



Apteco

Technical Guide

Helping you to get the most out of the
Apteco Marketing Suite™

Elaine Integration Guide
D052T3X004 – November 2019

Revision Tracking Sheet

This manual may be revised periodically to incorporate new or updated information.

Note:

Every effort has been made to keep the information up to date there may be changes to the broadcaster's API if in doubt contact your support department.

Listed below is the revision date of each page (if applicable):

PageRevision

All pages May 2018

Updated D052T3X004 - November 2019

Updated November 2019 – Elaine API Key broadcasting parameter added to document

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1 Introduction

This integration guide details the processes required to integrate the Apteco Marketing Suite with the Elaine® email service provider (ESP).

Integration options:

FastStats

For a one-off broadcast, you can use a combination of the Email Broadcasting and Email Responses wizards to upload your list, schedule a broadcast campaign, and finally receive responses from your customers back into your FastStats system for further analysis.

PeopleStage

Automate data uploads for unattended and scheduled marketing broadcasts, PeopleStage will allow you to define and implement marketing process flow diagrams that will react to the responses you receive from the ESP.

Export and Upload a File

Access generic FTP support to allow data export and upload to third-party digital broadcast providers.

Note:

Apteco approves this integration with Elaine®. Use of the Apteco Marketing Suite in combination with Elaine® software through this integration will not affect the intellectual property rights indemnity provided in the Apteco Marketing Suite “End User Licence Agreement”.

1.1 Summary of Elaine® functionality

Technology

Elaine® integrates with your FastStats system by utilising a RESTful transport over HTTP/S, in conjunction with SFTP.

Supported Integrations

Elaine® supports all the above integration options.

Note:

SMS is also available, if you need to use SMS please contact Apteco Support.

Type of Integration – User Defined

Elaine® is a User Defined integration meaning you can select variables at run time and create a personalised output based on specific requirements.

1.2 Before You Begin

CAUTION

This guide assumes you have the relevant Apteco Marketing Suite system administration experience to perform this task, particularly with the FastStats Administrator, SQL Server and the areas of the Apteco Marketing Suite that relate to creating selections and campaign creation. If you do not, contact your Apteco partner or the Apteco support team. You need to have the appropriate system and SQL Server administrator permissions to install the relevant components successfully. Additionally, you will need to have Access to the broadcaster web-based control panel and obtain all the relevant information from Elaine®. You will also need to understand how to construct your message in Elaine®.

This guide details the steps required to integrate FastStats and PeopleStage with a Broadcaster using an API; the document is in two parts:

1. The configuration of the Apteco Marketing Suite
2. Appendices which include:
 - a. A summary of configuration in Elaine®
 - b. API Parameters

You need to configure Elaine® before you perform the steps in Chapter 4

Useful to have before you start:

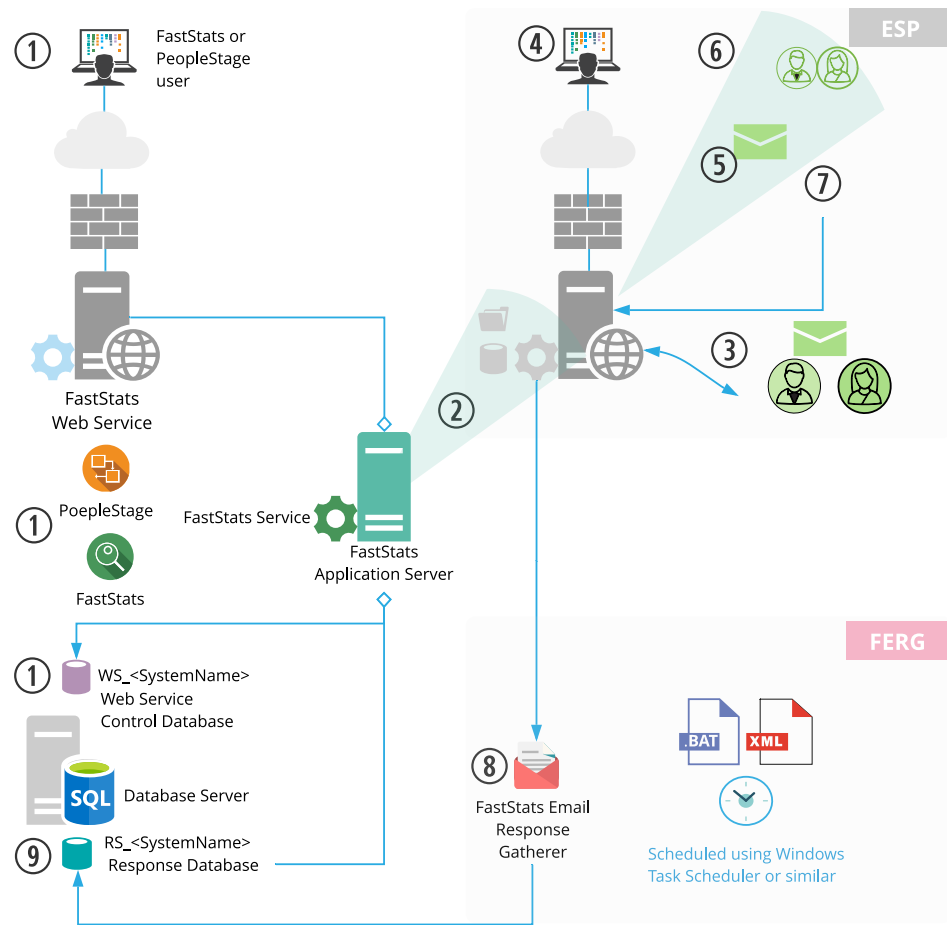
- **Database Connection String** made up of the database server Instance name and FastStats system name, for example:
 - `<SQLServerInstanceName>;Initial Catalog=RS_<SystemName>;User Id=faststats_service;Password=fa5t5tat5;`
- The **Digital Integration.zip** available from:
<https://www.apteco.com/portal/software-releases>
- Decide where your **FERG folders** are to be created
 - Used to store the .xml and .bat files used when scheduling FERG
 - Bulk insert folder must be accessible from SQL Server to use BULK INSERT
- Decide where you want the FastStats Email Response Gatherer to be installed
 - This will typically be on the same PC as the FERG folders but can be on any PC
- The Elaine® API Username and Password
- The Elaine® Message Name

2 Process Summary

2.1 Architecture

The following diagrams describe a typical process from FastStats to Elaine®, to the customer and back to FastStats.

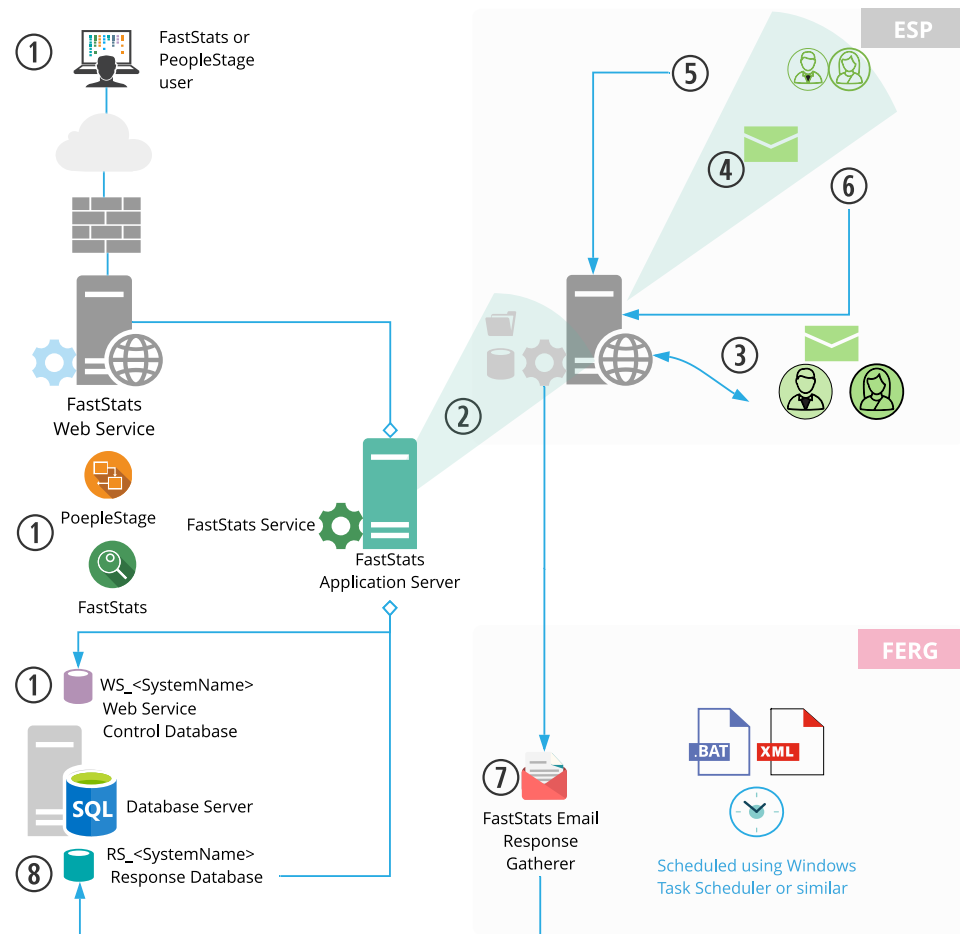
Schematic showing campaign scheduling performed in Elaine®.



1. A broadcast is initialised through the FastStats Web Service using the Email Broadcasting Wizard, which inserts a job into the Web Service Control database (WS_DB).
2. The FastStats Service picks this job up, uploads the list to the Elaine® SFTP site and then uses RESTful communication to monitor the upload.
3. Elaine® then imports the contents of this list to its subscribers and associates them with a list name ready for use in any email campaigns.
4. A campaign can then be scheduled using the Elaine® web interface.
5. Elaine® sends Messages to all recipients on the list.
6. Elaine® records any undelivered messages.

7. Elaine® records a response for each interaction with a message (for example opens and clicks).
8. A scheduled job on the FastStats server initiates the FastStats Email Response Gatherer (FERG) which checks the SFTP site for response files.
9. These responses are then imported into the Response database (RS_DB) ready for analysis by your FastStats system.

Schematic showing scheduling performed in FastStats or PeopleStage.



The key difference in this process is messages are sent from Elaine® automatically, allowing full control of the campaign scheduling from within the Apteco Marketing Suite.

Note:

For the message to send automatically, you need to create a Message in Elaine®.

3 Apteco System Configuration

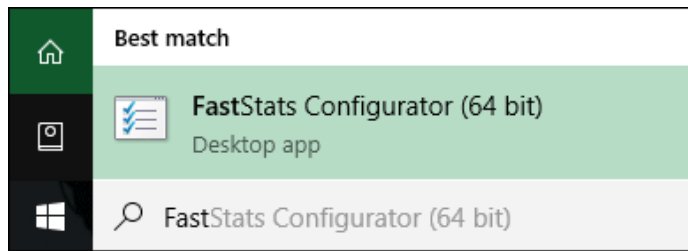
3.1 Creating the Response Database

You will need to create a response database to receive your responses from the ESP.

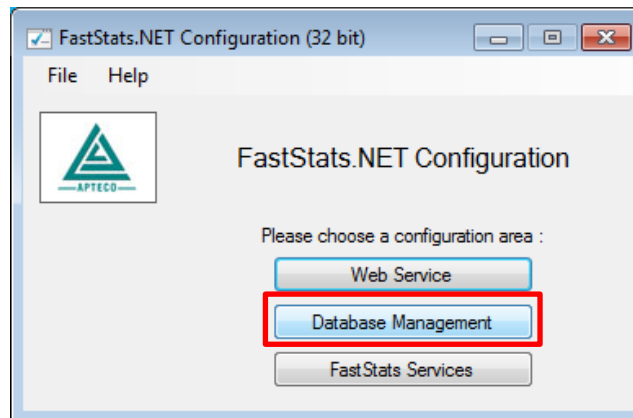
1. Open the FastStats Configurator.

Tip:

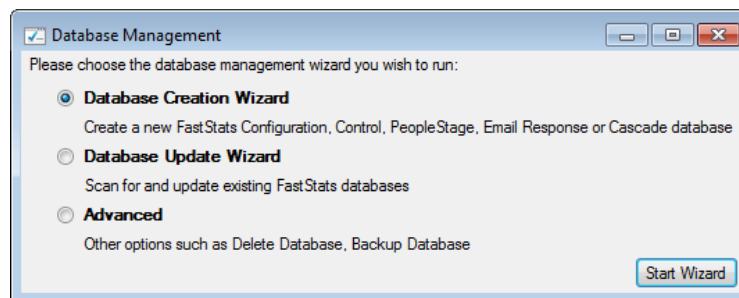
Search for Fast in the Start Menu



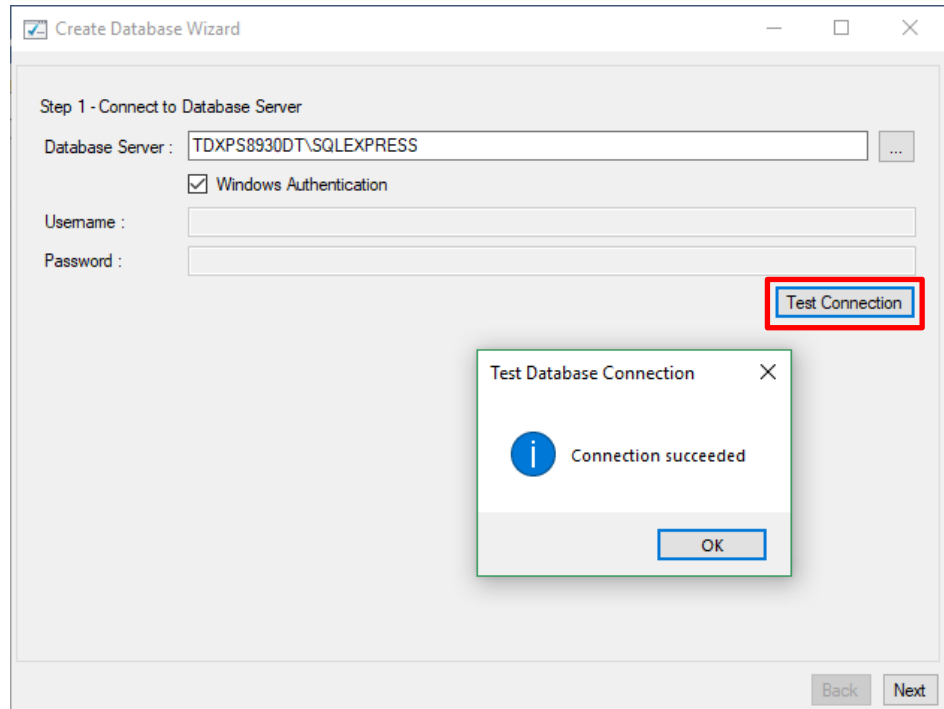
2. Select **Database Management**.



3. Select the **Database Creation Wizard** option and click **Start Wizard**.



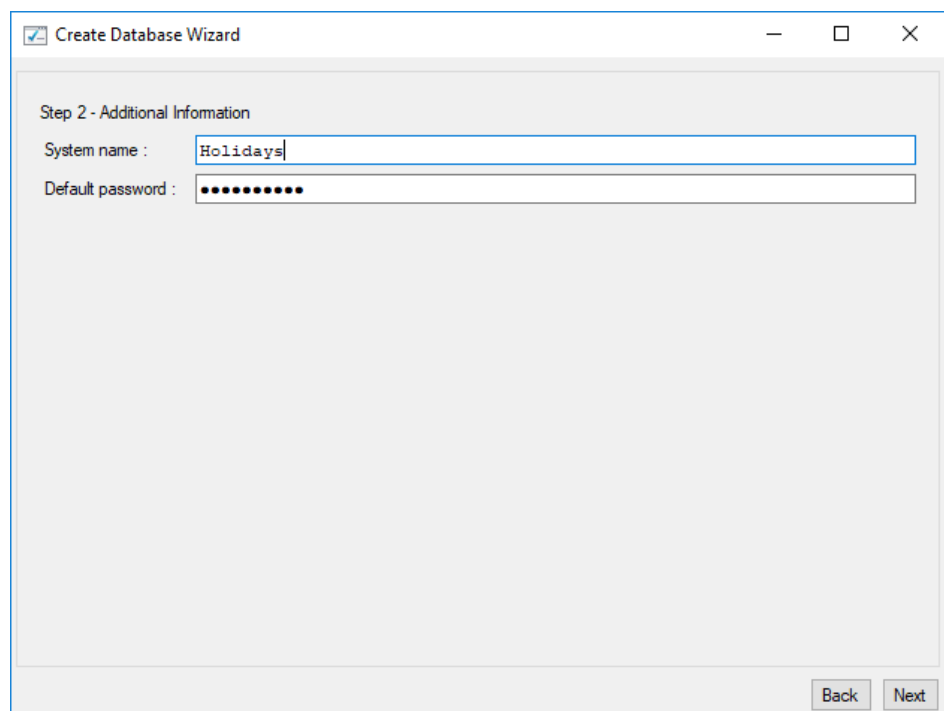
4. Enter the name of the **Database Server** where you wish to store the response database, click **Test Connection**



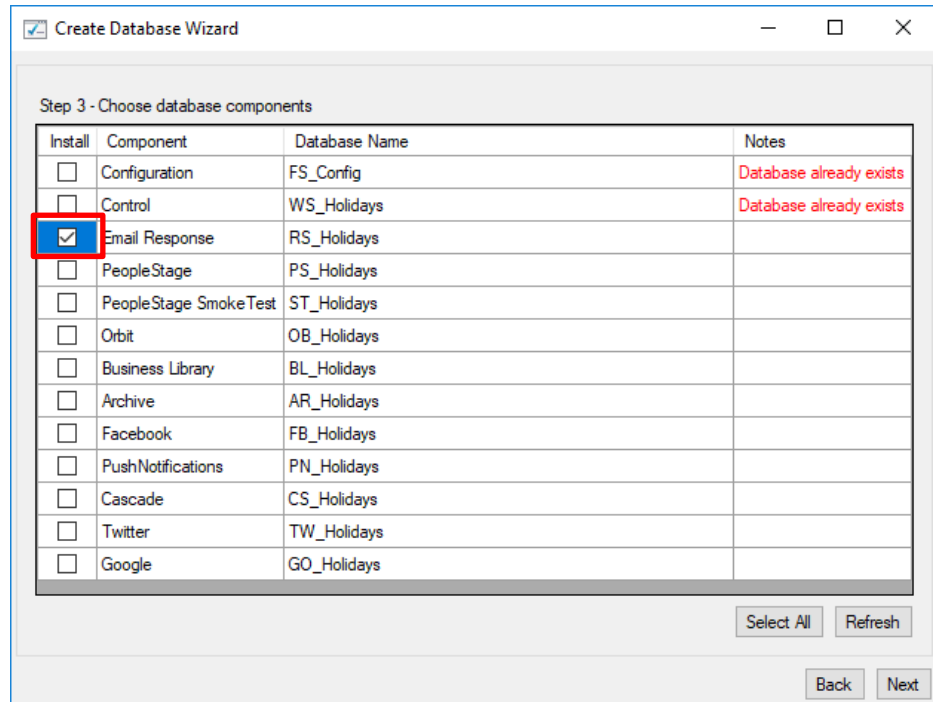
Note:

The Database Server name can be found by launching SSMS and finding the SQL Instance for your FastStats system, for example TDWIN10B\SQLExpress.

5. Enter a System name (for example Holidays) and your secure password.



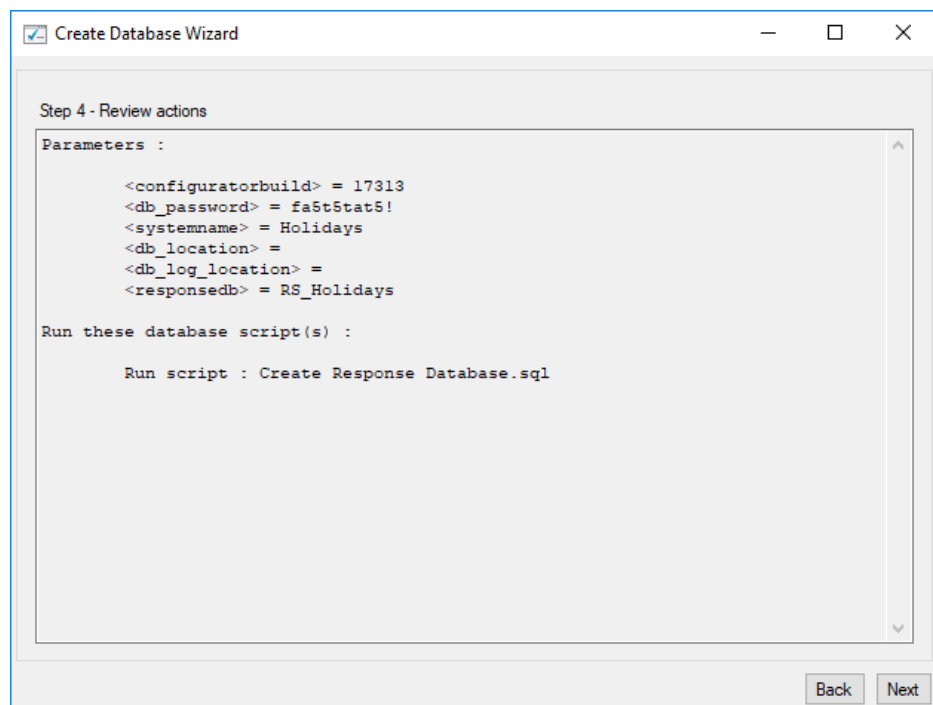
6. Select the **Email Response** check box, then click **Next**.



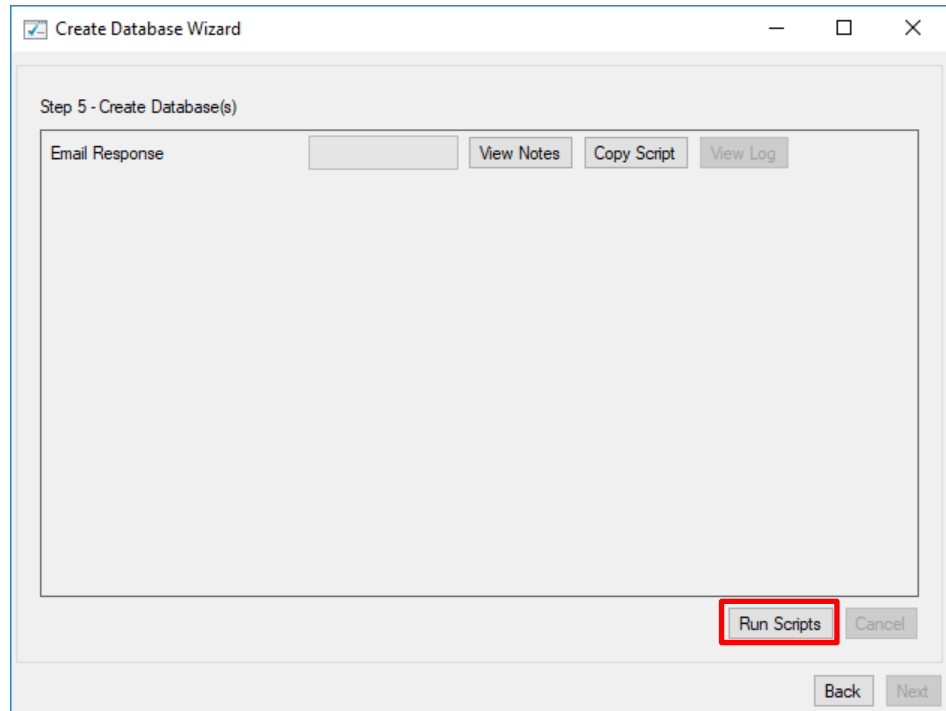
Note:

The Response Database may already exist, see the **Notes** column if it does you do not need to complete this process, click **X** to exit the installer.

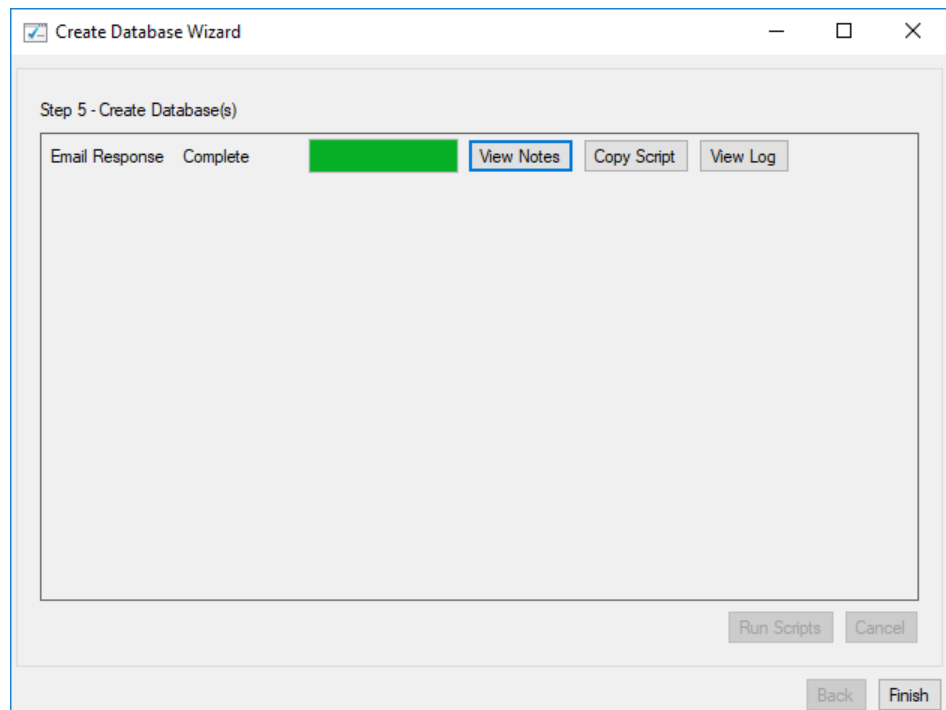
7. Click **Next** on the Review actions step.



8. Click **Run Scripts**.



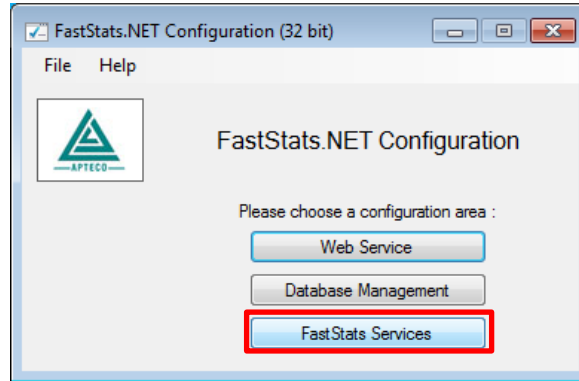
9. Click **Finish**.



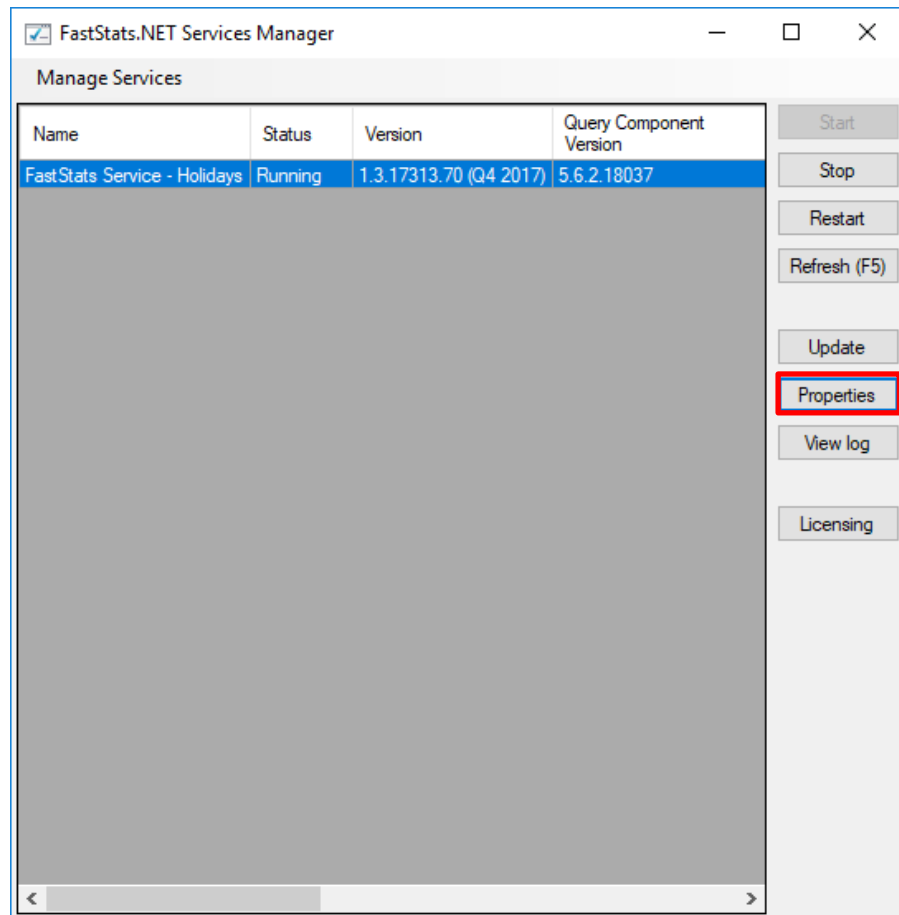
3.2 Linking the Response Database to the FastStats Service

You need link the response database to the FastStats service.

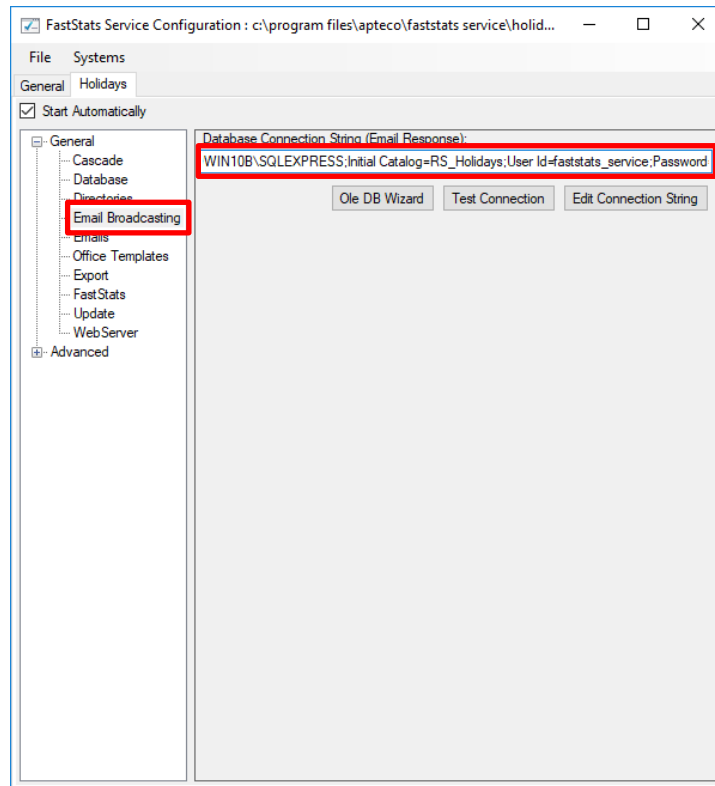
1. Open the **FastStats Configurator**
2. Select **FastStats Services**



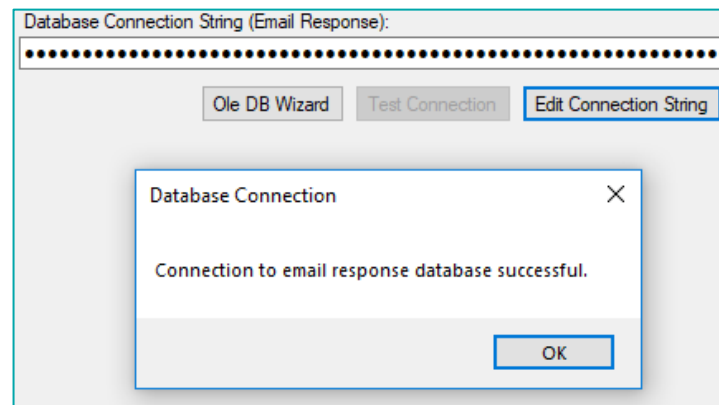
3. Select the **FastStats Service** for the system to link to the response database, click **Properties**



4. Select the system tab you want to link the response database, select **Email Broadcasting** from the list on the left and then enter the database connection string to your response database.



5. Click **Test Connection**, click **OK** to close the dialogue box



6. Select **Save** from the File menu

Note:

A restart of the FastStats service is required to pick up the changes to the configuration, click **Restart** in the **Managed Services** dialogue box.

General Considerations

For broadcasts to work correctly you need to ensure that the FastStats server has access to the relevant Elaine® server through port 443, see the example URL below; this may vary with your account: nr23.elaine-asp.de

3.3 Installing the Email Response Gatherer

You can find the FastStats Email Response Gatherer installer in the DigitalIntegration.zip, extract the zip file to your designated PC where you want the email response web gatherer to run.

Digital Integration.zip available from:

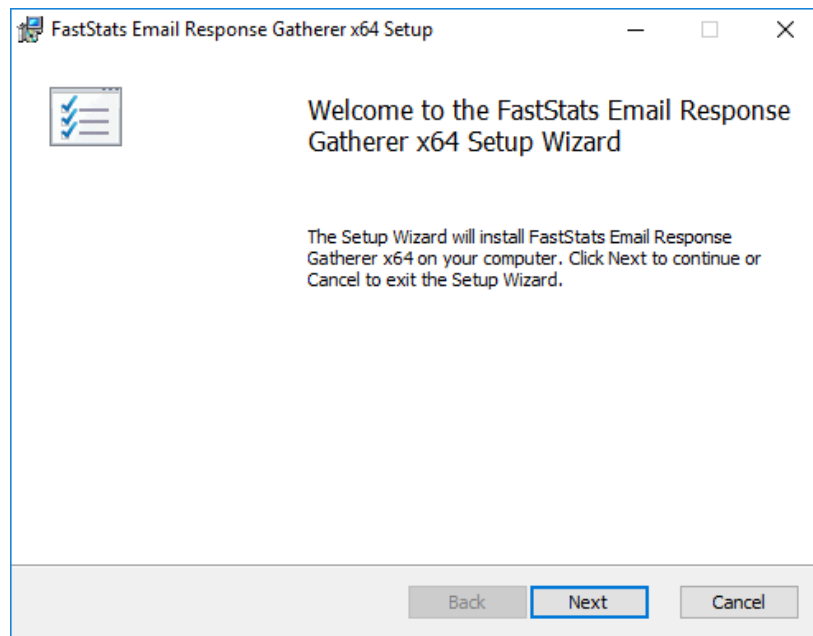
<https://www.apteco.com/portal/software-releases>

Note:

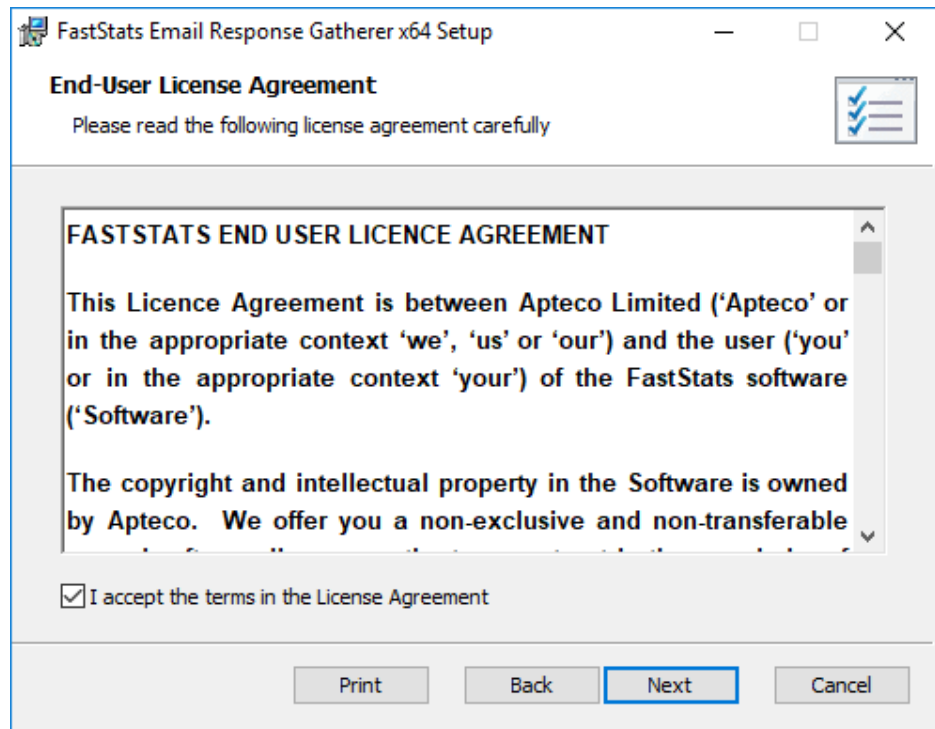
The FastStats Email Response Gatherer application can run on any PC in your system.

Open the **EmailResponseGatherer64Setup.msi** from the DigitalIntegration folder.

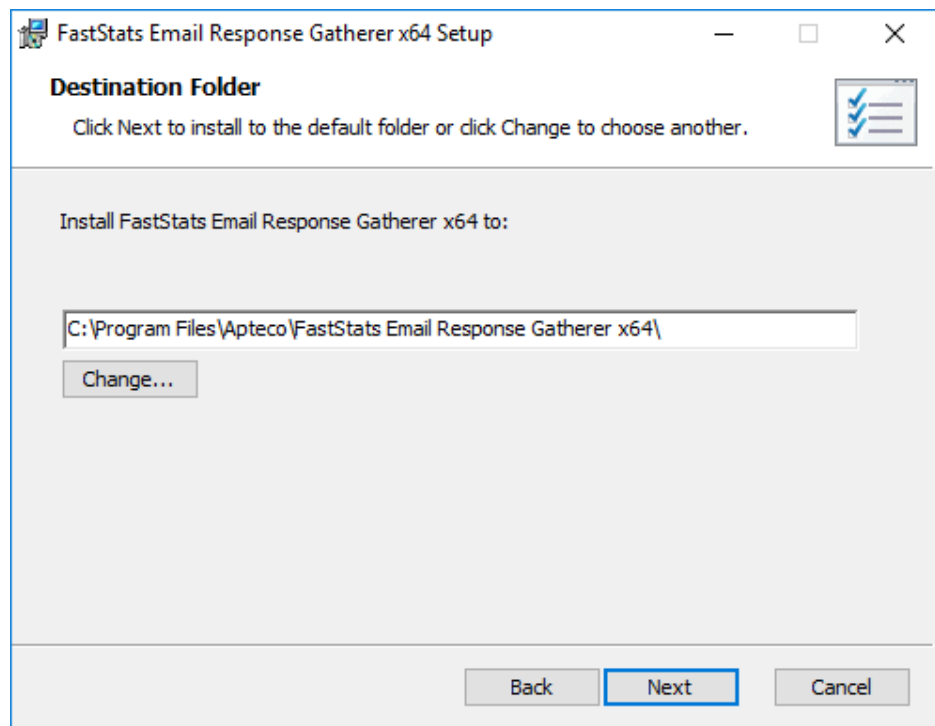
1. Click **Next**.



2. Select the check box to accept the terms and click **Next**



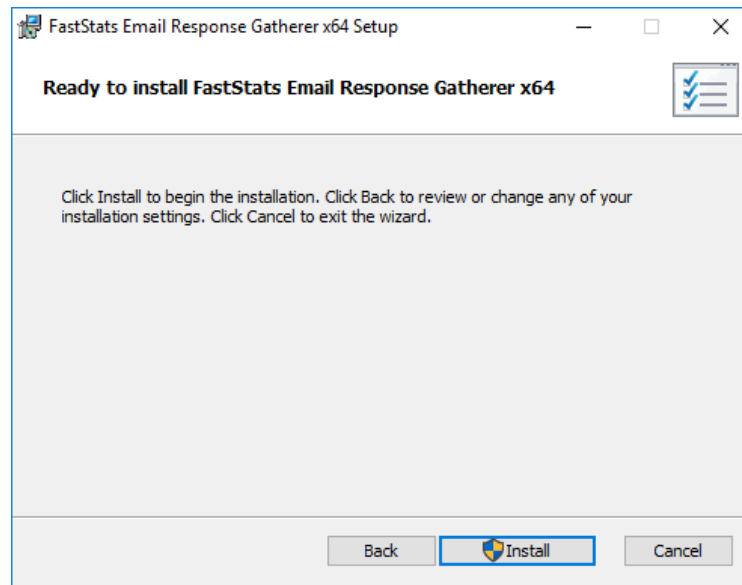
3. Click **Change** if you wish to install the Email Response Gatherer application in a different location then click **Next**



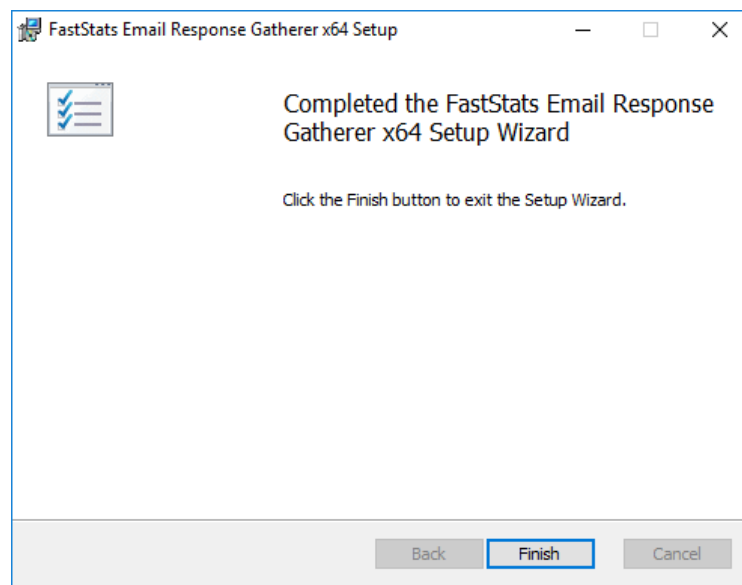
Note:

The default directory for this is **C:\Program Files\Apteco\FastStats Email Response Gatherer x64** but may be different, we recommended that you install this in your FastStats application files directory on the FastStats Application Server.

4. Click **Install** to start the installation



5. Once the installation has completed, click **Finish**



3.4 Creating the Response Gatherer Folders

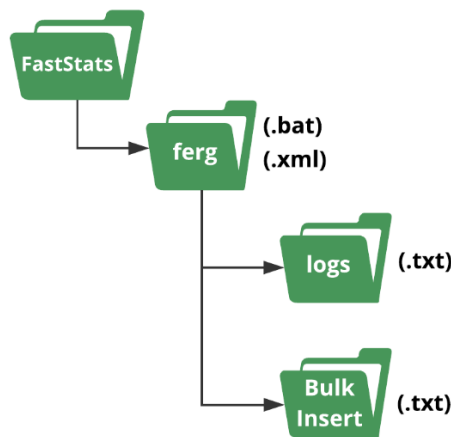
You will need to create folders to store the files to use with the Response Gatherer; these will include the following types of files.

Table 1 – Files Associated with the Response Gatherer

Type of file	Description
Batch (.bat)	Contains the information for applications like Task Scheduler or command-line programs to run the Response Gatherer on a schedule
XML (.xml)	Contains the connection and communication parameters used to connect to the broadcaster
Text files (.txt)	The Response Gatherer will generate two log files each time it runs, an Event log with the times each event occurred, and a Details log with a step by step log of the digital response batch process with the broadcaster

You can create the directories in any user-defined location and use your own choice of name; you must refer to the directories in the batch file.

A typical example folder structure



Important:

The bulk insert directory must be accessible from the SQL server and the user running the SQL Server Service must have read permissions to it.

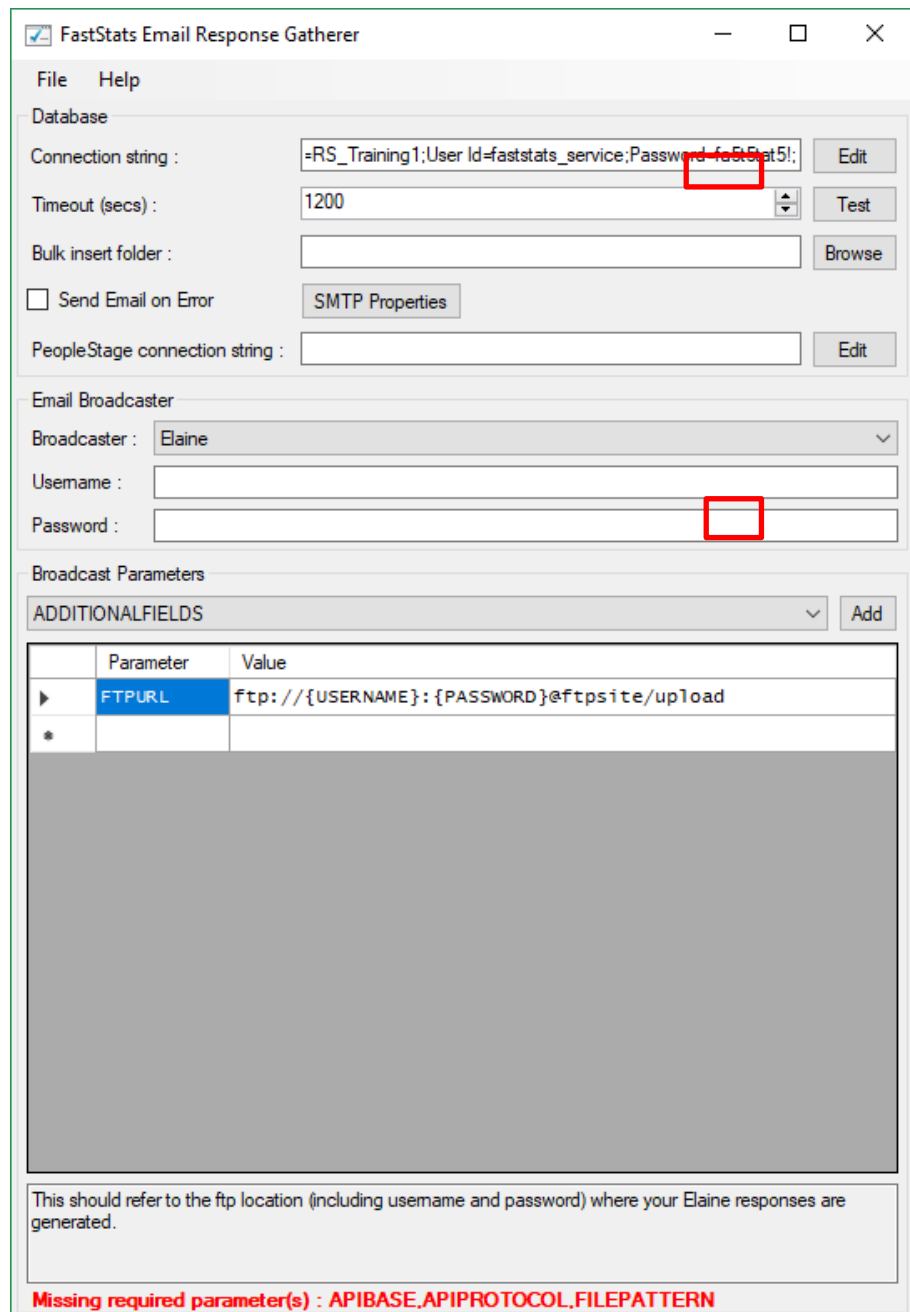
3.5 Creating the Configuration File

You will need to create an XML file containing the configuration settings to use with the Email Response Gatherer; the XML file is specified in an argument when you run the EmailResponseGatherer.exe

Note:

You can use the Response Gatherer with multiple integrations by using an XML and matching batch file for each integration.

1. Browse to the directory where you installed the Email Response Gatherer and open the **EmailResponseConfig.exe**, enter your Connection String and click **Test**
2. Select Elaine® from the Broadcaster drop-down list
3. Enter the **Username** and **Password** to use with the Elaine® API
4. Use **Add** to add all the required parameters for the Broadcaster
5. Use the File menu to save the XML file to the batch and XML file folder



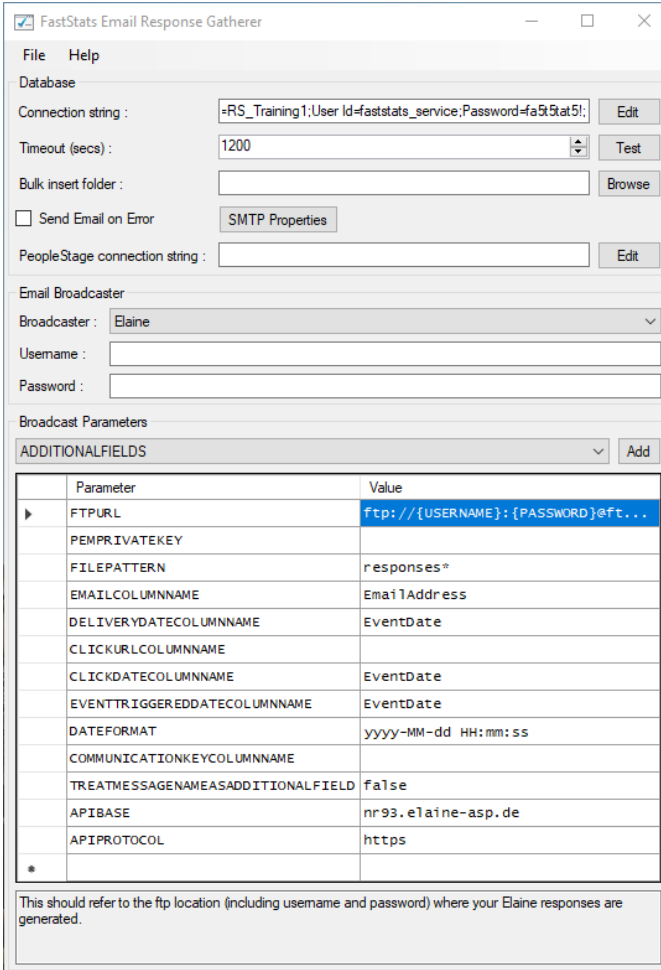
Note:

The Email Response Config application displays a warning message about required parameters until you have included them all.

Table 2 – EmailResponseConfig Parameters

Dialogue Item	Settings to use
Connection String	The connection string to the response database for your system
Timeout (secs)	The timeout (in seconds) for the connection and query steps, the default is 1200 seconds
Bulk insert folder	The location to store the results to optimize the processing of campaigns that generate large volumes of data, SQL Server can BULK COLLECT from this location
PeopleStage Connection String	Used for certain broadcasters, to retrieve metadata from the PeopleStage database Not applicable with Elaine®

Email Response Config dialogue with ADDITIONAL FIELDS completed



FastStats Email Response Gatherer

File Help

Database

Connection string : -RS_Training1;User Id=faststats_service;Password=fa9t5at5! Edit

Timeout (secs) : 1200 Test

Bulk insert folder : Browse

Send Email on Error SMTP Properties

PeopleStage connection string : Edit

Email Broadcaster

Broadcaster : Elaine

Username : Password :

Broadcast Parameters

ADDITIONALFIELDS Add

Parameter	Value
FTPURL	ftp://{USERNAME};{PASSWORD}@ft...
PEMPPRIVATEKEY	
FILEPATTERN	responses*
EMAILCOLUMNNAME	EmailAddress
DELIVERYDATECOLUMNNAME	EventDate
CLICKURLCOLUMNNAME	
CLICKDATECOLUMNNAME	EventDate
EVENTTRIGGEREDDATECOLUMNNAME	EventDate
DATEFORMAT	yyyy-MM-dd HH:mm:ss
COMMUNICATIONKEYCOLUMNNAME	
TREATMESSAGEASADDITIONALFIELD	false
APIBASE	nr93.elaine-asp.de
APIPROTOCOL	https

* This should refer to the ftp location (including username and password) where your Elaine responses are generated.

See **Appendix A** Email Response Gatherer Parameters for a full list of available parameters to use with the Email Response Gatherer.

Note:

Use “Quote” for the **Encloser** parameter with Elaine® version 6

3.6 Scheduling the Response Gatherer

You need to set FERG to run on a scheduled basis, provide it with the broadcaster's communication details (in a .xml configuration file) and the location to output the Log files; this example uses Windows Task Scheduler however you can use any similar application or create Command Line (.cmd) files manually.

Creating the Batch Files

The batch files provide the Response Gatherer with the Log file directory and the name of the XML file to use.

Create or modify the batch file using Notepad++ or similar text editor, see appendix B for an example file, save the file to the batch and xml file directory.

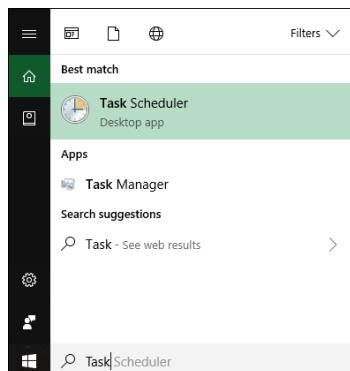
Using Task Scheduler

Using the Windows Task Scheduler, you can create multiple Tasks to run the Response Gatherer on a timed basis.

1. Open Windows **Task Scheduler**

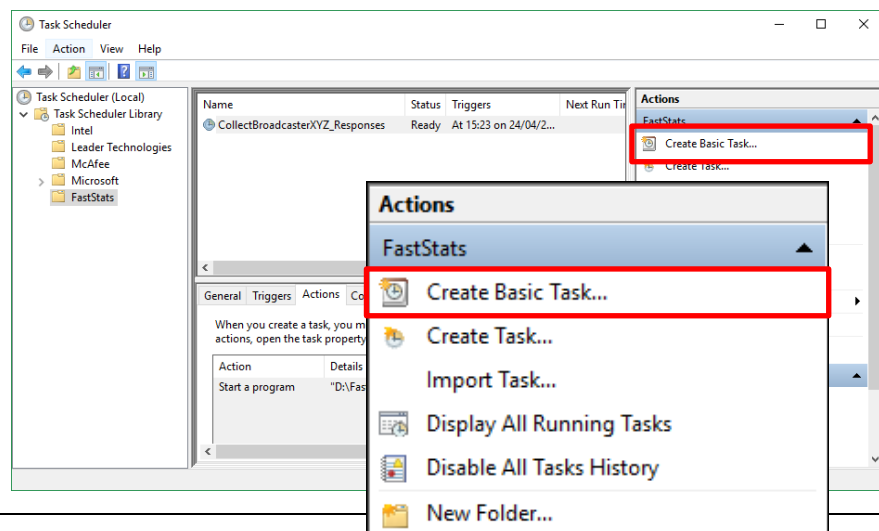
Tip

Search for **Task** in the Start Menu



The Windows Task Scheduler opens

2. Select **Create Basic Task**

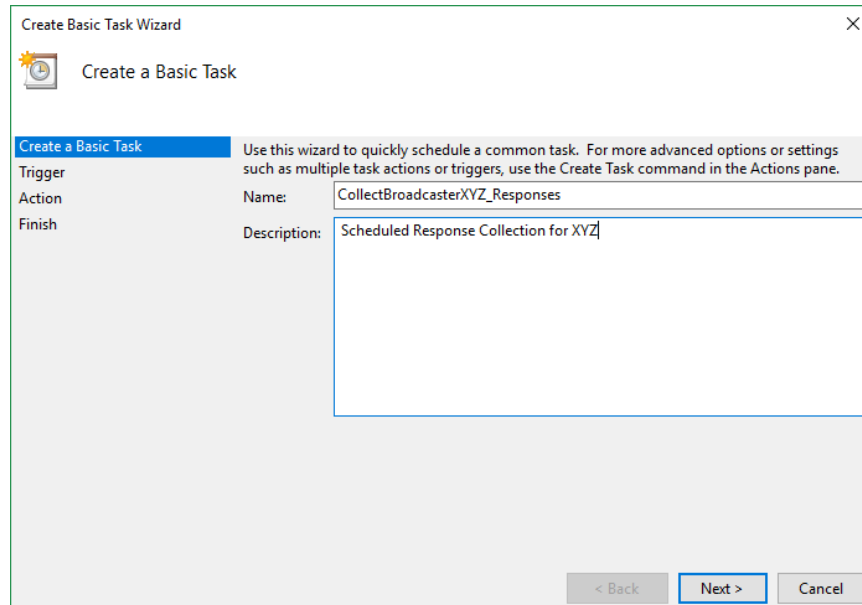


Tip:

You can create folders to organise your tasks

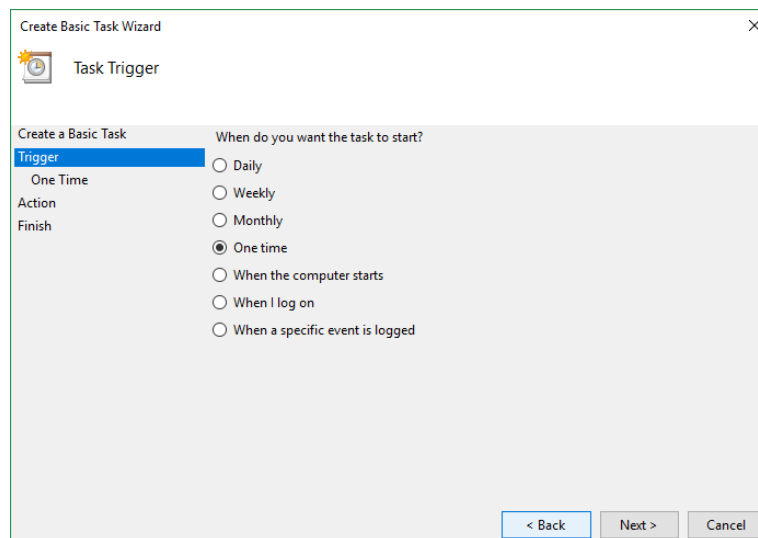
3. Create a Basic Task step

a. Give your task a Name and Description

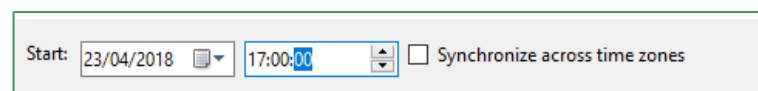


4. Task Trigger step

a. Select the Trigger interval

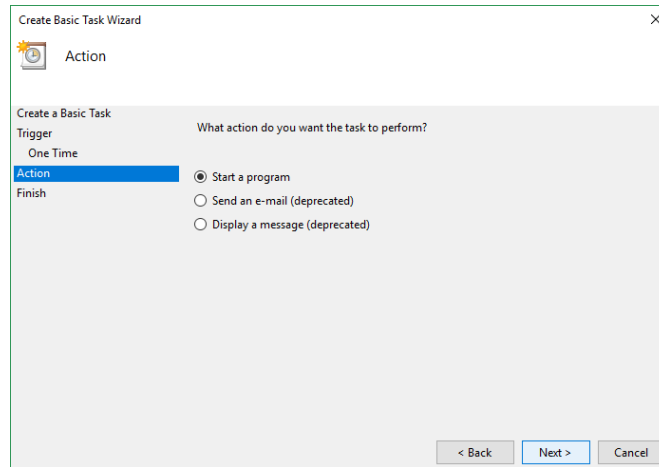


b. Enter the Start Date and Time or relevant sub-step details



5. **Action** step

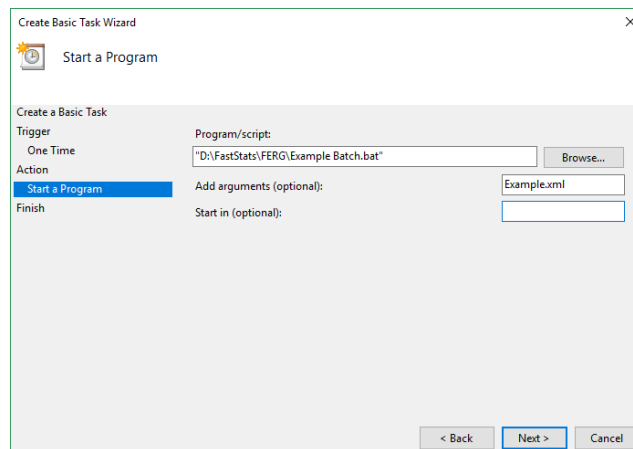
- a. Select **Start a program** and click **Next**



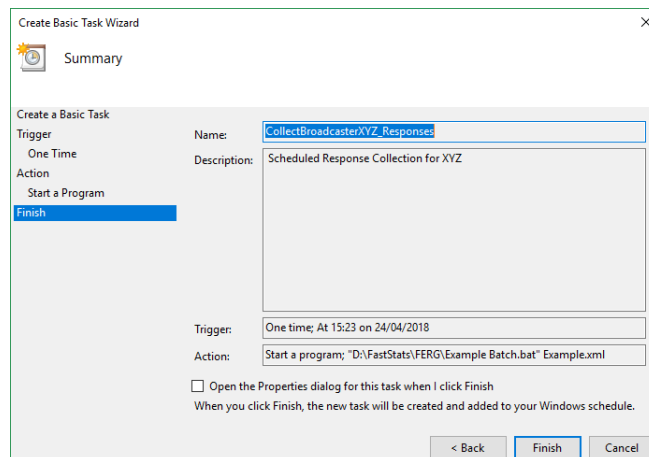
6. **Start a Program** Step

- a. Click **Browse** then navigate to the folder containing your batch files, select the file to use and click **Open**
- b. **Optional:** Provide the name of the XML configuration file in the **Add arguments** box, click **Next**

Note: The XML file is typically included in the batch file.



7. **Summary** step – Click **Finish**



4 FastStats Broadcasting & Responses

Notes:

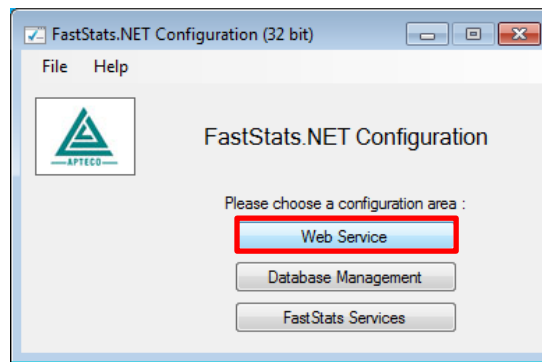
You must log in as an administrator to perform the following task.

The Email Broadcasting Wizard is required for FastStats use only.

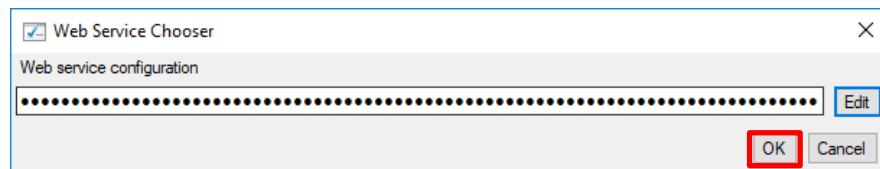
4.1 Enable Email Broadcasting

You must enable the Email Broadcasting wizard plugin.

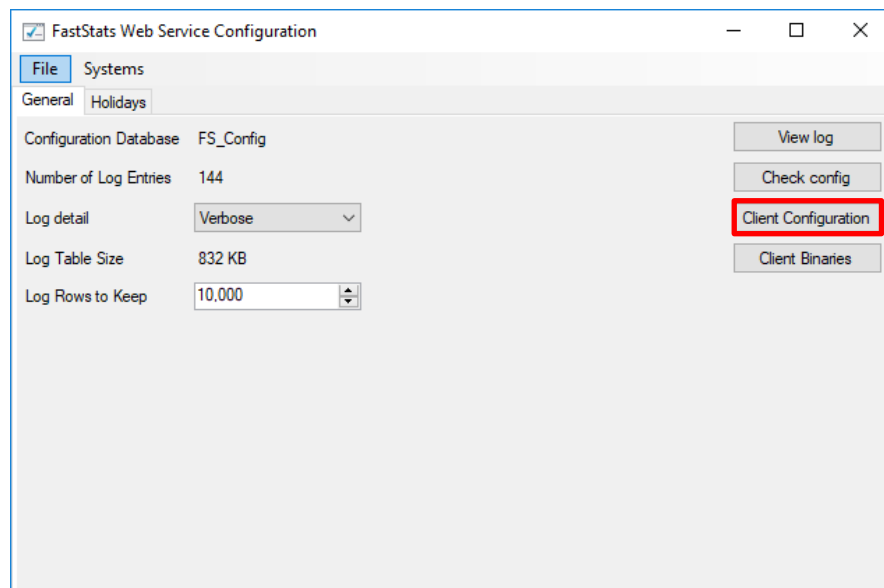
1. Open the **FastStats Configurator**
2. Select **Web Service**



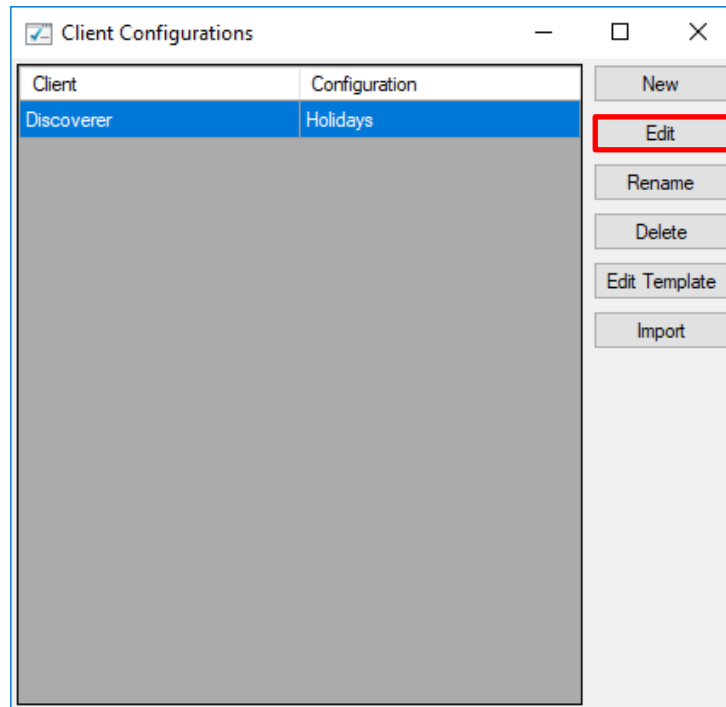
3. Click **OK** on the Web Service Chooser dialog box



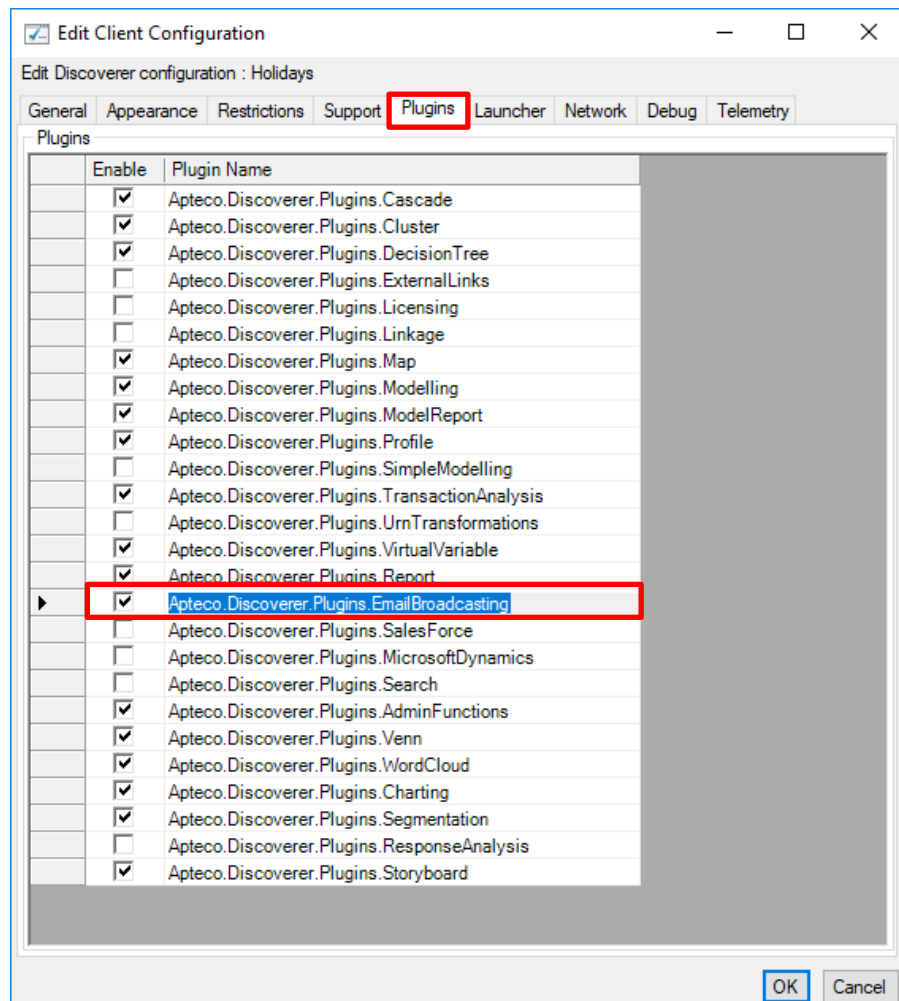
4. Click **Client Configuration**



5. Select the Discoverer client associated with your system and click **Edit**

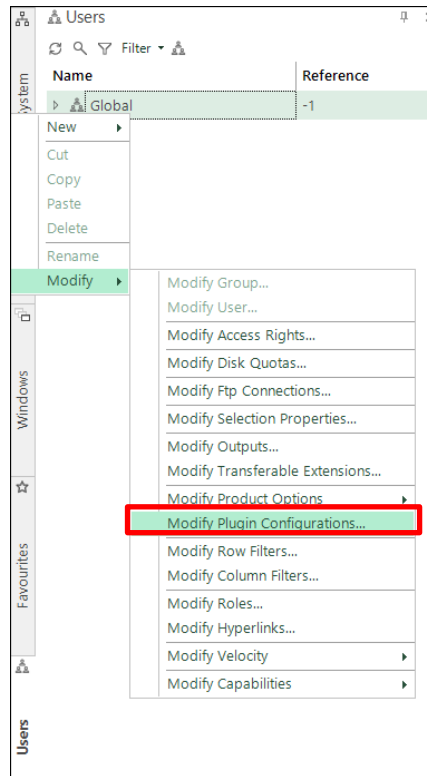


6. On the Plugins tab ensure the **Apteco.Discoverer.Plugins.EmailBroadcasting** check box is selected then click **OK**

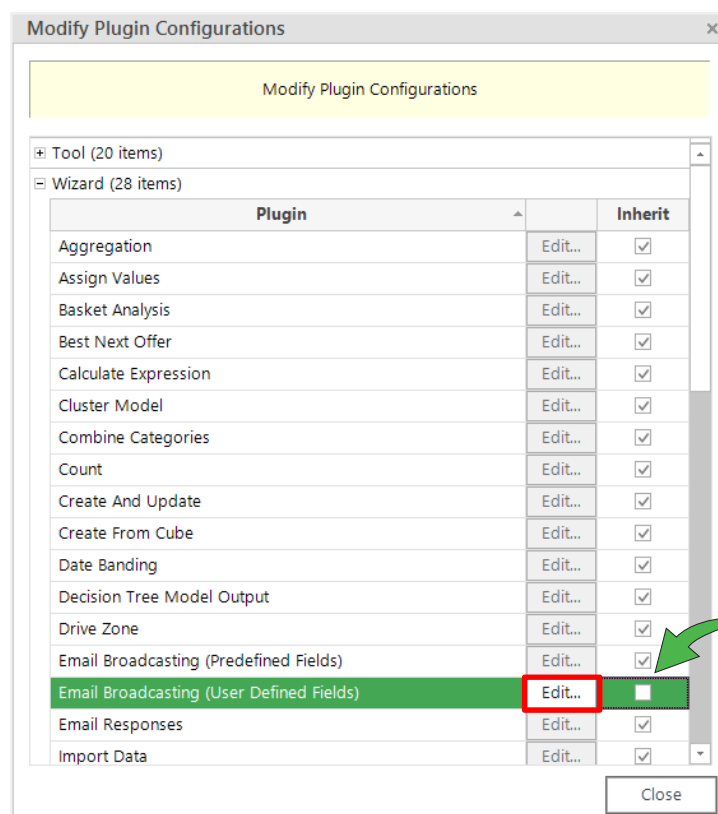


4.2 Configuration in FastStats

1. Open Apteco FastStats, select the **Users** explorer, right-click on the **Global** node then navigate to **Modify > Plugin Configurations**



2. Expand the **Wizard** node then **clear** the **Inherit** check box for **Email Broadcasting (User Defined Fields)** and then click on the **Edit** button.



3. Click **Add** to add a new template

The screenshot shows the 'Email Broadcasting' dialog box. It has several input fields: 'Name' (Email Broadcasting), 'Visible In Toolbox' (checked), 'Tooltip Text' (Upload selected records to your chosen Email Service Provider), 'Image Path' (images\EmailBroadcastingWizard.jpg), 'Group' (Output Wizards), 'Order Within Group' (_1), and 'Group Order' (_5). Below these fields is a table with the header 'Name'. At the bottom right, the 'Add...' button is highlighted with a red box. There are also 'OK' and 'Cancel' buttons at the bottom.

4. Enter a **Name**, select the appropriate **Resolve Table** from the drop-down and select **Elaine®** from the Broadcaster drop-down.

The screenshot shows the 'Edit Template' dialog box. It has several input fields: 'Name' (Elaine), 'Resolve Table' (People), 'Extras' (empty), 'Broadcaster' (Elaine), 'Known Parameters' (Api Base: ed92.elaine-asp.de, Api Protocol: https, Api Version: 2), and 'Additional Parameters' (empty table with columns Key and Value). At the bottom, there is a 'Parameters' field with the text 'ApiBase=ed92.elaine-asp.de;ApiProtocol=https;ApiVersion=2;UseDatedList=True;DatedListFormat=yyyyMMdd-' and a 'Parse' button. There are also 'OK' and 'Cancel' buttons at the bottom. A red box highlights the 'Resolve Table' and 'Broadcaster' dropdowns, and another red box highlights the 'Known Parameters' section with a green arrow pointing to the scroll bar on the right.

Note:

Scroll to enter the Known Parameters information, * indicates a required parameter.

Complete the template parameters form with the required settings for your Elaine® account.

Table 3 – Edit Template Known Parameters Settings

Parameter	Settings to use
Api Base	nr23.elaine-asp.de*
Api Protocol	https
Api Version	*This refers to the Elaine API Version either 1 or 2.
Use Dated List check box	Selected (default)
Dated List Format	yyyyMMdd-HHmms
FTP Protocol	sftp
FTP Username *	ed22* (blank by default)
FTP Password *	ed22* (blank by default)
FTP URL	nr23.elaine-asp.de/upload*
Upload Empty Lists	Selected (default)
Private Key Path	C:\...\elaine-nopassword.ppk (blank by default) * (only relevant if using a private key on the FTP site)
Mailing List Retention Period (days)	0
Elaine Urn Field Name	Urn (blank by default) *
Elaine Email Field Name	Email Address (blank by default) *
Elaine Sms Field Name	(blank by default) *
Elaine Communication Key Field Name	(blank by default) *
Append Email to Urn	Cleared (default) This ties into the Email Response Gatherer and allows the retrieval of the email address
Max Import Wait Time	300 (default)
Message Preview Group Name	(blank by default)
Encoding	Default

Note:

*These settings will be specific to your Elaine® account.

Note:

You will need to exit out of FastStats and log in again for these changes to take effect.

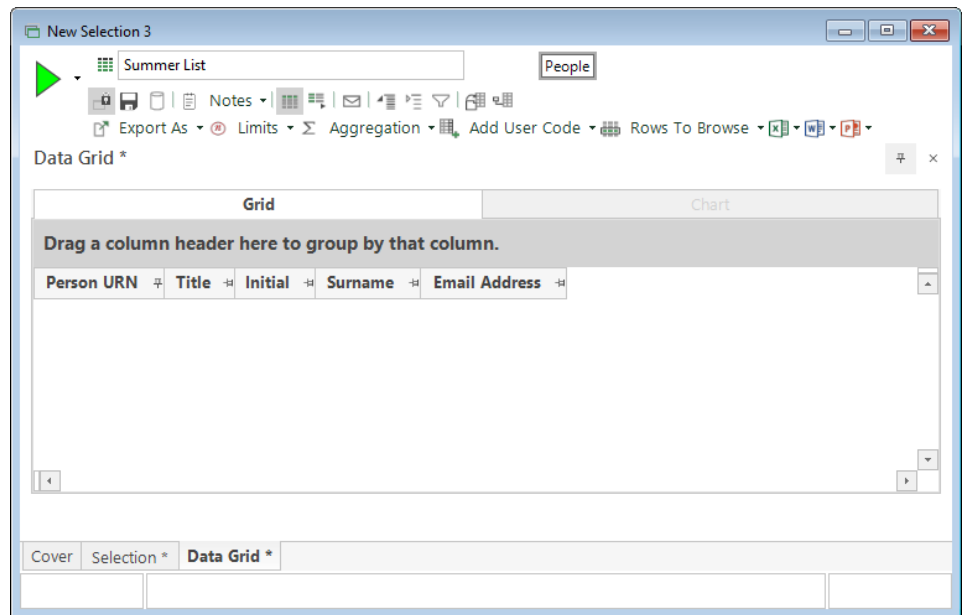
4.3 Checking your configuration

You can test the configuration by creating a Data Grid and using the email Broadcast Wizard; this will send a message to the people in your selection.

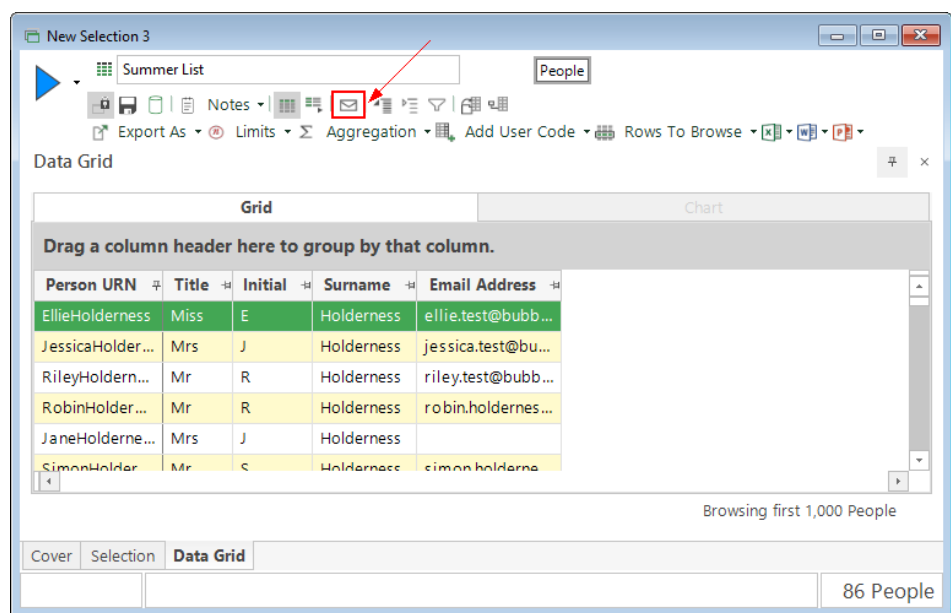
Note:

You must set up a message in Elaine® before performing this step see **Appendix A Configuring Elaine®**.

1. Create a **Data Grid** based on the appropriate selection criteria and drag on the variables that you want to pass to Elaine® (one must be an email address)



2. Click the **Email Broadcasting** icon

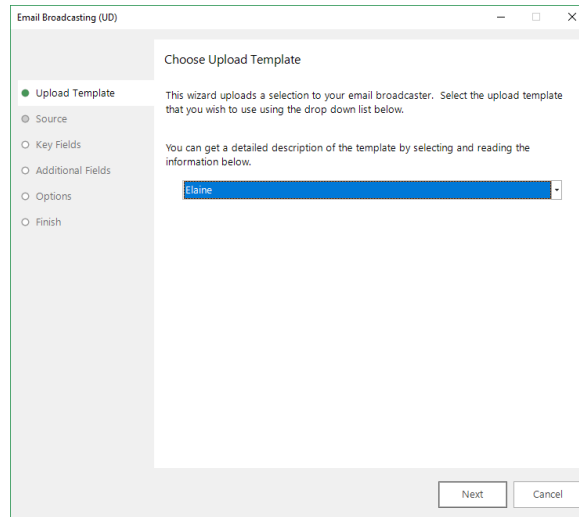


The **Email Broadcasting Wizard** opens

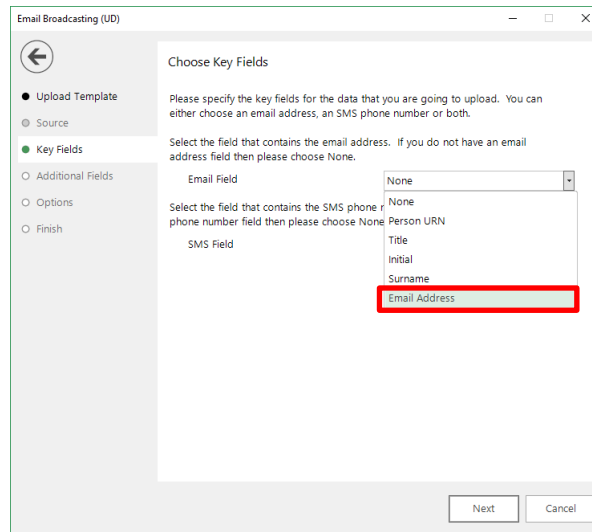
3. Choose the **Elaine®** template from the drop-down list and click **Next**

Note:

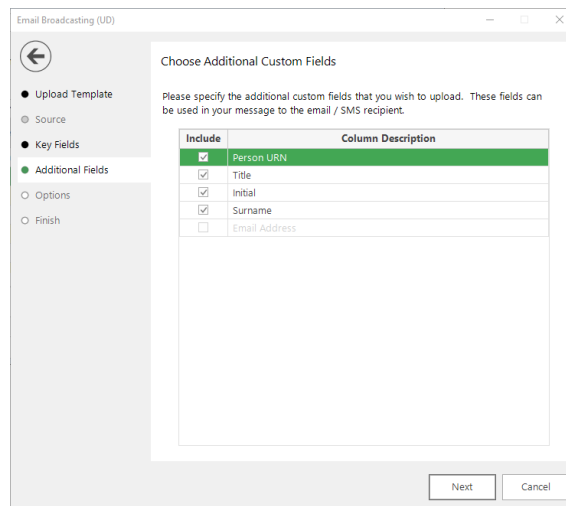
The wizard will omit this step if you have only one Upload Template



4. Choose the email field and click **Next**



5. Review the additional fields that will be sent as part of the list and click **Next**



6. Complete the **Email Broadcasting Details** form then click **Next**

The screenshot shows a window titled "Email Broadcasting (UD)" with a sidebar on the left containing navigation options: Upload Template, Source, Key Fields, Additional Fields, Options, and Finish. The main area is titled "Email Broadcasting Details" and contains the following fields and instructions:

- Instruction: "Please enter your credentials for uploading your records to the broadcaster."
 - Username:
 - Password:
- Instruction: "Enter the details for this list. If you want to overwrite an existing list, ensure that you check the overwrite box."
 - List Name:
 - Overwrite an existing list
 - Message Name:
- Instruction: "A copy of the list will be saved to the directory below."
 - File Path:
- Instruction: "When the list has been processed and is ready, the broadcaster will send a confirmation email to the address below."
 - Email Address:
 - Progress:

Buttons at the bottom right:

Table 4 – EmailResponseGatherer.exe.config Settings

Option	Settings to use
Username	The username for your Elaine® account
Password	The password for your Elaine® account
List Name drop-down	Click on the List Name retrieve button and select a list from the drop-down (this appends any new records to the list) or enter a new List Name
Message Name	Click on the Message Name retrieve button and select one from the drop-down or leave it blank if you only want to upload your list
A copy of the list will be saved to the directory below	Browse to the location where you wish to save a copy of the list
Email Address	Enter an Email Address FastStats will use this to notify you once the list has been processed and then click Next

7. If you entered a message name, a Broadcast Warning message displays meaning this will send a message to your target audience

Click **Yes** to commit this action

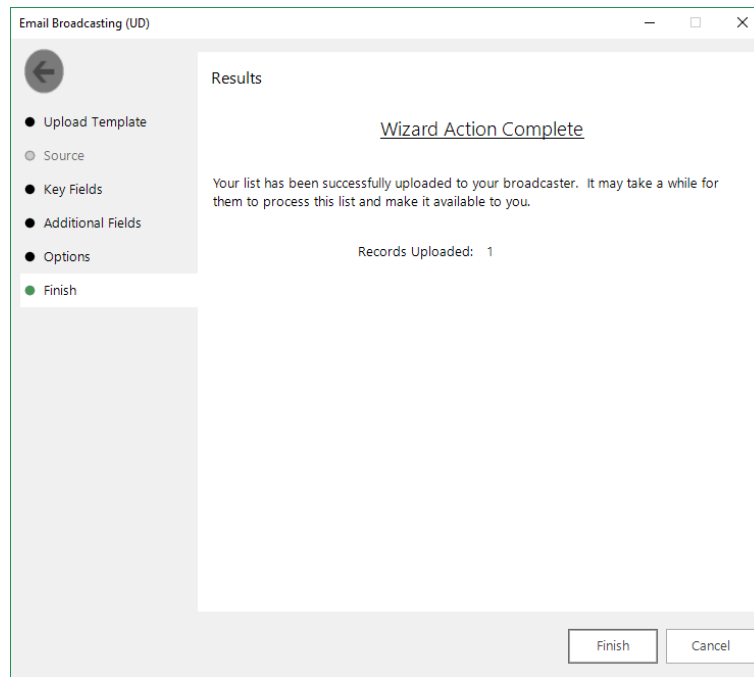
The dialog box titled "Broadcast Warning" contains the following text:

? You have chosen to broadcast a message to the selected recipients. On confirming this action, an upload and automatic broadcast will take place.

Are you sure you wish to continue with this action?

Buttons:

8. Once the list has been uploaded (and if applicable the message delivery has been scheduled), the wizard will complete. Click **Finish** to close the wizard.



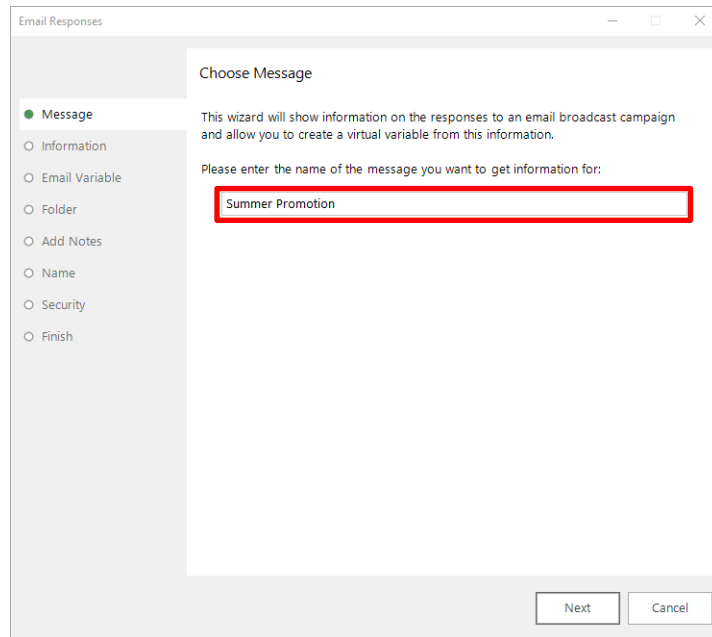
Note:

You will need to exit out of FastStats and log in again for these changes to take effect.

4.4 Email Responses Wizard

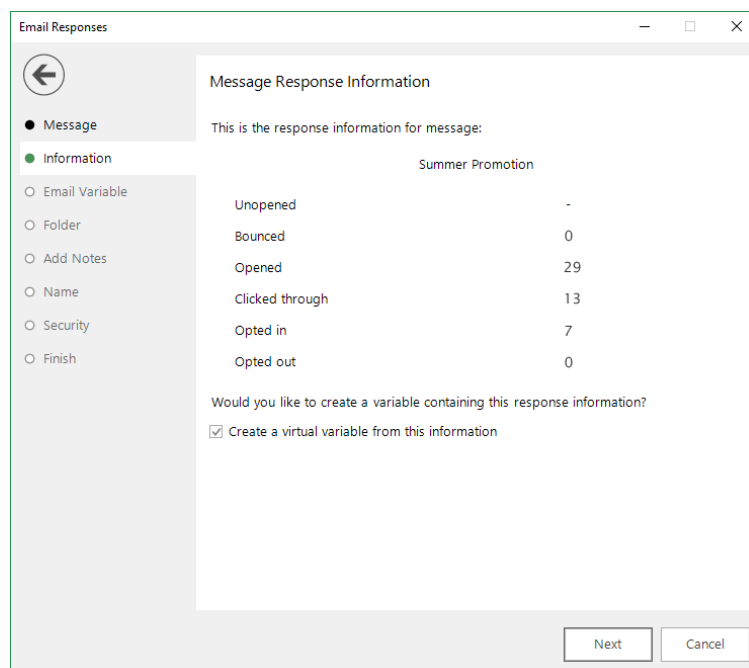
When your emails have been sent out you can start analysing the responses from your target audience.

1. Open the **Email Responses** wizard
2. Enter the name of the message that you used in the Email Broadcasting wizard and click **Next**



The screenshot shows the 'Email Responses' wizard window. The title bar reads 'Email Responses'. On the left is a navigation pane with options: Message (selected), Information, Email Variable, Folder, Add Notes, Name, Security, and Finish. The main area is titled 'Choose Message' and contains the following text: 'This wizard will show information on the responses to an email broadcast campaign and allow you to create a virtual variable from this information. Please enter the name of the message you want to get information for:'. Below this text is a text input field containing 'Summer Promotion', which is highlighted with a red rectangular border. At the bottom right of the window are 'Next' and 'Cancel' buttons.

3. As the Email Response Gatherer starts collecting information from Elaine®, you will see how customers are interacting with your broadcast. If you want to analyse this information further, click on Create a virtual variable from this information and then click Next

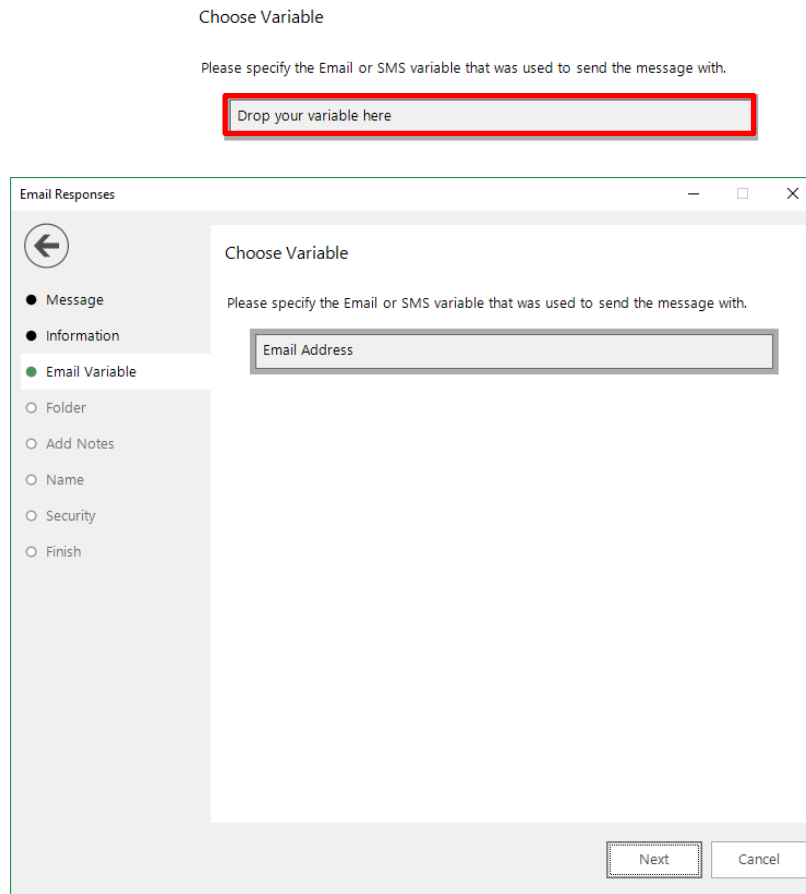


The screenshot shows the 'Email Responses' wizard window at the 'Message Response Information' step. The title bar reads 'Email Responses'. The left navigation pane has 'Message' and 'Information' (selected) highlighted. The main area is titled 'Message Response Information' and contains the text: 'This is the response information for message: Summer Promotion'. Below this is a table showing response statistics:

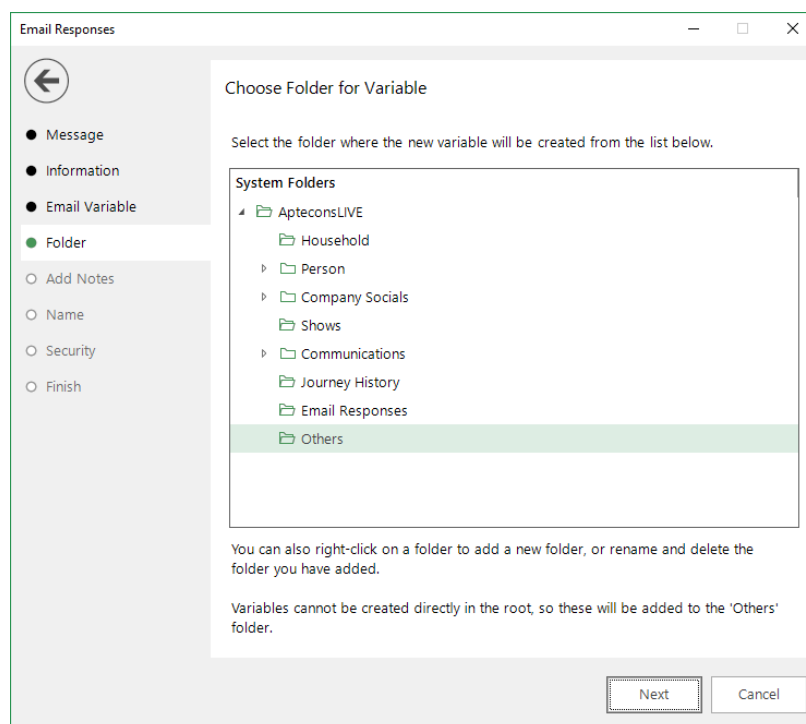
Unopened	-
Bounced	0
Opened	29
Clicked through	13
Opted in	7
Opted out	0

Below the table, there is a question: 'Would you like to create a variable containing this response information?' with a checked checkbox labeled 'Create a virtual variable from this information'. At the bottom right of the window are 'Next' and 'Cancel' buttons.

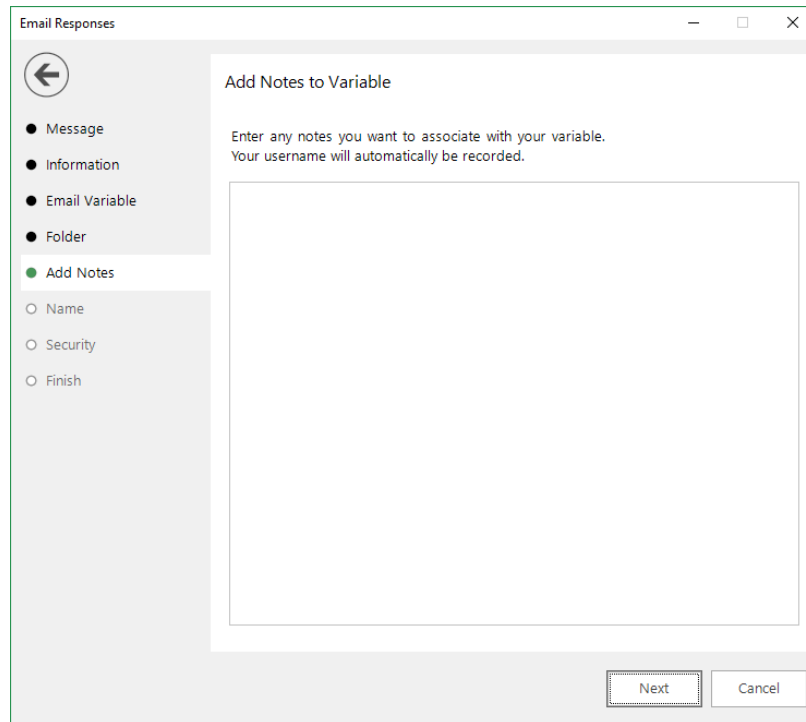
4. Drag the Email variable that you used in the Email Broadcasting wizard onto the drop box and click **Next**



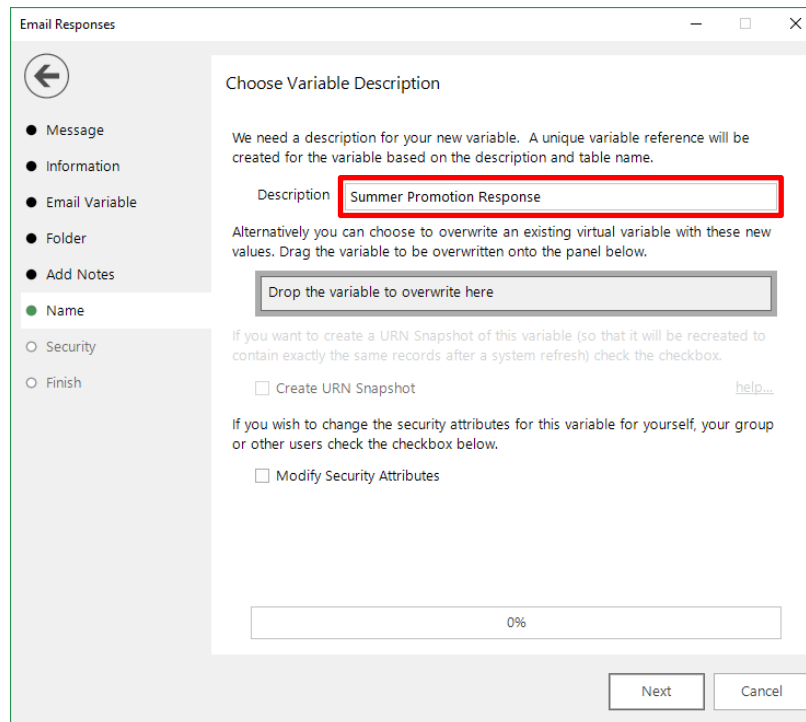
5. Locate the folder where you wish to store the virtual variable and click **Next**



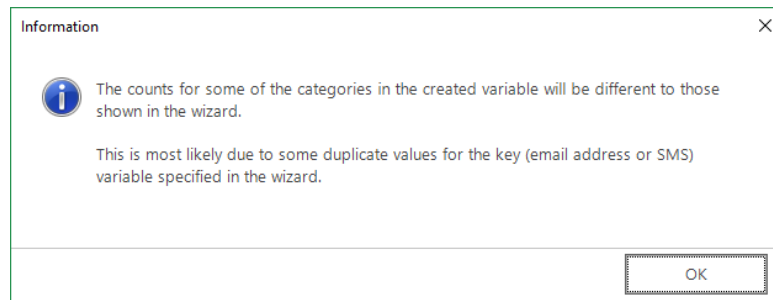
6. Enter any notes that will be stored along with the virtual variable and click **Next**



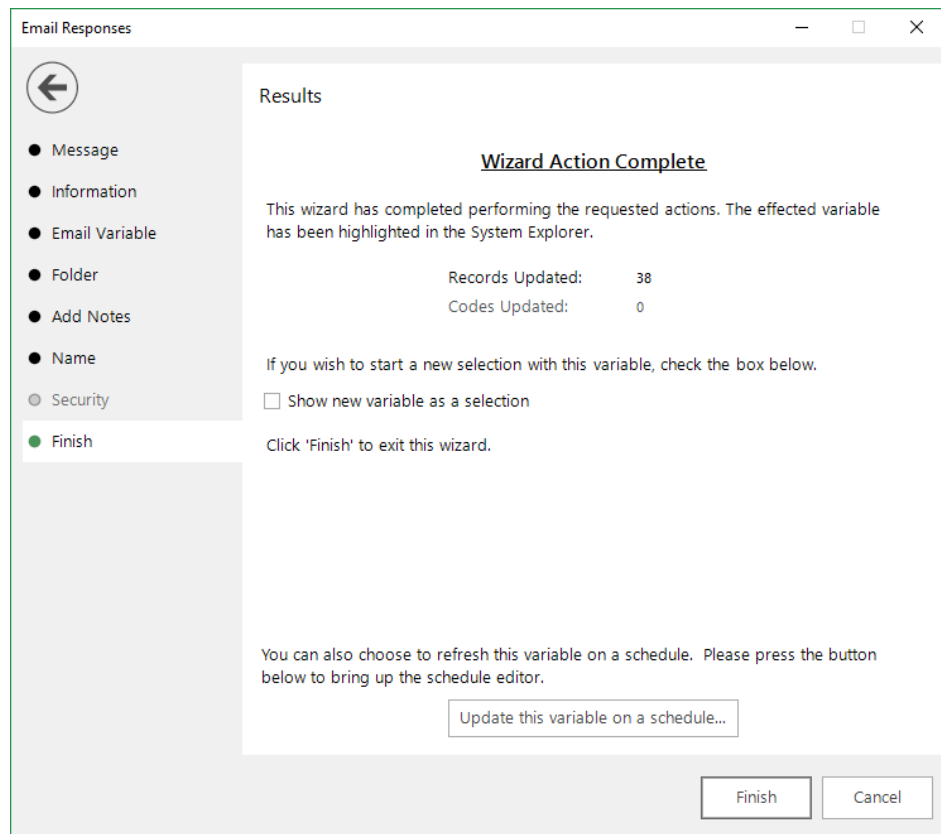
7. Enter a Description for the virtual variable or drag an existing virtual variable onto the drop box if you wish to overwrite it. Modify the Security Attributes if applicable and then click **Next**



8. Click **OK**



9. Click **Finish**

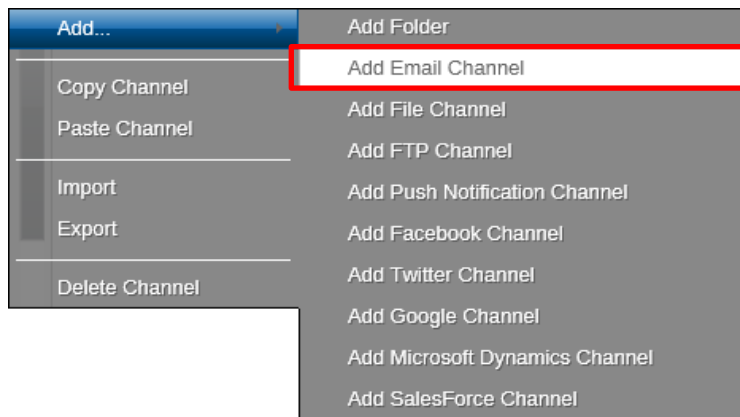


5 PeopleStage Broadcasting & Responses

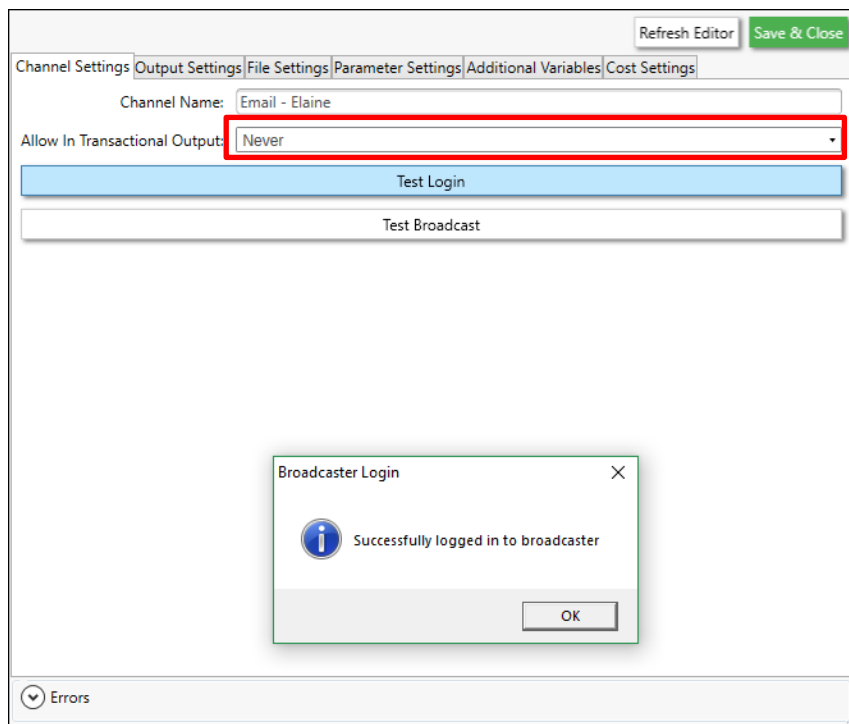
5.1 Defining the Broadcast Channel in PeopleStage

To use Elaine® with PeopleStage, you must set up a channel that defines the settings and parameters and any fields that you always want to send to Elaine®.

1. Open PeopleStage, select **File > Administration > Channel Editor**. Click **Add Email Channel** through the context menu within a folder



2. Enter a name in **Channel Name**



Note:

(Optional) Select Yes from the **Allow In Transactional Output** (you need to be careful if you select this option, as it means we can send multiple emails to the same email address)

3. Define Output Settings for Elaine®

Table 5 –PeopleStage Output Settings

Field	Settings
Broadcaster	Select Elaine® from the drop-down
Username	Enter your API username
Password	Enter your API password
Variable Name	Select Email Address from the drop-down
Variable Description Override	Enter the description, for example, “Email Address” Note: This must correspond to the e-mail field within Elaine®
Upload but don’t broadcast	(Optional) – Select this check box to upload the list only without initiating a broadcast
Reply email Address	The email address that will receive notifications when the channel is used, i.e. list uploaded / broadcast. Note: This is not the reply email address that will be used for the email send.
Number of Retries	The number of times to retry on failure of the channel. It is recommended (for Broadcast Channels) to leave this at 0. The Delivery Agent also has a retry value, so setting this to > 0 can result in multiple retries and may cause undesirable results
Response File Key Type	The key field to match responses to sends. Varies from broadcaster to broadcaster due to the fields they return in the response file. Should be set to Communication Key for Elaine®.
Message Content Type	Only Dynmark has the ability to use PeopleStage templates so this will always be Broadcaster Template. This is where the creative comes from.

4. Complete the **File Settings**

There are validation errors indicated in red Refresh Editor Save & Close

Channel Settings Output Settings File Settings Parameter Settings Additional Variables Cost Settings

Zip File

Output File Format: Comma Separated Values (CSV)

Output Header: Descriptions

Delimiter: Tab

Alpha Encloser: None

Numeric Encloser: None

Extras:

Encoding: utf-8

Errors

- Parameter ApiBase has no value set
- Parameter FTPUsername has no value set
- Parameter FTPPassword has no value set

Note:

The default Encoding is Windows-1252 if you change use the same setting on the **Parameter Settings** tab. Set this to **utf-8**

5. The ESP **Parameter Settings** tab is blank by default, select parameters from the drop-down and click **Add** to complete the form

Refresh Editor Save & Close

Channel Settings Output Settings File Settings Parameter Settings Additional Variables Cost Settings

Encoding

Escape Quotes

FTP Protocol

FTP URL

Mailing List Retention Period

Max Import Wait Time

Message Preview Group Name

Private Key Path

Upload Empty Lists

Use Dated List

Add

Enter the protocol for your FTP connection. The default value is 'sftp'.

You will be able to get these from Elaine® or contact your Partner or Apteco

The screenshot shows a web-based configuration interface for Elaine. At the top, there are tabs for 'Channel Settings', 'Output Settings', 'File Settings', 'Parameter Settings', 'Additional Variables', and 'Cost Settings'. The 'Parameter Settings' tab is active. Below the tabs is a search bar and an 'Add' button. A table lists various parameters and their values:

Parameter Name	Parameter Value
Api Base	ed92.elaine-asp.de
Elaine Email Field Name	Email Address
Elaine Urn Field Name	Urn
FTP Password	ed92
FTP Protocol	sftp
FTP URL	ed92.elaine-asp.de/%2Fsieis/import/upload
FTP Username	ed92
Private Key Path	C:\Temp\elaine-nopassword.ppk
Upload Empty Lists	false
Message Preview Group Name	MessagePreviewGroup
Append Email To Urn	true
Mailing List Retention Period	7
Max Import Wait Time	500
Escape Quotes	true
Encoding	UTF8

Below the table, there is a summary string: `ApiBase=ed92.elaine-asp.de;ElaineEmailFieldName=Email Address;ElaineUrnFieldName=Urn;FTPPassword=ed92;FTPProt`. At the bottom left, there is an 'Errors' section with a downward arrow.

Table 6 –Example PeopleStage Parameter Settings

Field	Settings
	*Example, these will be specific to your account
Api Base	nr23.elaine-asp.de
Elaine Email Field Name	Email Address*
FTP Password	Enter your FTP password *
FTP Protocol	Either sftp, ftp or ftps*
FTP URL	nr23.elaine-asp.de/*
FTP Username	ed22*
Private Key Path	C:\Temp\elaine-nopassword.ppk*
Upload Empty Lists	false
Message Preview Group Name	MessagePreviewGroup*
Append Email to Urn	true
Mailing List Retention Period	7
Max Import Wait Time	500
Escape Quotes	true
API Version	*This refers to the Elaine API Version either 1 or 2
Encoding	UTF8

See **Appendix B** for all the available parameters

6. Add any additional variables on the **Additional Variables** tab

There are validation errors indicated in red

Refresh Editor Save & Close

Channel Settings Output Settings File Settings Parameter Settings **Additional Variables** Cost Settings

Variable Name	Variable Description	Output Type	Formatting	Unclassified as blank
Forename (PeForena)	First Name	-	No Formatting	-
Select a Variable		-	-	-

- ▶ Household
- ▶ Person
- ▶ Company Socials
- ▶ Shows
- ▶ Communications
- ▶ Journey History
- ▶ Email Responses
- ▶ Others

Add Additional Variables Directly

Additional Variables Location:

Errors

An additional variable () can't be found in the FastStats system

7. Click **Save & Close**

Refresh Editor **Save & Close**

Channel Settings Output Settings File Settings Parameter Settings **Additional Variables** Cost Settings

Variable Name	Variable Description	Output Type	Formatting	Unclassified as blanks
> Forename (PeForena)	First Name	-	No Formatting	-
Surname (PeSurnam)		-	No Formatting	-
Click here to add new item				

Add Additional Variables Directly

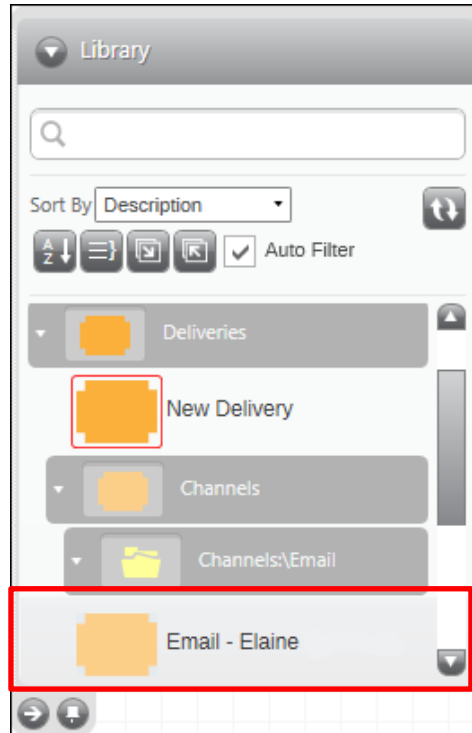
Additional Variables Location:

Errors

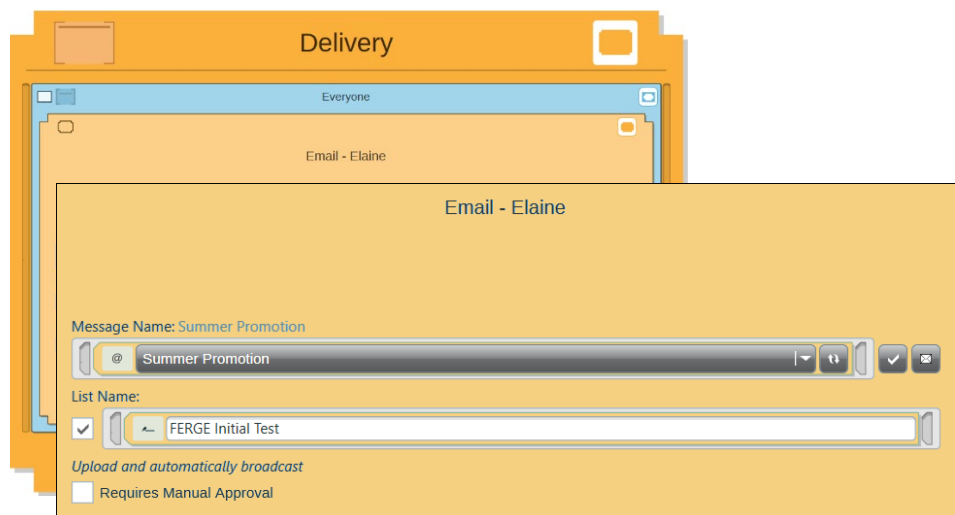
5.2 Broadcasting in PeopleStage

You can now test your channel at any Delivery Stage

1. You can drag your new Elaine® channel from the Library to your Delivery step



2. You can select from the available messages in Elaine® from the Message Name drop-down or use PeopleStage's functionality to dynamically select a message, to use a different language for example.



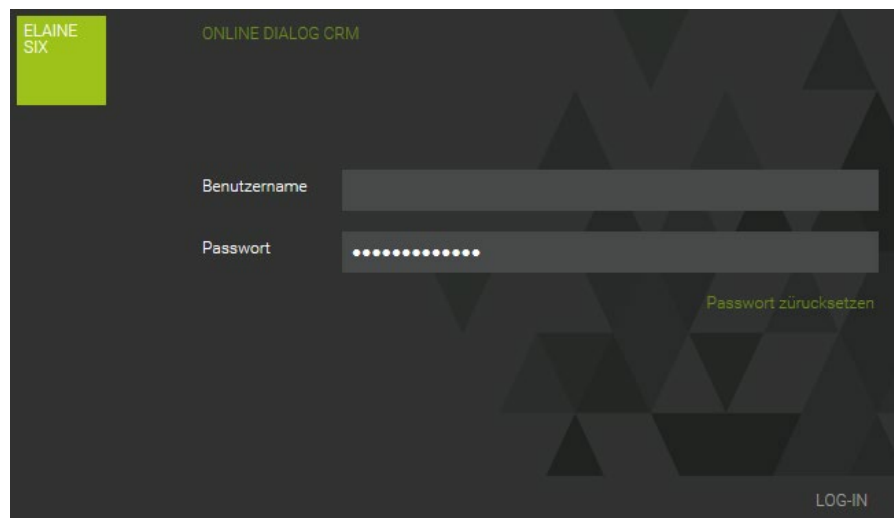
3. You can use the same **List Name** as the **Message Name** or define a custom one
Selecting the **Requires Manual Approval** check box gives the option to view a sample list before processing

Appendix A: Elaine® Configuration

Elaine® works on the principle of having a database of subscribers, which you can segment into lists. FastStats or PeopleStage will upload a list of subscribers and insert them into the Elaine® database.

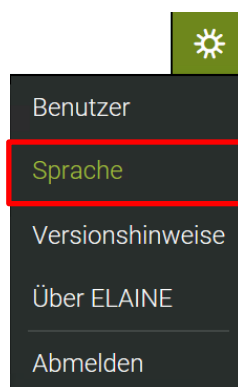
If you wish to automatically broadcast the list to a message either from the Email Broadcast wizard or PeopleStage, you need to create a message within Elaine®.

1. Login to your Elaine® account to access the web-based control panel



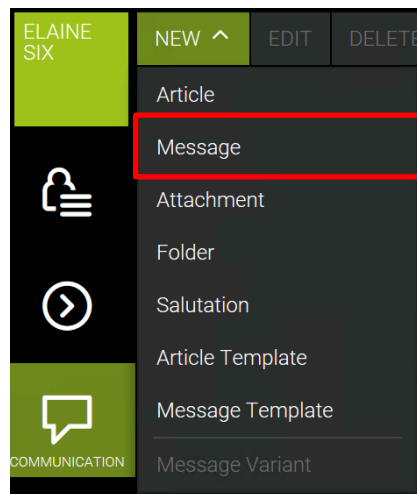
Note:

You can change the interface language from the settings menu, top right.



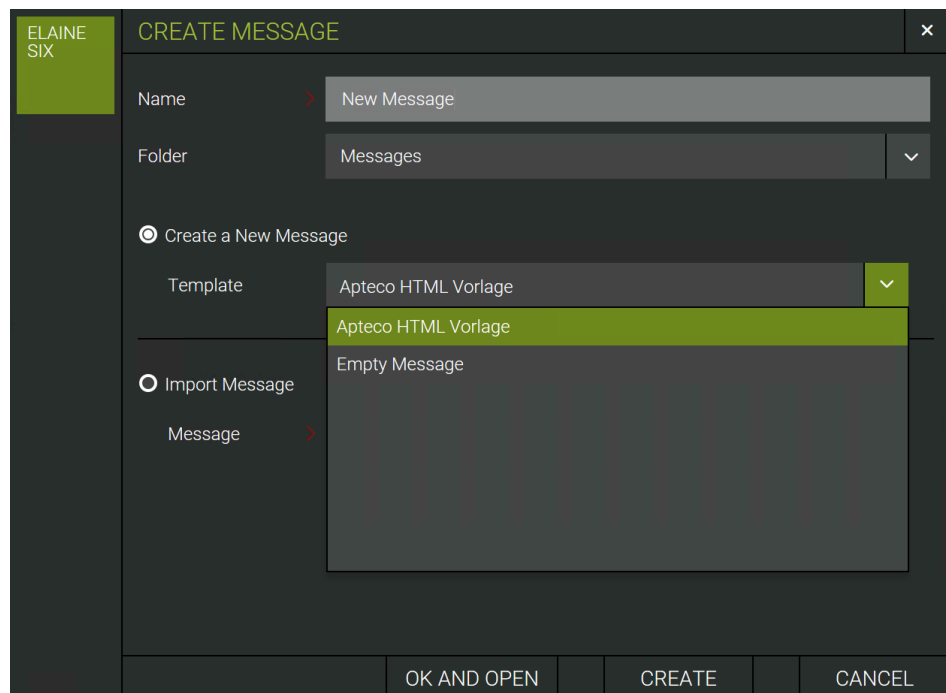
Creating a new Message in Elaine®

2. From: **Communications** go to **New > Message**



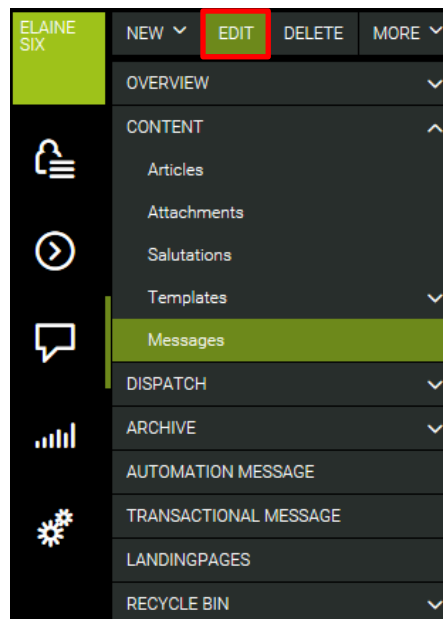
The **Create Message** dialogue opens

3. Enter a **Name** for the message and select from the options:
- Create the New Message using a template
 - Import Message – To import a message

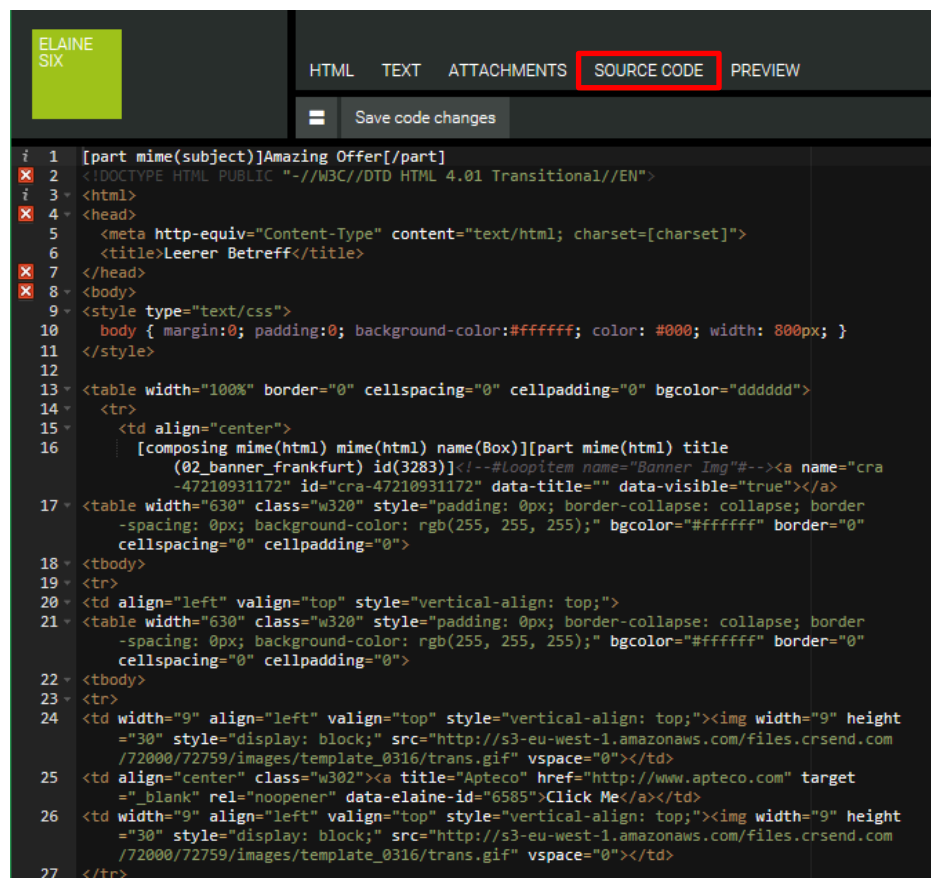


Add any relevant offers that you want in the message, these can be picked up by PeopleStage when clicked by the recipient.

4. You can edit the Subject and the email content by selecting the message from the list in **Communications** and clicking **Edit**



5. To further Add/Edit HTML or text content use the **Source** tab



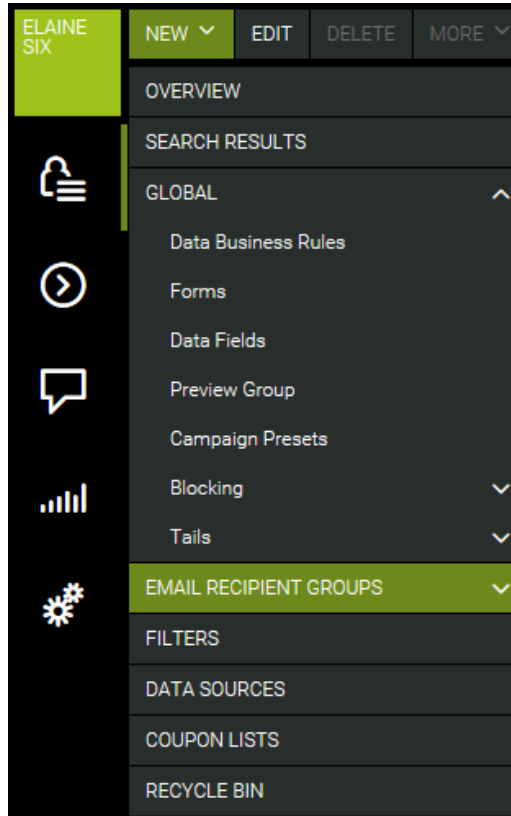
Once complete, click **Save code changes**

Note:

You should test your message to ensure there are no problems with the email message.

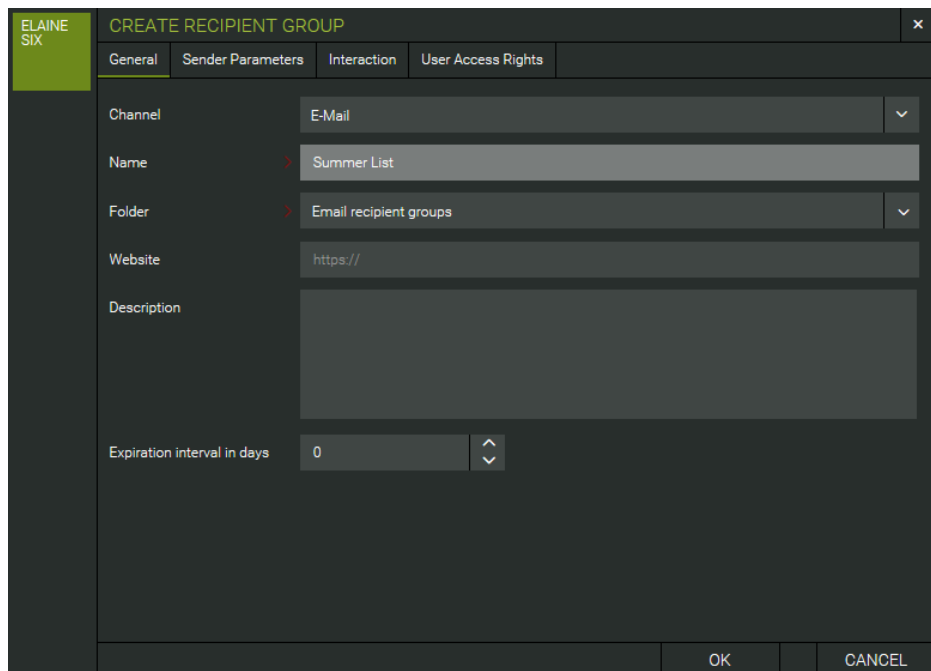
You can either create a List to use with FastStats or PeopleStage, these are called Recipient Groups in Elaine®, or you can enter a name in the Email Broadcasting Wizard which will create a list.

From: **Data** > **EMAIL RECIPIENT GROUPS** > select **New**



The **Create Recipient Group** window opens

The **Name** of the recipient group corresponds to the **List Name**



Appendix B: API Parameters

Table 9 – Email Response Gatherer Parameters

Parameter	Required	Default	Description
ApiBase	Y	nr23.elaine-asp.de*	The web service on the server tha hosts your Elaine® account
ApiProtocol	Y	https*	The communication protocol used with Elaine®, either http or https
FTPURL	Y		The ftp location (including username and password) where your Elaine® responses are generated
PEMPRIVATEKEY	N		If secure ftp is used above and requires a private key, this should refer to the path and filename of that key
FILEPATTERN	Y	Response*	Allows you to filter your responses to specific types when reading files from the ftp site

The following data is inserted into the FastStats Email Response Table

	Required	Response Table field	Elaine® extract file column
EMAILCOLUMNNAME	N	Email	Email address
URNCOLUMNNAME	N	Urn	FastStats Urn. Only be available if it has been previously uploaded from FastStats
COMMUNICATIONKEYCOLUMNNAME	N	CommunicationKey	FastStats Communication Key. Only be available if it has been previously uploaded from FastStats
RUNCOLUMNNAME	N		Reserved for future use
TYPECOLUMNNAME	N	MessageType	Response type
MESSAGENAMECOLUMNNAME	N		The message name is not returned in the Elaine® extract file, but a reference is, this should typically be left as the default value
DELIVERYDATECOLUMNNAME	N	DeliveryDate	Delivery date
CLICKURLCOLUMNNAME	N	ClickUrl	The name of the URL that was clicked
CLICKDATECOLUMNNAME	N	ClickDate	Date the link was clicked
EVENTTRIGGEREDDATECOLUMNNAME	N	EventTriggeredDate	Date the response occurred

Note:

*These settings are specific to each Elaine® account.

Continued

Additional Configuration	Required	Default	Description
DATEFORMAT	N		Date format used e.g. dd.MM.yyyy HH:mm
DATEOFFSET	N	0	Value in hours to offset any date values received. This allows you to write responses in your current time zone.
MAXRETRIES	N	1000	The number of times the Email Response Gatherer will check to see if the extract file exists on the ftp site
READACCESSRETRIES	N	300	The number of times the Email Response Gatherer will check to see if the extract file is readable on the ftp site.
DELIMITER	N	Tab	Type of delimiter used in the extract file, options include: <ul style="list-style-type: none"> • COMMA (,) • DOUBLEQUOTE (") • NULL. • SEMI (;) • SPACE () • SINGLEQUOTE (!) • TAB
ENCLOSER	N	None	Type of enclose used in the extract file
Note: Encloser setting for Elaine 6	Y		Use "Quote" for Elaine 6
TreatTypeAsAdditionalField	N	false	Setting this to true will force the raw response type to be written to the ReponseDetails table before any conversion is carried out
TreatMessageNameAsAdditionalField	N	false	Setting this to true will force the raw message name to be written to the ResponseDetails table before any conversion is carried out
LookupBroadcastIdsOnTheFly	N	false	False will force the Email Response Gatherer to download a full list of Broadcast Ids from all the previous broadcasts in the response database. This can then be used to quickly match responses to broadcasts. If set to true, the Broadcast Ids will be fetched and cached as and when required
OnlyProcessRecordsWithBroadcastId	N	false	Setting this to true will force the Email Response Gatherer to only download responses to messages that have originated from FastStats. The default option is false; all responses will be downloaded.

Table 10 – Email Broadcasting Parameters

Parameter	Required Y/N	Default	Description
ApiBase	Y	nr23.elaine-asp.de.	The web service on the server your Elaine® account is hosted on
ApiProtocol	N	https	The communication protocol used, either http or https
ApiKey	Y	1	This refers to the Elaine API Version either 1 or 2
FTPUsername	Y		The username for the login to the ftp site specified in FTPURL.
FTPPassword	Y		The password for the login to the ftp site specified in FTPURL
FTPURL	N	nr23.elaine-asp.de.	The ftp location where your upload will be generated
FTPProtocol	N	ftp	The type of ftp protocol you will be using to upload your list, options include: <ul style="list-style-type: none"> • ftp • ftps • sftp
PRIVATEKEYPATH	N		If secure ftp is used above and requires a private key, this should refer to the path and filename of that key
UploadEmptyLists	N	true	Set this to false if you wish to prevent empty list being uploaded to Elaine®
UseDatedList	N	true	Setting this to false will remove the date and time stamp at the end of the file name
DatedListFormat	N	yyyMMdd-HHmss	The date format string for the date and time stamp if created
ElaineUrnFieldName	N		The name of the field in Elaine® that will hold the URN
ElaineSmsFieldName	N		The name of the field in Elaine® that will hold the mobile number
ElaineCommunicationFieldName	N		The name of the field in Elaine® that will hold the communication key
MaxImportWaitTime	N	300 (5 minutes)	The maximum time to wait for a list to be imported in seconds
Encoding	N	UTF8	Enter the encoding of the incoming file
EscapeQuotes	N	False	Set this to true to escape quote characters
MailingListRetentionPeriod	N	0	The number of days to keep the uploaded mailing list
AppendEmailToURN	N	False	Setting this to true will generate the urn field as urn email
MessagePreviewGroupName	N		Defines the name of a group on Elaine® to use for previewing content when the target group cannot be found

Appendix C: Example Batch File

Example batch file to use with FERG and scheduling

```
@echo off

REM *****
REM File Name: Elaine BatchFile.bat
REM Date: 30/01/2018
REM ToDo:
REM Define the drive and folders to output the log files
REM Set FERG to define the location of the EmailResponseGatherer64.exe
REM Set LOGFILE to the folder where the event logs are stored
REM Set LOGFILEDETAILS to the folder where detail logs are stored
REM Define the XML configuration file to use
REM *****

C:
cd c:\FastStats\FERG
cls
SET FERG="%ProgramFiles%\Apteco\FastStats Email Response Gatherer x64\EmailResponseGatherer64.exe"
SET LOGFILE="Logs\Elaine.txt"
SET LOGFILEDETAILS="Logs\Elaine_Details.txt"
echo. >> %LOGFILE%
echo. >> %LOGFILEDETAILS%
echo %date% %time% - Starting FastStats Elaine Response Download >> %LOGFILE%
echo %date% %time% - Starting FastStats Elaine Response Download >> %LOGFILEDETAILS%
echo. >> %LOGFILE%
>> %LOGFILEDETAILS%
echo.

%FERG% Elaine.xml >> %LOGFILEDETAILS%

IF ERRORLEVEL 9003 goto FailedException
IF ERRORLEVEL 9002 goto FailedLogout
IF ERRORLEVEL 9001 goto FailedDownload
IF ERRORLEVEL 9000 goto FailedLogin
```

:OK

```
echo %date% %time% - FastStats Gathered Elaine Responses OK >> %LOGFILE%
```

```
goto Complete
```

```
:FailedLogin
```

```
echo %date% %time% - FastStats Gatherer Failed - Login Failed to Elaine >> %LOGFILE%
```

```
goto Complete
```

```
:FailedDownload
```

```
echo %date% %time% - FastStats Gatherer Failed - Downloading from Elaine >> %LOGFILE%
```

```
goto Complete
```

```
:FailedLogout
```

```
echo %date% %time% - FastStats Gatherer Failed - Logging out of Elaine >> %LOGFILE%
```

```
goto Complete
```

```
:FailedException
```

```
echo %date% %time% - FastStats Gatherer Failed - Elaine API Exception >> %LOGFILE%
```

```
goto Complete
```

```
:Complete
```

```
echo %date% %time% - Completed FastStats Elaine Response Download >> %LOGFILE%
```

```
End of example text
```

To see how to use the batch file see section 3.4 [Scheduling the Response Gatherer](#)

Appendix D:API Methods and Calls

The following describes the methods and calls used during an exchange from FastStats to the Elaine® API

First, we get the Groups, and get the data fields for the Groups

```
/api_getGroups
```

```
/api_getDataFields?p1=group
```

Get the current Import Status of the group, loop until we receive the status for the group that we are importing.

Loop

```
/api_getImportStatus?p1=filename
```

Until success

Then to broadcast a message to the imported group

```
/api_getMailingsByStatus?p1=status
```

```
/api_getDetails?p1=Mailing&p2=mailingId
```

```
/api_getGroups
```

```
/api_mailingCopy?p1=mailingId&p2=name&p3=&p4=folder
```

```
/api_mailingAddressToGroup?p1=mailingId&p2=groupId&p3=type&p4=campaignId
```

```
/api_mailingRelease?p1=mailingId&p2=dateandtime&p3=cycle
```

Appendix E: Troubleshooting

The following are some common problems that may occur, and procedures for resolving them.

Errors relating to configuring and using FERG

These errors can occur due to missing files

Description: Error received when running FERG using a batch file

Error: Could not read email response configuration file: Could not find file 'D:\FastStats\FERG\Elaine.xml'.

Elaine.xml refers to the filename referenced in this section of the batch file:

```
%FERG% Elaine.xml >> %LOGFILEDETAILS%
```

In the location:

```
"cd D:\FastStats\FERG" in the batch file
```

Solution: Ensure the file exists or change the filename in the batch file to match.

Errors relating to running a campaign

These errors can occur due to

For customer service and technical support visit:

www.apteco.com/support

T: +44 (0)1926 407 595 (Support Desk)

Note: If you have purchased the Apteco Marketing Suite™ via one of our partners then they are your first line of support.

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