Respondent EMailer 5

User Guide

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Respondent EMailer User Guide

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Getting Started

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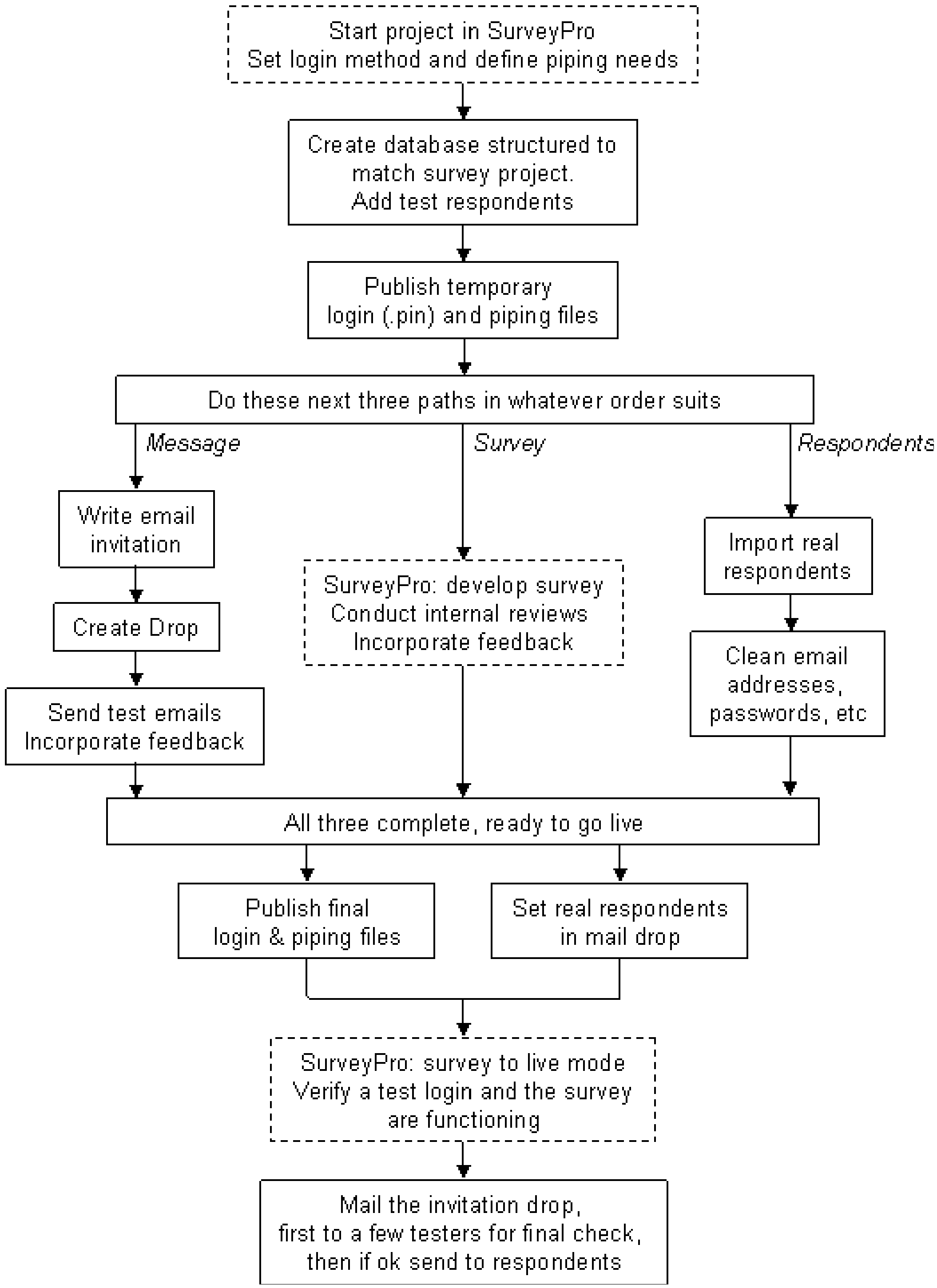
Understanding EMailer Projects

The process for developing and launching a web survey follows this straightforward flowchart. Respondent EMailer is not just a simple mailing program; it is integrated with SurveyPro to support this process smoothly and efficiently. The boxes in dashed lines summarize development done in SurveyPro and the ones in solid lines are done in this Respondent EMailer.



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Additional Resources

Discussion List and Newsletter

Apian provides a free discussion list for users to ask questions about SurveyPro and survey research in general. You can opt for either an e-mail or Web-based interface.

We also recommend signing up for the Apian newsletter to stay posted on product updates and workshops, and for the tips from our Support team.

http://apian.com/support/forums/

Knowledge Base

This is a searchable resource for how-to questions and problem-solving.

http://apian.com/support/knowledgebase/

Technical Support

All new orders and upgrades come with a period of free support. Annual support contracts may be purchased by phone at (800) 237-4565 / (206) 547-8392 or online.

http://apian.com/support/

Coaching and Training

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Downloads

Updates (patches) to Apian Software products are provided for you to download free of charge.

http://apian.com/downloads/

Setting Up Your List

This chapter covers the process of creating a new respondent database, importing names, and making corrections.

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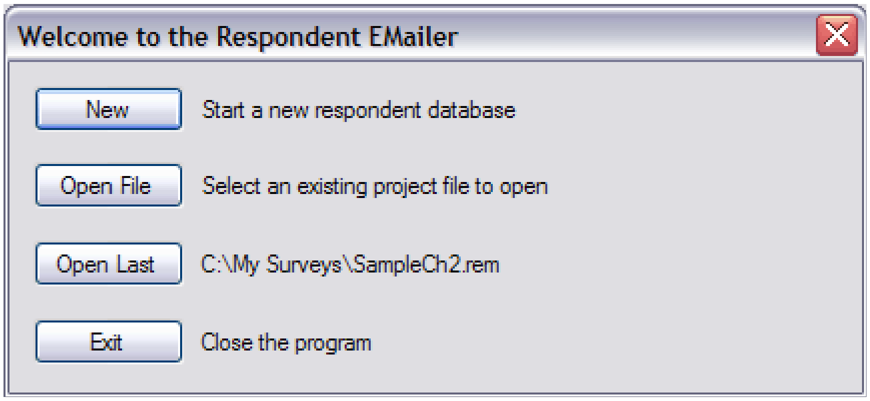
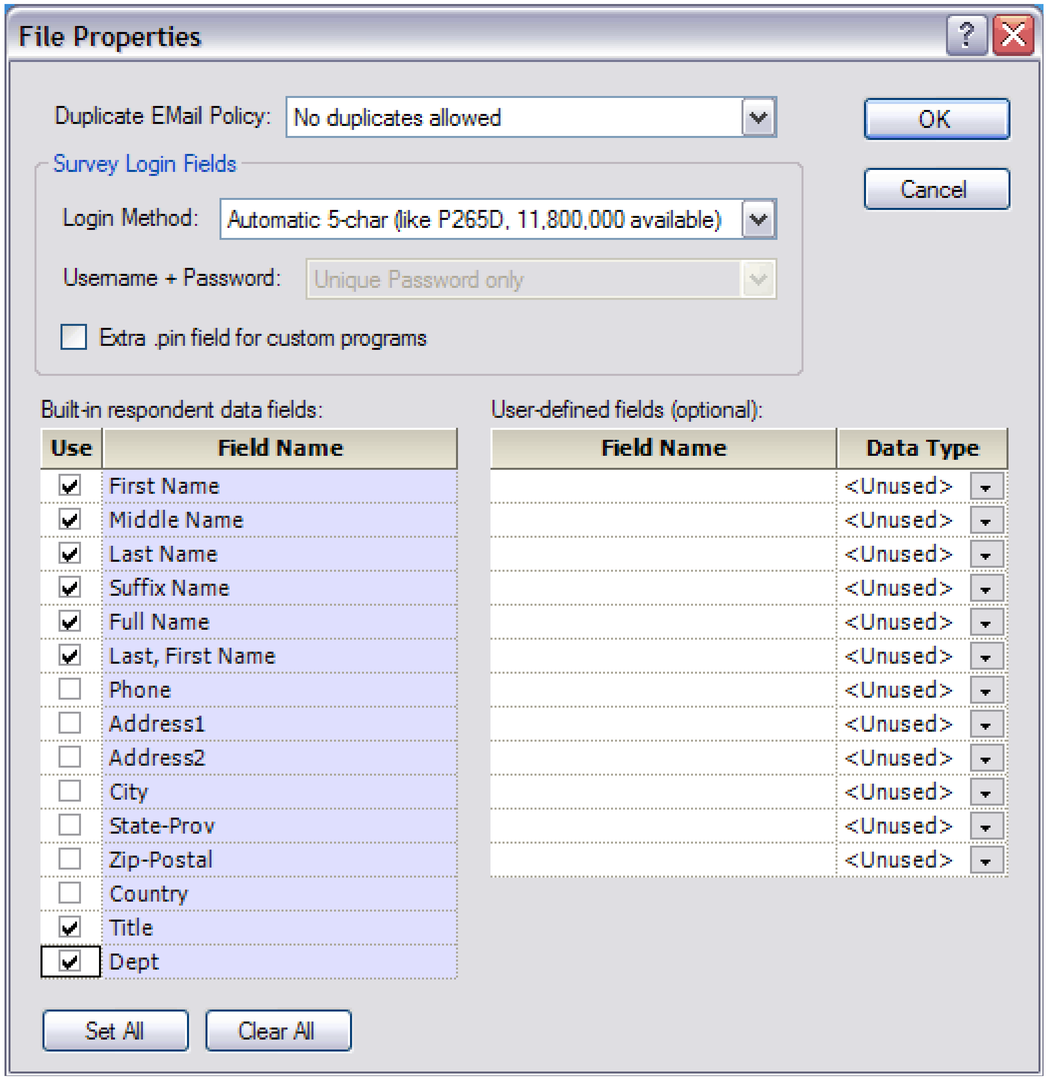
Creating a Respondent Database

When the program opens, after the About notice, it will ask how you want to start:



Click the New button (same as File Properties) to start the process which brings up this dialog:

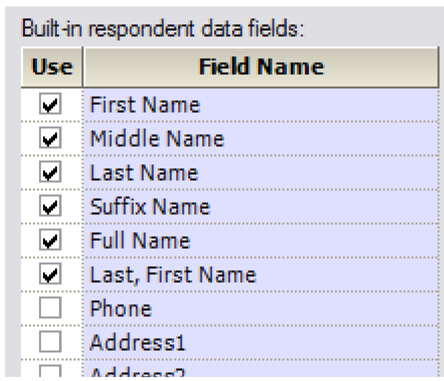


Duplicate Email Policy sets the rules for addresses appearing more than once. Normally it is set to allow no duplicates. You can also choose to allow duplicates in the database but not in a particular mailing drop, or in unusual cases allow duplicates in a single mail drop. This policy is implemented when the send list is scanned just before mailing.

Survey Login Fields need to match the SurveyPro login setup for the Web survey to work properly. For more on the trade-offs involved and the role of the login, see the NetCollect User Guide Login Options chapter.

Login method determines how the on-line login fields will be handled, if any. You may have no login restriction to the survey, a shared password, or a unique password you will supply such as an employee number, or an automatic 4 or 5 character code supplied by this program. The latter has been selected here. User Name + Password options may apply when you are supplying the login codes. It is only active when the login is from imported data, not automatic 4- or 5-character codes. Enable extra .pin field can be used to support server custom module programming. It provides a read/write field that can be accessed quickly though the login lookup. It is rarely used; generally data piping is fast enough and easier to set up.

Beyond the email addresses and login information, you may want to include additional facts about the respondent for use in the emails or to be piped into their on-line survey. There are a set of stock fields to choose from:



Check the ones you will be using.

There are a set of name fields that represent the most common ways of storing names:

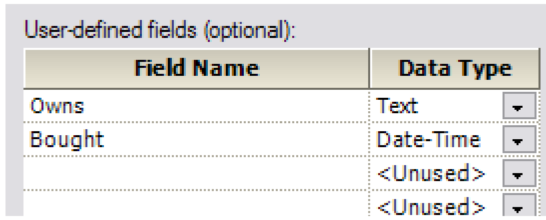
- Full Name, i.e. “Sally Jones”
- Last, First Name, i.e. “Jones, Sally”
- Separated which would have “Sally” as First Name and “Jones” as Last Name

These name field contents are interconnected on import or editing. If you change “Jones” one place it gets fixed in the other two. That makes it easy to import data with Last, First names but include respondent’s name in their email in a different way. See Recipient Name Formats.

The four separated name fields—first, middle, last, suffix—are turned on or off together.

User fields can be added when the built-in ones do not cover your needs.

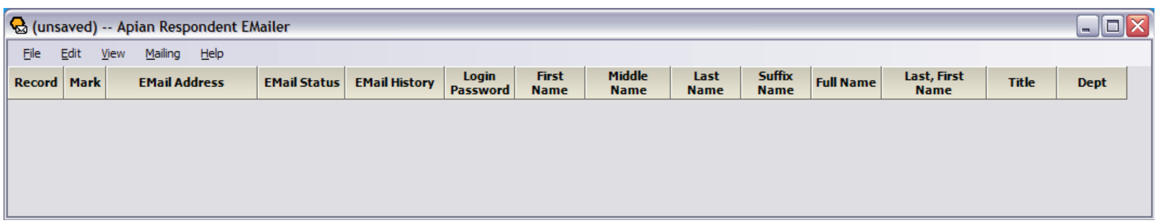
For example:



Any added fields need to be labeled and assigned a data type. The label is for your reference and can be anything so long as it is unique, though shorter is better.

These assignments can be changed later using the File, Properties menu item (see [File Properties]), but it will be easier if you set them as accurately as possible when the file is started. As noted in the overview, you should already have your survey project started in SurveyPro, and have made the key decisions of how the respondents will log into the survey and what respondent data, if any, will be piped into it.

Once you make your settings and click OK the empty data table will appear:



There are additional fields for managing the respondents and their emails which will be explained when they are used later.

Importing Test and Real Respondents

Normally you will have at least two sets of items to bring in:

•Testers, generally yourself plus some in-house names and perhaps some at a client. The purpose is to check the mail merge and the text. Include some addresses outside your local network to be sure that the emails flow to the outside world correctly.

•The real respondents.

In many projects the real respondent list may not be available during the survey development process so you would populate the database just with your test names first. They could be typed in or imported from a stock file.   Then go to [Producing On-Line Support Files] so the survey has some login and piping information for testing.

When the real respondent list arrives, import and clean it for the full mailing, then re-publish the on-line files. Meanwhile everything else can be tested and approved.

Respondent data is normally imported from delimited text files as might be exported from Excel, Outlook or a database program. Comma (.csv),

Tab or Pipe "|" delimiters can be used with each respondent on its own line. A file with comma delimiters will have records like:

"Fred Flintstone",fflint123@aol.com, Graphics Specialist, Marketing,

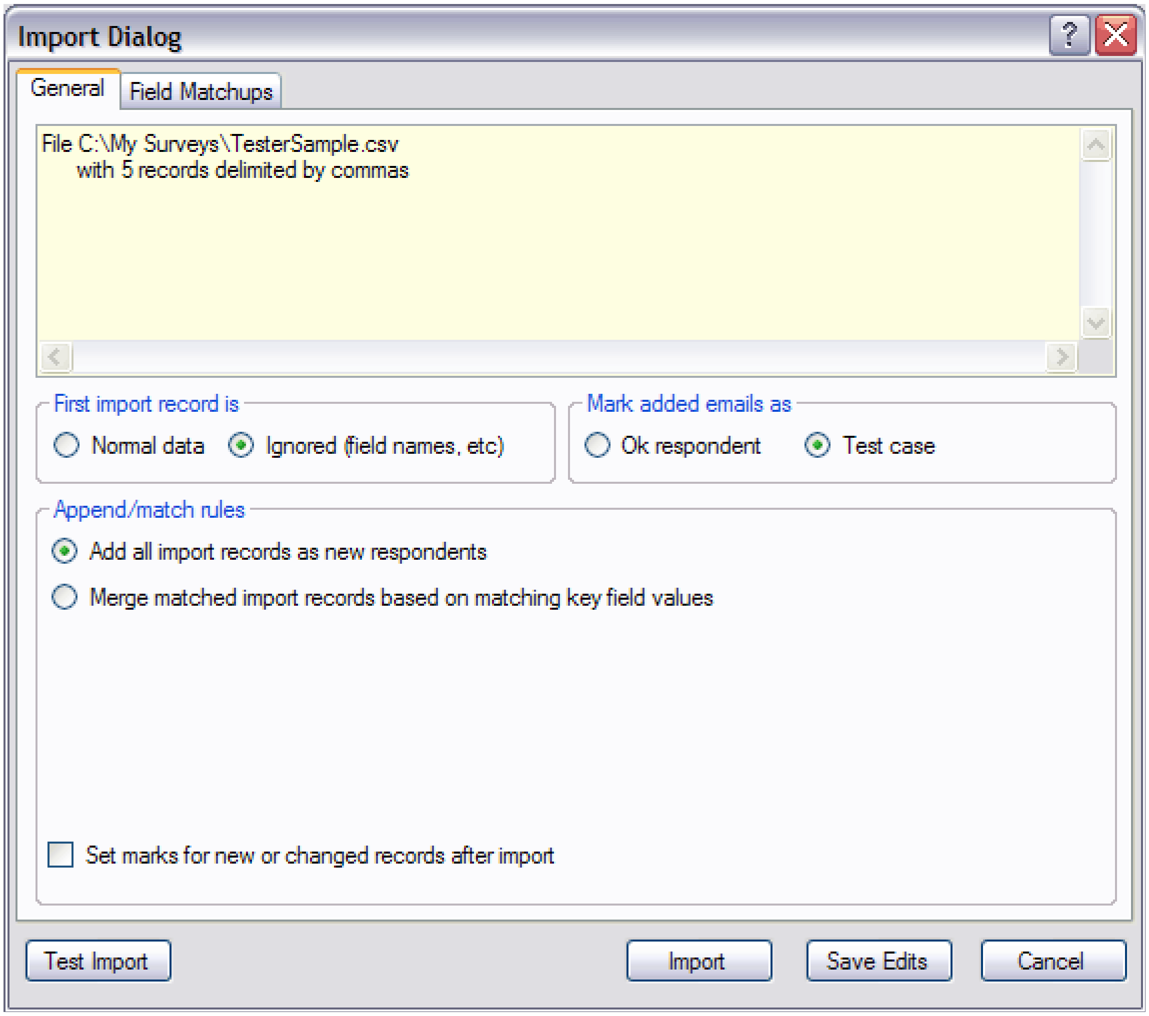
Note the optional quotes around some fields, which are only required for clarity when the field value contains a delimiter character or a quote. If the item is supposed to have a quote in it put the quote twice: Say "hi" becomes

,"Say ""hi""",

Multi-line values are not permitted in the import file; each line is a record. Once a record is imported, its record number is fixed and it cannot be deleted. However it can be set Unused or Empty.

The file may have the field names (column headers) in the first record \which can be ignored during import.

Select File, Import and the appropriate delimiter to get the usual windows file open dialog. Once you have identified the file the import control dialog appears:



This first dialog tab shows the default settings for importing new respondents from a file. The exceptions are switching to Test Case and Ignore Field Names for added emails. At the top is a description from scanning the import file, which found here 5 records and no apparent problems.

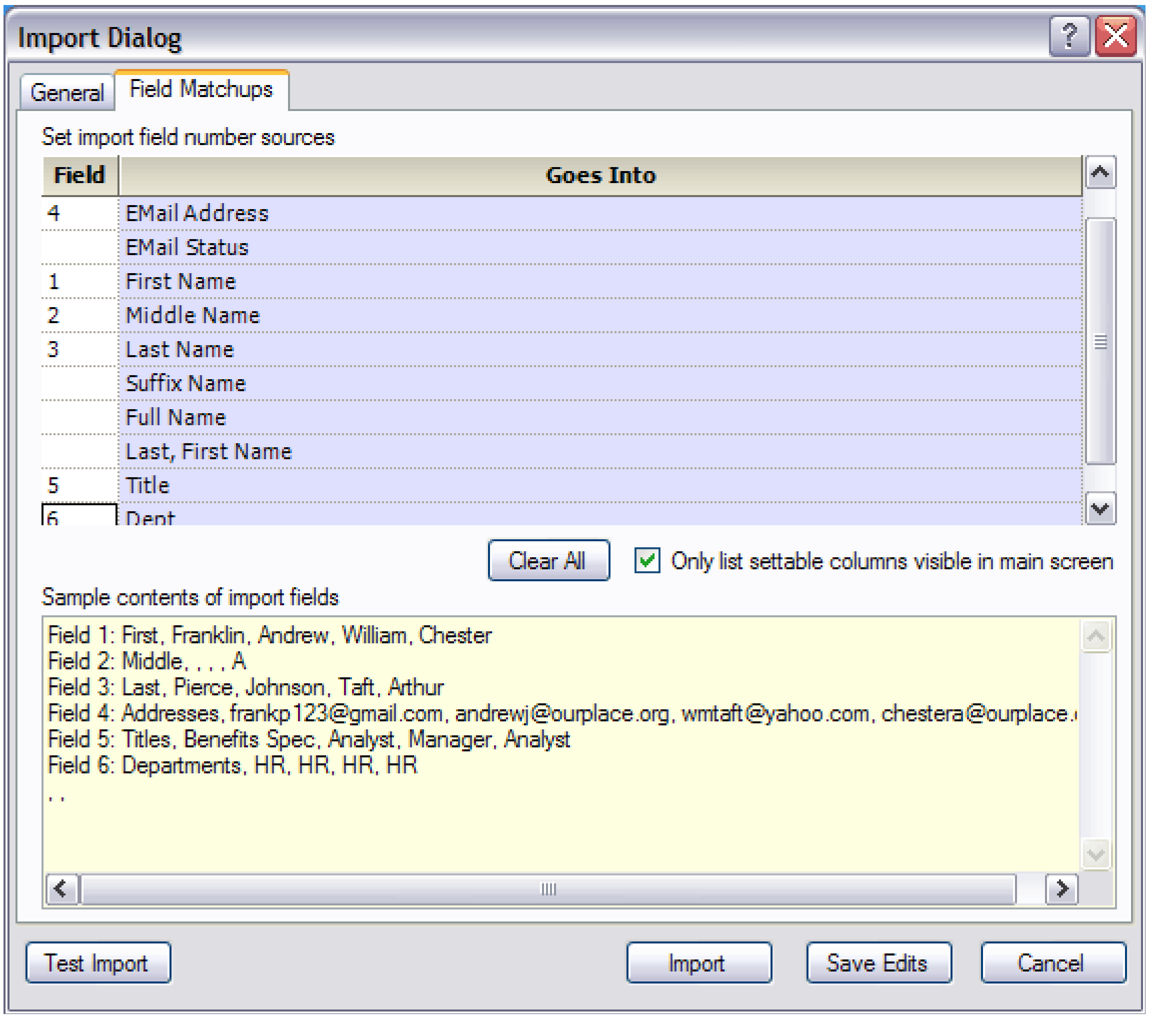
Some files may have defective records and those will be noted. Sometimes problems show here because the file actually uses a different delimiter than the one selected from the menus.

> *First import record* determines whether it should be considered data or should be ignored as containing other information like field names.

> *Mark added emails as Ok or Test* sets the initial value of imported names to separate the test and live phases of the survey project.

Append/Match rules determines if the import will test an imported key field against the project data for matches. This is most often used for importing corrected addresses (see Making Corrections in the Respondent EMailer).

Select the Field Matchups tab to set where the import file fields go in the respondent data columns:



At the bottom is a peek at the data in the file separated into the fields. The list at the top is where you identify which import field goes into which data table field, such as import field 1 going into the First Name column.

Clear All empties the field list.

Only list settable… checkbox limits the target columns to those shown in the main screen which are not read-only. If you unclick this it will let you import into all the fields in the database, including the normally read-only ones.

Test Import will run a trial import, everything up to the point of actually changing the data, and give you a report. This is an excellent double-check before actually doing the import.

Import brings up a confirmation dialog. If that is acceptable, on OK the imported data fills in.

If you only have the test people to import, do them now and then generate the on-line files. Come back here for the respondent import, which can be one or more files, continue into the data cleaning that is likely to be needed and re-publish the on-line files.

If the test people or perhaps some late arriving respondents need to be added by hand, use the Respondents menu, Add New Empties to generate as many blank records as you need (see Creating Spare Logins with Extra Passwords). We routinely put in about 10-20% spares. While this makes the file a little bigger, it does not slow performance on the Web server.

We did two imports here, one of some test names and the second of the real respondents:

C:\My Surveys\SampleCh2.rem -- Apian Respondent EMailer

File Edit View Mailing Help

Record	Mark	EMail Address	EMail Status	EMail History	Login Password	First Name	Middle Name	Last Name	Suffix Name	Full Name	Last, First Name	Title	Dept
1		frankp123@gmail.com	Test		V85NM	Franklin		Pierce		Franklin Pie	Pierce, Franklin	Benefits Sp	HR
2		andrewj@ourplace.org	Test		CY72Y	Andrew		Johnson		Andrew Jo	Johnson, Andrew	Analyst	HR
3		wmtaft@yahoo.com	Test		VF5K4	William		Taft		William Taf	Taft, William	Manager	HR
4		chestera@ourplace.org	Test		DPNJ9	Chester	A	Arthur		Chester A	Arthur, Chester A	Analyst	HR
5		gcleveland5@yahoo.com	OK		JRX61	Grover		Cleveland		Grover Clev	Cleveland, Grover		Retired
6		benjamin52@earthlink.com	OK		99H8N	Benjamin		Harrison		Benjamin H	Harrison, Benjami		Former Pre
7		millardfill@comcast.net	OK		TT2RN	Millard		Fillmore		Millard Fill	Fillmore, Millard		
8		alincoln@polisci.wash.edu	OK		MNNHT	Abe		Lincoln		Abe Lincoln	Lincoln, Abe	Political Sci	Professor
9		ja652@netscape.net	OK		W581G	John		Adams		John Adam	Adams, John		
10		jg123@aol.com	OK		X6R9X	James		Garfield		James Garf	Garfield, James		
11		jtyler@msn.com	OK		WK7HC	John		Tyler		John Tyler	Tyler, John		
12		willymck@aol.com	OK		19XM7	William		McKinley		William Mc	McKinley, William		
13		wharding@thinktank.or	OK		1DYC4	Warren		Harding		Warren Har	Harding, Warren		Sr Analyst
15		j-buchanan@gmail.com	OK		P13RD	James		Buchanan		James Buc	Buchanan, James		
16		yourpres@yahoo.com	OK		CFVN2	William	Henry	Harrison		William He	Harrison, William	Executive	President
17		usgrant@soldiers.org	OK		2J49T	Ulysses		Grant		Ulysses Gra	Grant, Ulysses		Retired
18		andyj@soldiers.org	OK		4HGCK	Andrew		Jackson		Andrew Jac	Jackson, Andrew		Retired
20		mvavburien@media.com	OK		F6WWG	Martin	Van	Buren		Martin Van	Buren, Martin Va		
21		jamesp@thinktank.org	OK		HVVV5	James		Polk		James Polk	Polk, James		Sr Analyst
22		yourpres@yahoo.com	OK		TFG30	John	Quincy	Adams		John Quinc	Adams, John Qui	Executive	President
23		monroej@media.com	OK		HG6H4	James		Monroe		James Mon	Monroe, James	Editorial	
24		info@rutherford.org	OK		F6JJY	Rutherford		Hayes		Rutherford	Hayes, Rutherfor	Library	Manager
25		zack@thinktank.org	OK		FV075	Zachary		Taylor		Zachary Ta	Taylor, Zachary		Sr Analyst
26		calvin@coolidge.org	OK		00V0Y	Calvin		Coolidge		Calvin Cooli	Coolidge, Calvin		
27		info@mtvervon.biz	OK		3HY5H	George		Washingto		George Wa	Washington, Geor	Executive	Proprietor
14		tommonticello.org	Unused		0CCWF	Thomas		Jefferson		Thomas Jef	Jefferson, Thoma	Libray	Curator
19		jimmys-mad@yahoocom	Unused		7P17P	James		Madison		James Madi	Madison, James		

We imported only the Full Name which the EMailer automatically used to fill in the other forms of the name. The passwords were automatically generated as 5-character codes.

The email cells have been color-coded. Yellow backgrounds are for duplicates, pink are invalid addresses and orange for both invalid and duplicated. As a reminder of the coding, if you hover your mouse over one of the colored cells it will pop up the reason. The import set the invalid ones as Unused pending correction.

Columns with a blue background are not editable. Some, like the email history, are managed by the program with a darker blue. Others, like Pass-word in a lighter blue, are locked for your convenience to avoid accidental changes in the data. These columns can be locked and unlocked by you at any time with the View, Columns menu item.

The password column uses the same yellow and pink color coding for duplicates and invalids. To produce a valid on-line login .pin file pass-words must either be unique or blank (ignored). The automatic generation used here ensures uniqueness, but if you imported the passwords any problems would show up.

Correcting Problem Names and Addresses

The EMailer includes some tools to make it fast and easy to get a clean data table. The first is to sort on a column using the Respondents, Sort Ascending or Sort Descending menu items. Here is the result of an ascending sort on the emails:

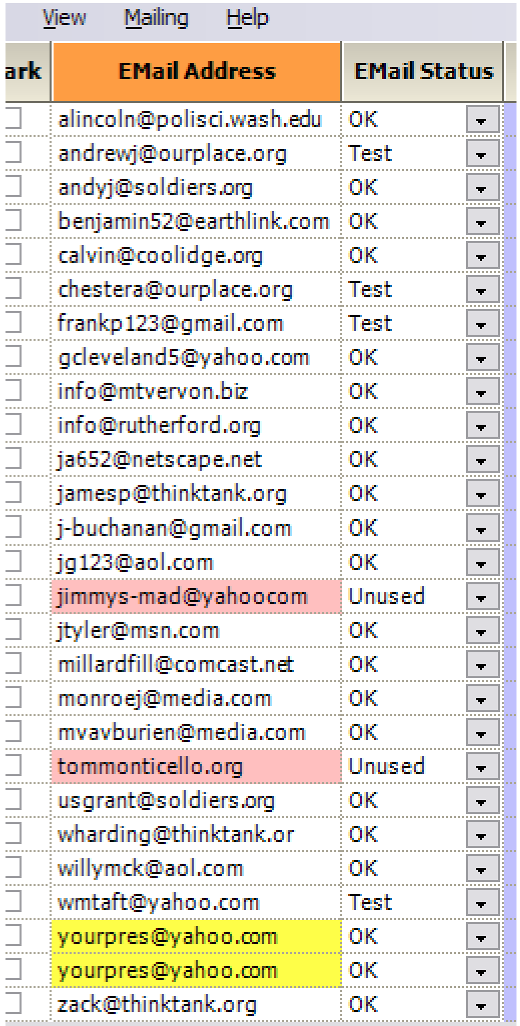
View Mailing Help

ark	EMail Address	EMail Status
	info@mtvervon.biz	OK
	jg123@aol.com	OK
	willymck@aol.com	OK
	benjamin52@earthlink.com	OK
	frankp123@gmail.com	Test
	j-buchanan@gmail.com	OK
	monroej@media.com	OK
	mvavburien@media.com	OK
	jtyler@msn.com	OK
	gcleveland5@yahoo.com	OK
	wmtaft@yahoo.com	Test
	yourpres@yahoo.com	OK
	yourpres@yahoo.com	OK
	alincoln@polisci.wash.edu	OK
	millardfill@comcast.net	OK
	ja652@netscape.net	OK
	wharding@thinktank.or	OK
	calvin@coolidge.org	OK
	andrewj@ourplace.org	Test
	chestera@ourplace.org	Test
	info@rutherford.org	OK
	andyj@soldiers.org	OK
	usgrant@soldiers.org	OK
	jamesp@thinktank.org	OK
	zack@thinktank.org	OK
	tommonticello.org	Unused
	jimmys-mad@yahoocom	Unused

Note that the unused and invalid (pink) emails drop to the end. (This option that is set with the Respondents menu.) It has also sorted them by

ISP rather than alphabetically, so @gmail.com emails appear together at the start of the list.

Here is a sort with the sort method switched to alphabetical and without putting unused at the end:



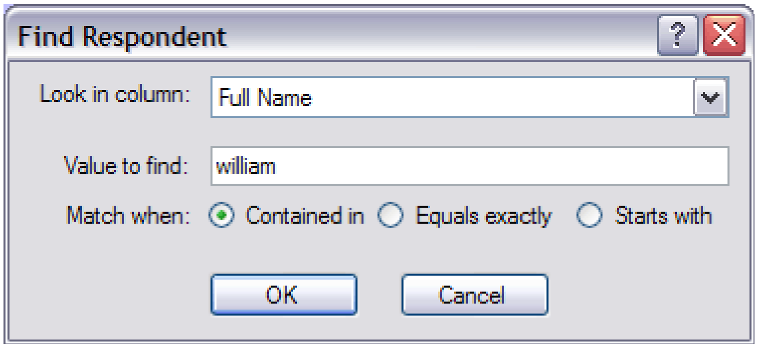
View Mailing Help

ark	EMail Address	EMail Status
	alincoln@polisci.wash.edu	OK
	andrewj@ourplace.org	Test
	andyj@soldiers.org	OK
	benjamin52@earthlink.com	OK
	calvin@coolidge.org	OK
	chestera@ourplace.org	Test
	frankp123@gmail.com	Test
	gcleveland5@yahoo.com	OK
	info@mtvervon.biz	OK
	info@rutherford.org	OK
	ja652@netscape.net	OK
	jamesp@thinktank.org	OK
	j-buchanan@gmail.com	OK
	jg123@aol.com	OK
	jimmys-mad@yahoocom	Unused
	jtyler@msn.com	OK
	millardfill@comcast.net	OK
	monroej@media.com	OK
	mvavburien@media.com	OK
	tommonticello.org	Unused
	usgrant@soldiers.org	OK
	wharding@thinktank.or	OK
	willymck@aol.com	OK
	wmtaft@yahoo.com	Test
	yourpres@yahoo.com	OK
	yourpres@yahoo.com	OK
	zack@thinktank.org	OK

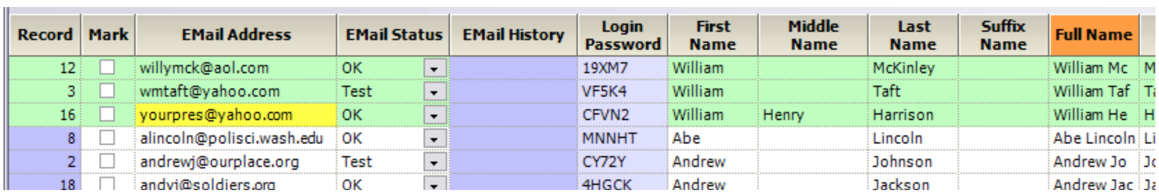
The column being sorted is indicated by the orange background at the top of the column.

Finding Records

You can also search for a particular value with the Respondent, Find menu item:



Here we are looking in the full names for any which contain “william”. After clicking OK the list looks like this:



Record	Mark	EMail Address	EMail Status	EMail History	Login Password	First Name	Middle Name	Last Name	Suffix Name	Full Name
12		willymck@aol.com	OK		19XM7	William		McKinley		William Mc
3		wmtaft@yahoo.com	Test		VF5K4	William		Taft		William Taf
16		yourpres@yahoo.com	OK		CFVN2	William	Henry	Harrison		William He
8		alincoln@polisci.wash.edu	OK		MNNHT	Abe		Lincoln		Abe Lincoln
2		andrewj@ourplace.org	Test		CY72Y	Andrew		Johnson		Andrew Jo
18		andyj@soldiers.org	OK		4HGCK	Andrew		Jackson		Andrew Jac

The rows found are pulled to the top of the display and green is used instead of white as a background to highlight them. The orange marker has moved to the Full Name column to indicate this was used for the selection.

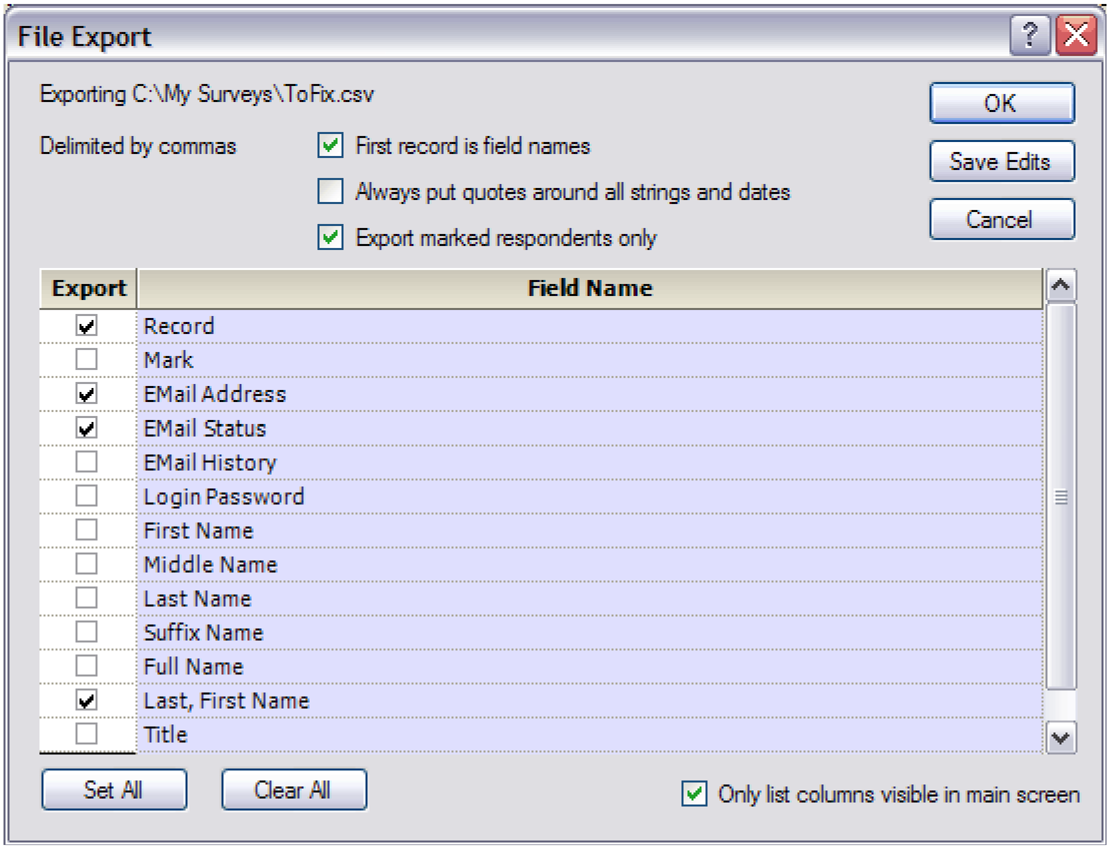
The cleaning process proceeds by correcting the emails or marking them unused. Any other issues like people who appear more than once with different emails or passwords can also be corrected.

Marking and Exporting Records

If someone else is the owner of the information you may want to export snapshots of the problems for them to work out. The way to do this is by marking the problem rows. This can be done by any mix of Respondent, Select Marks or manual marking. Here we have marked four of them for export:

Record	Mark	EMail Address	EMail Status
12	☐	willymck@aol.com	OK
3	☐	wmtaft@yahoo.com	Test
16	☑	yourpres@yahoo.com	OK
8	☐	alincoln@polisci.wash.edu	OK
2	☐	andrewj@ourplace.org	Test
18	☐	andyj@soldiers.org	OK
6	☐	benjamin52@earthlink.com	OK
26	☐	calvin@coolidge.org	OK
4	☐	chestera@ourplace.org	Test
1	☐	frankp123@gmail.com	Test
5	☐	gcleveland5@yahoo.com	OK
27	☐	info@mtvervon.biz	OK
24	☐	info@rutherford.org	OK
9	☐	ja652@netscape.net	OK
21	☐	jamesp@thinktank.org	OK
15	☐	j-buchanan@gmail.com	OK
10	☐	jg123@aol.com	OK
19	☑	jimmys-mad@yahoocom	Unused
11	☐	jtyler@msn.com	OK
7	☐	millardfill@comcast.net	OK
23	☐	monroej@media.com	OK
20	☐	mvavburien@media.com	OK
14	☑	tommonticello.org	Unused
17	☐	usgrant@soldiers.org	OK
13	☐	wharding@thinktank.or	OK
22	☑	yourpres@yahoo.com	OK
25	☐	zack@thinktank.org	OK

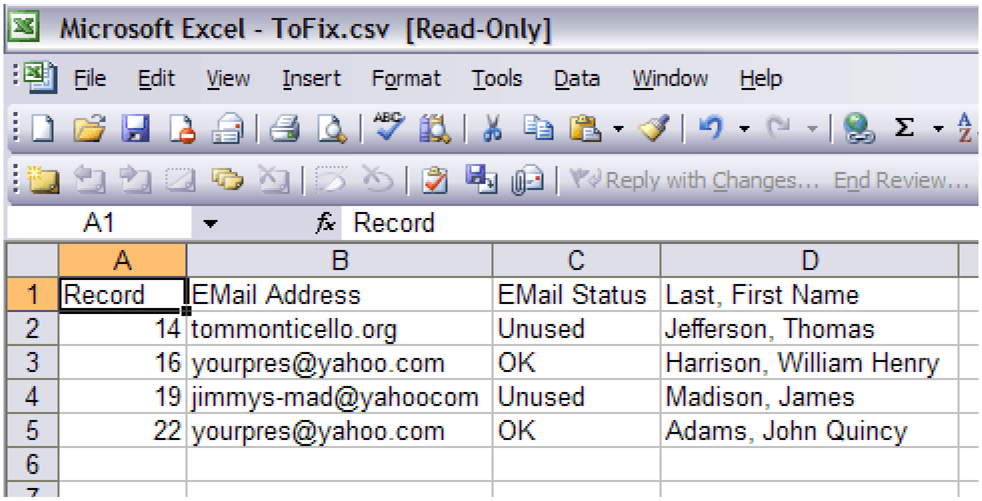
Then go to File, Export, and select the delimiter you want. This will pull up the export dialog:



The file produced looks like:

```
Record,EMail Address,EMail Status,"Last, First Name",
14,tommonticello.org,Unused,"Jefferson, Thomas",
16,yourpres@yahoo.com,OK,"Harrison, William Henry",
19,jimmys-mad@yahoocom,Unused,"Madison, James",
22,yourpres@yahoo.com,OK,"Adams, John Quincy",
```

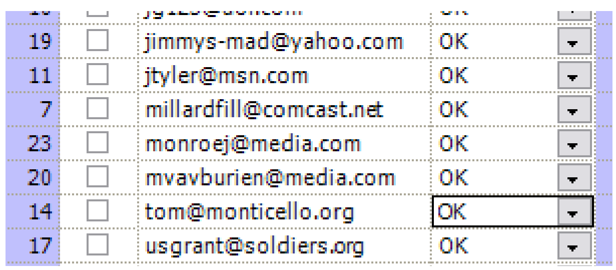
As a .csv (comma separated values) file, this can be directly opened in Excel:



	A	B	C	D
1	Record	EMail Address	EMail Status	Last, First Name
2	14	tommonticello.org	Unused	Jefferson, Thomas
3	16	yourpres@yahoo.com	OK	Harrison, William Henry
4	19	jimmys-mad@yahoocom	Unused	Madison, James
5	22	yourpres@yahoo.com	OK	Adams, John Quincy
6				

Making Corrections in the Respondent EMailer

When the corrections come back they can be entered and confirmed. Change email addresses by clicking in the cell and editing within it. You change the email status, say to switch from OK to Unused, with the pull-down list. If you were to change one of two duplicates to Unused then the yellow background goes away since the remaining OK one is now unique. After making a couple such corrections, our list looks like this:



19		jimmys-mad@yahoo.com	OK
11		jtyler@msn.com	OK
7		millardfill@comcast.net	OK
23		monroej@media.com	OK
20		mvavburien@media.com	OK
14		tom@monticello.org	OK
17		usgrant@soldiers.org	OK

At this stage the typical settings to be used for email status are:

OK, a valid email for a respondent

Test, an address of someone on your staff or at your client, to check that a mailing is ready to be sent

Unused, a row that should be ignored for email purposes, i.e. because the address is a duplicate, has been opted-out or is known to be invalid

Empty, a row with a login but has no respondent assigned; a spare

Importing for Batch Corrections

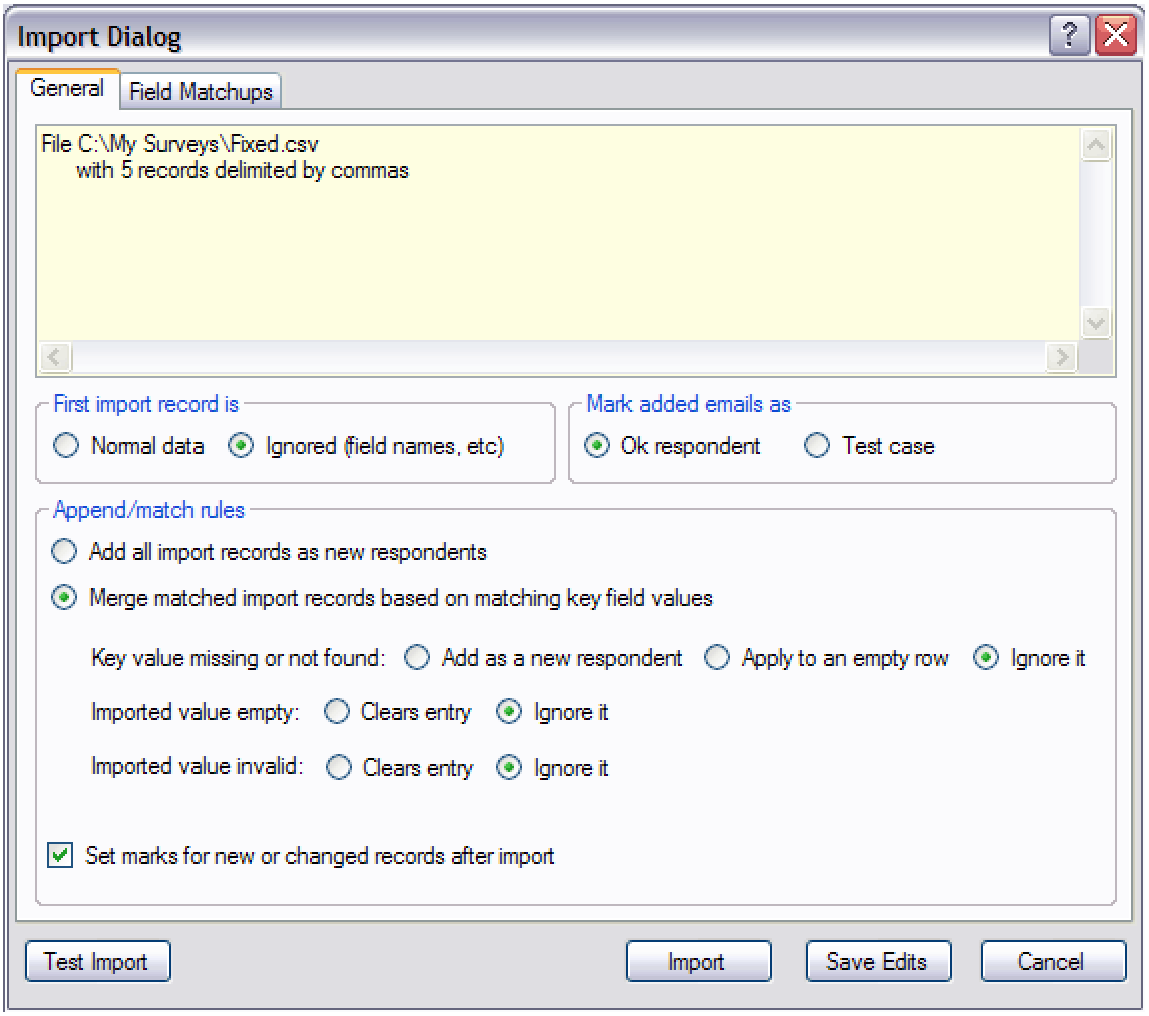
Rather than doing the corrections by hand, you can export the file with the respondent record number and have the corrections made in that file. **Do not change the record numbers.** These make the perfect "key" for importing the corrections from the file.

Put the fixes in their own columns and leave any unchanged cells blank so the import can ignore them. Normally corrections to emails may involve both the address and the status so the corrected file exported from Excel might look like:

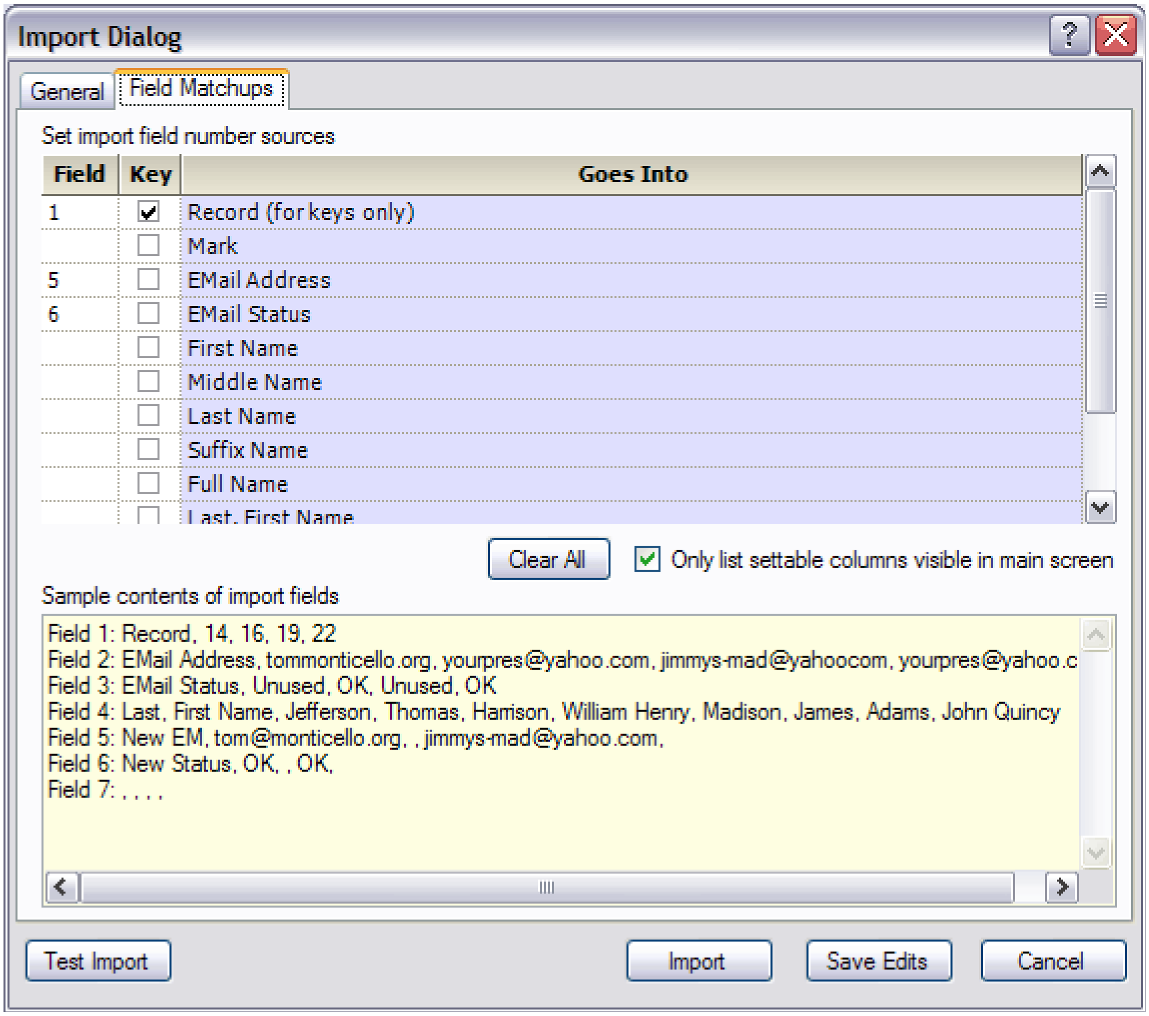
```
Record,EMail Address,EMail Status,"Last, First Name",New EM,New Status,
14,tommonticello.org,Unused,"Jefferson, Thomas",tom@monticello.org,OK,
16,yourpres@yahoo.com,OK,"Harrison, William Henry", , ,
19,jimmys-mad@yahoocom,Unused,"Madison, James",jimmys-mad@yahoo.com,OK,
22,yourpres@yahoo.com,OK,"Adams, John Quincy", , ,
```

This will set records 14 and 19 to new addresses and OK status, but leave records 16 and 22 unchanged.

The *Respondent, Import* dialog would be set to these options:

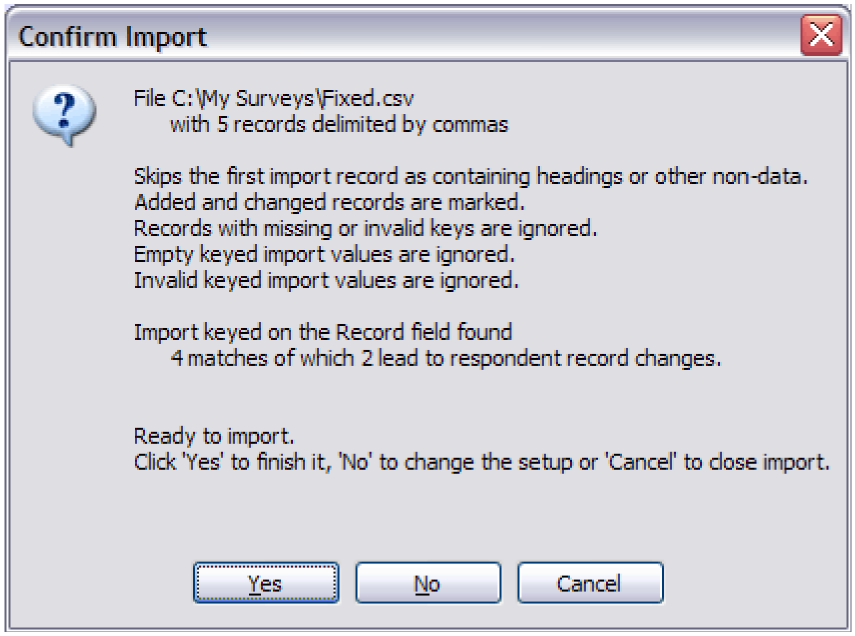


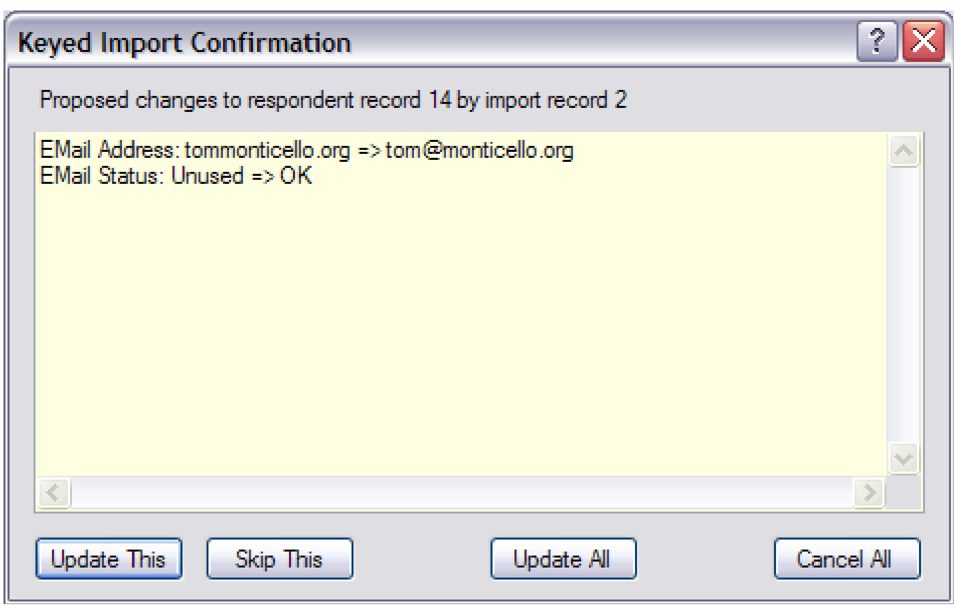
We have indicated the corrections will have a key to match them up with the existing data. Although this file has pre-assigned passwords in empty rows, **we are assuming the project has not gone "live" yet**, so these empties should be kept in reserve. (Changes to live projects require special procedures, see Adding Respondents to a Live Survey.) Selecting the *Field Matchups* tab:



The record number will be the key. Exactly one field must be selected as the key, which must be unique in the imported file. Any entries without keys (record numbers here) will be handled as specified in the previous tab.

When you click Ok each imported change will be presented for your approval:





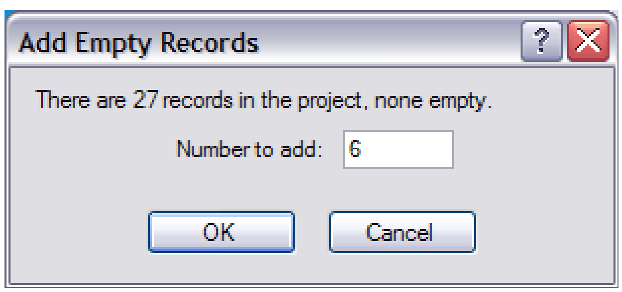
The existing values for any imported fields are shown, plus any that are to be changed by the import record (i.e., Email Address and Status in this example). You can elect to accept this update, skip over it, or let this and any other remaining updates happen automatically. You can also elect to cancel the import—note that cancel stops where you are and will keep any changes already made.

If you have additions it would be best if they were in a separate file from the corrections in order to handle the other imported fields properly. It also makes it easy to apply these additions to empty passwords when you have reserved some (see below) so the online .pin does not need to be changed.

Creating Spare Logins with Extra Passwords

When your project uses the automatic 4- or 5-character passwords, or if your are assigning arbitrary ones yourself if is a good idea to put some spares into the login .pin file. There will be no other information tied to them. If you need to add a new respondent or give someone a replacement password once the survey is live you can use one of these spares instead of having to go through the complex process of revising the on-line .pin. Normally about 10% for spares is recommended.

To add them, use the menu *Respondents, Add New Empties* to get the dialog:



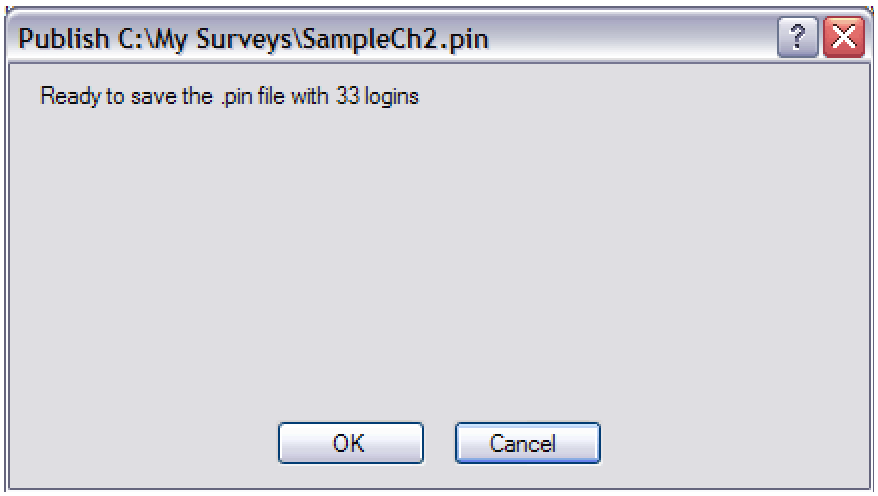
Indicate how you may want to add and click ok. Be generous—codes are cheap and the process of adding more to a live project is tricky! While generally just a few scattered respondent changes need to be handled, we have had cases where a whole department has been left out of the list when the survey launched.

Producing On-Line Support Files

Surveys with unique respondent logins are supported on the server by a special file (.pin) optimized for fast lookup. These can be produced from SurveyPro. However, it is better to do them here because they tie directly to the rest of the respondent information and you have specific password cleaning tools. For the automatic 4 and 5 character passwords, this will generate them much more quickly and will filter out ones similar to many offensive words.

The logins must be unique or blank. The non-blank ones all go to the web server's .pin and the blanks are ignored. There is a field not normally visible called "PIN No Login" which you can make visible with the View, Columns dialog—this would let you keep a login code while not letting the on-line server accept it. PIN UID (User ID) is the session code assigned to one respondent while taking the survey. On submission of a finished survey, it is used to assemble the page answers into one form.

To prepare a .pin file once the respondent data is clean, select File, Publish Project .pin. This will ask for the file name. It should go into your survey's local published Project folder to be uploaded with the rest of the project. In SurveyPro this means using the Advanced Upload option. Once it has the file name you will either get a confirmation:



Or you may get a notice about problems like duplicate passwords to be resolved first.

The other file often used on-line is a pipe-in to pre-fill answers or show some information in question text. This is typically keyed on the login value. Use *File, Export* to produce this.

While your survey is in Test mode on the Web server, you can update these files without too much concern. All that might be lost are any partial test surveys which would be reset. **However once the survey goes Live you have to carefully follow special procedures to update the .pin file!** These procedures are documented in the chapter Adding Respondents to a Live Survey. They are a bit tricky, so we highly recommend getting the on-line files right and locked before switching the survey to Live mode.

Recipient Name Formats

The names can be kept in several formats:

- Full Name like "Sally Jones"
- Last, First Name like "Jones, Sally"

• Separated with “Sally” as First Name and “Jones” as Last Name

These name field contents are interconnected on import or editing. If you change “Jones” one place it gets fixed in the other two. That makes it easy to import data with Last, First names but present their name to each respondent in a different way to suit the context.

On import it uses the separate names as its first choice, then the Last, First combinations and finally the Full Names. This is the order of least ambiguity in the conversions. If it finds a name that does not meet its rules it will leave the conversion blank.

When you are editing names in the main screen it will carry a change to one field into the others once you leave any one of the entries.

The exact conversion rules are:

Separate Names

Accepted verbatim, then converted into L S, F M and F M L, S formats.

Last, First Names

Split into first, middle, last and suffix using the templates: L, F M S ; L, F M ; L, F ; L, or L S, F M ; L S, F ; L S, or L F M S ; L F M ; L F ; L.

Full Name

Splits into first, middle, last and suffix using these templates: F M L, S ; F L, S ; L, S ; ,S or F M L, ; F L, ; L, or F M L S ; F M L ; F L ; L.

Note that for the combined formats the commas help reduce ambiguity when you have a choice of source data to import.

When you’re using Last, First Names or Full Names, and it cannot find an unambiguous interpretation it will mark the names as inconsistent with a pink background leaving the other two formats blank. For example, two commas or more than 4 words in the name would be invalid. Use the Edit, Invalid-Duplicate Sort on any name column and it will bring these to the top.

Email Address Formats

To facilitate sort and find operations, email addresses are converted to a standard format when they contain both a display name and address. For example

able@xyz.com is unchanged

Sam Able[able@xyz.com] becomes

Sam Able <able@xyz.com>

It accepts ( ), [ ] or < > as brackets to separate the real email address from the display name, converting them all to < >. Otherwise duplicates, sort and find would be affected by non-functional differences like which brackets were used or whether the opening bracket had a space before it.

PIN Files and the Respondent Database

The .pin file is used by the online Server Application when there are unique respondent passwords to control login access to the survey. Use File, Publish .pin to produce them and File, Update from .pin to fetch the completion status. Once the survey goes "live" the online .pin should not be overwritten except with a special procedure in the User Guide.

There are four data fields associated with the .pin file:

.pin Survey Done

Used for reminders, this shows which respondents have surveys completed or in process.

.pin Online UID

Normally hidden, this is the unique ID assigned by the online application when a respondent starts a survey. May be useful in special login problem cases.

.pin No Login

Can be set to lock-out one respondent without impacting the rest, rarely used.

.pin Optional

A field for use by custom online coding, also rarely used.

File Extensions

When working with the Respondent EMailer, you may come across the following file extensions:

.rem5	The Respondent EMailer project data file (.rem for earlier versions)
.rem5.bak	A backup copy of the last .rem5 save
.csv	Comma separated data files, typically used for interchange with Excel or piping online

.tab	Tab delimited data files preferred by some applications
.asc and .txt	other ASCII interchange files
.remx	A temporary file used during a mailing to track each message sent and to log any that had problems. This is automatically swept up at the end of the mailing, or if the program is aborted for some reason (like power failure) during the mailing it will be picked up automatically the next time the .rem5 project file is opened.
.pin	password file

Managing EMail Drops

Once you have your database of names and addresses set up (see Setting Up Your List), this chapter will help you create messages and send invitation drops.

Chapter Contents:

Setting Up a Message

- Creating a Message
- Inserting Links in Messages
- Setting Your Mail Server
- Testing the Message

Working with Drops

- Defining a Drop
- Selecting Respondents for a Drop
- Sending the Drop

Bounce Processing

- Marking Bounces for Export or Review
- Exporting Bounces for Correction After Marking

Non-Respondent Reminder Mailing

[Adding Respondents to a Live Survey](#)

Setting Up a Message

There are three steps to sending a mailing:

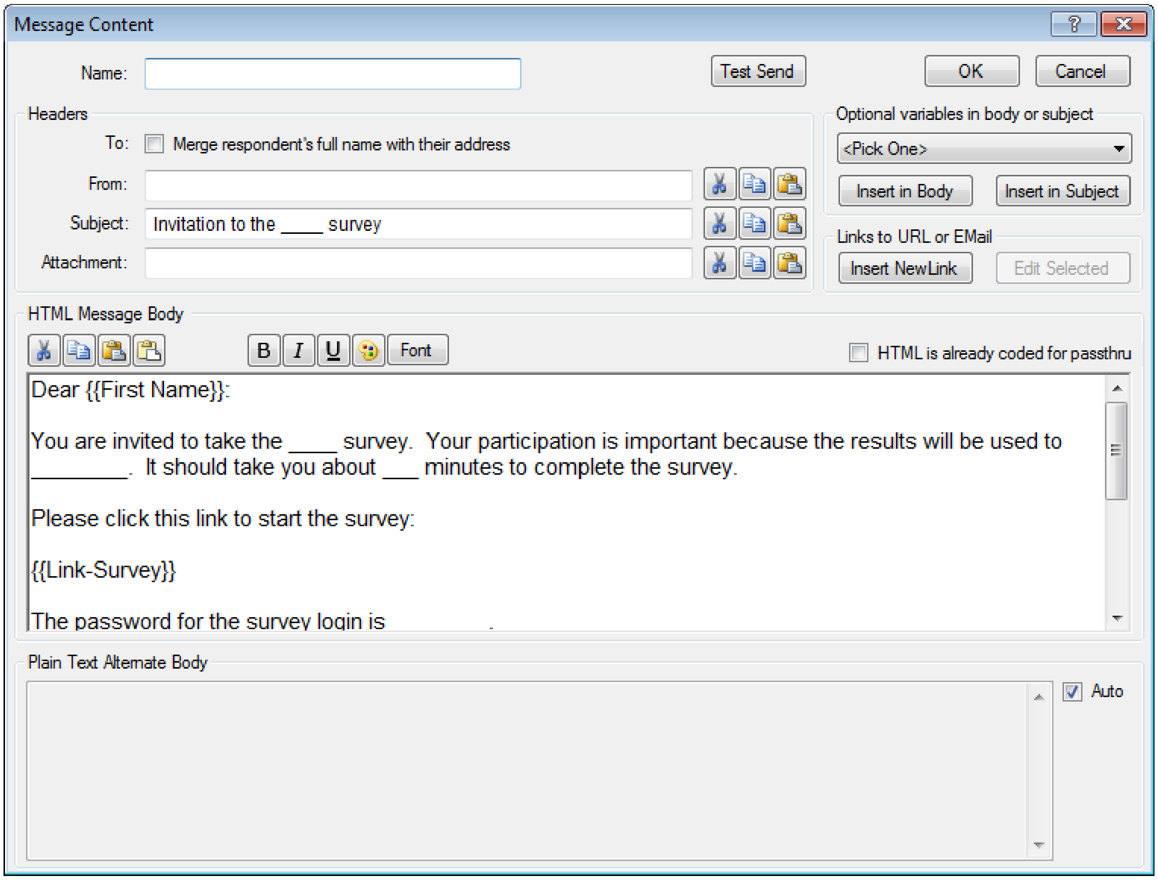
1. Define a Message (the email text) to be sent with optional variable values

2. Define a Drop which controls the mailing (see Working with Drops)

3. Send the drop (see Sending the Drop)

Creating a Message

The message setup, reached by the Mailing, New Message menu, looks like this (version 5.0B and later):



Message Name is used within the program to keep track of mes-sages. It does not go to respondents.

From Address is where you want any replies or bounces to return to. This must be a valid email address.

Subject is required. To differentiate it from spam, it should be immediately recognizable to your respondent as something they want to participate in. Otherwise the message will be tossed, possibly by using an anti-spam button which can cause problems with your ISP.

HTML Message Body starts with a template to get you started with a new message. You can use the Bold, Italic, Underline, Font and Color buttons to highlight portions of the text. HTML email is now in wide use, though sometimes disabled for security concerns, hence the backup plain text below. In addition to the obvious font enhancements it can send a very wide range of languages plus symbols that go beyond the 127 character ASCII set.

Variable List and Insert in Body can be used to insert merge vari-ables like the {{Login Password}}. Variables in the message are the data column name enclosed in {{ and }} brackets.

As each mes-sage is sent, the {{Login Password}} will be replaced by the respondent's unique value. The same would be true of name, department or whatever else is available from the respondent data. You could also type the variable in; the list and button are just a convenience. Variables can also be put in the Subject line, and can be used as many times as needed.

Plain Text defaults to "Auto" which on send will be an alternate message without the formatting and with any characters beyond the basic 127 ASCII characters replaced with periods. The pur-pose of this alternate message is to enable your message to reach the simplest or most secure recipient mail systems, including some Webmail programs and Blackberries. If you wish to tune the test version, uncheck the Auto box and type in something read-able. Both emails are always sent. The respondent's email soft-ware decides which one to use, so if the backup message just says "Reading the full message requires html" they can find a system or settings that lets them do so.

HTML is already coded for passthru means that you want the con-tents of the HTML window to be passed through literally as a pre-coded message you have designed elsewhere. It will substitute any variables found but otherwise it will not be changed. Note that is also disables the automatic plain text; that will have to be entered independently.

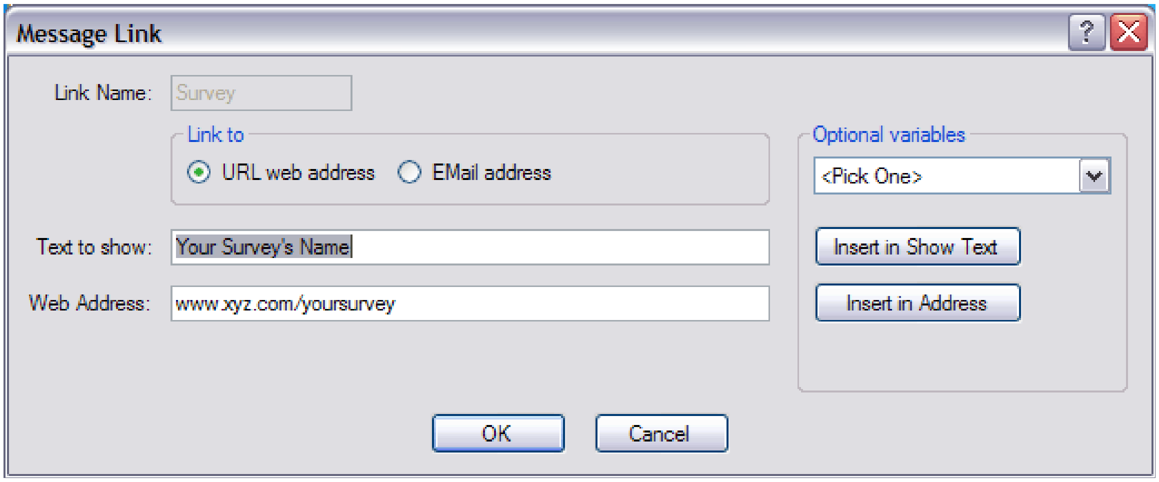
Insert New Link and Edit Selected provide a way to place URL or email links in the message, with control over the text displayed and with optional variable merging. If you select one like the survey {{Link-Survey}} the Edit Selected button will be enabled, or if you click Insert New Link another will be added.

Message Tips:

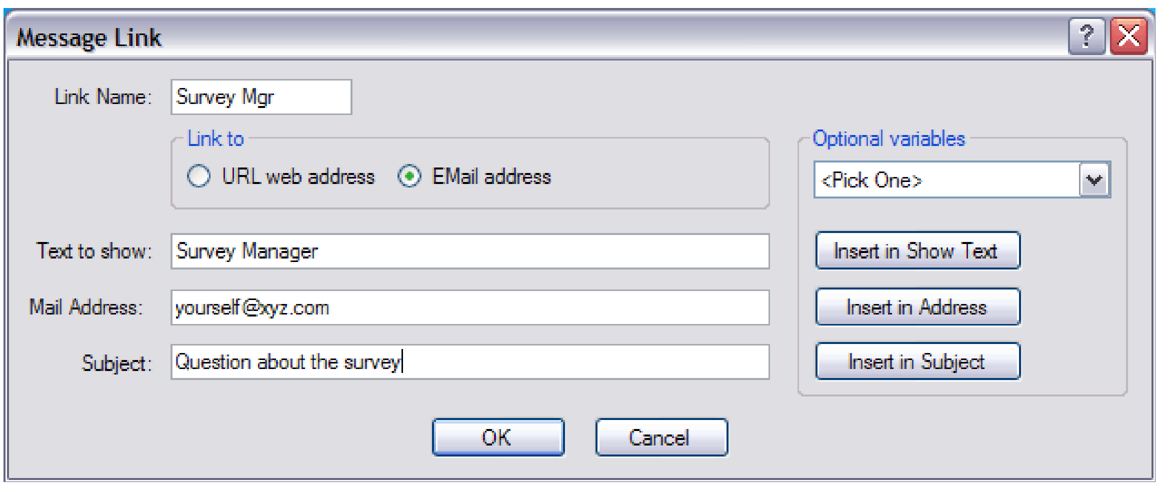
- Try to get some identification of the respondent into the message itself and/or the subject. You will find in processing bounces that you will not always get the "to" address back with the bounce report.   Or, the message may be forwarded in a way that hides the original "to" address.
- Include a clear way to correct the email address or opt-out of future mailings, as well as whatever will motivate the respondent to take the survey.
-

Inserting Links in Messages

A URL definition looks like this, here the default survey link you will need to edit:



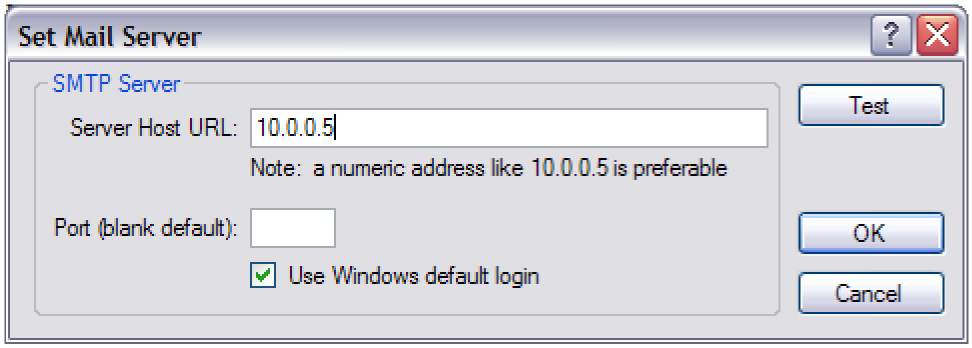
In the html message the Text to Show will be visible and the Web Address will be behind in a clickable link. In the plain text message the Web Address would be shown.



The link names are set once on New, then fixed for future edits. Thus {{Link-Survey}} can be used in more than one message, like reminders as well as the invitation.

Setting Your Mail Server

Once you have the message ready to go, use the Test Send button to try it. The first time you will get a dialog to specify your email server:



You will need access to an SMTP (Simplified Mail Transport Protocol) server to send the mail, often provided by Exchange Server in a Windows environment or as a link to your ISP. This is generally the way Outlook and other programs do their mail so the correct link should be available from your IT department, ISP or Web configuration dialogs. This setting can be reached from the Mailing, Set Mail Server menu whenever it needs updating.

The server can be addressed by a name like smtp.yourisp.com or by a number like 10.0.0.5. The example above uses the Windows default server which is usually available when you are connected to email for Outlook. Your IT department can give you the numeric host address and optional port number. The default will work in most cases whenever your normal email is available. If not, see the reference section for doing an explicit server login.

When you click OK to set the mail server it simply saves these connection parameters for use later when the first email is sent. OK does not do a login. You can force the sending of an email here with the Test button to confirm the service is actually available. It will request your email address and send a short generic message like "Server test using: 10.0.0.5" to you. If the SMTP server accepts this test message to be forwarded then the test will be considered successful. Next check your inbox to be sure the message arrives.

Testing the Message

Once the server is defined, Test Send in the Message Definition dialog can be used. This will send the two versions of the message, HTML and plain text separately, to the “From” address. This verifies that the From address is the one you want and lets you see both versions of the messages. In a normal mailing only one message will be sent to each email address.

Because you are sending the text message without any respondent data the variables will be in their {{…}} format. Links which do not merge variables will appear in their proper way for testing.

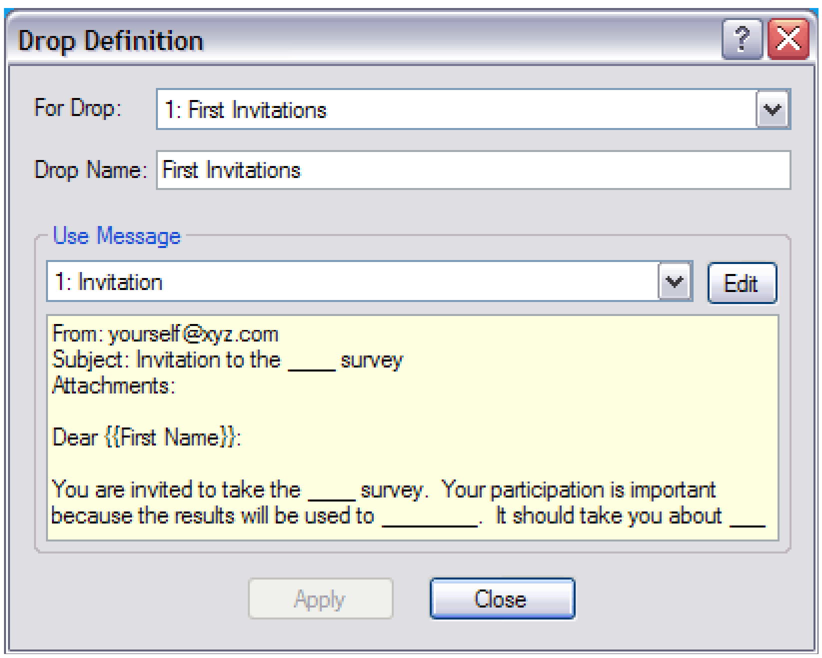
Once certain the text is ok, you can also start drops to test addresses to see the true recipient experience.

www.Apian.com
(206) 547-8392
Support@apian.com

Working with Drops

Now that the message is ready, the next step is to configure a Drop for sending it. Drops and messages are separate so that messages can be reused. The following sections go through the process of creating and sending drops. See also New Drop.

Defining a Drop



Drop Name will be the column heading in the respondent data table.

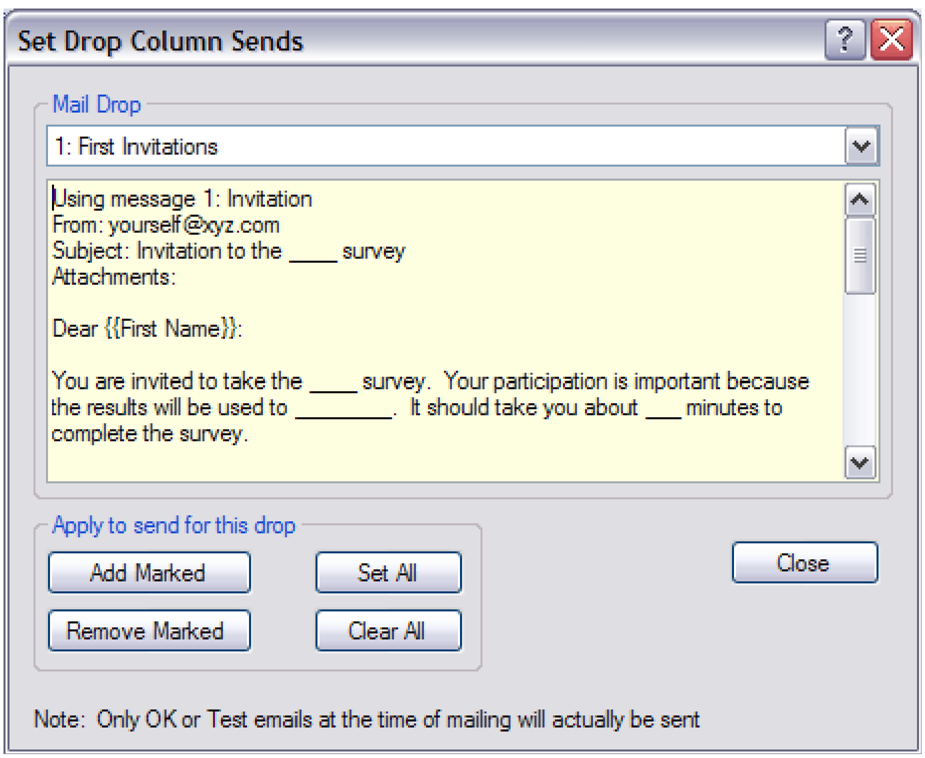
Use Message specifies which previously defined message is used for the drop. (See New Drop.)

Click OK returns to the main screen where a new column has appeared for the named drop:

Last, First Name	Title	Dept	First Invitation
ierce, Franklin	Benefits Sp	HR	Unused
ohnson, Andrew	Analyst	HR	Unused
aft, William	Manager	HR	Unused
rthur, Chester A	Analyst	HR	Unused
leveland, Grover		Retired	Unused
arrison, Benjami		Former Pre	Unused

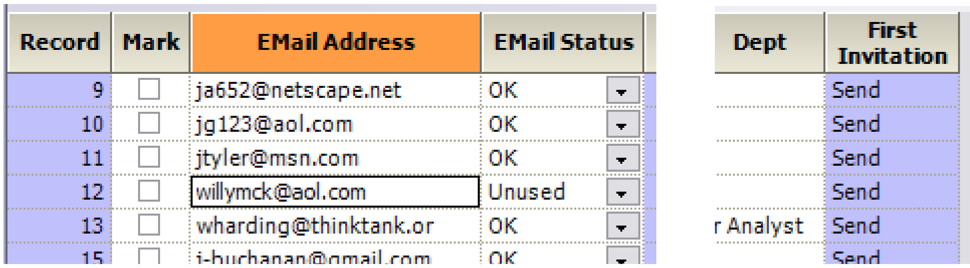
Selecting Respondents for a Drop

All respondents are listed as “unused” by default, meaning the drop has no respondents yet. The next step is to select the respondents to send to. For the initial mailing this is likely to be everyone, so you can select menu *Mailing, Set Drop Column Sends*:



If you click Set All and close, it will include all the respondents in the drop. For follow-up mailings, resending after bounce corrections, reminders, etc., you would use the option of setting the marks column in the respondent table and Adding or Removing according to those markers.

Note that we have included all rows. This may include some test and problem email



Record	Mark	EMail Address	EMail Status	Dept	First Invitation
9	☐	ja652@netscape.net	OK		Send
10	☐	jg123@aol.com	OK		Send
11	☐	jtyler@msn.com	OK		Send
12	☐	willymck@aol.com	Unused		Send
13	☐	wharding@thinktank.or	OK	r Analyst	Send
15	☐	j-buchanan@gmail.com	OK		Send

When the mailing is actually dropped, only the Test and OK email status rows are included; the rest will not be attempted. You will also be able to send your tests first with everything ready to go, and once the test is ok, immediately send the real ones without any extra setup.

The login passwords will merge into each email where the {{Password}} variable was set.

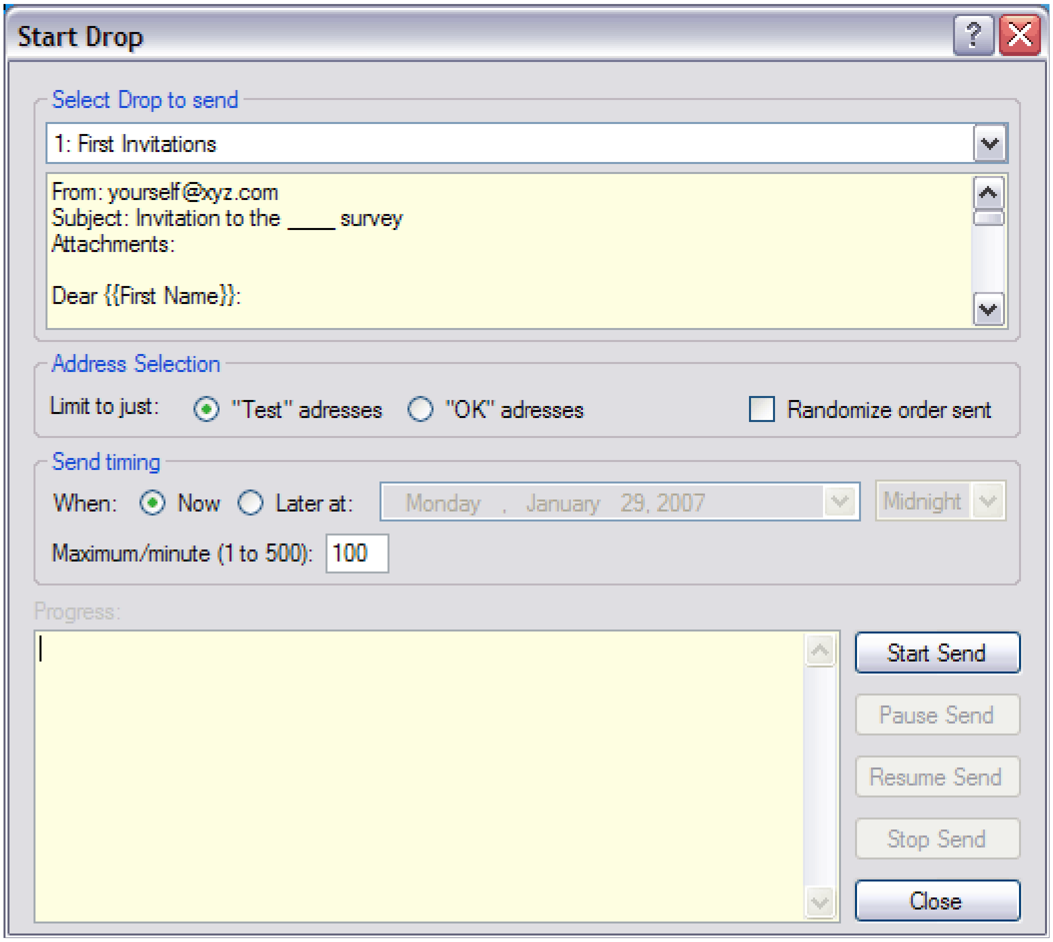
If you are more cautious, you might elect to only mark a few tester addresses while you get the message approved internally. This eliminates the risk of accidentally sending to any real respondents. Then do the full selection and mail it when everything is cleaned up.

Tip:

Some of your test emails should go to external addresses. Signing up for a gmail or yahoo address is a good way to confirm the message is getting through and to see it in alternate views.

Sending the Drop

To mail the drop, use the mailing menu Email a Drop which brings up this:



The sending rules apply to whatever rows are marked Send for this drop, further restricted to either Test or OK addresses. Always do at least one Test mail as a final confirmation after all the changes have been made. Do the mailing first to the tester, usually yourself, and confirm that everything is correct including any variable substitutions. Then switch to OK, reset the timing if appropriate and run the live mailing.

With the *Timing to Now*, click *Start Send*. Only the pause button will be enabled and you will start to see confirming messages in the Progress window. If this were a real mailing of substantial length you would minimize the window and let it run to completion. If there were a lot of emails you might monitor the survey to be sure the response rate is being handled ok. (that you are not inviting too many people for your server capacity).

The *Maximum rate per minute* is an upper limit. The Respondent EMailer will only go as fast as the SMTP server accepts messages, plus a little gap to allow other activities on your computer to be handled. An email server connected through a LAN should handle the maximum rate, but if it is remote the mailing may go out more slowly.

The other concern in setting the rate is the capacity in pages per minute of this survey on the server. By default the survey processing rate is 250 or 500 page starts per minute divided by the number of survey pages, so a 10 page survey at 250 ppm would accept about 25 new respondents to start the survey every 60 seconds. See the NetCollect User Guide Server Installation chapter for its information on calculating load.

Emails are sent in record number order.

Sometimes the mailing may be scheduled for a specific future time. In that case pick *Later At* and specify the date and hour to begin. When you click *Start Send* the progress will show a countdown clock. Again let it run until the mailing is complete. In other words the computer and mailer need to be left running. You can do other things; it is simply checking every second to update the clock which takes an insignificant amount of computer resources. Even while mailing it uses a modest part of computer resources.

Start Send begins the mailing process with a confirmation box:

Step 1 of 4: Set the SMTP server if it has not already been set.

Step 2 of 4: Sends a message to the From address you specified in the message definition. This verifies that the server is ready and lets you check your inbox to make sure that the test message arrived. The message will have the {{…}} variables since this test is not tied to respondent data.

Step 3 of 4: Save the project .rem5 file and prepare the log file

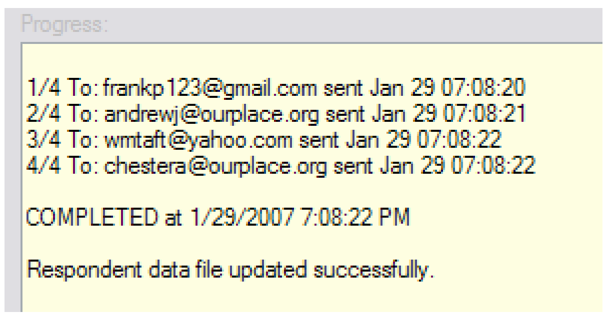
Step 4 of 4: Begin the Test or OK mailing sends, postponed until the start time if you selected later.

Once the mailing begins the *Progress* window will show what is happening and the *Pause Send* button will be the only one enabled.

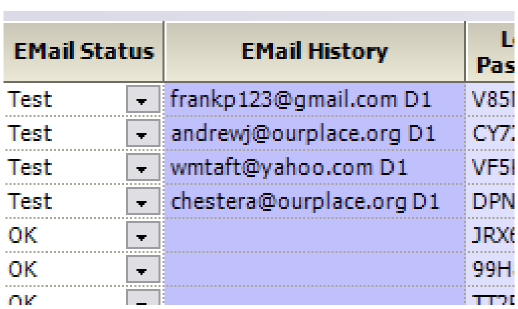
If the message is not complete or its from address does not work, the mailing will not start until the problems are resolved. If it starts but an individual message has a problem outbound it will usually be logged as “Unable” in the progress box and drop list. You might watch a long mailing for a few minutes to make sure the server is handling most of them so any general problems can be resolved right away.

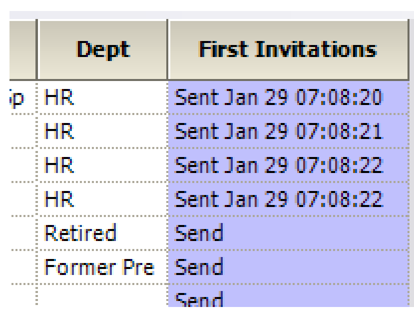
Pause lets you change the timing parameters or resolve issues on the server, then *Resume Send* where you left off. Changing the rest of the drop or message properties requires canceling and restarting.

A successful send looks like this:



After closing the mailing dialog the Drop will be updated with which messages were sent or were unable along with the time.





Note the Email History is filling in with the addresses used. “Unable” here only reflects problems at the outbound mail server. Bounces due to delivery problems will show up as replies to your From address. The next step would be bounce processing to deal with the inevitable problems (see Bounce Processing). Even clean lists such as employees often have a couple of problems, with any customer/member list having more issues. While bounces may come back for some time and a few will happen almost immediately, the bulk will arrive within an hour.

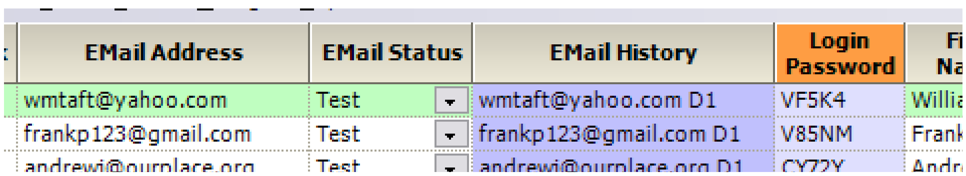
Bounce Processing

When you have some bounce replies to your mailing, open up the Respondent EMailer file in one window and your email software in another. You will need access to the inbox for your drop's From email address.

Open each email to determine the problem. Somewhere in that email there should be a way to tie it uniquely back to a respondent, like a name or login password. Generally you can copy that identifying item to the clipboard from the bounced email.

Switch to the respondent list and click in the column with that search information so it has the orange column header.

Use the *Respondents, Find from Clipboard* menu item (or its Ctrl+1 shortcut key). This will find the respondent you want with a minimum of typing. Here we looked for the password "VF5K4":



EMail Address	EMail Status	EMail History	Login Password	Fi Na
wmtaft@yahoo.com	Test	wmtaft@yahoo.com D1	VF5K4	Willia
frankp123@gmail.com	Test	frankp123@gmail.com D1	V85NM	Frank
andrewj@ourplace.org	Test	andrewj@ourplace.org D1	CY72Y	Andr

Note: Sometimes the original address forwards to another destination, so the if the bounce is not in the list, try to find them using their name or other details.

When you have identified the respondent pull down the Email Status list for it and select the appropriate reason. You may want to drag the width of the column out so you can see all the options:

Empty
Unused
OK
Test
Invalid
Opt-Out, Remove
Bounce Unkn Person
Bounce Unkn Server
Bounce Box Full
Bounce Unsolicited
Bounce Autoreply
Bounce other

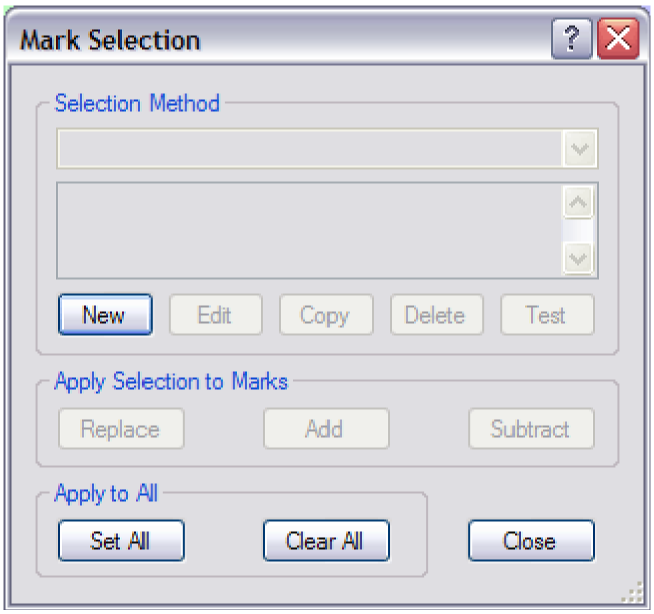
You can generally ignore out-of-office notices since these were in fact delivered, though you may choose to remove them from reminder mailings.

Please be sure to respect any requests to opt-out or remove; spam is causing a good deal of hostility toward even legitimate email. You also don't want to risk being blacklisted or dropped by ISP.

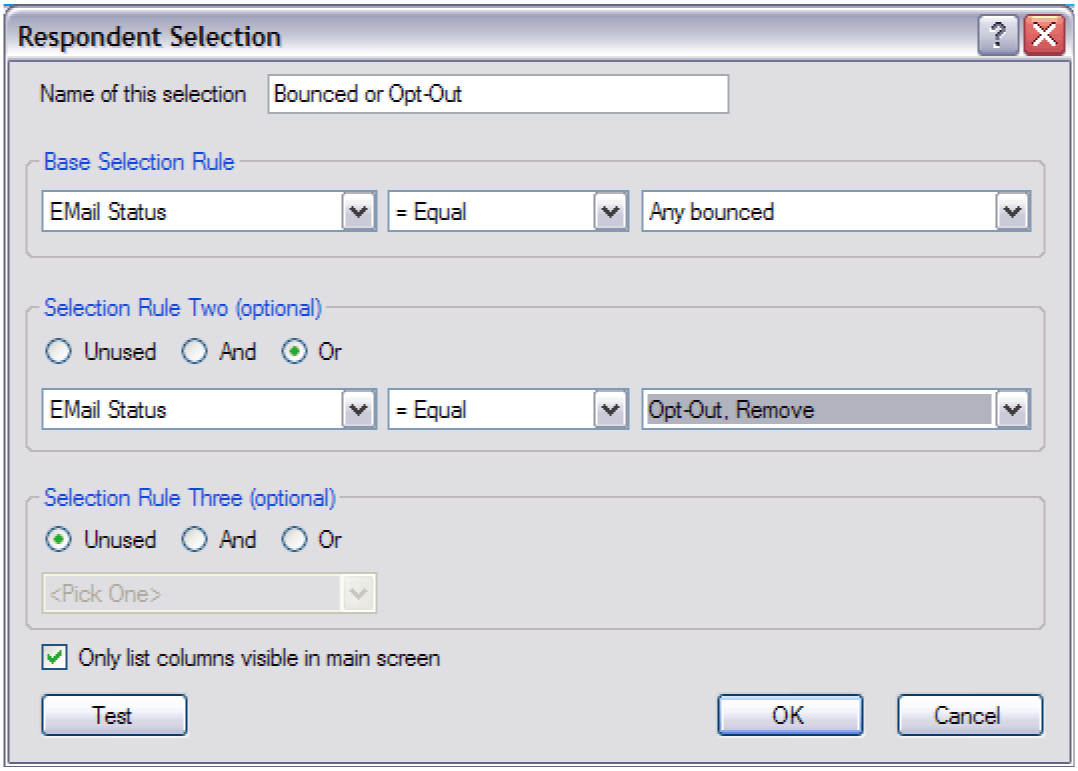
Once you have the bounces marked in the Respondent EMailer, you can resolve them yourself directly (see Making Corrections in the Respondent EMailer). If the fixes are done by some-one else, export them in a portable format like .csv or .tab. Then the corrected emails can be imported back in.

Marking Bounces for Export or Review

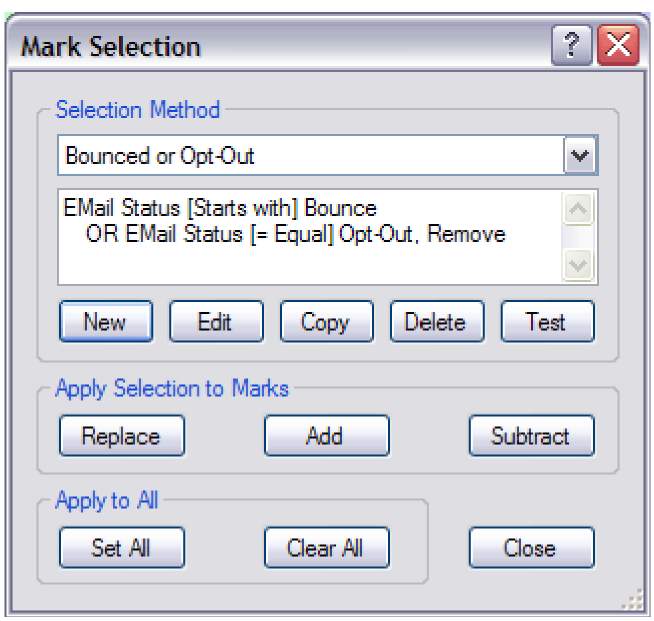
Export has an option to only export marked items so the first step is to set the marks to the bounced and opt-out cases. Go to the Edit, Mark Selection menu which brings up the following dialog:



This works from selection rules that can be saved and reused. Click the *New* button:



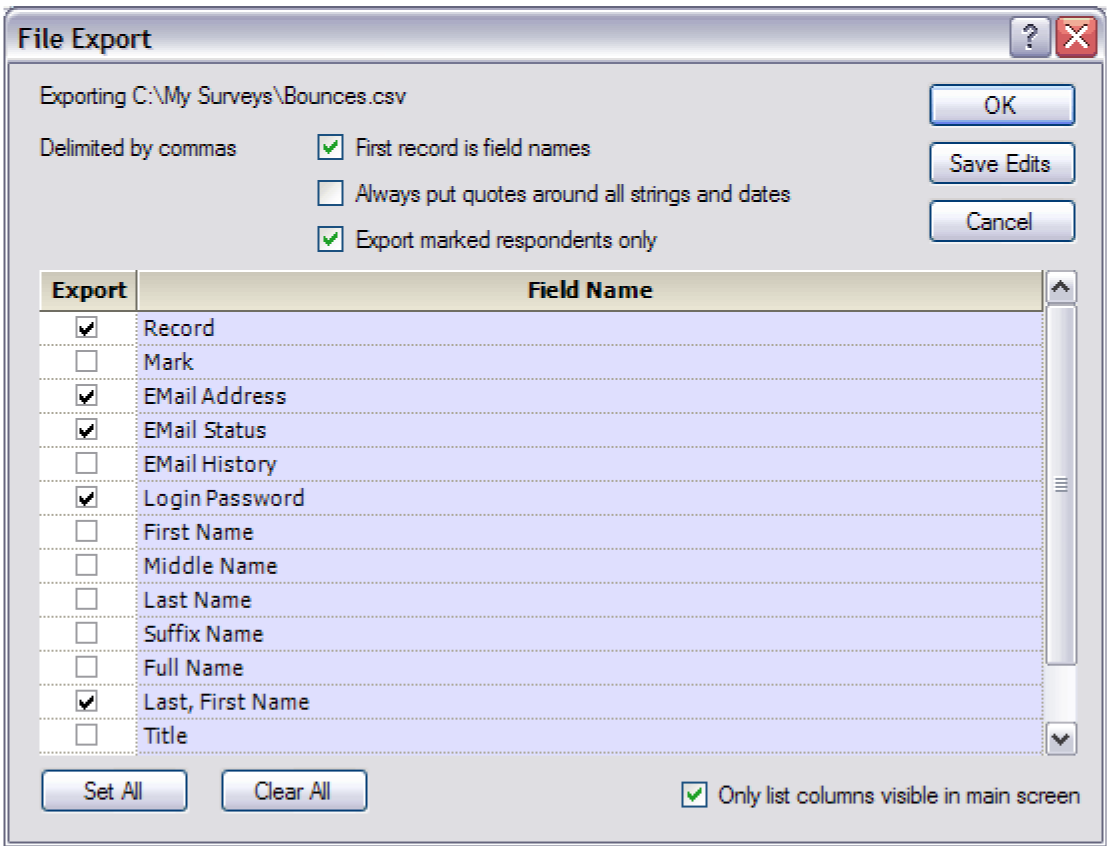
You could click the *Test* button to be sure you get about the right number for this rule. Click *OK* to save it which brings you back in the marking dialog:



First click the Clear All button to be sure there are no marks left over from some earlier operation, then click the Add button to mark the bounces. Note that the changes happen when you click one of the Apply buttons. Click Close to return to the main screen. Once in the main screen you can do a Descending Sort on the marks to bring them all to the top.

Exporting Bounces for Correction After Marking

Go to File, Export and pick a file name. This pulls up the export setup:



Check the Export marked respondents only box first, and then select the fields you want in the output file. We have included the Email Address and Status to be corrected, plus the Record number and the Login Password to enable corrections to be imported back to the right respondents. The Last,First Name is included as information to the person doing the correction.

Tip:

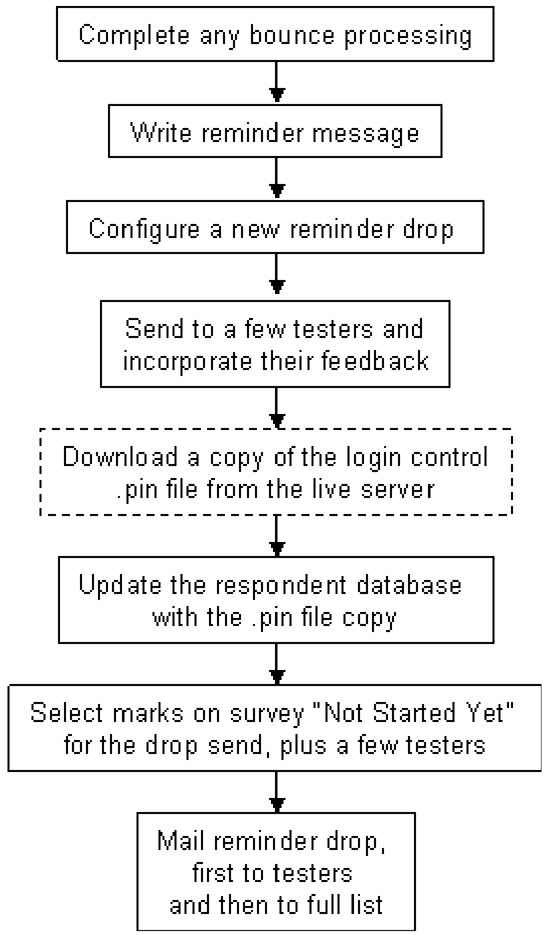
Remind the person tracking down the correct emails not to alter either the record or password fields. Have them add a column for the corrected addresses instead of changing the originals, plus a column for changes in status. Leave any unchanged entries in that new column blank so the import can ignore them.

The process for importing the changes is just like the one shown in Making Corrections in the Respondent EMailer. Since the import setup checked Set Marks for New or Changed any altered records are marked. The next step is usually to resend the invitation. Use the menu Mailing, Set Drop Column Sends to transfer these marks to the original Invitations drop and do the re-send of just those fixes. There is no need for a new drop for re-sends to bounce corrections or additions unless you must track them separately.

When you have a file of late additions, import them with the Set Marks on and transfer those marks to the drop before resending them all. Remember that the marks are reset on each import so you need to do the transfer for the drop re-send each time.

Non-Respondent Reminder Mailing

A non-respondent reminder mailing requires setting up another message and drop, using the online .pin file for the completion status, and then mailing to the ones who have not yet begun. It is quite simple with these step-by-step instructions. Dashed lines indicate steps taken in SurveyPro, solid lines for steps taken in the EMailer.



This reminder process uses many of the same tools and procedures as the original invitations, but with a new message and drop aimed at just the people who are not done. The completions information comes from the on-line .pin file. The menu item File, Update with Project .pin transfers the completion state into the Respondent EMailer database. Edit, Marks Selection menu pulls out the ones to send which are transferred to the new drop.

Adding Respondents to a Live Survey

This procedure is for the rare cases when you have to add respondents to the online .pin after the survey goes live. It must be done carefully to preserve the information about what has been completed so far and any sessions for surveys underway, plus minimizing the time the site is offline for maintenance. **This is only needed if you ran out of spare passwords from your initial list setup.**

Important:

Updating live .pin files can only be done on your own Web server. If you're using QuestionWeb, contact Technical Support for assistance.

1. Backup your respondent (.rem5) file to a safe place
2. Make any corrections and additions to the respondent database
3. With the Control Panel put the online survey into Maintenance Mode
4. Archive the online data so you have backups
5. Get a copy of the .pin file from the server
6. Update the .rem5 respondent data with the copy of the live .pin
7. Be sure your test rows are cleared with .pin Survey Done set to "Not Used Yet"
8. Republish the .pin file with these changes and additions
9. Upload the revised .pin to the server
10. Turn the Maintenance Mode off
11. Try a test login or two to verify the project is functioning properly

Assuming the first two steps are done properly, the rest of the process should only take a few minutes.

Menus and Dialogs

This chapter includes both an overview of each menu's items and dialog references.

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Message Link Dialog

New Drop

Set Drop Column Sends

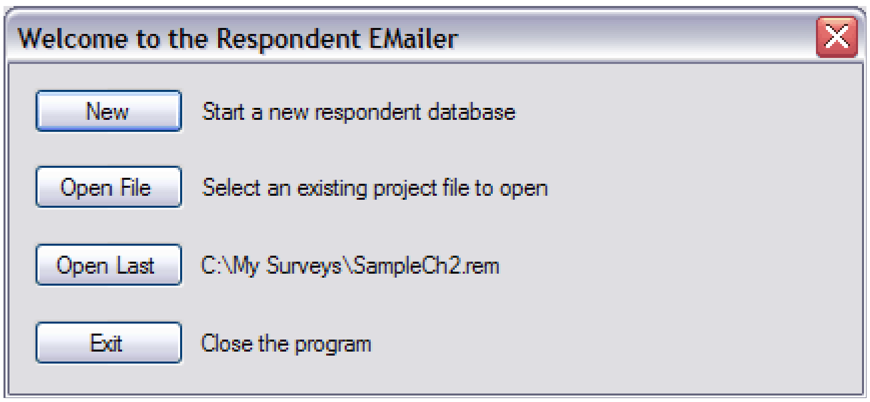
Email a Drop

Set Email Service

Main Screen

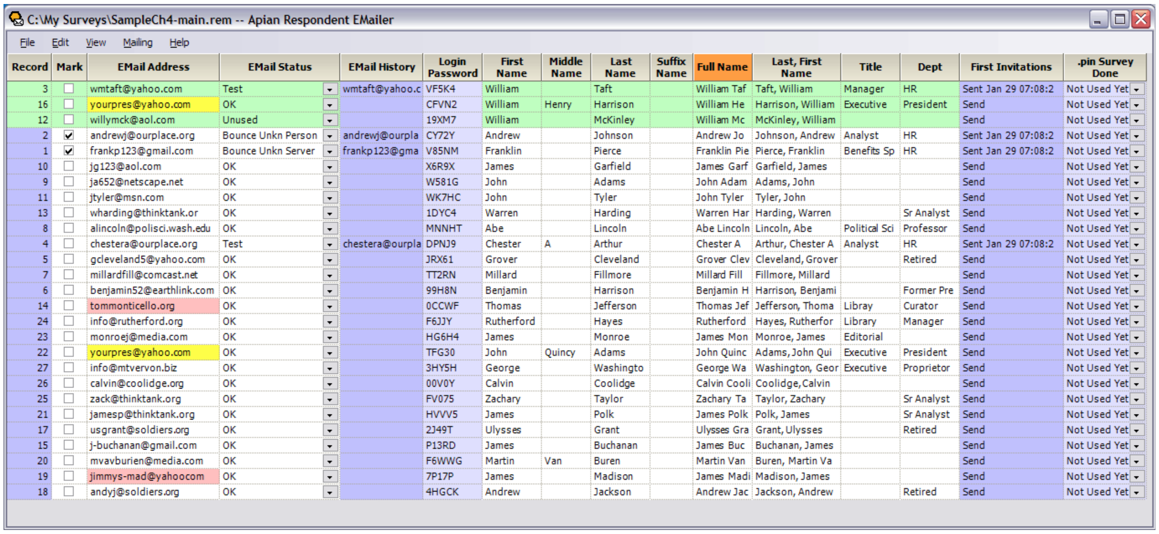
Startup

When the program starts the About Respondent EMailer dialog shows briefly, followed by a choice of how to begin the session:



The New option is the same as File, New (see File Menu) and the Open File option is the same as File, Open (see File Menu).

Data table grid



C:\My Surveys\SampleCh4-main.rem -- Apian Respondent EMailer

File Edit View Mailing Help

Record	Mark	EMail Address	EMail Status	EMail History	Login Password	First Name	Middle Name	Last Name	Suffix Name	Full Name	Last, First Name	Title	Dept	First Invitations	.pin Survey Done
3	☐	wmtaft@yahoo.com	Test	wmtaft@yahoo.c	VF5K4	William		Taft		William Taf	Taft, William	Manager	HR	Sent Jan 29 07:08:2	Not Used Yet
16	☐	yourpres@yahoo.com	OK		CFVN2	William	Henry	Harrison		William He	Harrison, William	Executive	President	Send	Not Used Yet
12	☐	willymck@aol.com	Unused		19XM7	William		McKinley		William Mc	McKinley, William			Send	Not Used Yet
2	☑	andrewj@ourplace.org	Bounce Unkn Person	andrewj@ourpla	CY72Y	Andrew		Johnson		Andrew Jo	Johnson, Andrew	Analyst	HR	Sent Jan 29 07:08:2	Not Used Yet
1	☑	frankp123@gmail.com	Bounce Unkn Server	frankp123@gma	V85NM	Franklin		Pierce		Franklin Pie	Pierce, Franklin	Benefits Sp	HR	Sent Jan 29 07:08:2	Not Used Yet
10	☐	jg123@aol.com	OK		X6R9X	James		Garfield		James Garf	Garfield, James			Send	Not Used Yet
9	☐	ja652@netscape.net	OK		W581G	John		Adams		John Adam	Adams, John			Send	Not Used Yet
11	☐	jtyler@msn.com	OK		WK7HC	John		Tyler		John Tyler	Tyler, John			Send	Not Used Yet
13	☐	wharding@thinktank.or	OK		1DYC4	Warren		Harding		Warren Har	Harding, Warren		Sr Analyst	Send	Not Used Yet
8	☐	alincoln@polisci.wash.edu	OK		MNNHT	Abe		Lincoln		Abe Lincoln	Lincoln, Abe	Political Sci	Professor	Send	Not Used Yet
4	☐	chestera@ourplace.org	Test	chestera@ourpla	DPNJ9	Chester	A	Arthur		Chester A	Arthur, Chester A	Analyst	HR	Sent Jan 29 07:08:2	Not Used Yet
5	☐	gcleveland5@yahoo.com	OK		JRX61	Grover		Cleveland		Grover Clev	Cleveland, Grover		Retired	Send	Not Used Yet
7	☐	millardfill@comcast.net	OK		TT2RN	Millard		Fillmore		Millard Fill	Fillmore, Millard			Send	Not Used Yet
6	☐	benjamin52@earthlink.com	OK		99H8N	Benjamin		Harrison		Benjamin H	Harrison, Benjami		Former Pre	Send	Not Used Yet
14	☐	tommonticello.org	OK		0CCWF	Thomas		Jefferson		Thomas Jef	Jefferson, Thoma	Libray	Curator	Send	Not Used Yet
24	☐	info@rutherford.org	OK		F6JJY	Rutherford		Hayes		Rutherford	Hayes, Rutherfor	Library	Manager	Send	Not Used Yet
23	☐	monroej@media.com	OK		HG6H4	James		Monroe		James Mon	Monroe, James	Editorial		Send	Not Used Yet
22	☐	yourpres@yahoo.com	OK		TFG30	John	Quincy	Adams		John Quinc	Adams, John Qui	Executive	President	Send	Not Used Yet
27	☐	info@mtvervon.biz	OK		3HY5H	George		Washingto		George Wa	Washington, Geor	Executive	Proprietor	Send	Not Used Yet
26	☐	calvin@coolidge.org	OK		00V0Y	Calvin		Coolidge		Calvin Cooli	Coolidge, Calvin			Send	Not Used Yet
25	☐	zack@thinktank.org	OK		FV075	Zachary		Taylor		Zachary Ta	Taylor, Zachary		Sr Analyst	Send	Not Used Yet
21	☐	jamesp@thinktank.org	OK		HVVV5	James		Polk		James Polk	Polk, James		Sr Analyst	Send	Not Used Yet
17	☐	usgrant@soldiers.org	OK		2J49T	Ulysses		Grant		Ulysses Gra	Grant, Ulysses		Retired	Send	Not Used Yet
15	☐	j-buchanan@gmail.com	OK		P13RD	James		Buchanan		James Buc	Buchanan, James			Send	Not Used Yet
20	☐	mvavburien@media.com	OK		F6WWG	Martin	Van	Buren		Martin Van	Buren, Martin Va			Send	Not Used Yet
19	☐	jimmys-mad@yahoocom	OK		7P17P	James		Madison		James Madi	Madison, James			Send	Not Used Yet
18	☐	andyj@soldiers.org	OK		4HGCK	Andrew		Jackson		Andrew Jac	Jackson, Andrew		Retired	Send	Not Used Yet

The main screen is an editable grid presentation of the respondent database.

The database always has some columns, like record number and email address, which the program requires for operation. Additional columns can be added with the File, Properties dialog to suit your project. Each time a Mailing, New Drop is defined a column is added for its send settings.

The data can be mail merged into the invitations and piped into online surveys.

Which columns show up in the main screen grid is controlled by View, Columns, and can be changed at any time.

Various sort and find tools are available under the edit menu, accessible either through the main menu or via a popup menu by right-clicking on the grid. Main menu items can be selected with the mouse, or by holding the Alt key down and pressing the underlined letters, such as Alt-F-S for

File Save, or by using the shortcut keys available for some items like Ctrl-S for File Save.

Data fields

Following are the fields used in the Respondent EMailer.

Record—Assigned when data is imported into the database. It cannot be changed or deleted after that. Setting the Email Status to Unused or Empty is the equivalent of a delete.

www.Apian.com
(206) 547-8392
Support@apian.com

Mark—Checkboxes that can be set manually or by the Edit, Marks Selections. They are used to control the File, Export or Mailing, Set Drop to Send operations.

Email Address—may be a plain address or a combination of a display name and the address in brackets. This is kept in a standardized format like John Smith <jsmith@xtz.com>. See Email Address Formats.

Email Status—Qualifies the respondent's address with a series of possible values: Empty, Unused, OK, Test, Invalid, Opt-Out, Remove, Bounce Unkn Person, Bounce Unkn Server, Bounce Box Full, Bounce Unsolicited, Bounce Autoreply, Bounce other.

OK—a valid email for a real respondent.

Test—an address of someone on your staff or at your client for test mailings.

Opt-Out, Remove—someone who has asked to be removed from the list.

Bounces—returned emails for various reasons, generally indicating a stale or incorrect email address. When fixed set to OK and resend.

Unused—a row that should be ignored for email purposes, say because the address is a duplicate, has been opted-out or is known to be invalid.

Empty—a row with a login but no respondent assigned; a spare.

Email history—Lists the email addresses used in the past and which drop number they went with. Helpful in preventing circular fixup in bounced addresses (where an address gets "corrected" to).

Login Password—The password uniquely assigned to each respondent which may be accompanied by a Login Username in some cases. The login setup is specified in File, Properties and must match the SurveyPro project.

Names—there are several ways of representing names, cross-linked automatically to stay consistent. Thus you can start with separate first, middle and last names yet use a last, first format for an email merge or online piping. For details see Recipient Name Formats.

Title, Dept—Some of the optional data columns chosen in File, Properties

First Invitations—this is a mail drop column defined from Mailing, New Drop. It starts as Unused, can be set to Send or Resend, and will record whether a drop Sent or was Unable with the date.

.pin Survey Done—If you are sending reminders, this online status will be updated from a copy of the .pin file. There are 5 possible values: Not Used Yet, In First Time, Completed Once, In Another Time, Completed Again.

Data field color coding

Light blue	Optional read only, set or cleared in View, Columns
Medium blue	Fixed read only, always controlled by the program
Pink	An address or login that is invalid
Yellow	An address or login that is duplicated
Orange	An address or login cell that is both invalid and duplicated
Light green	Used in rows found in the most recent find operation
Orange	Heads the column that sort and find commands will act on

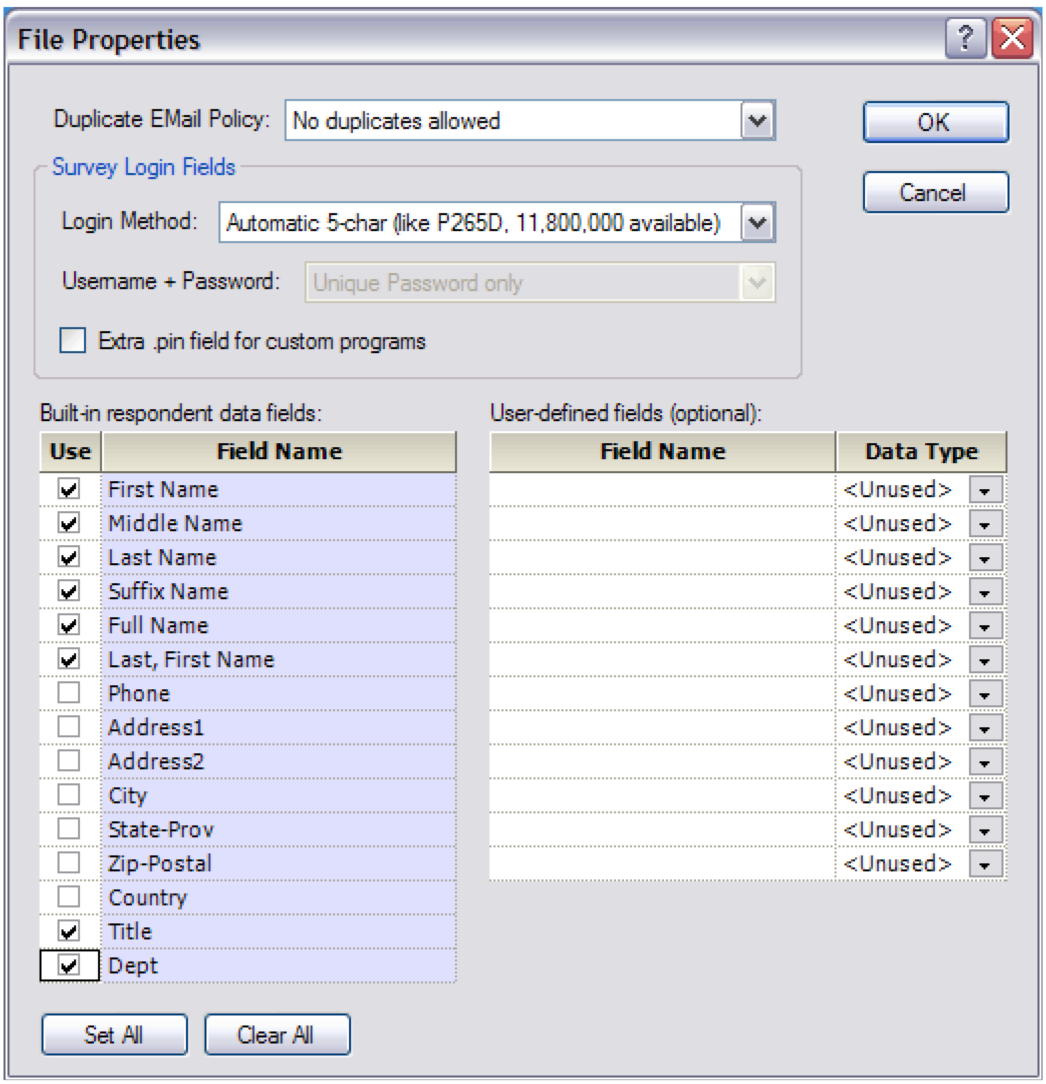
File Menu

New	Properties defines the general policies for a mailing as well as fields used.
Properties	See File Properties.
Open (Ctrl+O)	Brings up the normal open dialog. EMailer projects are saved as .rem5 files with a backup .rem5.bak. See also File Extensions.
Close	Closes the open project, asking if you want to save changes first. The next step is to select New or Open.
Save (Ctrl+S)	Save simply saves a new copy if possible. Otherwise, if no file name has been set, it acts like Save As.
Save As	Save As brings up the normal save dialog. EMailer projects are saved as .rem5 files with a backup .rem5.bak.
Import	Import is used to add test or real records to the database, as well as for batch corrections of bounces. See Import.
Export	Export saves all records or marked records, such as bounces needing correcting. See Export.
Publish Project .pin	Use this function to create your survey's .pin password file. See Publish Project .pin.

Update with Project .pin — Updates the database with who has completed the survey so you can send reminders to only non-respondents. See [Update with Project .pin](#).

History — Logs the import, export and mailing operations to aid managing the project. Times are local.

File Properties



Duplicate Email Policy sets the rules for addresses appearing more than once. Normally it is set to allow no duplicates. You can also choose to allow duplicates in the database but not in a particular mailing drop, or in unusual cases allow duplicates in a single mail drop (for a 360 survey, for example). This policy is implemented when the send list is scanned just before mailing.

Survey Login Fields need to match the SurveyPro login setup as published in order for them to work properly on-line. For more on the trade-offs involved and the role of the login, please see the NetCollect documentation Chapter 11.

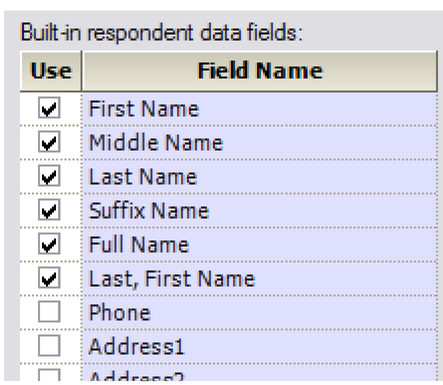
Login method determines how the on-line login fields will be handled, if any. You may have no login restriction to the survey, a shared password, a unique password you will supply such as an employee number, or an automatic 4 or 5 character code supplied by this program. The latter has been selected here.

User Name + Password options may apply when you are supplying the login codes. It is only active when the login is from imported data, not automatic 4- or 5-character codes.

Enable extra .pin field can be used to support server custom module programming. It provides a read/write field that can be accessed quickly though the login lookup. It is rarely used; generally piping is fast enough and easier.

Built-in respondent data fields

Beyond the email addresses and login information, you may want to include additional facts about the respondent for use in the emails or to be piped into their on-line survey. There are a set of stock fields to chose from:



There are a set of name fields that represent the most common ways of storing names:

- Full Name, i.e. “Sally Jones”
- Last, First Name, i.e. “Jones, Sally”

• Separated which would have “Sally” as First Name and “Jones” as Last Name

These name field contents are interconnected on import or editing. If you change ‘Jones’ one place it gets fixed in the other two. That makes it easy to import data with Last, First names but include respondent’s name in their email in a different way.   For more details see *Misc, Names*.

The four separated name fields (First, Middle, Last and Suffix) are turned on or off together.

User-defined fields

User fields can be added when the built-in ones do not cover your needs.

For example:

User-defined fields (optional):

Field Name	Data Type
Owns	Text
Bought	Date-Time
	<Unused>
	<Unused>

The added fields are labeled and assigned a data type. The label is for your reference and can be anything so long as it is unique.

Import

The first step is to specify what type of file you are importing. Respondent EMailer accepts delimited text files as might be exported from Excel, Out-look or a database program. Comma (.csv), Tab or Pipe (|) delimiters can be used with each respondent on its own line. A file with comma delimiters will have records like:

"Fred Flintstone",fflint123@aol.com,"Graphics Specialist", Marketing,

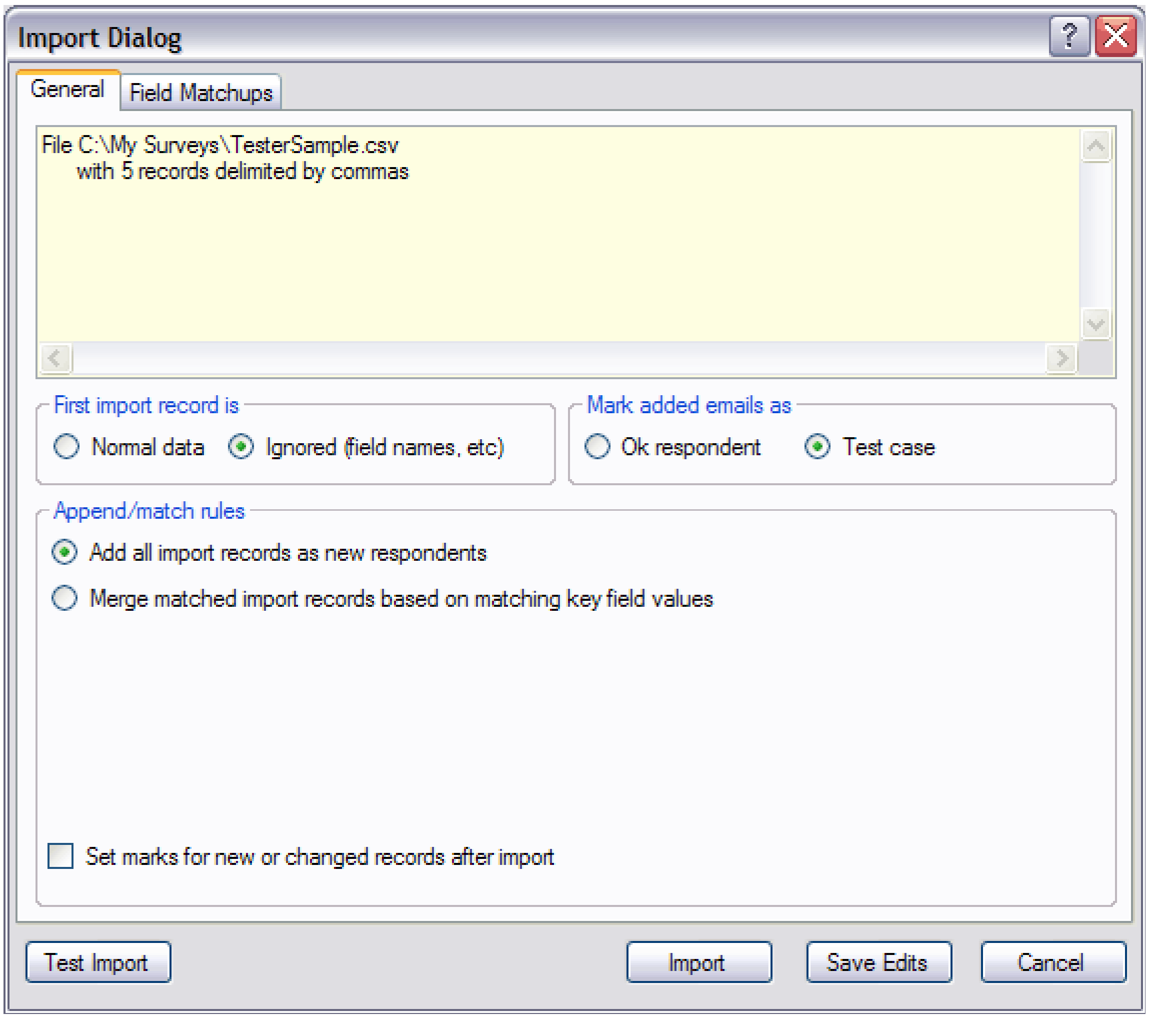
Note the optional quotes around some fields, which are only required for clarity when the field value contains a delimiter character or a quote. If the item is supposed to have a quote in it put the quote twice:

Say ”hi” becomes ,"Say ""hi""",

Multi-line values are not permitted in the import file; each line is a record. Once a record is imported, its record number is fixed and it cannot be deleted. However it can be set *Unused* or *Empty*.

Once the file is selected a dialog with two tabs appears to specify how.

General tab



The first dialog tab specifies general characteristics of the import while the second dialog tab specifies how the data fields line up.

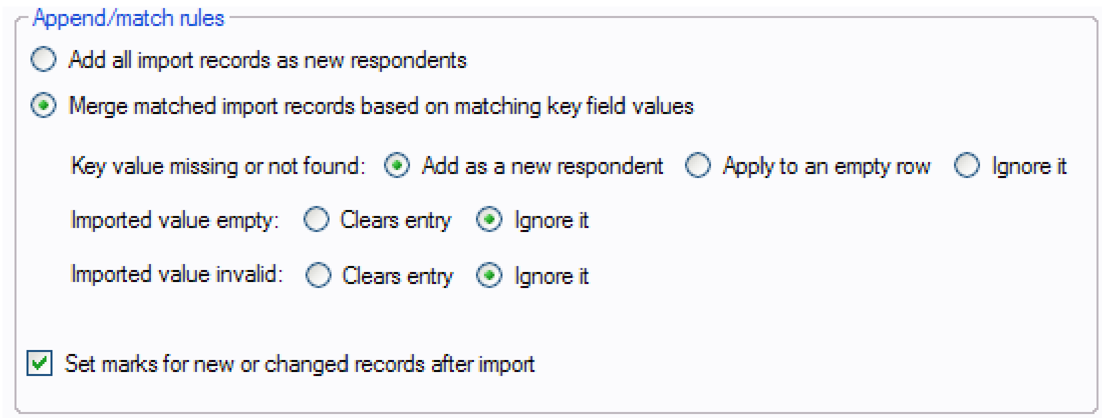
At the top is a report from scanning the import file, which found here 8 records and no apparent problems. Some files may have defective records and those will be noted. Sometimes problems show here because the file actually uses a different delimiter than the one selected from the menus.

First Import Record specifies whether it has data or labels.

Mark Added Emails As specifies whether to flag valid imported addresses as OK (live) respondents or as Test respondents.

Append/Match Rules can be set to:

> *Add as New*—all import records are added to the end, used to bring the respondents into the project the first time.
>
> *Merge on Keys*—Used to update records by matching import records to project respondents with a key column, like the password or record number. When selected there are additional choices:

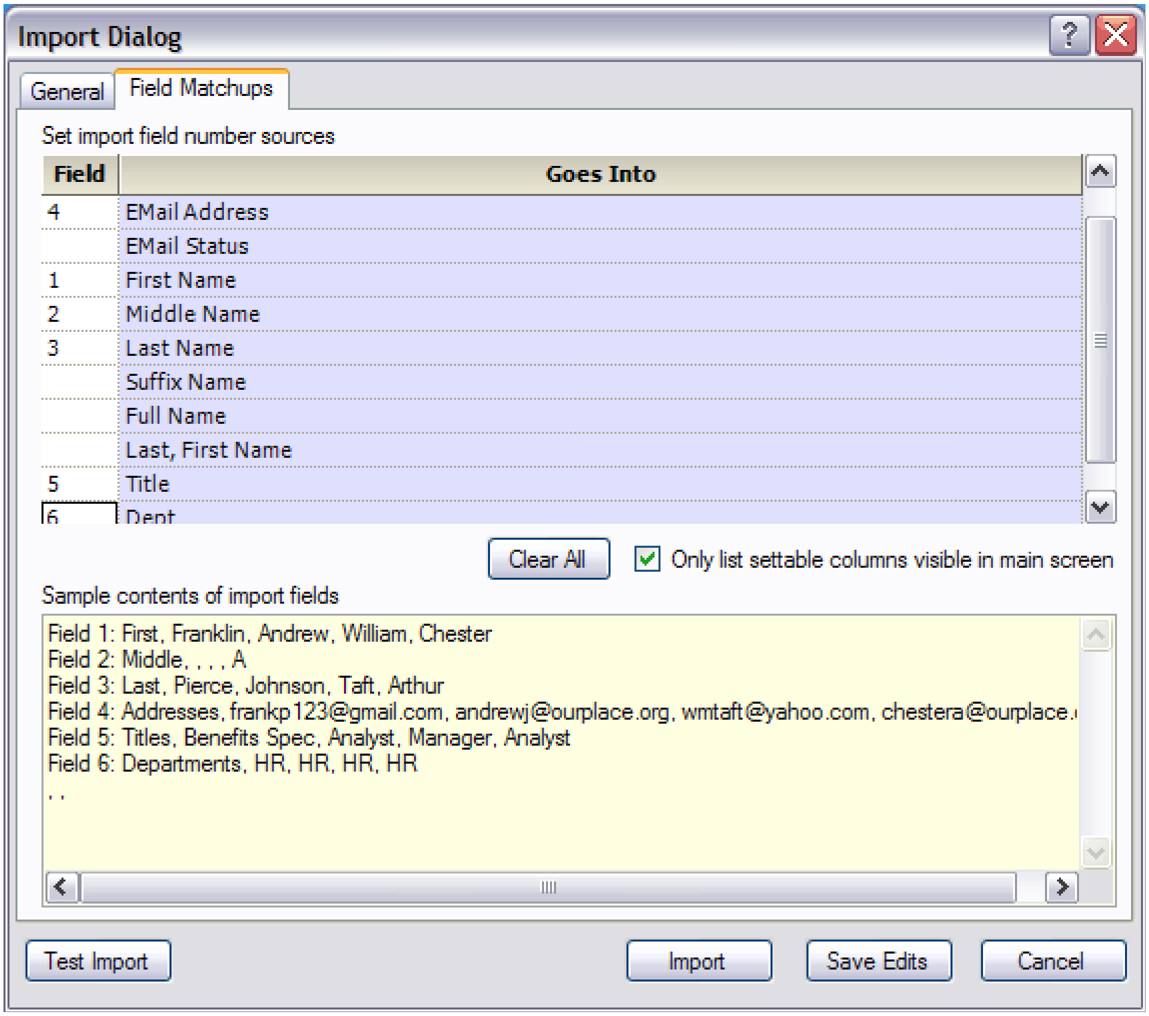


> *Key Missing*—Import records that do not find a key match to an existing record can be added to the end, assigned to an empty row or skipped. The empty spare rows come from Edit, Add New Empties
>
> *Value Empty*—Blank import file fields can either set the target value empty or leave it alone
>
> *Value Invalid*—Invalid import file fields, such as trying to use "two" for a number or date field, can either set the target value empty or leave it alone

Set Marks lets you flag records added or changed by this import. Clear all existing Marks first.

Field Matchup tab

The second tab is for field match-ups:



The list at the top is where you identify which import field goes into which data table field, such as import field 1 going into the EMail Address column.

At the bottom is a peek at the data in the file separated into the fields. If you have one field showing all your data the most likely reason is the file uses a different delimiter character than the one specified.

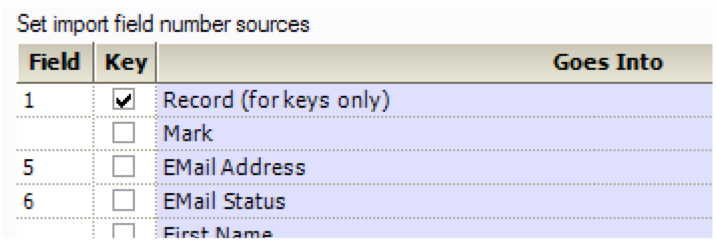
Email addresses will be standardized when imported. See Email Address Formats.

For imported names, you can have multiple formats of the names in the same file. However, as part of standardizing the formats, the EMailer will use only one format on import, and derive the others from it. It will select which field to use in this order: Separate, Last-First or Fullname. It uses this order to minimize ambiguities (e.g. does xx yy zz mean first middle last or first last suffix). Since import only uses one, pick the import data field(s) which best fit the program's rules. See Recipient Name Formats for more on how this works.

The *Clear All* button lets you empty the field list.

The *Only list settable* checkbox limits the target columns to those shown in the main screen which are not read-only. If you unclick this is will let you import into all the fields in the database when you have a need to, including the read-only ones.

For *Keyed* imports there is an additional column to specify the unique key:


Set import field number sources

Field	Key	Goes Into
1	☑	Record (for keys only)
	☐	Mark
5	☐	EMail Address
6	☐	EMail Status
	☐	First Name

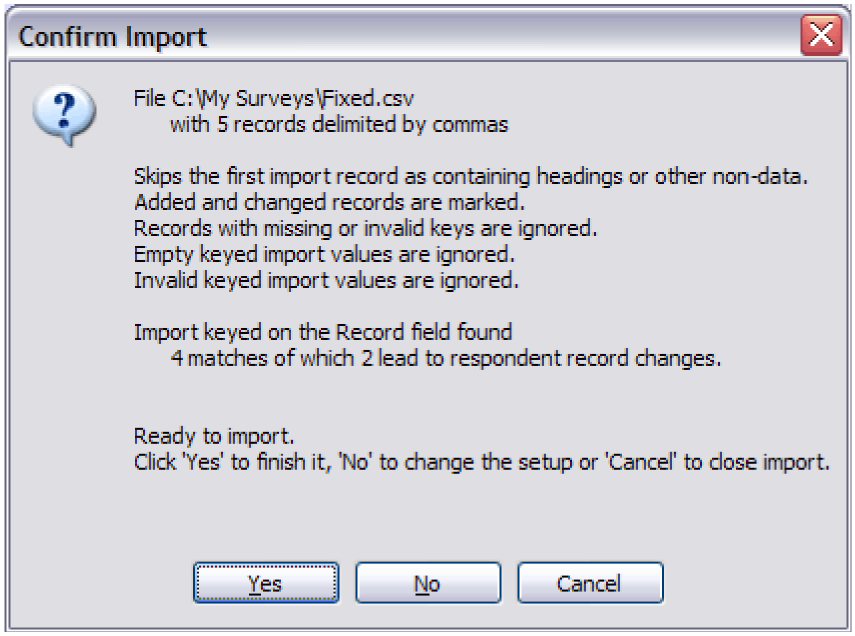
Test Import will go through the import process for everything but actually updating the data and reporting the results. It is good practice to test all imports before using them!

Save Edits—Keeps the current dialog settings, whether complete or not, and exits the dialog.

Cancel—Exits the dialog without saving any changes.

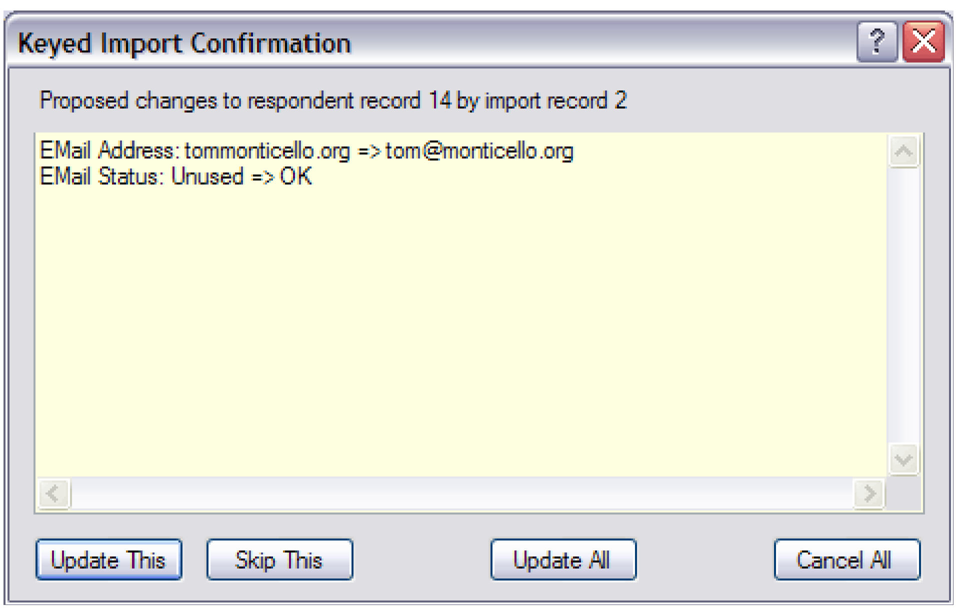
Confirm Import

Import will require that you have checked both tabs to be sure the field alignments are correct. It will first do a check scan and report its results:



For straight additions this will execute when you click *Yes*.

For keyed imports it will present a confirmation dialog for each record match found:



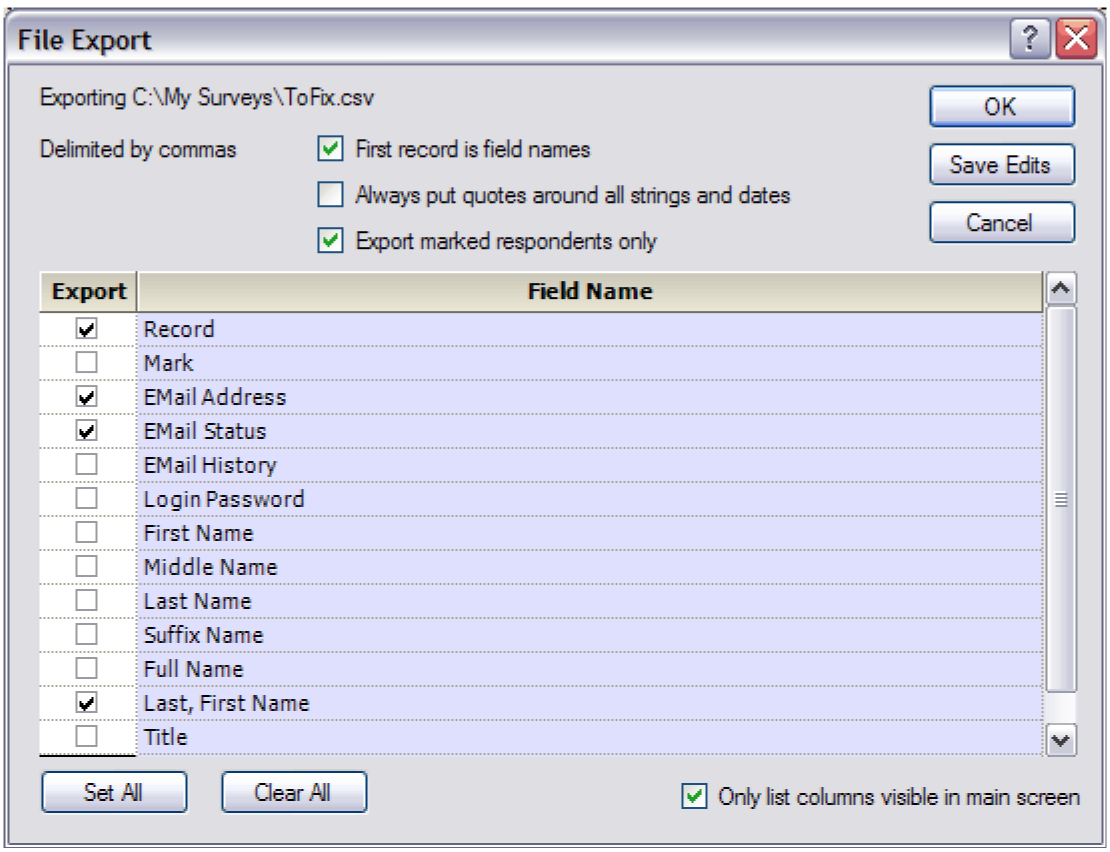
Update This and *Skip This* let you control the process one record at a time. Only records that involve changes are shown, in this case the first changed one was from the third import record.

Update All does this one and all the rest without any more confirmations.

Cancel All stops the import at this point. However any changes that had already been accepted will remain.

Export

The first step is to specify what type of file you are exporting. All are text files with one record per line and as a delimiter commas, tabs or pipes (|). Comma delimited are typically .csv extension and open directly in Excel. Quotes are exported doubled.



First Record Field Names is normally checked to help the users of the file identify the data.

Always Quote is generally not required, though it does no harm other than producing a somewhat larger file. Leaving it off means quotes are only used on values that would be ambiguous otherwise due to delimiters or quotes.

Export Marked Only will limit the export to respondents marked in the main screen, typically set by a combination of hand editing or Edit, Mark Selection. Otherwise all the respondents are exported.

Use the Export checkbox list to specify the data that is to be exported. Set All or Clear All can be used to quickly change all the checkboxes.

Only list columns visible limits the export columns to those shown in the main screen. Unselect shows all the fields in the database.

Save Edits—Keeps the current dialog settings, whether complete or not, and exits the dialog.

Cancel—Exits the dialog without saving any changes.

OK executes the export without further dialogs.

Publish Project .pin

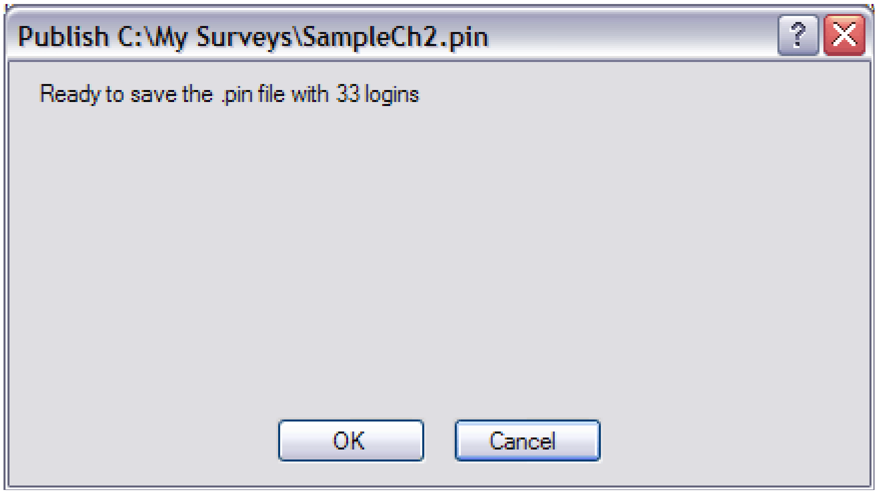
The .pin file is used by the online Server Application when there are unique respondent passwords to control login access to the survey. Typically you would publish a temporary one with some testers to do the development and reviews. When the full cleaned respondent list is available, you publish the one for taking the survey live.

NOTE: Once a survey goes “live” there are special procedures for updating the online .pin file without losing the existing status. See Adding Respondents to a Live Survey and consider contacting Technical Support before changing the .pin on a live project!

The .pin file should normally reside in your local SurveyPro Project folder so it can be uploaded automatically with the rest of the survey. Since you are using the Respondent EMailer to manage respondents, do not use the SurveyPro .pin generation.

For automatically generated passwords it is desirable to publish it with some spares, typically about 10-20% extra. The extra file size does not impact the speed on the server and they come in handy to give to people added after the project goes live.

After picking the file name you will get a confirmation dialog:



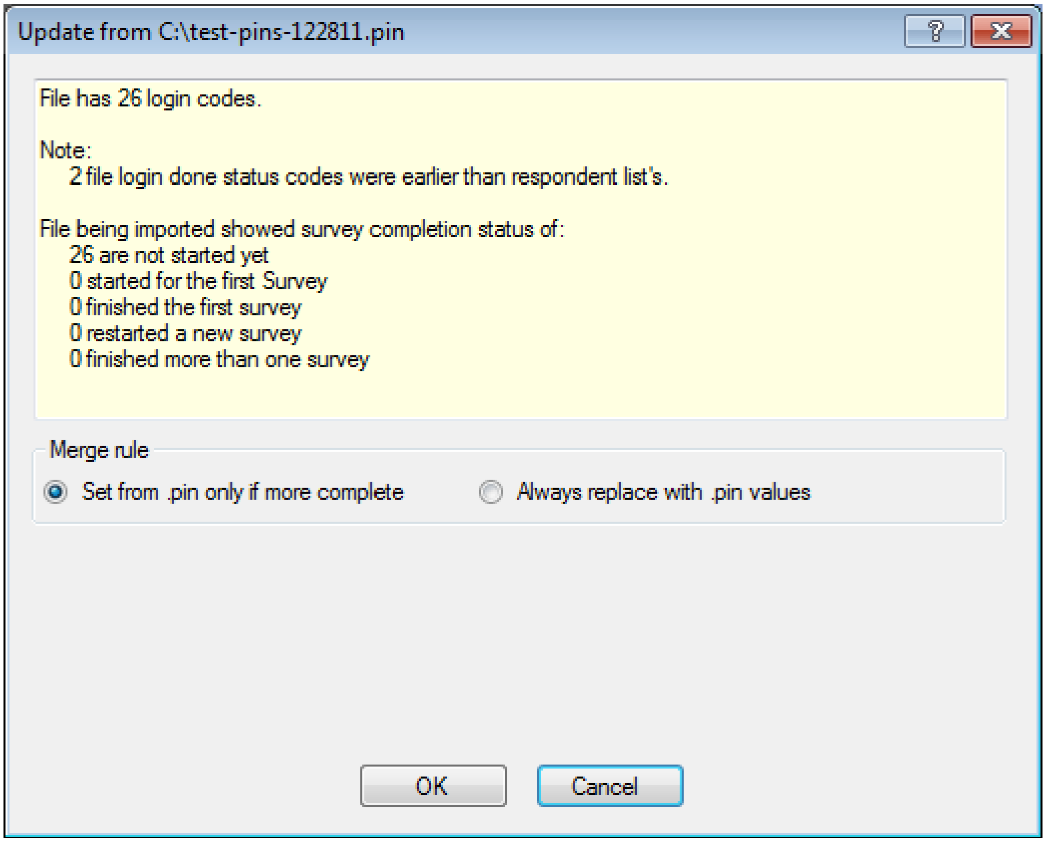
Normally this is all you would see. However if some Login Passwords are blank you would be reminded that these will not go to the .pin file.

In the rare cases when the optional extra .pin field is used, it will warn if there is a conflict between the fixed field width specified in *File, Properties* and the actual data lengths.

Update with Project .pin

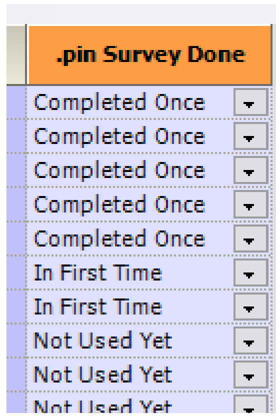
The first step is to identify the .pin file to import, usually a copy of the latest one from the live online project folder in order to prepare for a reminder mailing.

It will bring up a confirmation dialog:



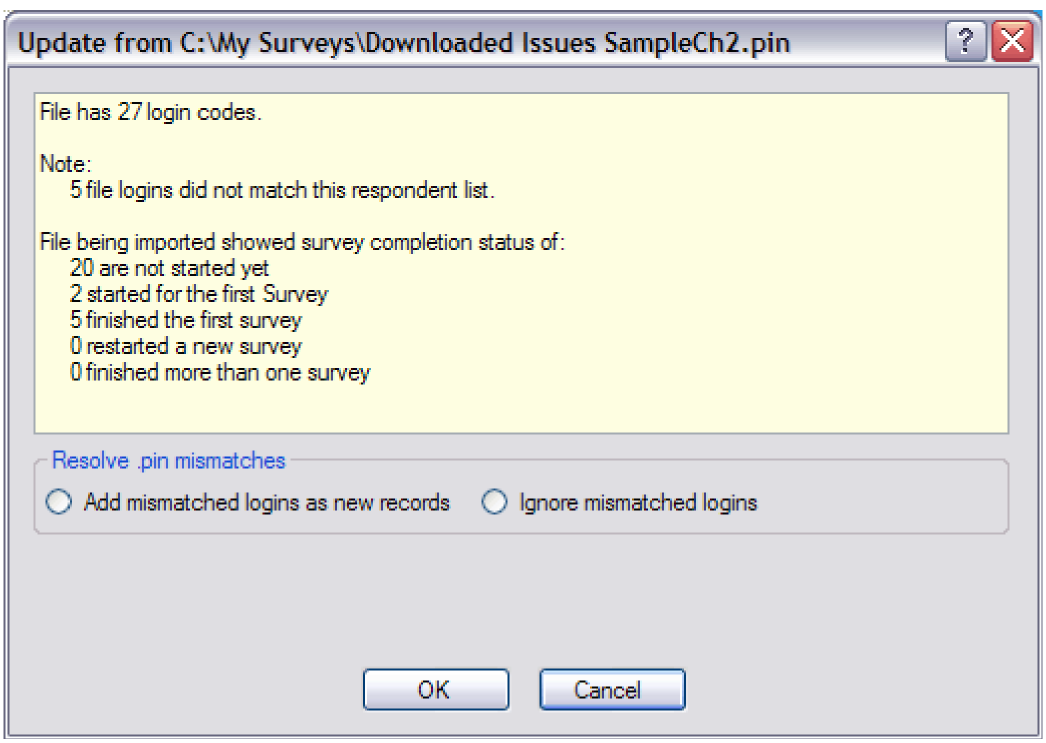
This gives you a report on what the online status is. If it does not look right stop here and resolve it before corrupting your respondent database!

The update fills a set of .pin data columns which may all be hidden at the moment. The one you care about for reminder mailing is .pin Survey Done which you will want to make visible with *View, Columns*. To learn more about the .pin structure see PIN Files and the Respondent Database. After the update you would see:



The *Merge rule* choice determines whether the done column is the highest completion the respondent has gotten to (the default setting) or is an exact match to this .pin file. In almost all cases these two have the same effect, but there are times like multiple language pins or special pin file resets where you will need to think through which one you want.

When the logins disagree you would see something like this instead:



This could happen for special development or support needs, such as building a project file from a pin from somewhere else. In this case there were some passwords in the .pin that were not in the Respondent EMailer database. You will need to indicate how the mismatches should be handled.

Edit Menu and Right-Click Popup Menu

The Edit Menu is used to locate and modify individual records in the database.

Cut (Ctrl+X)

Copy (Ctrl+C)

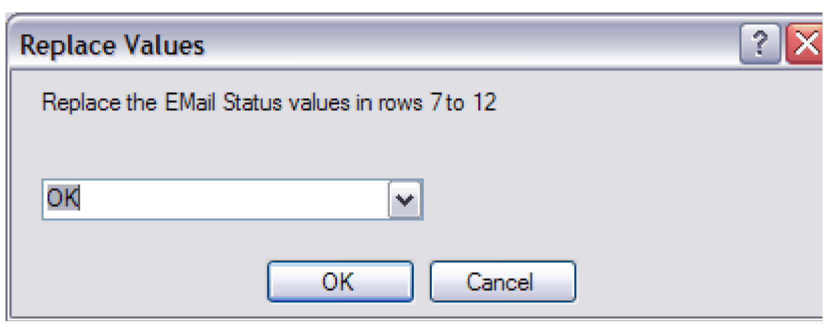
The normal clipboard cut or copy for a single selected grid cell. If more than one cell in a column is selected, the text on the clipboard will be one cell per text line.

Paste (Ctrl+V)

The normal clipboard paste for a single line clipboard test item. However if the pasted item is multiple lines then it will paste into the column from the selected cell down, one cell entry per line.

Replace

For single cells the easiest way to set them is by typing into the main screen grid, but if you want to change a set of values at once select them in the grid and supply the new value here. The values must be in one column and must be contiguous rows like this from 7 to 12. Click on the cell at one end, hold the Shift key down and click on the other end. Ctrl+click is not supported.



Ascending Sort (Ctrl+A)

Descending Sort (Ctrl+D)

These will sort the selected column (shown by an orange header cell).

Most are treated as text and sorted alphabetically. Sorts are case-independent.

Checkbox (true-false), number and date fields sort on their values.

Email Addresses can be sorted two ways according to the *Edit, Email Sort Method*. One is alphabetic and the other is by domain name and Internet Service Provider (ISP).

You can force unused or empty rows to always sort to the end (the default) with *Edit, Sort Unused-Empty to End*.

If you chose this operation using the pull-down menu or its hot key then it will perform the operation on the data column with the orange heading. If you do a right-click on a data cell then it will select that column, do the operation and move the orange highlight over if needed.

Invalid-Duplicate Sort (Ctrl+I)

For EMail Addresses or Login Passwords, this will sort the selected column (shown by an orange header cell) with items that are invalid and duplicated first, then invalids, then duplicates and finally the rest that are syntactically correct. Within each category the rows are sorted alphabetically so you see duplicates together.

This sort ignores the unused or ISP/Alphabetic sort settings. It is disabled for other columns.

Sort Unused-Empty to End

Clicking on the menu item switches between ignoring the Email Status Unused and Empty settings, or sorting them to the end. Changes apply to the next sort and for the whole row regardless of which column a sort is done on.

Email Sort Method

There are two choices here on a sub menu:

> *ISP* (the default)—sorts first on the domain so all .com addresses appear before .org, then on the provider so @earthlink sorts before @yahoo, then on the person's email username so fjones@yahoo.com goes before gjones@yahoo.com. If two people have the same email address but a different display name then that is the last sort level: Fred <jones@z.com> comes before Gina <jones@z.com>.
>
> *Alphabetic*—straight alpha sort. Note that the addresses are kept in a standardized format so that trivial differences in punctuation and blanks do not affect the sorting.

Changes apply to the next address sort. Sorts are case-independent. For more on EMail Addresses see Email Address Formats.

Find (Ctrl+F)
You can search a column for a whole name or address, or a partial string. See Find (Ctrl+F).

Find from Clipboard (Ctrl+1)
This will search the selected column (shown by an orange header cell) for whatever value it finds on the clipboard. See Find from Clipboard (Ctrl+1).

Find More Like (Ctrl+2)
Locates and groups records with identical values to the currently selected cell. See Find More Like (Ctrl+2).

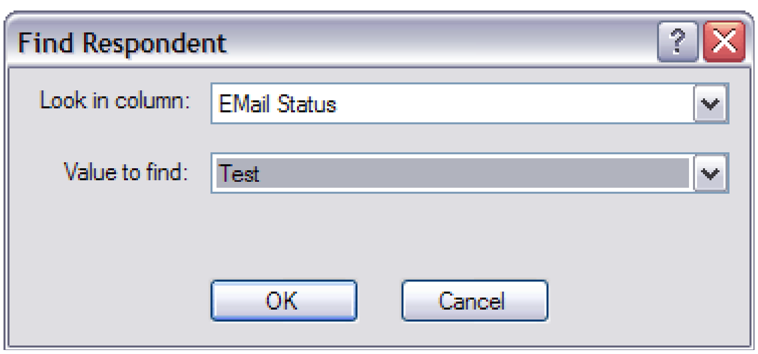
Clear Found
Removes the green background from any previous find operations.

Mark Selection
Used to select sets of records and mark for sorting, correction, mailing or export. See Mark Selection.

Add New Empties
Creates extra records for typing in tester names, additional respondents, or adding blanks for spare passwords. See Add New Empties.

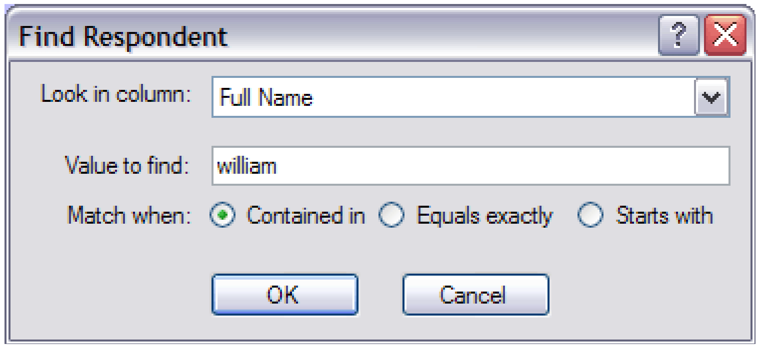
Find (Ctrl+F)

A quick way to find a specific value for a data column:



For discrete variables like the status the value setting will be a pull-down list. There may be a few special cases at the bottom, such as <Any bounces> for the status.

For text variables the box looks like:

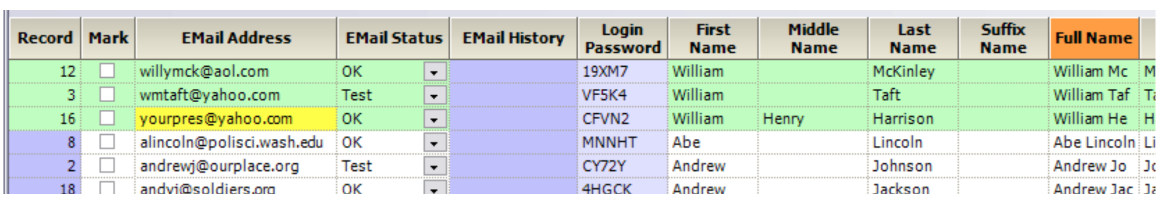


Type in the value and indicate how you want the search done. For example if the search was for "Smith" instead of "William":

> *Contained in*—finds all names having smith anywhere in them, whether or not it is a separate word. "Smith", "Aerosmith" and "Smith-Jones" would all be found.
>
> *Equals exactly*—the entire entry has to match the entry, so smith would find a last name of "Smith" but not "Smith-Jones".
>
> *Starts with*—matches the beginning, so "Smith" and "Smith-Jones" would be found but not "Aerosmith".

Searches are case-independent so smith finds Smith or SMITH.

The orange header will move to the find column and the items found will be at the top of the main screen with a green background:



Record	Mark	EMail Address	EMail Status	EMail History	Login Password	First Name	Middle Name	Last Name	Suffix Name	Full Name	
12	☐	willymck@aol.com	OK		19XM7	William		McKinley		William Mc	M
3	☐	wmtaft@yahoo.com	Test		VF5K4	William		Taft		William Taf	Ta
16	☐	yourpres@yahoo.com	OK		CFVN2	William	Henry	Harrison		William He	H
8	☐	alincoln@polisci.wash.edu	OK		MNNHT	Abe		Lincoln		Abe Lincoln	Li
2	☐	andrewj@ourplace.org	Test		CY72Y	Andrew		Johnson		Andrew Jo	Jo
18	☐	andyj@soldiers.org	OK		4HGCK	Andrew		Jackson		Andrew Jac	Ja

If you chose this operation using the pull-down menu or its hot key then it will perform the operation on the data column with the orange heading. If you do a right-click on a data cell then it will select that column, do the operation and move the orange highlight over if needed.

Find from Clipboard (Ctrl+1)

This is particularly useful for bounce handling or other cleanup. For example you could copy the Login Password YF5K4 from the bounced email and then with the Login Password column selected use the keyboard shortcut Ctrl-1 (Control key plus the number one) to find the respondent:

EMail Address	EMail Status	EMail History	Login Password	Fi Na
wmtaft@yahoo.com	Test	wmtaft@yahoo.com D1	VF5K4	Willia
frankp123@gmail.com	Test	frankp123@gmail.com D1	V85NM	Frank
andrewj@ourplace.org	Test	andrewj@ourplace.org D1	CY72Y	Andr

Items found appear at the top with a green background. where the blue read-only backgrounds do not take precedence.

This is a “Contained in” search, to facilitate looking based on fragments of a name, for example. Searches are case-independent so smith finds Smith or SMITH.

If you chose this operation using the pull-down menu or its hot key then it will perform the operation on the data column with the orange heading. If you do a right-click on a data cell then it will select that column, do the operation and move the orange highlight over if needed.

Find More Like (Ctrl+2)

First select a single cell, then use the menu or its shortcut Ctrl-2 (Control key plus the number two) to find any other respondents with the same value.

Login Password	First Name	Middle Name	Last Name	S N
X6R9X	James		Garfield	
HG6H4	James		Monroe	
HVVV5	James		Polk	
P13RD	James		Buchanan	
7P17P	James		Madison	
VF5K4	William		Taft	
CFVN2	William	Henry	Harrison	

Items found appear at the top with a green background where the blue read-only backgrounds do not take precedence.

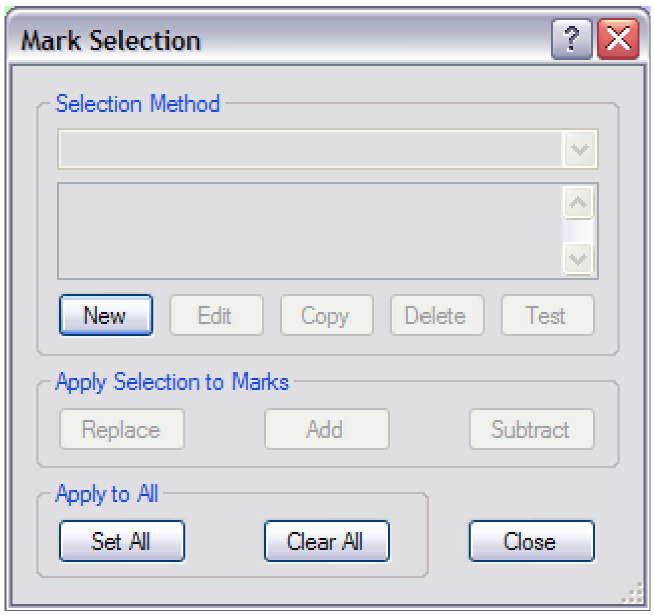
This is an “Equals exactly” search. Searches are case-independent so “smith” finds Smith or SMITH.

If you chose this operation using the pull-down menu or its hot key then it will perform the operation on the data column with the orange heading. If you do a right-click on a data cell then it will select that column, do the operation and move the orange highlight over if needed.

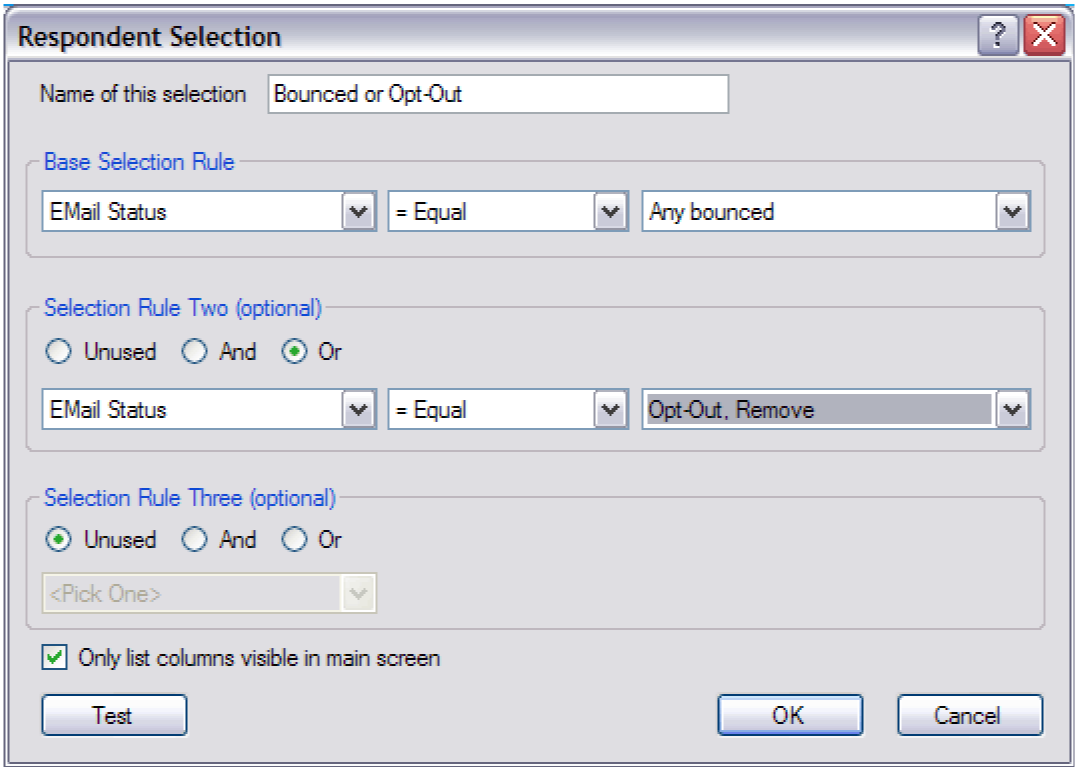
Mark Selection

This uses search rules to set the mark column values. It can be a simple search for any respondents who have not started their survey yet. Or make complex selections with a combination of selections rules and manual clicking. Marks are used for *File, Export* or the Mailing, *Set Drop Column Sends*.

The first time this menu item is selected you get this:



Marking works from selection methods that can be saved and reused, so click the *New* button to define one:



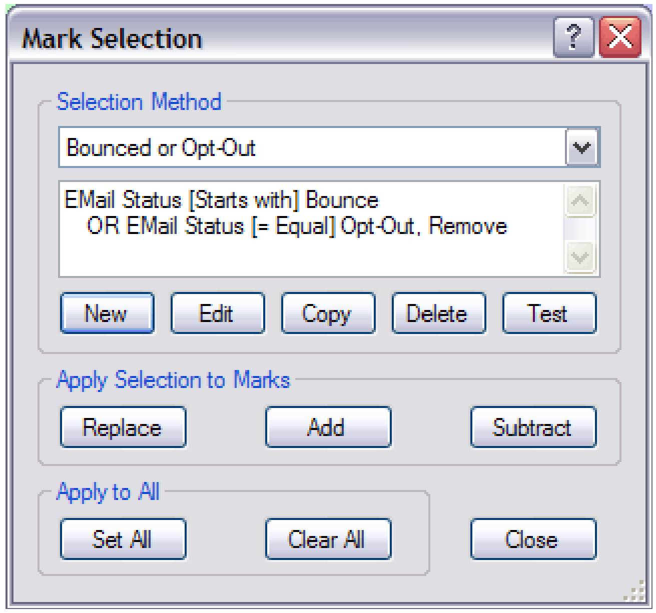
A selection needs a unique name for reference and one base rule. Then it can have 1 or 2 optional rules connected by And or Or. Each rule has a variable column, a relationship like “=Equal” or “Contains” and a value. The value will be a pull-down list for discrete variables or a typed entry for text numbers or dates. Matches are case-independent so smith finds Smith or SMITH.

Only List Columns Visible lets you control whether the variable put-downs show just the fields in the main screen or everything in the underlying data table.

The variable list will include any previously defined selections. They can be nested so long as they do not refer to themselves (no circular references).

The *Test* button helps get the setup right by confirming it finds about the right number for this rule.

Ok saves it and brings you back in the marking dialog:



The first row of buttons relate to the selection method chosen in the pulldown list:

New—defines another rule

Edit—change the definition

Copy—start a new definition from the one shown

Delete—removes the selection from the project

Test—will show how many the method finds

The next row is to Apply Selection to Marks:

Replace—clears out any existing marks and then sets the ones the method finds

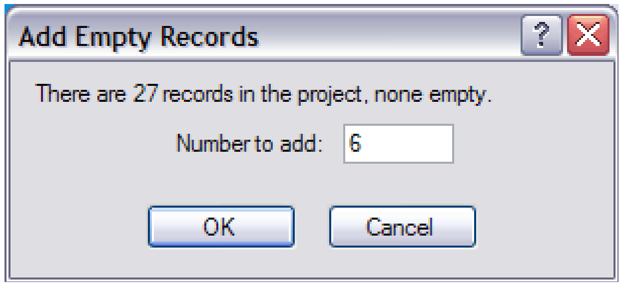
Add—uses the method to add marks that it matches without clearing the rest

Subtract—uses the method to remove marks which it matches without clearing the rest

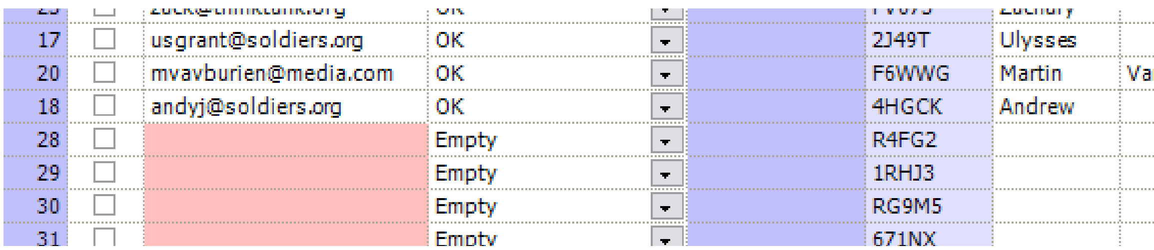
Set All and Clear All ignore the selection method and just set everything.

Close leaves the dialog. There is no Ok/Cancel set because the marks are being changed each time you click one of the previous buttons.

Add New Empties



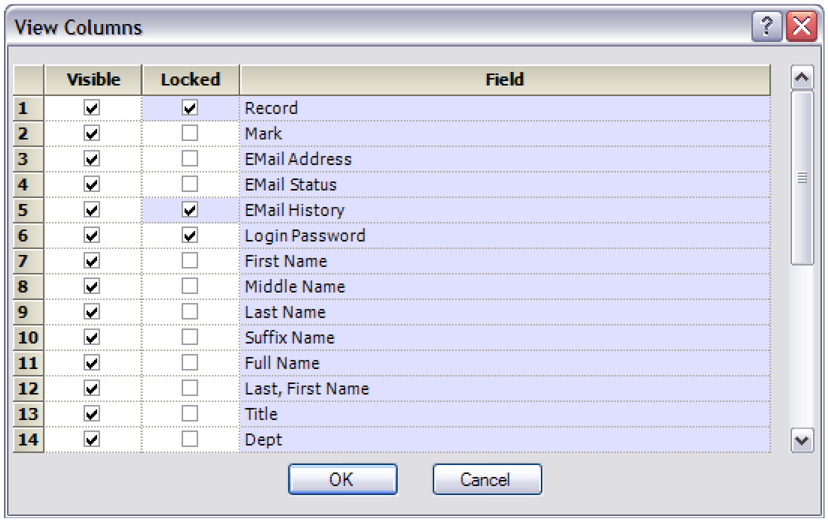
Puts empty records into the database, generally as spares for automatically generated login passwords.



The result is new rows with just a Login Password assigned. These can be used later for additional testers or people who were overlooked in setting up the original invitations. So long as they do not need any of the piping online, they can be assigned and invited without affecting the online live survey.

View Menu

Columns Controls the visibility and lock status of the datatable columns. To add, rename or remove the underlying data columns use File, Properties.



Visible is whether is shows up in the main screen.

Locked is whether it can be edited. Note that some columns, i.e., Record Number and Email History, have blue backgrounds indicating they are always locked. This is set by the program.

Mailing Menu

This menu contains options for working with messages and drops.

New Message Messages are created and saved in your project before you do a drop. See New Message, Edit Message.

New Drop Once you've set up some records and defined a message, you can define a drop to track a mailing. See New Drop.

Edit Drop Properties This lets you edit the name and message selection for an existing drop column in the pull-down list.

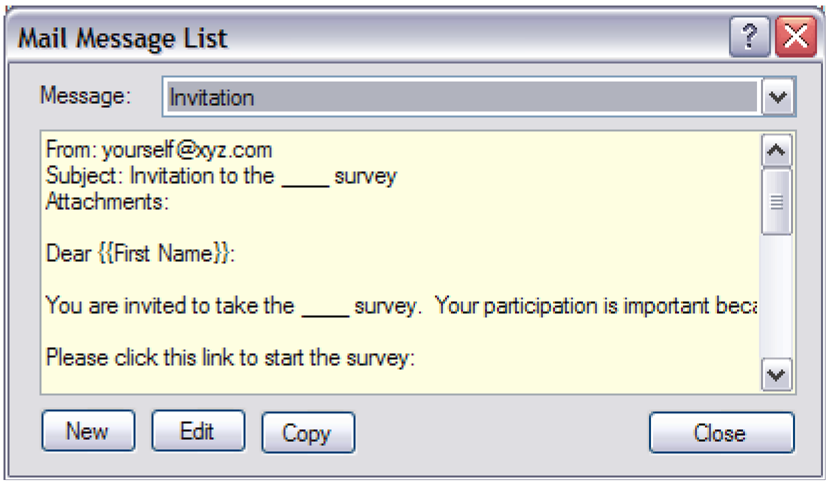
Set Drop Column Sends Use this dialog to set the records for a particular drop. See Set Drop Column Sends.

Email a Drop Starts a drop once the message and respondents are selected. See Email a Drop.

Set Email Service Specifies the outbound mail server to use. See Set Email Service.

New Message, Edit Message

New goes directly to the definition dialog. Edit brings up a selection dialog:



The pull-down list at the top selects a message and the first parts of it appear as a reminder. The buttons are:

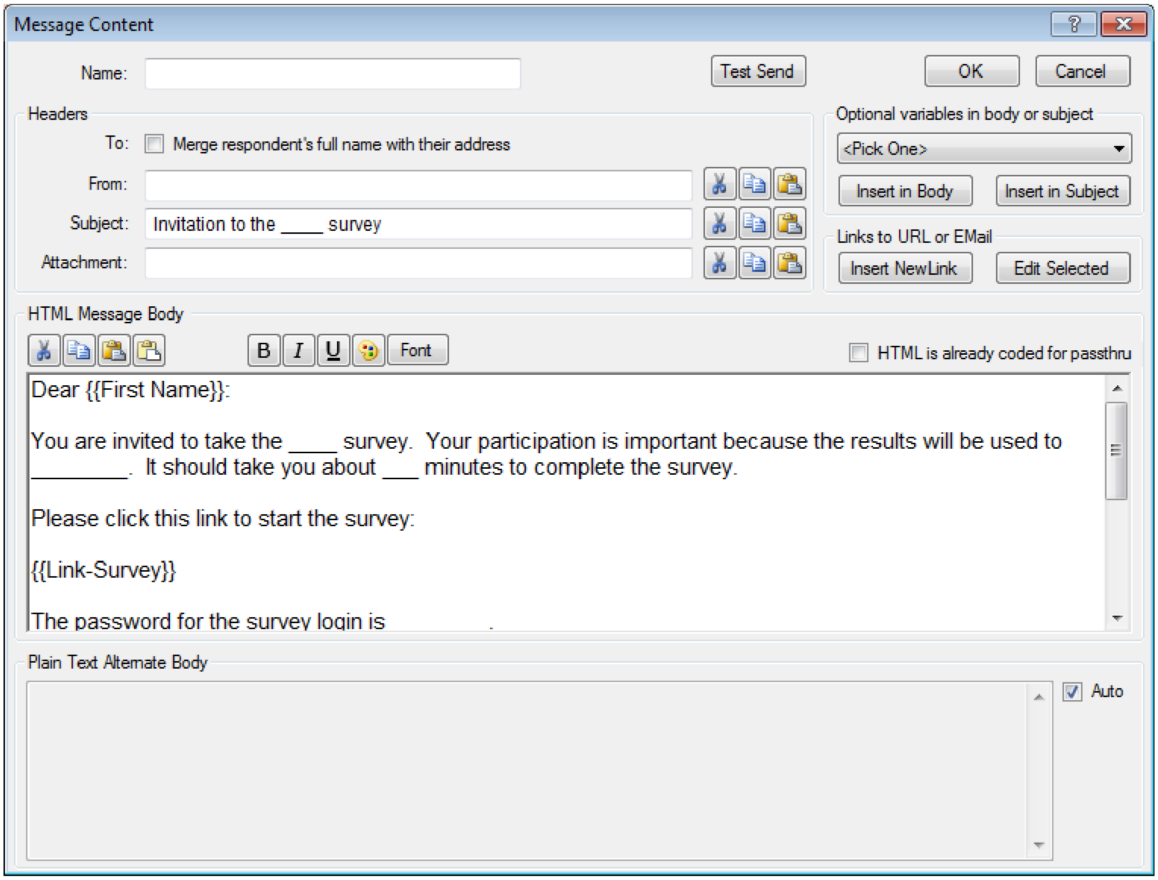
New—defines another message from scratch

Edit—edits the selected message

Copy—make a copy of the current message to start a new one

Close—exits the dialog

A new message is preloaded with a default text which you can edit or replace to suit your own needs. Messages are defined using:



The *Message Name* is used within the program to keep track of messages. It does not go to respondents.

The *From Address* is where you want any replies or bounces to return to. A real address is required.

The *Subject* is required. To differentiate it from spam, it should be immediately recognizable to your respondent as something they want to participate in. Otherwise the message will be tossed, possibly by using an antispam button which can cause problems with your ISP.

A *template HTML Message Body* is suggested to get you started with a new message. You can use the *Bold, Italic, Underline, Font and Color* buttons to highlight portions of the text. HTML email is now in wide use, though sometimes disabled for security concerns, hence the backup plain text below. In addition to the obvious font enhancements it can send a very wide range of languages plus symbols that go beyond the 127 character ASCII set.

The pull-down Variable List and Insert in Body button can be used to insert merge variables like the {{Login Password}}. Variables in the message are the data column name enclosed in {{ and }} brackets. As each message is sent, the {{Login Password}} will be replaced by the respondent's unique value. The same would be true of name, department or whatever else is available from the respondent data. You could also type the variable in; the list and button are just a convenience. Variables can also be put in the Subject line, and can be used as many times as needed.

The lower auto Plain Text here is blank—on send it will be an alternate message without the formatting and with any characters beyond the basic 127 ASCII characters replaced with periods. The purpose of this alternate message is to enable your message to reach the simplest or most secure recipient mail systems, hence the character restriction. If your main message is in a language that becomes unintelligible as plain 7-bit text, then uncheck the Auto box and type in something readable. Both emails are always sent. The respondent's email software decides which one to use, so if the backup message just says "Reading the full message requires html" they can find a system or settings that lets them do so.

HTML is already coded for passthru means that you want the contents of the HTML window to be passed through literally as a precoded message you have designed elsewhere. It will substitute any variables found but otherwise it will not be changed. Note that is also disables the automatic plain text; that will have to be entered independently. Both versions are always sent in one email. The respondent's email software decides which one to use, so if the backup message just says "to read the full message requires html" they can find a system or settings that lets them do so.

Tips:

- Try to get some identification of the respondent into the message itself and/or the subject. You will find in processing bounces that you will not always get the "to" address back with the bounce report. Or, the message may be forwarded in a way that hides the original "to" address.

- Include a clear way to correct the email address or opt-out of future mailings, as well as whatever will motivate the respondent to take the survey.

Test Send will send the two versions of the message, html and plain separately, to the "From" address. This verifies that the From address is the one you want and lets you see both versions of the messages. In a normal mailing only one message will be sent to each email address.

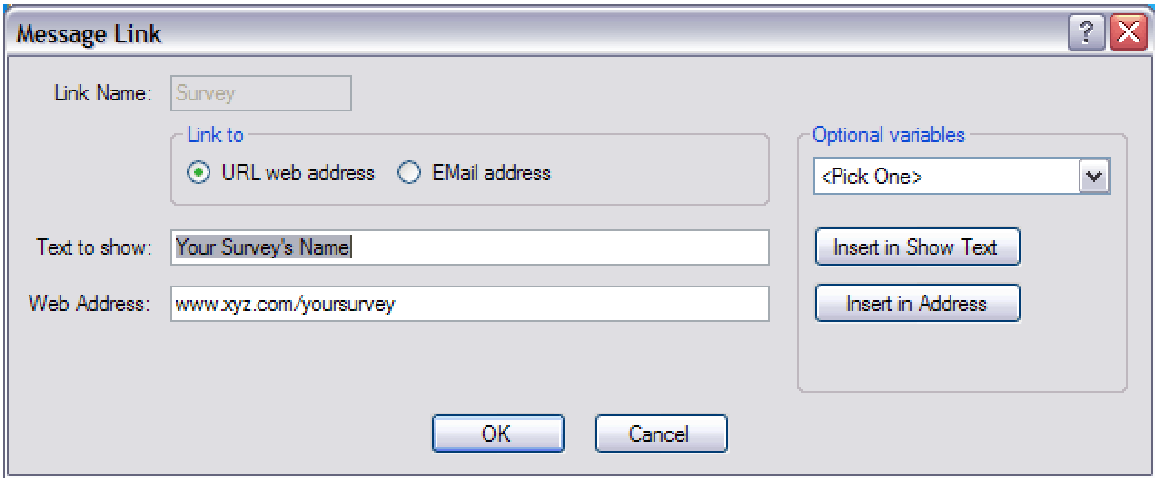
Because you are sending the text message without any respondent data the variables will be in their {{…}} format. Links which do not merge variables will appear in their proper way for testing. The first time you do a test it will ask for the email server (see Set Email Service).

OK saves the message and Cancel closes without saving changes.

Insert New Link and *Edit Selected* provide a way to place URL or email links in the message, with control over the text displayed and with optional variable merging. If you select one in the text like the {{Link-Survey}} the Edit Selected button will be enabled, or if you click Insert New Link another will be added.

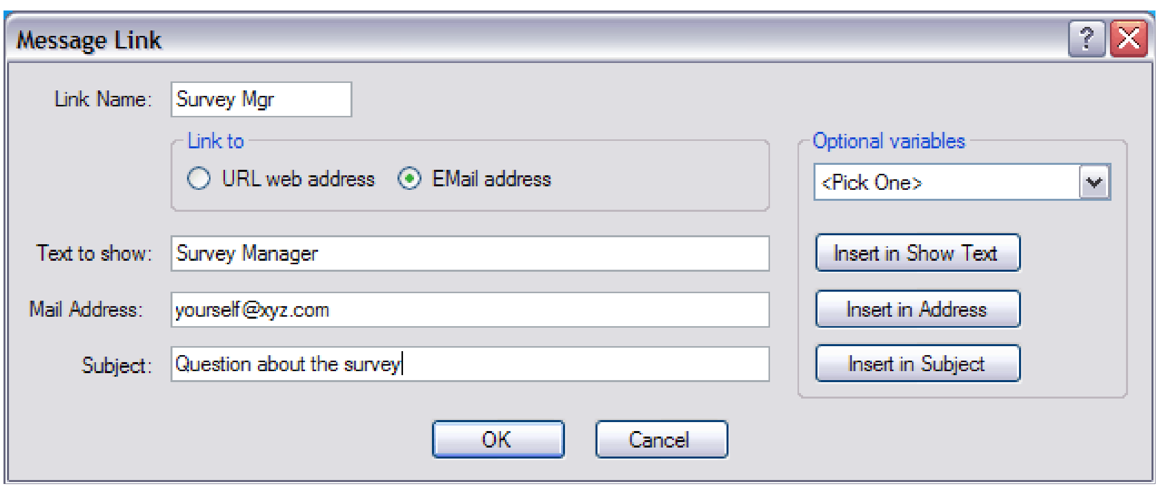
Message Link Dialog

A URL web site link definition looks like this:



In the html message the *Text to Show* will be visible and the *Web Address* will be behind in a clickable link. In the plain text message the *Web Address* would be shown.

An email link looks like this:



In the html message the *Text to Show* will be visible and the Mail Address will be behind a clickable link which pops up a blank message. The address and optional subject are filled in. In the plain text message the address would be shown.

The link names are shared across messages so {{Link-Survey}} can be defined once and used in both invitation and reminder messages.

www.Apian.com
(206) 547-8392
Support@apian.com

Once a message is defined the next step is to link it to a drop with *Mailing, New Drop*.

New Drop

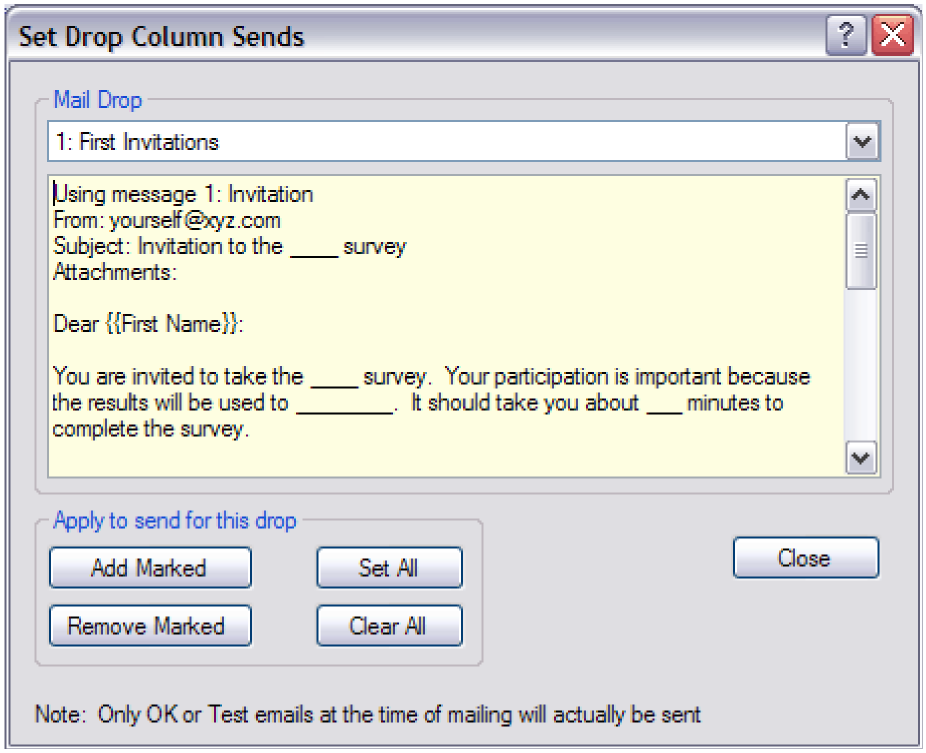
New drop adds a column to the database to track respondents' history with the mailing. The only other part of the definition is the message you're using. Selecting respondents and scheduling is done via *Set Drop Column Sends* on page 68 and *Email a Drop* on page 69.

After clicking OK the main screen will have an additional column at the right end with everything as Unused:

Last, First Name	Title	Dept	First Invitation
ierce, Franklin	Benefits Sp	HR	Unused
ɔhnson, Andrew	Analyst	HR	Unused
aft, William	Manager	HR	Unused
rthur, Chester A	Analyst	HR	Unused
leveland, Grover		Retired	Unused
arrison, Benjami		Former Pre	Unused

Set Drop Column Sends

If you're only sending to a portion of your list, use the Edit menu's Find tools to mark records. See Edit Menu and Right-Click Popup Menu.



Set All will include all the possible respondents in the drop.

Clear All will remove any respondents currently marked to Send.

Add Marked will set any respondents with a check in the Mark column to Send. If the respondent had gotten a mailing before, like someone whose address bounced but has been fixed, then it will say Resend.

Remove Marked is the opposite of Add.

The note about *OK and Test* means that the actual mailing process will only attempt to send messages whose Email Status is OK or Test. All others are skipped even if they are marked as Send in the drop. This simplifies the setup process for you. Set the drop Send according to broad criteria and let the program filter out the individuals you have identified as problems.

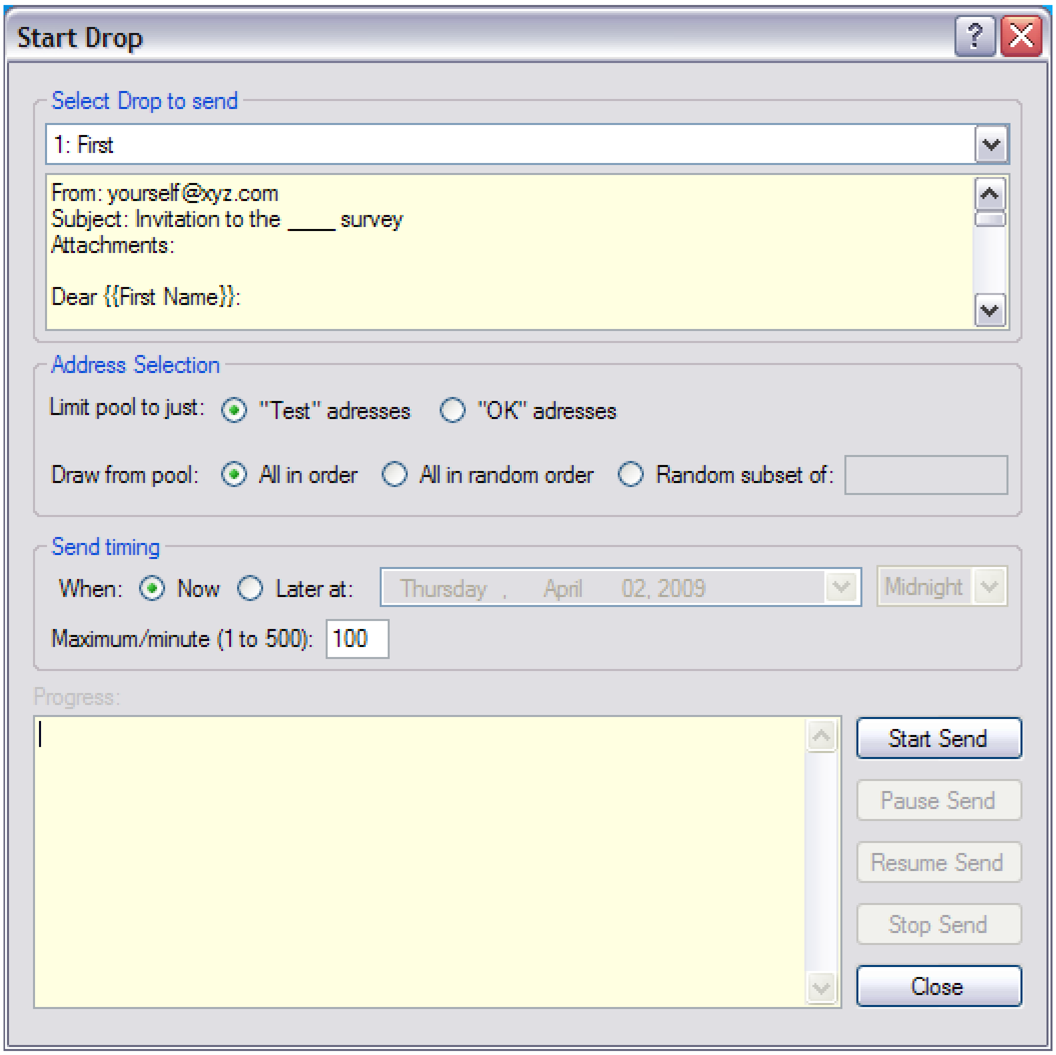
Neither *Add* nor *Remove* affect the respondents which are not marked.

Close when you have made any changes you want. The changes are made as any of the four buttons above are clicked so there is no need for a Cancel button.

Once the drop's Sends are set it is ready to be mailed with *Mailing, Email a Drop*.

Email a Drop

Once a drop is defined (see [New Drop]) and records selected (see [Set Drop Column Sends]), you're ready to do the mailing.



Select Drop to Send is a pull-down list of available drops. A part of the message is shown below it as a reminder.

Address Selection lets you chose between OK (live) and Test respondents marked for the drop. Normally you would have at least one Test mail to send as a final confirmation after all the changes have been made (remember Murphy's Law: no change is too small to not mess up something else). Do the mailing first to the tester, usually yourself, and con-firm that everything is correct including any variable substitutions. Then switch to OK, reset the timing if appropriate and run the live mailing.

Draw from pool:

> *All in order:* Messages are sent to addresses in database record number order.
>
> *All in random order*: Addresses are mailed in random order.
>
> *Random subset of*: Set the number of emails you want to be sent and they will be drawn at random from the pool of addresses selected for this mailing. Normally this applies to OK addresses only because there will not be enough test addresses.

Since each message sent is logged to a file as it happens, you need not be concerned if the process is interrupted and has to be restarted, no matter which *Draw* option is selected.

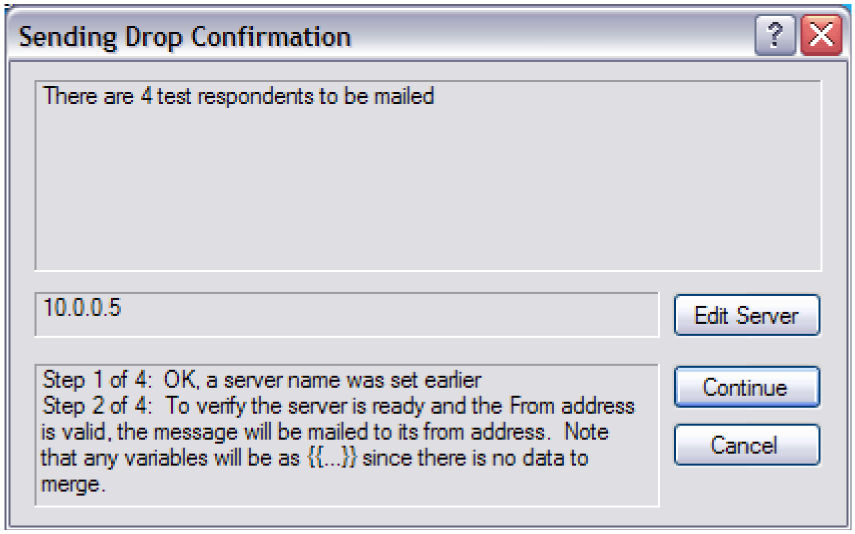
Sending times controls when the drop begins, Now or Later, and how fast messages are sent. Test mailings usually go Now and the rate does not matter much for a few items.

The *Maximum rate per minute* is an upper limit. The Respondent EMailer will only go as fast as the SMTP server accepts them, plus a little gap to allow other activities on your computer to be handled. An email server connected through a LAN should handle the maximum rate, but if it is remote the mailing may go out more slowly.

The other concern in setting the rate is the capacity in pages per minute of this survey on the server. By default the survey processing rate is 250 or 500 page starts per minute divided by the number of survey pages, so a 10 page survey at 250 ppm would accept about 25 new respondents to start the survey every 60 seconds. See the NetCollect User Guide Server Installation chapter for its information on calculating load.

Close will save the settings and return to the main screen

Start Send begins the mailing process with a confirmation box:



Step 1 of 4: Set the SMTP server if it has not already been set.

Step 2 of 4: Sends a message to the From address you specified in the message definition. This verifies that the server is ready and lets you check your inbox to make sure that the test message arrived. The message will have the {{…}} variables since this test is not tied to respondent data.

Step 3 of 4: Save the project .rem5 file and prepare the log file

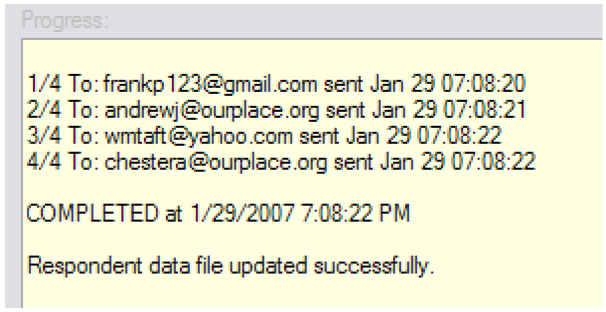
Step 4 of 4: Begin the Test or OK mailing sends, postponed until the start time if you selected later.

Once the mailing begin the *Progress* window will show what is happening and the Pause Send button will be the only one enabled.

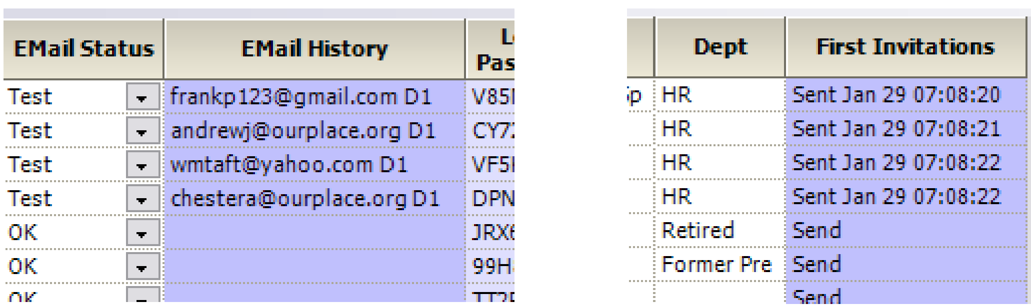
Clicking *Pause Send* will suspend the process and let you change the *Sending times* controls if you want. The *Resume Send* and *Stop Send* buttons will be enabled.

Resume Send continues where it was paused.

Stop Send will close out this mailing. On a successful mailing the progress window will look like this:

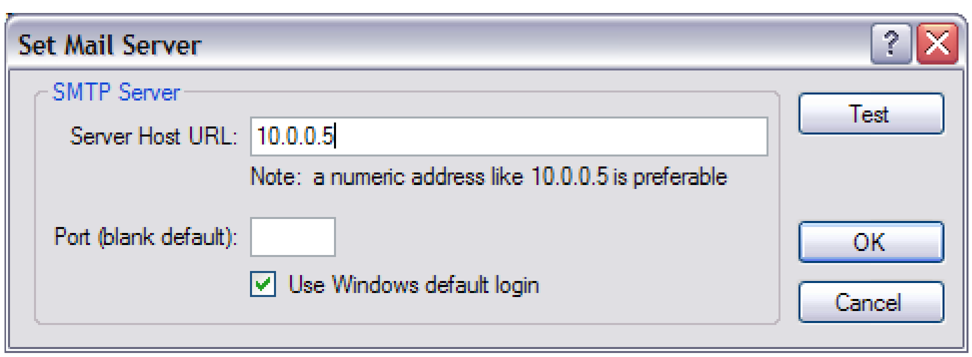


After closing the mailing dialog the Drop column will be updated with which messages were sent or were unable along with the time:



“Unable” here only reflects problems at the outbound mail server. Bounces due to delivery problems will show up as replies to your From address. The next step would be bounce processing to deal with the inevitable problems—even clean lists go out of date surprisingly quickly. While bounces will come back for some time and a few will happen almost immediately, the bulk will arrive within an hour.

Set Email Service

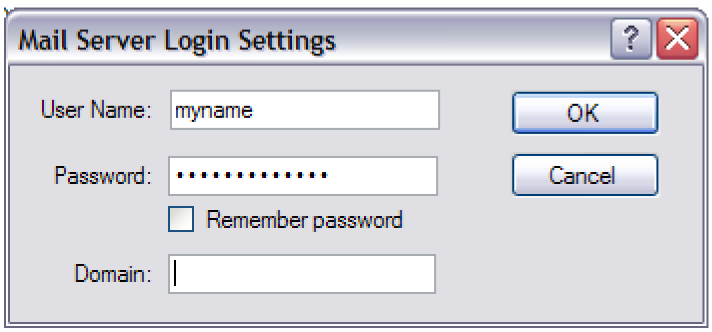


You will need access to an SMTP (Simplified Mail Transport Protocol) server to send the mail, often provided by Exchange Server in a Windows environment or as a link to your ISP. This is generally the way Outlook and other programs do their mail so the correct link should be available from your IT department, ISP or Web configuration dialogs. This setting can be reached from the Mailing, Set Mail Server menu whenever it needs updating.

The server can be addressed by a name like smtp.yourisp.com or by a number like 10.0.0.5. The example above uses the Windows default server which is usually available when you are connected to email for Outlook.

Use Windows default login:

> *Checked:* The host address may be specified by either the name or the number, but the number is more direct and preferred here. Your IT department can give you the numeric host address and optional port number. This default will work in most cases whenever your normal email is available.
>
> *Un-Checked:* Forces the program to ask for the login name, password and optional domain before the first email is sent. At that point this dialog will appear:



> Your IT department or ISP can provide the entry values. A name and password are required; the domain is optional. The values are kept in your personal Windows registry, not in the .rem5 file, for security.
>
> The Server Host URL must be in the full named format like smtp.yourisp.com, not numeric, to handle this explicit login.

When you click OK to set the mail server it simply saves these connection parameters for use later when the first email is sent. OK does not do a login. You can force the sending of an email here with the Test button to confirm the service is actually available. It will request your email address and send a short generic message like "Server test using: 10.0.0.5" to you. If the SMTP server accepts this test message to be forwarded then the test will be considered successful. Next check your inbox to be sure the message arrives.

Help Menu

About Respondent Emailer	Displays the build date information and license and copyright information.