DRUPAL
GOVCON

2015

Combining the Power of Views and Rules

Who are we?

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Views Rules module

Assumptions

You are familiar with setting up a Drupal site

You are familiar with the views module

You are familiar with the rules module

The Rules module is often used as a site building tool to create Drupal websites.

Rules limitation

- Not able to access all site data

- Depending on which trigger/event occurred only a few contextual variables will be available for use in a rule.

Background
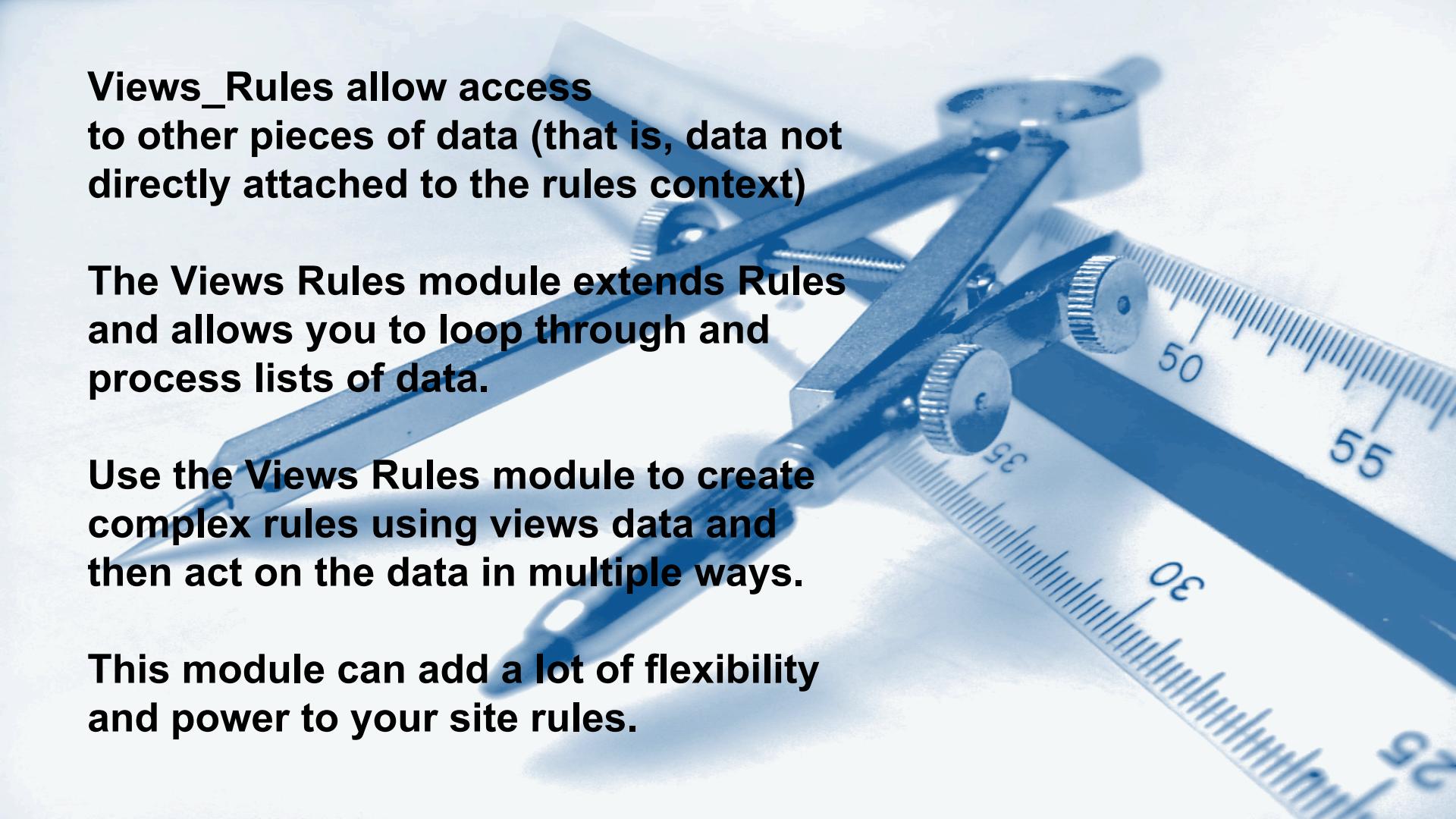
[views_rules](#) **makes dealing with complex loops in rules easier**

Provides a View loop in Rules
- similar to a regular Rules loop, but allows looping over rows of
  view results.

Collect view result rows in Views
- collects each variable in all view result rows into list variables
  for use in Rules.

Views_Rules allow access
to other pieces of data (that is, data not
directly attached to the rules context)

The Views Rules module extends Rules
and allows you to loop through and
process lists of data.
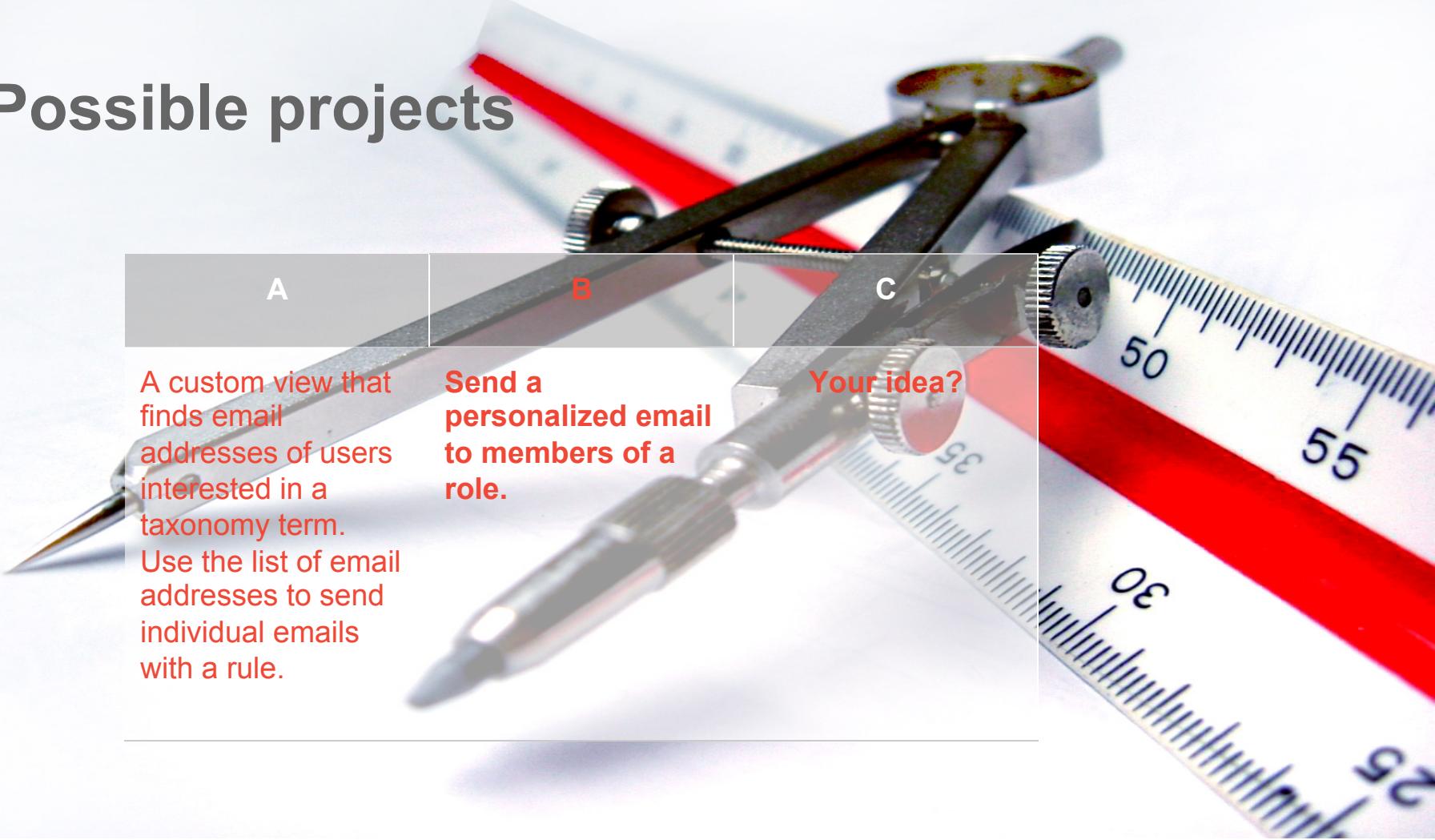
Use the Views Rules module to create
complex rules using views data and
then act on the data in multiple ways.

This module can add a lot of flexibility
and power to your site rules.

Possible Projects

Possible projects

A	B	C
A custom view that finds email addresses of users interested in a taxonomy term. Use the list of email addresses to send individual emails with a rule.	**Send a personalized email to members of a role.**	**Your idea?**

Modules

Required modules

Entity API - *Entity Token*
Mime Mail
Mail System
Rules
Tokens
Views
Views Rules

Configure mail: mail system

Mail System ⊕

MAIL SYSTEM SETTINGS

Drupal provides a default `MailSystemInterface` class called `DefaultMailSystem`. Modules may provide additional classes.

Each `MailSystemInterface` class may be associated with one or more identifiers, composed of a *module* and an optional *key*.

Each email being sent also has a *module* and a *key*. To decide which class to use, Drupal uses the following search order:

1. The class associated with the *module* and *key*, if any.
2. The class associated with the *module*, if any.
3. The site-wide default `MailSystemInterface` class.

Site-wide default `MailSystemInterface` class

[MimeMailSystem ▾]

Mime Mail module class

[MimeMailSystem ▾]

Theme to render the emails

[Current ▾]

Select the theme that will be used to render the emails. This can be either the current theme, the default theme, the domain theme or any active theme.

Configure mail:
mime mail

Mime Mail ⚙

Sender name

[redacted]

The name that all site emails will be from when using default engine.

Sender e-mail address

[redacted]

The email address that all site e-mails will be from when using default engine.

☐ **Use simple address format**

   Use the simple format of user@example.com for all recipient email addresses.

☑ **Include site style sheets**

   Gather all style sheets when no mail.css found in the default theme directory.

☐ **Send plain text email only**

   This option disables the use of email messages with graphics and styles. All messages will be converted to plain text.

☐ **Link images only**

   This option disables the embedding of images. All image will be available as external content. This can make email messages much smaller.

E-mail format

Full HTML ▾

Personalized Email

How do you personalize the email?

The rule that sends the emails needs to have access to the information you want to insert into the email.
-   The user's name

-   In other words, it needs to have access to a token that contains the information.

Create a View that will list all of the users that have the role Member.
- The view will contain the user's name from their user profile

Create a Rule that will use this view to loop through the list of users and send a personalized email, with the user's name, to each one.

Views: Create a Rules Display

Displays

Entity Reference | **Rules** | ➕ Add

▼ Rules details

Display name: Rules

Title
Title: Members

Format
Format: Table | Settings

Fields — Add ▼
User: Name
User: E-mail

Filter criteria — Add ▼
User: Active (Yes)
User: Roles (= member)

Sort criteria — Add ▼
User: Name (asc)

Rules settings
Row variables: edit field info
Access: Permission | View user profiles

Header — Add

Footer — Add

Pager
Items to display:
Display a specified number of items | 10 items

Add fields from the user profile
• Name
• Email

If a field is not in the Rule display for the view, it will not be available for use by a rule

Rules Display :: Rules ::: row variables

Configure the row variables

Member Info (User)

Rules: row variables   ⊗

Configure the variable info for each field as they would be used in Rules.

User: Name

☑ Enabled
   Uncheck this box to make this variable unavailable for use in Rules.

☐ Use rendered result
   Check to use rendered value (e.g. rewritten) instead of the raw value. Note that a rendered field may
   contain markup but is not affected by the field's "Style settings".

Data type	Label	Name
Text	User: Name	name

User: E-mail

☑ Enabled
   Uncheck this box to make this variable unavailable for use in Rules.

☐ Use rendered result
   Check to use rendered value (e.g. rewritten) instead of the raw value. Note that a rendered field may
   contain markup but is not affected by the field's "Style settings".

Data type	Label	Name
Text	User: E-mail	mail

[Apply]   [Cancel]

view name/description ▾

clone Rules ▾

ers   Add
  Add
avior   Add

style: Basic | Settings

: views_rules_1
comment
al links: No
on: No
: Settings
e:
s language

Caching: None

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Rules

Active rules

Name	Event	Status	Operations
Send Email to Member of Role Machine name: rules_news_email_to_member, Weight: 0	After saving new content of type *Responsive Email*	Custom	edit disable clone delete export
Assign Role to New User Machine name: rules_register_new_member_for_news_letter, Weight: 0	After saving a new user account	Custom	edit disable clone delete export
ReSend Email to Member of Role Machine name: rules_resend_email_to_member_of_role, Weight: 0	After updating existing content of type *Responsive Email*	Custom	edit disable clone delete export

Inactive rules

Name	Event	Status	Operations
There are no inactive rules.			

Rules: send email

Events

Event	Operations
After saving new content of type *Responsive Email*	delete
◇ Add event	

Conditions   Show row weights

Elements	Operations
✛ Content is of type 　　Parameter: *Content:* [node], *Content types:* Responsive Email	edit delete
◇ Add condition ◇ Add or ◇ Add and	

Actions   Show row weights

Elements	Operations
✛ Views loop: Member Info - Rules 　　Row variables: User: Name (name), User: E-mail (mail)	edit view display edit delete Add view loop Add action Add loop
✛ Send mail 　　　　Parameter: *To:* [mail:value], *Subject:* [node:title], *Message:* Dear [name:value], ...	edit delete
◇ Add view loop ◇ Add action ◇ Add loop	

▷ Settings
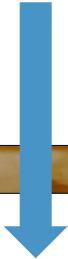
[Save changes]

Rules: send email :: add view loop

Rules: send email :: add view loop

Row variables

Adjust the names and labels of row variables (from the view) available in each iteration of the view loop, but note that renaming of already utilizied variables invalidates the existing uses.

User: Name

Variable label *

`User: Name`

Variable name *

`name`

The variable name must contain only lowercase letters, numbers, and underscores and must be unique in the current scope.

User: E-mail

Variable label *

`User: E-mail`

Variable name *

`mail`

The variable name must contain only lowercase letters, numbers, and underscores and must be unique in the current scope.

Views Rules Connections

Row variables

Adjust the names and labels of row variables (from the view) available in each iteration of the view loop, but note that renam
existing uses.

User: Name

Variable label *

User: Name

Variable name *

name

The variable name must contain only low

Fields   Add ▾

User: Name

User: E-mail

User: E-mail

Variable label *

User: E-mail

Variable name *

mail

The variable name must contain only lowercase letters, numbers, and underscores and must be unique in the current scope.

Views Rules Connections

Rules: send email :: add view loop ::: add action

Rules: send email ::
Token Replacement in Send mail to all users of a role

To

The e-mail address or addr

Value *

[mail:value]

Subject

The mail's subject.

Value *

[node:title]

Message

The mail's message body.

Value *

Dear [name:value],

[node:body]

Views Rules Display configuration

Views: add new view

Views: Rules Display

You do not need to define a Page display
if you only need the view for the purpose of
exposing data to rules.

Views: Configuration

Views: Configuration

Rules: Select which pager, if any, to use for this view

○ Display a specified number of items
● Display all items
You may also adjust the settings for the currently selected pager.

[Apply] [Cancel]

PAGER
Items to display: Display a specified number of items
| 10 items

Exposed form style: Basic | Settings

OTHER
Machine Name: views_rules_1
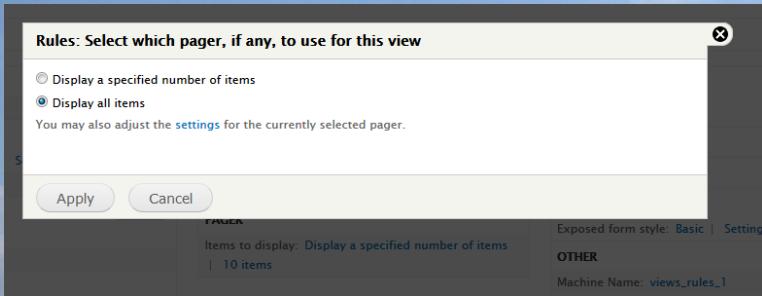
Set the Pager to "Show all items".
The rule needs all the information
- paging will cause the rule not to email
all of the matched users.

Rules ::: row variables

Rules ::: row variables

Rules ::: row variables

If the field has a label,
the label will auto-populate

If the field does not have a label,
the fieldname will auto-populate

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THANK YOU!

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