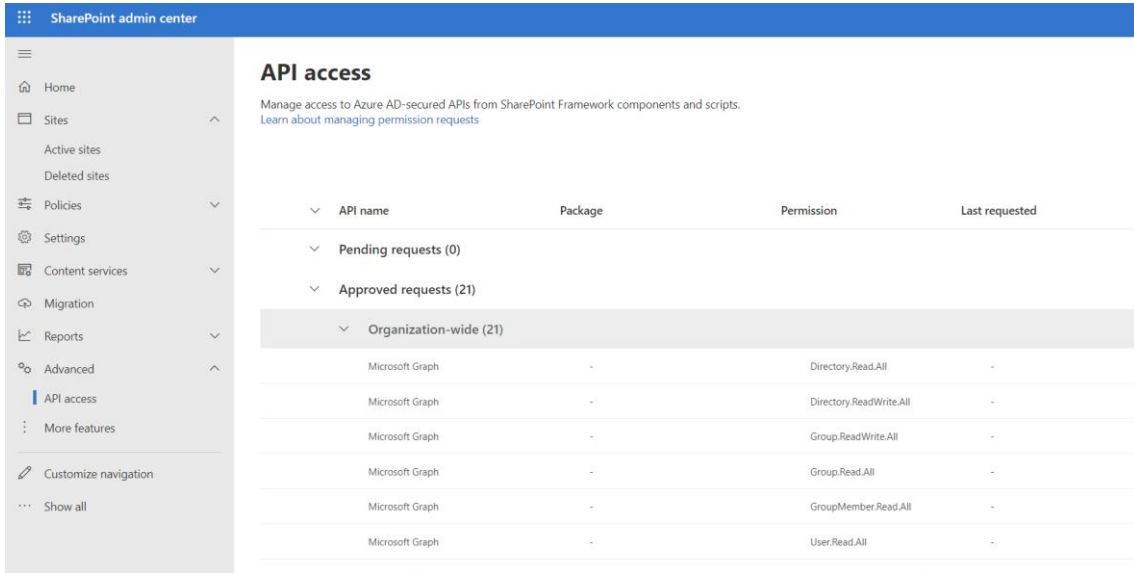
4.1 GRANT API ACCESS PERMISSIONS

For its correct functioning, **Newsletter Aggregator for SharePoint** requires permissions to use the Microsoft Graph API, to obtain information from all user Azure Active Directory.

For this, using a tenant administrator account, access the SharePoint Online application catalog and go to **“Advanced”** and then **“API access”**.

All pending requests will appear and all requests from the **“trpd-spo-wp-newsletter”** package must be accepted to guarantee the proper functioning of the web part.


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The screenshot shows the SharePoint Admin Center interface. On the left is a navigation sidebar with options like Home, Sites, Policies, Settings, Content services, Migration, Reports, Advanced, API access (highlighted), More features, Customize navigation, and Show all. The main content area is titled "API access" and includes a sub-header "Manage access to Azure AD-secured APIs from SharePoint Framework components and scripts." Below this is a table with columns: API name, Package, Permission, and Last requested. The table shows a list of approved requests for Microsoft Graph, including permissions like Directory.Read.All, Directory.ReadWrite.All, Group.ReadWrite.All, Group.Read.All, GroupMember.Read.All, and User.Read.All.

API name	Package	Permission	Last requested
Pending requests (0)			
Approved requests (21)			
Organization-wide (21)			
Microsoft Graph	-	Directory.Read.All	-
Microsoft Graph	-	Directory.ReadWrite.All	-
Microsoft Graph	-	Group.ReadWrite.All	-
Microsoft Graph	-	Group.Read.All	-
Microsoft Graph	-	GroupMember.Read.All	-
Microsoft Graph	-	User.Read.All	-

Figure 5 - Grant API Access

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5 WEB PART ADDITION

To add a web part to a SharePoint Online page, you must first edit the page.

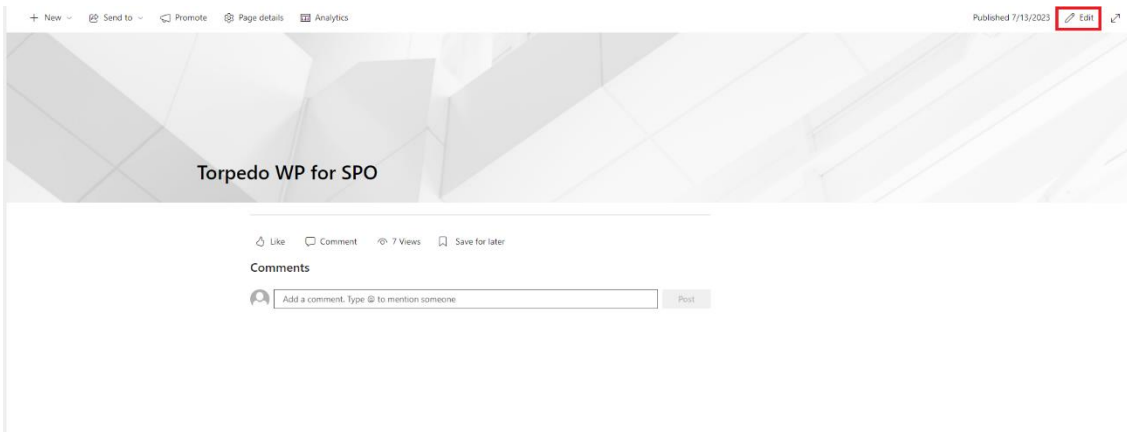


Figure 6 - Edit page in SharePoint Online

After editing the page it's possible to change sections, add or remove web parts. Add a one-column section or full-width section as shown in the following figure.

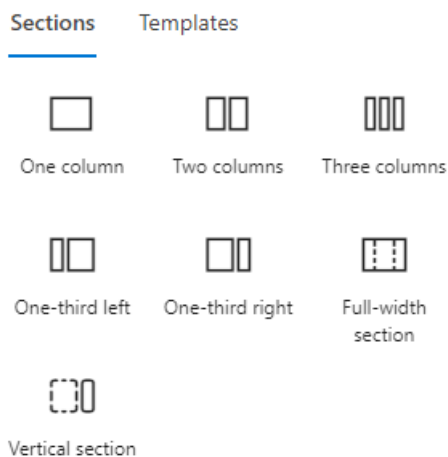


Figure 7 - Add one column or full-width section in SharePoint Online

After adding the section, it's possible to include the **Newsletter Aggregator for SharePoint** within it. Still in page editing mode in SharePoint Online, it is possible to add web parts by clicking on the + button that appears in each section zone, as shown in the figure below.


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Figure 8 - Button to add web parts

A popup will appear with all the web parts available for use in SharePoint Online. To add the **Newsletter Aggregator for SharePoint**, you can scroll through the list of options or filter the results by searching. Click on the web part to add it to the page.

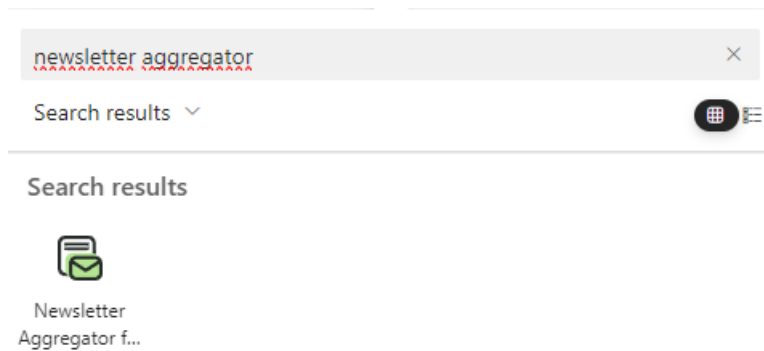



Figure 9 - Add Newsletter Aggregator for SharePoint

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6 WEB PART CONFIGURATION

To configure the web part, click on the option to edit the web part.

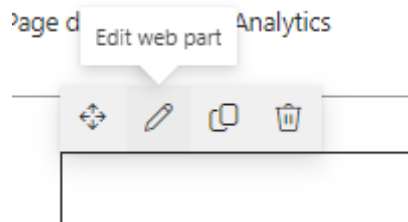


Figure 10 - Edit web part

Next, a right-side panel will appear with all configurable properties for the web part.

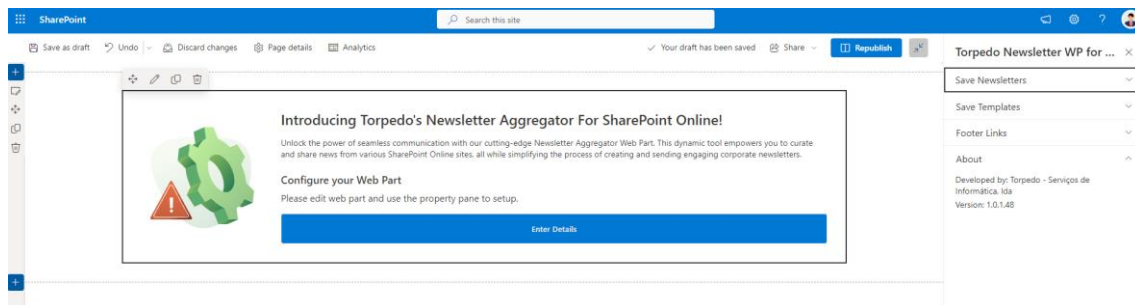



Figure 11 - Configure Newsletter Aggregator for SharePoint

The web part properties panel is divided in three big groups: **Save Newsletters**, **Send Newsletters** and **Footer Links**. The completion of the first two mentioned groups is mandatory for the web part to render.

The **Save Newsletters** section allows the user to specify which document library to use for saving newsletters generated by the web part. This document library should have a specific structure defined in the requirements section of this document. If the user does not wish to create this document library, they can click the **“Create Document Library”** button, and this document library will be automatically created on the selected site.

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The **Send Newsletters** group allows the user to specify the recipients to whom they can send the newsletter. They should select the site that contains the members needed for sending the newsletter.

Finally, through the **Footer Links** group, you can define the labels and links that will be assumed by default in the footer section of the newsletter. If no values are filled in, these links will need to be configured in the newsletter's footer section.

6.1 CREATING NEWSLETTER USING THE WEB PART

Once the web part is installed on a page, the following initial screen will appear.

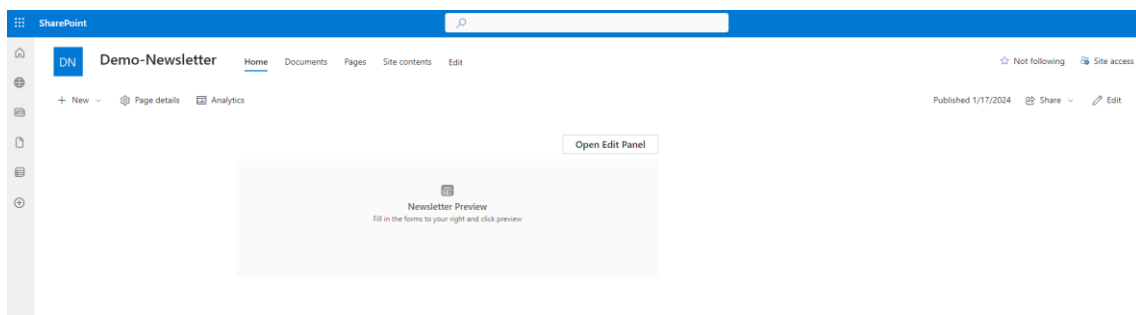



Figure 12 - Newsletter Aggregator for SharePoint Initial Screen

Through this initial screen and after clicking the **'Open Edit Panel'** button, the newsletter configuration panel will appear. Using this panel, the user can choose to create a new newsletter template or load a previously made one. The list of newsletter templates is populated by obtaining the templates from the selected template list in the web part's property panel.

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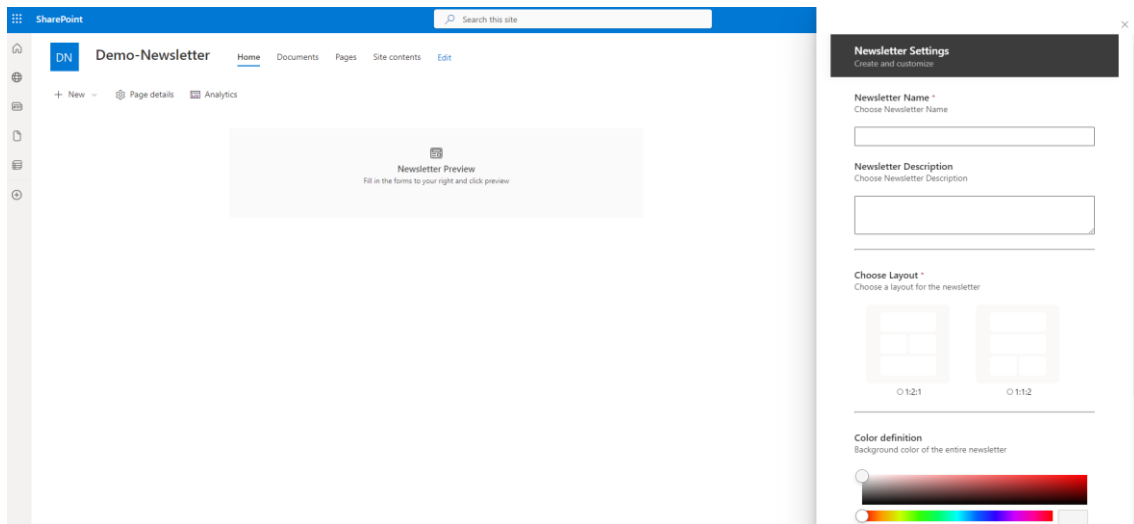


Figure 13 - Newsletter Aggregator for SharePoint General Settings Screen

This screen allows the user to specify the name and description of the newsletter, which will be used to save the newsletter in the document library. It also allows choosing between one of the two available layouts and setting colors for the background and buttons of the newsletter.

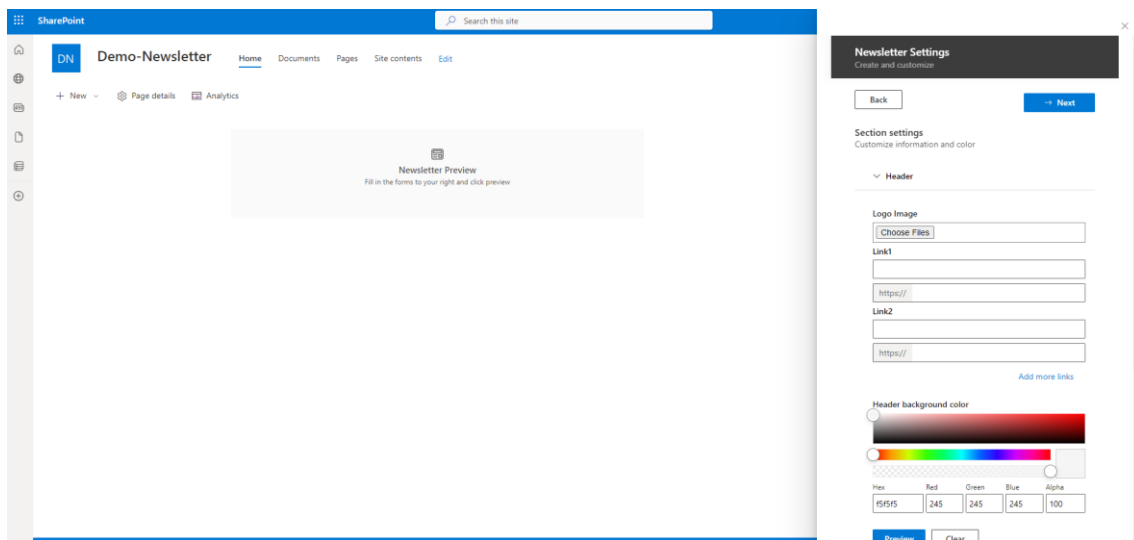



Figure 14 - Second screen for newsletter configuration

Using this interface, users can customize different sections of the newsletter. To proceed, click on the desired section for configuration, complete all relevant fields, and then click the **“Preview”** button. Subsequently, a preview of the overall

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newsletter appearance up to this point will be displayed on the left side, as illustrated in the following figure.

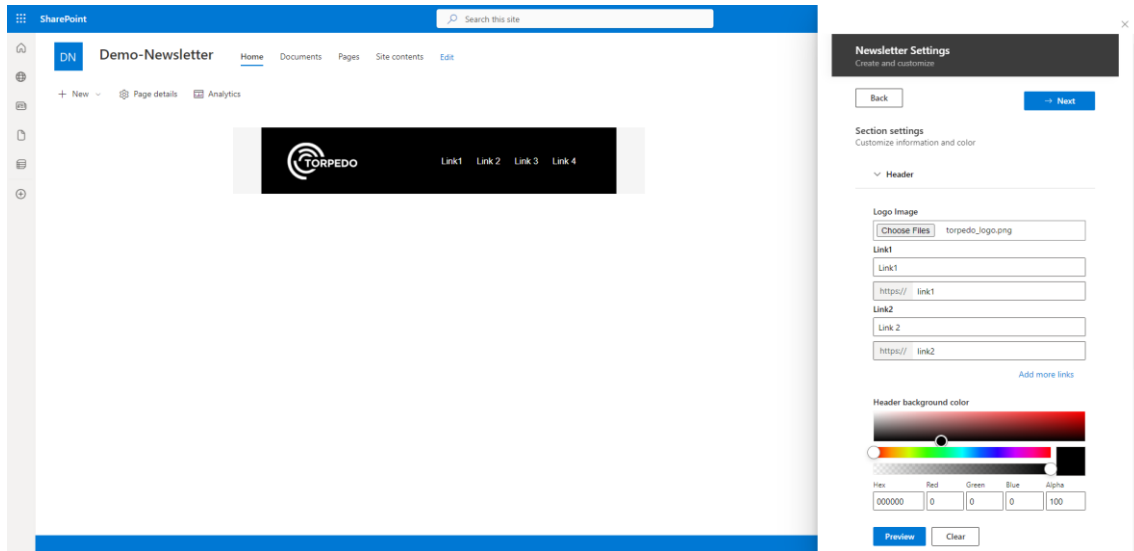


Figure 15 - Preview of the 'Header' section"

When updates to the newsletter are required, simply click the **“Preview”** button, and the newsletter will be automatically updated. After completing the configuration for all newsletter sections and clicking the **“Next”** button, the Newsletter Sending screen will be displayed.

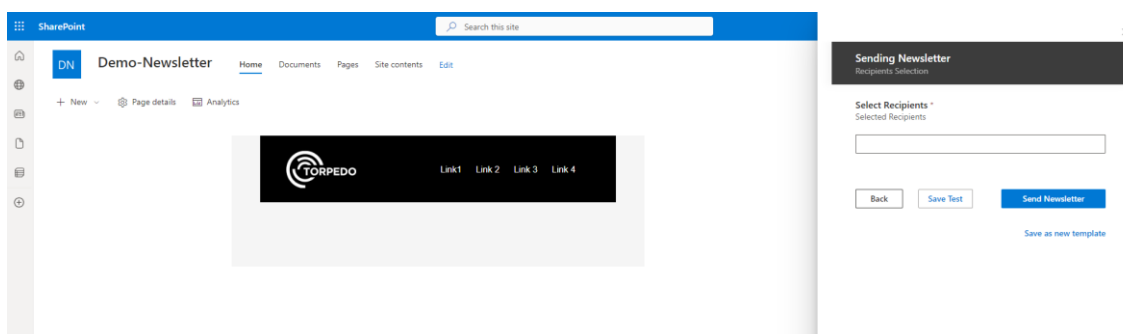



Figure 16 - Newsletter Sending Screen

This screen facilitates the input of recipients for the current newsletter. To accomplish this, begin typing the name of the desired user, and instantly, all user options associated with your search will be displayed. After selecting all recipients, click the **“Send Test”** button if your newsletter is in a testing phase, or click the **“Send Newsletter”** button if your newsletter is final and it should be sent to the

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selected users. If you click the **“Send Test”** button, the web part will only be saved in the document library and will not be sent to the selected recipients.

The newsletter sending screen, like all the previous ones, allows user to save a newsletter template at any time by pressing the **“Save as new template”** button. Later, these templates can be loaded on the web part's initial screen.

Finally, the newsletter sending confirmation screen will appear. Here, the total number of selected users will be displayed. Once you press the **“Save and Send”** button, the newsletter will be automatically saved and sent to the selected users.

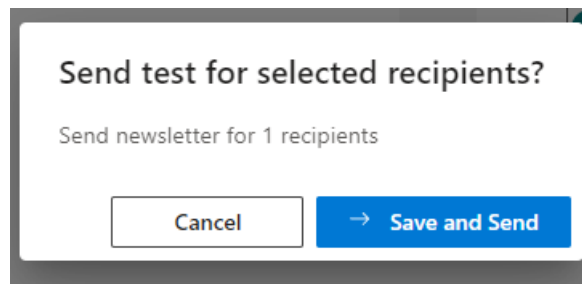


Figure 17 - Newsletter Sending Confirmation Screen

Once the screen below appears, your newsletter has been saved and sent to all users.

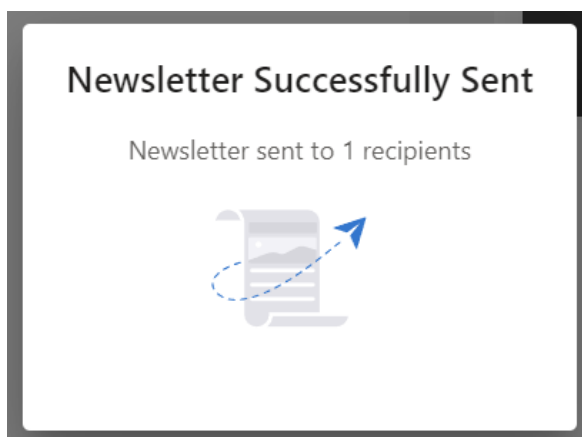


Figure 18 - Newsletter Successfully Sent Screen