



SIEBEL EMAIL MARKETING STAND-ALONE ADMINISTRATION GUIDE

*VERSION 7.5.3, REVISION A
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Introduction

This guide provides information about configuring and maintaining Siebel Email Marketing Stand-Alone (EMSA) and improved database support. For information about system requirements, see *System Requirements and Supported Platforms*.

NOTE: This document may contain references to BoldFish. Products formerly labeled as BoldFish are now known as Siebel Email Marketing Stand-Alone.

Although job titles and duties at your company may differ from those listed in the following table, the audience for this guide consists primarily of employees in these categories:

Siebel Application Administrators	Administrators who plan, set up, and maintain Siebel applications.
Siebel Application Developers	Developers who plan, implement, and configure Siebel applications, possibly adding new functionality.
Siebel System Administrators	Administrators responsible for the whole system, including installing, maintaining, and upgrading Siebel applications.

How This Guide Is Organized

This guide includes sections that provide the following:

- [“Performance Characteristics of Siebel Email Marketing Stand-Alone” on page 11](#) explains Server administration and the optimization of its operation.
- [“User Management” on page 15](#) explains the functionality that is available according to the user *type*. This chapter discusses each user type and the different levels of functionality that is available.
- [“Database Management” on page 19](#) explains how to add or remove a database, edit the properties of a database, configure a database to identify a subscriber’s email format, and configure a database for the personalization of email postings.
- [“List Management” on page 25](#) explains the difference between internal and external lists, how to create and configure a new internal list, how to add subscribers to an internal list, and how to set up procedures for bounce handling. Additionally, this chapter explains the functionality available to the designated List Owner, and details each level of functionality accessed using the List Owner screen. Finally, this chapter covers the Default List, a special list from which all subsequent lists will inherit default settings.
- [“Configuring Server Options” on page 77](#) explains how you can configure the Siebel Server, Email Server, and license options. Additionally, this chapter provides a tutorial of a typical system set up.
- [“The purgeDB Utility” on page 67](#) explains how to use purgeDb to maintain the advanced reporting database.
- [“Log Files” on page 97](#) explains how, if you encounter any problems while using Siebel EMSA, you can review the contents of the log files.
- [“Troubleshooting” on page 99](#) lists some of the most frequently asked questions regarding Siebel EMSA.

Additional Documentation

This guide does not contain information about upgrading Siebel Email Marketing Stand-Alone. That information is in the *Siebel Email Marketing Stand-Alone Installation Guide* on SupportWeb.

Revision History

Siebel Email Marketing Stand-Alone Administration Guide

Version 7.5.3, Rev. A

Table 1. Changes Made in Version 7.5.3, Rev. A

Topic	Revision
“Advanced Reporting Module Considerations” on page 12	Added heap size procedure.
“Basic Setup, A Tutorial” on page 93	Updated the license section.
“Log Files” on page 97	Updated smtp.log section.
Preface	Deleted this chapter. For general information about Siebel Email Marketing Stand-Alone, see <i>Siebel Email Marketing Stand-Alone User Guide</i> .
Glossary	Deleted this chapter.
Upgrading	Deleted this section. For information about the process of upgrading Siebel Email Marketing Stand-Alone, see <i>Siebel Email Marketing Stand-Alone Installation Guide</i> on SupportWeb.

Additional Changes

- Changed the template and format for the entire book.
- Deleted references to POP3 and Pipemail as they are no longer supported.

Performance Characteristics of Siebel Email Marketing Stand-Alone

1

This chapter deals with server administration and the optimization of its operation.

This chapter covers the following topics:

- [“Advanced Reporting Module Considerations” on page 12](#)
- [“SMTP Queue Considerations” on page 13](#)

Advanced Reporting Module Considerations

Advanced Reporting Module (ARM) greatly affects the performance of the server in a number of ways; it requires that during a mailing, detail information is written into the ARM database tables, especially `bf_mailing_detail`. In particular, one row is inserted per individual recipient. The information is actually stored first into a memory buffer (the size of which is controlled by the new configuration option `LWD.bf_mailing_detail.queueSize`), and then written to the ARM database, either when the buffer fills up, or every 60 seconds, whichever comes first. A double-buffer mechanism is used, so that Siebel EMSA is kept writing into a new memory buffer while the first one is being flushed, and each flush job runs under its own thread.

The overhead of pushing items onto these memory buffers was measured to inflict a performance drop of about 1%. The rest is pure I/O, and naturally, the flusher threads will compete for some CPU time with the SMTP delivery engine. Database response is critical to the speed of mail delivery as a whole, in that, if the second buffer fills up faster than the first one gets flushed, the mailing will halt until the first buffer is entirely flushed. It is important that this option is tuned so that database flushes take less than 60 seconds.

Memory management is of great concern in Siebel Email Marketing Stand-Alone (EMSA). For each mailing, up to two in-memory buffers will be used, each of which will be `LWD.bf_mailing_detail.queueSize` in size—the product is shipped with a default value of 50,000 (items) for this configuration option. Obviously, if more concurrent mailings are anticipated, then either the value should be set low, or Siebel EMSA should be started with a higher heap size (default 256 MB -mx256 MB).

To change the heap size in UNIX

- Edit the file `boldfish.sh` and change the following line by increasing the `-mx` switch to a value less than the total amount of physical memory.

```
JAVA_SWITCHES=${BES_JVM_SWITCHES:- "-mx256m -ss1m" }
```

For example, if the host has 512 MB of memory, the following is reasonable:

```
JAVA_SWITCHES=${BES_JVM_SWITCHES:- "-mx448m -ss1m" }
```

To change the heap size in a Windows environment

- 1** Edit the file `install-win32-service.bat` and change the following line by increasing the `-mx` switch to a value less than the total amount of physical memory.

```
set JVM_MEM_SWITCHES=-Xms256m -Xmx256m
```

For example, if the host has 512 MB of memory, the following is reasonable:

```
set JVM_MEM_SWITCHES=-Xms448m -Xmx448m
```

- 2** Next, complete the following steps, to have the change in Windows take effect:
 - a** Stop the SEM service.
 - b** Open up a DOS prompt and change directories to the Siebel EMSA home directory.
 - c** Run the following command - `install-win32-service -uninstall`
 - d** Then run the following command - `install-win32-service`
 - e** Start the SEM service.

SMTP Queue Considerations

Siebel Email Marketing Stand-Alone (EMSA) can also control the number of queued SMTP items in memory. These options are set in the `global_config` file.

One of the options that is provided is the following: `LWD.SMTP.residentQueueSize` (with an initial internal value of 2,000 items). This option controls the maximum SMTP queue size shared by all SMTP threads, and is internally divided equally amongst all SMTP threads, so that each thread has its own dedicated queue. Producer threads *spray* new items across all queues in a round-robin fashion, with provision not to exceed a particular queue's maximum size (in that case, Siebel EMSA *overflows* into the next nonfull queue). There is no provision, at this point, to *steal* from another thread's queue, if one's own is empty.

NOTE: There are three configuration options provided. The other configuration options determine the algorithm by which the queues will grow (optimistic, linear, conservative), and what happens to the optimized queue sizes after a mailing is done (retain, reset).

In real-life situations, where receiving SMTP Servers exhibit a high degree of latency, the SMTP queues will have no need to grow, or more accurately, be optimized. In addition, the producers will be doing less work, and therefore the Advanced Reporting Module database flusher threads will be able to complete their tasks very fast, and memory use should not be an issue. In the rare cases that it is, it is recommended that the startup heap size be increased from 256 MB to 512 MB and beyond or `LWD.SMTP.residentQueueSize` be reduced.

Siebel Email Marketing Stand-Alone functionality is available according to the user *type*. Users are assigned a type according to the function they serve.

Siebel Email Marketing Stand-Alone user types are as follows:

- [“Site Manager” on page 16](#)
- [“List Owner” on page 17](#)
- [“Subscription Manager” on page 18](#)
- [“Error Handler” on page 18](#)
- [“Author” on page 18](#)
- [“Moderator” on page 18](#)
- [“Report Viewer” on page 18](#)

Site Manager

The Site Manager is the *super user* of Siebel Email Marketing Stand-Alone (EMSA), with access to functionality assigned to other user categories (List Owner, Subscription Manager, Error Handler, Report Viewer, and List Author). In addition, the Site Manager configures, regulates, and maintains Siebel EMSA, controlling the following settings:

- **The Default List Definition.** The default list includes settings that can be inherited by all newly created lists; it is the basic template for list creation. It can be used to set upper limits, a global policy on content and other options. For more information about the Default Lists, see [“The Default List” on page 64](#).
- **Siebel Email Marketing Stand-Alone Files.** The server files define how requests to the server are formatted in email messages. For more information about server files, see [“Background Information—Email Setup” on page 96](#).
- **Siebel Email Marketing Stand-Alone Options.** Server options affect the running of both the Web server and the Email Server. The Site Manager can define your organization’s name, SMTP Server, database configuration, and other global configuration options. For more information about server options, see [“General Configuration” on page 78](#).
- **Email Server Options.** The Site Manager can configure how requests are processed that are sent to the machine on which Siebel EMSA is installed. For more information about Email Server options, see [“General Email Server Setup” on page 87](#).
- **Email Server Regular Expressions.** The Site Manager can configure the Regular Expressions that will be used by the Email Server. For more information about Email Server regular expressions, see the [“The Posting Screen” on page 33](#).
- **Global Regular Expressions Definition.** The Site Manager can configure the Regular Expression that lists and the servers in which Siebel Email Marketing Stand-Alone can extend. For more information about global regular expressions, see the [“The Posting Screen” on page 33](#).
- **List Creation and Removal.** The Site Manager is the only user allowed to create and remove lists. For more information about creating and removing lists, see [“List Management” on page 25](#).

- **List External Setup.** The Site Manager can see what is required to setup externally in order to get a list up and running (such as sendmail aliases). For more information about external list setups, see [“List Management” on page 25](#).
- **Site Managers.** The Site Manager can add and remove additional Site Managers from the system. The Site Manager assumes the functional responsibility of any unassigned user types. The Site Manager can view and update system licenses. For more information about licensing, see *Siebel Email Marketing Stand-Alone Installation Guide* on SupportWeb.

Adding Additional Site Managers

Siebel Email Marketing Stand-Alone can have more than one Site Manager. The following section explains how to add another Site Manager.

Make sure to only enter one email address per line.

To add a site manager

- 1** Click Site Manager > Site Managers.
- 2** From the Update Site Managers screen, add the email address of the new Site Manager.
- 3** Click Submit.

List Owner

The List Owner configures, maintains, and controls a given list. Additionally, the List Owner has access to functionality assigned to the Subscription Manager, Error Handler, and Author. Accordingly, the List Owner assumes the responsibility of those user types if they are not already assigned.

Subscription Manager

The Subscription Manager adds subscribers to or removes subscribers from a given list. The Subscription Manager also assigns appropriate attributes, such as the default language and mail mode, of subscribers. If a Subscription Manager is not assigned, the List Owner assumes this responsibility.

The Subscription Manager is only able to subscribe users to an internal list.

Error Handler

The Error Handler analyzes error messages (either bounced email or error messages generated by Siebel Email Marketing Stand-Alone), and removes users whose email addresses have bounced too often. If an Error Handler is not assigned, the List Owner assumes this responsibility.

Author

The Author composes and posts messages to a given list for distribution. If an Author is not assigned, the List Owner assumes this responsibility.

Moderator

The Moderator is responsible for approving postings to a list.

Report Viewer

Report viewers have access to the Mailing Delivery Status and Reporting Statistics for mailings sent to the list, but cannot create, alter, or stop a mailing. In other words, they are *read-only* users who can see mailing statistics, but cannot send mailings on their own.

The Database Setup screen allows you to add and remove databases. In addition, you can edit the database properties, as well as configure the database.

Due to the technical nature of database connections, the database administrator (DBA) should control the functionality described in this chapter.

If you are unable to access this functionality, it is probably because your external source database has not been configured.

This chapter covers the following topics:

- [“The Database Setup Screen” on page 20](#)
- [“Add a Database” on page 20](#)
- [“Edit Database Properties” on page 22](#)
- [“Remove a Database” on page 23](#)

The Database Setup Screen

From the Database Setup screen, you can:

- Add or remove a database.
- Edit the properties of a database.
- Configure a database to identify a subscriber's email format.
- Configure a database for the personalization of email postings.

The following sections describe the database functionality.

The database connectivity can be accessed from the Database Setup screen.

To access the Database Setup screen

- Click DB Connections to navigate to the Database Setup screen.

Add a Database

You can add a database at the Database Setup screen.

To add a database

- 1** Click Create New DB.

The Database Setup screen displays a new section that allows you to identify the attributes of the new database.

- 2** Identify a JDBC driver from the JDBC Template field.

The URL and Driver fields will be populated with values provided by the JDBC driver.

- The *URL* is required to execute the queries that define how to obtain a list of email addresses for use in a mailing.
- The *Driver* is the address of the JDBC driver to be used for accessing a target database where Siebel Email Marketing Stand-Alone-defined tables exist.

- 3** Name the database in the DB Connection Name field.

- 4 Modify the <hostname> and <port> connection settings in the URL field so that they are appropriate for the new database and any < > delimited strings.

CAUTION: Do not modify the JDBC driver-supplied values in the Driver field unless you are absolutely sure that it is necessary to do so.

- 5 Provide a *user name* and *password* for the new database in the respective User Name and Password fields.
 - The *user name* is the user in a target database that has privileges to read and write to the tables. Often, this is the user that was used to create the tables.
 - The *password* is the password for the user that connects to the target database to maintain Siebel Email Marketing Stand-Alone-defined tables.
- 6 Specify a mail mode.

For more information about mail modes, see [“Mail Modes” on page 21](#).

- 7 Click Test DB Connection.

Siebel Email Marketing Stand-Alone will test the new connection, and will display the result (either a message that the connection is valid by displaying the version of the database, or an *error* message) at the top of the Database Setup screen.

- 8 Click Update.

The attributes section of the Database Setup screen will disappear, and an icon representing the newly-created database connection is displayed at the top of the Database Setup screen.

Mail Modes

Specify the method in which your recipients will receive email.

To set up your database if it is set up with user-associated mail mode values

- 1 Click Enable Mail Mode.

NOTE: If you do not know whether or not your database is set up so that mail mode values are associated with users, ask your DBA.

The Mail Modes dialog box appears.

- 2 Choose the mail modes that are associated with your users, and provide the appropriate identifying value in the respective field.

Make sure that the value you assign to a given mail mode is the same value as defined in the target database.

- 3 Click OK when finished.

If you specify the method in which your recipients will receive email by means of this method, you will have to use the mail mode variable & mode when defining a query.

To set up your database if it is not set up with user-associated mail mode values

- 1 Click Specify Default.

The Mail Modes dialog box appears.

- 2 From here you can choose a default mail mode for everyone.
- 3 Click OK when finished.

Edit Database Properties

You can edit database properties at the Database Setup screen.

To edit database properties

- 1 From the Database Setup screen, click the icon of the database you want to edit.
- 2 The attributes section for the database you want to edit appears.

- 3 From here you can modify the attributes, settings, and values of the selected database.

- 4 When finished, click Update.

The attributes section of the Database Setup screen disappears.

Remove a Database

You can remove a database at the Database Setup screen.

To remove a database

- 1 From the Database Setup screen, click the icon of the database you want to remove.
- 2 Click Delete.

The selected database is deleted.

Most of the mailings you send will be to a list of recipients that you have specifically designated, or to a list of recipients that resulted from a predefined query.

This chapter explains the difference between internal and external lists, how to create and configure a new internal list, how to add subscribers to a list, and how to set up procedures for bounce handling. Additionally, this chapter covers the Default List, a special list from which all subsequent lists inherit default settings.

NOTE: If you are unable to access this functionality, it is probably because your external database has not been configured.

This chapter covers the following topics:

- [“Internal verses External Lists” on page 26](#)
- [“Create a List” on page 27](#)
- [“Configure a List” on page 29](#)
- [“Bounce Handling” on page 54](#)
- [“Additional Information” on page 62](#)
- [“The Default List” on page 64](#)

Internal versus External Lists

For the purposes of this discussion, there are two types of lists: *internal* and *external*.

- An *internal* list is a self-contained object in Siebel Email Marketing Stand-Alone (EMSA). Subscriber information is stored and maintained with the Siebel EMSA instance; therefore the name *internal*. This functionality is used only by users who do not have a preexisting external database containing email addresses, template commands, and template variable data. Mail merging and bounce handling options are more limited with internal lists.
- An *external* list is an object that retrieves email addresses, template variable data, header information, user permissions, and so on, from a database external to Siebel EMSA or through a predefined SQL select statement created through the Siebel EMSA user interface. When using an external database, any data that exists in the database may be used for personalization through template variables. Also, because stored procedures are called when bounces occur, users have the full functionality of the local database 3GL (that is to say, *3rd-generation language*, or any higher structured language that uses ifs, thens, and elses) to take appropriate action.

Internal and external lists are created in the same way, through clicking Site Manager, and then the List Creation hyperlink. The difference comes when you associate the list with the internal database or an external database. Of course, in order to associate a list with an external database, it must have been previously defined and connected to Siebel EMSA.

Siebel EMSA records bounces and unsubscribe information with the use of stored procedures that are edited according to your schema. For more information about stored procedures, see [“Stored Procedures” on page 95](#).

Create a List

You can create an internal or external list. The differences in creating an internal versus an external list are noted where appropriate.

CAUTION: All newly created lists inherit default values from a special list, called the Default List. Although you are free to configure a list as you see fit during creation, it is important to realize that, due to the possibility of *multitenancy* (more than one enterprise using the same Siebel EMSA list) the Default List might be reconfigured without your knowledge. Therefore, it is in your best interest not to rely on the values contained in the Default List, as those values could possibly change without your knowledge. If you have any questions regarding multitenancy, contact Technical Support on SupportWeb.

For more information regarding the Default List, see [“The Default List” on page 64](#).

To create a list

- 1 From the Site Manager screen, click the List Creation hyperlink.

The Create a List screen appears.

- 2 Complete the Minimum List Creation Information form as desired:

- **List Name.** Specify a distinctive and readily-identifiable name for the list.

CAUTION: Keep in mind that the owner-specified name for a given list may be viewable to recipients, depending on the mail client or browser.

- **List Email.** Specify an email address for the list.

CAUTION: Make sure you include the name of the machine that Siebel Email Marketing Stand-Alone is installed on so that bounces and responses are handled properly.

NOTE: The List Email should be made up of the List Name and the fully-qualified hostname.

- **List Owner.** Specify the email address of the Owner of the list. The Owner will be able to administer the list and delegate responsibilities for various features of the list.
- **List Template.** Siebel Email Marketing Stand-Alone uses the specified list as a template in creating new lists in the system. The template feature can be used as a shortcut in creating large amounts of lists with the same characteristics. However, several list options are not copied over from the template list to the new list. These include the From: and Reply-To: headers and the default subscriber options.
- **Use Subscribers From.** Siebel Email Marketing will copy the specified list's subscribers so that they become subscribers of the new list when it is created.

NOTE: This will only work with internal lists.

- **Database.** You must associate a list with a database.

For an internal list, select Internal Database. For an external list, select a database from the list of external databases that were previously configured. For more information about configuring external databases, see [“Database Management” on page 19](#).

NOTE: If this is an external database, you can now add queries to retrieve subscribers to this list and database combination. For more information about adding queries to external databases, see the section on setting up a query in *Siebel Email Marketing Stand-Alone User Guide*.

- 3 Click Submit.

Siebel Email Marketing appears displaying a message that the list was successfully created.

- 4 Click the *configure the list* hyperlink to configure the new list.

Additionally, the new list owner receives an email message confirming the creation of the new list.

Configure a List

Whether you have created an internal or external list, you can configure it from this screen. The differences in configuring an internal versus an external list are noted where appropriate. After you have created a new list, click the configure the list hyperlink to configure it. The Configuring List screen appears. From this screen you can configure the new internal list.

The General Configuration Screen

The General Configuration screen allows you to specify many of the most common options that dictate how the list will behave.

Perhaps the most important options is which Web server the list will be associated with.

General Configurations

You can specify a value for the following settings:

- **List Email Address.** This is the email address that the list will be known as. The other aliases for the list will be based on this email address.

NOTE: This field cannot be edited, but is displayed for your reference. Verify that the machine name is included in the List Email Address to facilitate bounce handling.

- **Requests for This List are.** List Owners or Site Managers can lock a list so that subscribers cannot access the list through email requests. If locked by the Site Managers, the list owners and all other list administrators cannot access their list. This is usually done during maintenance periods.
- **Mail Processing.** Mail distribution for a list can be suspended by List Owners or Site Managers. In that case, for each message that is not distributed, the author is notified and the list administrators are copied.
- **List Visibility.** A list should be made public only if the intention is to make it publicly available. In that case, its name and address shows up on all listings of the server's public lists, and everyone on the public list will know of its existence. If a list is made private, only its members and Site Managers see it.
- **Confirmation Levels.** A list can be configured so that subscriptions or unsubscriptions using email require a confirmation to be sent to the user.

There are basically three confirmation levels for subscription and unsubscription.

- **Messages off.** If selected, no notification of any kind will be sent to the subscribed or unsubscribed recipient.
- **Send welcome and goodbye messages.** If selected, a subscribed user will receive a welcome message. For the unsubscribed user, they will receive a goodbye message.
- **Require confirmation.** If selected, a subscription or unsubscription request will always require a confirmation by the recipient.

In addition, you can choose to have all postings be authenticated by requiring confirmation. In that case, each posting has to have a special header line in the body:

Confirm: password

where password is the author's password.

The actual email message should follow this line; it will be removed before the email is distributed. The benefits of confirmed posting are numerous: no fake posts, the same message body can be posted again, and so on.

- **Confirmation Cookie Timeout.** List-specific cookie timeout for list-specific user email requests. Siebel Email Marketing Stand-Alone occasionally uses cookies to authenticate certain transactions. The authentication cookie is sent by email to the user and stored in the database. When the user responds, the cookie is removed. However, if the user never replies, the cookie will never be removed. To prevent this situation, setting a cookie time out lets Siebel Email Marketing Stand-Alone clean up the cookies after some time.
- **Processing Priority.** Siebel Email Marketing contains a scheduler that alters the priority of various tasks running through the system. For most lists, the priority should be left to 0. However, if you find that a list is taking up too much processing time, you can alter its priority to be relatively lower than other lists. For other time-critical lists, you can set the priority to be higher. Valid values range from -25 to 25.
- **Daily Limit for Regular Mail.** How many emails would you like your list to process before mail processing is suspended? After mail distribution for this list has been suspended, Siebel Email Marketing Stand-Alone will not process any more emails for that list until the end of the day, or until manually reset by the list owners. An empty entry disables this feature.
- **Message Recipient Limit.** How many recipients would you like to be included in each email message this list is forwarding? The recommended value for Siebel Email Marketing Stand-Alone is 100. You must specify a value larger than 0.

The number of recipients actually used will be the minimum between the list-specific value and a global value that can be adjusted only by a Site Manager. If you specify a value of 1, the system will not only serialize the posting (one email per subscriber), but will also add special headers to make it easier to identify users who want to later unsubscribe from the list by choosing to reply to a post.

On template variable operations (as in personalized email) the system ignores this setting and sends one email per subscriber.

- **Web Server.** You can associate a list with a Web server. Select a Web server from the list of available Web servers.
- **Database.** This field was specified when you created the list. For example, if you created an internal list, the value of the Database field would be Internal Database. However, if you created an external database, the value of the Database field would be one of the available external databases.

The Archives Screen

The Archives screen lets you configure all aspects of saved archives.

NOTE: The archives are archives of messages sent to the list and are stored on disk and indexed in the database.

If you intend for your archives to be viewed from the Web server, then you must either store Text or HTML archives. It is recommend that you store HTML archives, as these will always have the best quality.

NOTE: The digest archives are not used for displaying archives on the Web.

If you do not have archives turned *on*, the list will not appear on the main view screen, because no archives are viewable. If you have archives and then turn them *off*, then old archives will not be viewable until you turn them back *on*.

You can specify a value for the following settings:

- **Archive Messages.** Use this option to specify if messages are to be archived or if the messages are not within Siebel Email Marketing Stand-Alone. You can specify if either Text, HTML or both formats are to be archived. If no formats are archived, then the archives will not be viewable through the Web site.
- **Send Messages to External Service.** Whether Text or HTML posts are archived within Siebel Email Marketing Stand-Alone, you can also send each post to the subscriber audience to a Java class for external archiving. The String arguments passed to the class's `main()` are the list name, whether this is the Text or HTML version of the post, the headers, and finally, the body. This class may be called twice (once for text, and again for HTML, depending on the configuration). The messages sent to the class may have been massaged by Siebel Email Marketing Stand-Alone and they have exactly the same content if they appear on Siebel Email Marketing's archives. For more information, see the Who Gets Posted Messages section in the [“The Posting Screen” on page 33](#) topic.

- **Archive Digests.** You can archive digests within Siebel Email Marketing Stand-Alone and these digests will not affect the archives viewed through the Web interface. The digests are stored in an archive file. Each digest that is sent out will be appended into the digest archive in.mbox file.
- **Archive Filename Format.** The archive filename specifies the filename used to write the archives. This indirectly defines how often new files are created. You can use the following % characters; these will be replaced in the file being written out.
 - %c = current message count
 - %m = month number (01 - 12)
 - %M = month name (Jan - Dec)
 - %d = day of month (01 - 31)
 - %D = day of year (Julian date) (001 - 366)
 - %E = day of week (Sun - Sat)
 - %w = week number in year (1 - 52)
 - %W = week number in month (1 - 5)
 - %Y = 2-digit year (00 - 99)
 - %Y = 4-digit year (1900 - on)
- **Archive Timeout Interval.** Archives can expire. After an archive has existed for this period of time, it will be removed from the system.
- **Archive File Access.** You can specify who can view archives with this option.

The Posting Screen

The Posting screen allows you to configure many of the rules about posting to a list.

Many of the options on this screen are regular expressions, which will either filter out or modify email. These regular expressions can either be in addition to the globally-defined regular expressions, or be used as the only regular expressions for their purpose.

You can specify a value for the following settings:

- **Who Gets Posted Messages.** Siebel Email Marketing Stand-Alone can direct incoming email to the *subscribers*, the *Owners* or an *External Service*, depending on this value.

To set up the external service, you can specify the name of a Java class to load and send the post to for external processing in the following cases:

- The email originated from an author or list owner and is about to be distributed to the list.
- The email originated by someone else and is about to be forwarded to the owners.

The String arguments passed to the class's `main()` are described in [Table 2](#).

Table 2. String Arguments

Arg1	Arg2	Arg3	Arg4	Comment
SUBSCRIBERS	Listname	Headers	Body	Mail about to be sent to the list subscribers
OWNERS	Listname	Headers	Body	Mail about to be sent to the owners

The message is sent to the class as is; that is, as received by Siebel Email Marketing Stand-Alone. See the Send Message to External Service section in the [“The Archives Screen” on page 32](#) topic for differences.

- **Where to Get Recipient Lists.** Siebel Email Marketing Stand-Alone allows you to provide it with the list of recipients for each post, if you do not want to use the internal storage and retrieval mechanisms.

You can specify the name of a Java class to load and where to get the list of recipients from.

The String arguments passed to that class's `main()` may differ between operations.

Currently, the only possible operation is `GET` (the list of recipients). [Table 3](#) lists all possibilities.

Table 3. GET Operations

Arg1	Arg2	Arg3	Arg4	Arg5	Arg6	Comments
GET	Listname	Column Names & Types	Separator	Mail Mode	Filename	<p>Get the list of recipients and store it in Filename, one line per user.</p> <p>Information about a user is separated with Separator.</p> <p>The comma-separated fields required are given as Column Names.</p> <p>The email address is always required.</p> <p>Other columns may be required, depending on mail merging.</p> <p>For example:</p> <p>email:string,firstname:string</p> <p>For a list of possible mail modes, see the online help.</p> <p>For example:</p> <p>john@doe.com John Doe</p> <p>joe@schmoe.com Joe</p>

NOTE: Your external service must implement the [“External Service Interface”](#) on [page 60](#).

- **Maximum Message Size.** Siebel Email Marketing Stand-Alone can reject any incoming email if its size is larger than the specified value.

NOTE: An empty entry disables this feature. (This is the default.)

A sensible number (in bytes) would be 1,000,000, but it really depends on the speed of your network connection.

- **Mailer Daemon.** This is a list-specific version of the Global Mailer Daemon Regular Expression.

For more information, see [“Global Mailer Daemon Regular Expression” on page 39](#).

It may, at your option, override the Global Definition of a Regular Expression.

For more information, see [“Extend the Global Definition of a Regular Expression” on page 39](#).

- **Sensed Requests.** This is a list-specific version of the Global Sensed Requests Regular Expression.

For more information, see [“Global Sensed Requests Regular Expression” on page 39](#).

It may, at your option, override the Global Definition of a Regular Expression.

For more information, see [“Extend the Global Definition of a Regular Expression” on page 39](#).

- **Suspicious Subjects.** This is a list-specific version of the Global Suspicious Subjects Regular Expression.

For more information, see [“Global Suspicious Subjects Regular Expression” on page 40](#).

It may, at your option, override the Global Definition of a Regular Expression.

For more information, see [“Extend the Global Definition of a Regular Expression” on page 39](#).

- **Suspicious Headers.** This is a list-specific version of the Global Suspicious Headers Regular Expression.

For more information, see [“Global Suspicious Headers Regular Expression” on page 40](#).

It may, at your option, override the Global Definition of a Regular Expression.

For more information, see [“Extend the Global Definition of a Regular Expression” on page 39](#).

- **Suspicious Bodies.** This is a list-specific version of the Global Suspicious Bodies Regular Expression.

For more information, see [“Global Suspicious Headers Regular Expression” on page 40.](#)

It may, at your option, override the Global Definition of a Regular Expression.

For more information, see [“Extend the Global Definition of a Regular Expression” on page 39.](#)

- **Preserved Headers.** This is a list-specific version of the Global Preserved Headers Regular Expression.

For more information, see [“Global Suspicious Headers Regular Expression” on page 40.](#)

It may, at your option, override the Global Definition of a Regular Expression.

For more information, see [“Extend the Global Definition of a Regular Expression” on page 39.](#)

- **Discarded Headers.** This is a list-specific version of the Global Discarded Headers Regular Expression.

For more information, see [“Global Suspicious Headers Regular Expression” on page 40.](#)

It may, at your option, override the Global Definition of a Regular Expression.

For more information, see [“Extend the Global Definition of a Regular Expression” on page 39.](#)

- **Visibility.** This is a list-specific version of the Global Visibility Regular Expression.

For more information, see [“Global Suspicious Headers Regular Expression” on page 40.](#)

It may, at your option, override the Global Definition of a Regular Expression.

For more information, see [“Extend the Global Definition of a Regular Expression” on page 39.](#)

- **Aliases.** This is a list-specific version of the Global Aliases Regular Expression. For more information, see [“Global Suspicious Headers Regular Expression” on page 40](#).

It may, at your option, override the Global Definition of a Regular Expression.

For more information, see [“Extend the Global Definition of a Regular Expression” on page 39](#).
- **Email Author Firewall.** This is a list-specific version of the Global Firewall Regular Expression. For more information, see [“Global Suspicious Headers Regular Expression” on page 40](#).

It may, at your option, override the Global Definition of a Regular Expression.

For more information, see [“Extend the Global Definition of a Regular Expression” on page 39](#).

Global Mailer Daemon Regular Expression

This regular expression will be used to try and determine if an email address is from a Mailer Daemon. Usually, if an email comes from one of these addresses, it is handled by the Error Handling section of Siebel Email Marketing Stand-Alone.

Extend the Global Definition of a Regular Expression

You can turn this option on or off. If it is turned on, the regular expression displayed will be used in addition to the corresponding Global Regular Expression, defined under the Global Regular Expressions section of the Site Manager screen.

Global Sensed Requests Regular Expression

This is a regular expression of things to look for in regular lists or email, which will be interpreted as requests that should have been sent to the list's request email address, rather than to the list. These are typically subscribe and unsubscribe requests.

Global Suspicious Subjects Regular Expression

If an email is received with a subject line that matches this regular expression, then that message will bounce.

Global Suspicious Headers Regular Expression

If an email is received with a header line that matches this regular expression, then that message will bounce.

Global Suspicious Bodies Regular Expression

If an email is received with a body (the main text) that matches this regular expression, then that message will bounce.

Global Preserved Headers Regular Expression

Headers which match this regular expression will be left in outgoing email sent to subscribers of a list.

Global Discarded Headers Regular Expression

Headers which match this regular expression will be removed from outgoing email sent to subscribers of a list.

Global Visibility Regular Expression

This regular expression will be used to determine whether a user can view a list.

Global Aliases Regular Expression

This is a not strictly a regular expression. Each line represents a translation from an email address to another email address. You can use regular expression substitution.

A line is separated by a white space; anything to the left is the *source*, and anything to the right is the *destination*.

Email addresses which match the source will be translated into the destination before they are used in the system. This is an easy way to make it so that `user@machine.domain.com` is interpreted as `user@domain.com` because machines may vary from day to day.

Global Firewall Regular Expression

This regular expression forbids users from accessing the system. If any of the addresses specified here match a user's email address, the user and associated email are ignored.

The Errors Screen

The Errors screen lets you configure what happens to errors related to this list.

Errors may be email that has been returned to the system for various reasons, or errors caused by users trying to use the system in an erroneous way.

Bounces are classified in two ways:

- **Hard Bounces.** These are bounces that have been returned because there has been a permanent error. For example, *user does not exist*.
- **Soft Bounces.** These are usually caused by temporary errors. For example, *cannot connect to host*.

Siebel EMSA records bounces and unsubscribe information with the use of stored procedures that are edited according to your schema. For more information about stored procedures, see [“Stored Procedures” on page 95](#).

Enable stored procedures in the target database to enable bounce handling. For more information regarding errors, see [“Bounce Handling” on page 54](#).

The Subscriptions Screen

This screen allows you to specify the options for subscribers. Click Subs to navigate to the Subscription screen.

NOTE: This page is only to be used in conjunction with an internal list.

You can specify a value for the following settings:

- **List Subscriptions Are.** This option specifies how list subscriptions are handled. The available settings are:

- **Closed.** The list does not accept subscription requests unless issued by a Subscription Manager.
- **Open.** The list accepts all subscription requests without moderation.
- **Moderated.** Subscription requests have to be approved by a Subscription Manager.
- **List Unsubscriptions Are.** This option specifies how list unsubscriptions are handled. The available settings are:
 - **Closed.** The list does not accept unsubscription requests unless issued by a Subscription Manager.
 - **Open.** The list accepts all unsubscription requests without moderation.
 - **Moderated.** Unsubscription requests have to be approved by a Subscription Manager.
- **What to Do with Subscriptions Requests.** Siebel Email Marketing Stand-Alone allows you to specify the name of a Java class to load and call whenever subscription changes are being made. That way, you can sync up between two databases.

For more information, see [“External Service Interface” on page 60](#) and [“External Service Callback for Statistics” on page 61](#).

The String arguments passed to that class's `main()` differs between operations.

The possible operations are:

- `ADD` (a new subscriber),
- `DEL` (delete a subscriber), and
- `Other`

[Table 4](#) lists all possibilities.

Table 4. String Arguments

Arg1	Arg2	Arg3	Arg4	Arg5	Comment
ADD	Listname	Email Address	Name	Mail Mode	Add a user to that list.
DEL	Listname	Email Address	< None >	< None >	Delete a user from that list.
OTH	Listname	Email	< None >	< None >	Passing on an email message for that list.

- **New Subscriber Default Options.** You can select the default options assigned to every new subscriber (if they have not already selected their own default options).

- **Preferred language.** Specify the default language for new subscribers.

NOTE: Currently, the only available option is *English*.

- **Preferred mail mode.** Specify the mail mode that new subscriber will get by default. The options shown depend on the configuration of the supporting Web server. The option AUTO DETECT tries to identify whether a user's mail reader supports HTML and will subscribe them in that mode if possible, otherwise the subscriber will receive MAIL/TEXT.

- **Send the Following Number of Previous Mailings to New Subscribers.** You can specify the number of most recent mailings to be sent to a newly-subscribed user.

The People Screen

With this screen you can assign different people to different tasks.

NOTE: List Owners can do everything that the other people on this screen can do.

You can assign certain people to certain permissions, and they will only be able to see the screens that allow them to do their task. For example, Subscription Managers will not be able to see the list configuration screens; they will only be able to view the Subscription Manager screens to add or remove people.

Enter email addresses one per line in the boxes provided.

To navigate to the People screen, click People.

At the People screen, you can specify a value for the following settings:

■ **Owners.** Each list has at least one owner.

List Owners are responsible for the configuration of the options open to them by the Site Manager(s).

Some options, like whether the list is archived or not, may be controlled by the Site Manager.

■ **Subscription Managers.** A list may have none, one, or more than one Subscription Manager.

In lieu of Subscription Managers, the List Owner assumes this responsibility, if subscription management (to either files or discussions) is enabled.

Subscription Managers are responsible for approving who can join or leave the discussion part of the list, and who can subscribe to files.

Subscription Managers are also responsible for helping subscribers with their attributes (for both the discussion part and files).

To specify Subscription Managers, enter their email address(es); one address per line.

■ **Error Handlers.** A list may have none, one, or more than one Error Handler.

In lieu of an Error Handler, the List Owner assumes this responsibility.

Error Handlers are responsible for analyzing error mail (either mail bounces or error messages generated by Siebel Email Marketing Stand-Alone), and have the power to remove users whose email addresses bounce too often.

To specify Error Handlers, enter their email addresses; one address per line.

- **Authors.** Privileged Authors are people who can post to the list.

A list may have none, one, or more than one Privileged Authors.

In lieu of Privileged Authors, the List Owner can assume this responsibility (if posting is restricted to owners and privileged authors).

To specify Privileged Authors, enter their email addresses; one address per line.

- **Moderators.** A list may have none, one, or more than one moderator or reviewer.

Moderators are responsible for approving postings to a list, or reviewing documents and clipboards (perhaps HTML) before they get posted.

Moderators can review postings by Authors, but not if the Author is a List Owner or a Site Manager.

To specify a moderator, enter their email addresses; one address per line.

- **Report Viewers.** A list may optionally have one or more report viewers.

Report viewers have access to the Mailing Delivery Status and Reporting Statistics for mailings sent to the list, but cannot create alter, or stop a mailing. In other words, they are *read-only* users who can see mailing statistics, but cannot send mailings on their own.

To specify a report viewer, enter their email address(es); one address per line.

The Digests Screen

Digests are collections of messages that have been emailed to a list within a certain time frame. Each message that is posted to a list before the *Digest Collect Until Time* is collected together in one big message, and after that time a new digest is started. When it is digest delivery time, the digest that was last collected is sent.

NOTE: It is very common to have the digest collection time and digest delivery time to be very close together.

You can adjust the time delay between digests being created by adjusting the digest interval time. This way it is possible to send digests once a day, twice a day, every hour, or only every week.

People who are subscribed to a mail list with mail mode of DIGEST or MIME_DIGEST will receive the digests. DIGESTs are easy to read with plaintext mail readers, such as *Elm*, *Pine*, *Emacs*, and *Mail*. MIME_DIGESTs consist of a MIME email message with each post to the list being a MIME attachment.

To navigate to the Digests screen, click Digests.

At the Digests screen, you can specify a value for the following settings:

- **Create Digests.** A digest is a collection of messages posted and is sent out as a whole (one large message) at regular intervals. If you want digests to be collected by your list, then you should select Yes and configure the parameters below.
- **Collect Digests Until.** Digests can be collected until a date and time you specify. Specify the date and time to stop collection for a given digest. If you choose to have daily digests sent out, ignore the Day field; and specify a time of day to stop collection for a given digest.
- **Digest Delivery Time.** Specify the date and time each digest is to go out. If you choose to have daily digests sent out, ignore the Day field; and specify a time of day each digest is sent out. This time should be after the stop-collection time, previously specified.
- **Digest Creation Interval.** Specify whether you want the digest to be sent out on a monthly, daily, hourly, or on a per-minute basis. This interval is relative to the stop-collection time, previously specified.

NOTE: Most subscribers who want a digest option usually prefer a time interval of a week or more.

- **Max Size of Digest.** Specify a maximum size for a given digest. Siebel Email Marketing Stand-Alone can send partial digests during a regularly-scheduled interval. If the size of a given digest exceeds the specified maximum size, Siebel Email Marketing Stand-Alone will send a partial digest.

NOTE: An empty entry disables this feature.

The Appearance Screen

The Appearance screen configures how a list will look to people who receive posts to the list through email. It does little to configure how the Web archives appears. You can configure how headers of incoming mail are modified before they are sent out, and if extra headers will be added as well.

To navigate to the Appearance screen, click Appearance.

At the Appearance screen, you can specify a value for the following settings:

- **Description.** Specify a name for this list.

CAUTION: Keep in mind that the owner-specified name for a given list may be viewable to recipients, depending on the mail client or browser.

- **To: Header Line.** The outgoing To: header line can be configured so that:
 - Whatever the author typed in is preserved, or

- The line is internally rewritten to One Line Description < listname@domain > .

If the Message Recipient Limit option is set to 1 and you have selected Internally Rewritten for this option, then the To: line will contain the email address of the recipient.

NOTE: You can change the Message Recipient Limit option from the List Owner, General screen. For more information about the Message Recipient Limit option, see [“Message Recipient Limit. How many recipients would you like to be included in each email message this list is forwarding? The recommended value for Siebel Email Marketing Stand-Alone is 100. You must specify a value larger than 0.” on page 31.](#)

- **From: Header Line.** The outgoing From: header line can be configured to preserve the identity of the author, or to have it internally rewritten to a value that you can specify.

CAUTION: The original author will be shown in the X-Sender: header line if you rewrite it.

- **Subject: Header Line.** The outgoing Subject: line will be preserved as is from the original author's message. You also have the option to tack on (at the beginning) the list name, or the list name and the current message count, so that your users can identify the list's messages.
- **Reply-to: Header Line.** The outgoing Reply-To: line can be configured as follows:
 - **Omit:** No Reply-To: is inserted.
 - **Preserve:** If a Reply-To: exists in the original message, it is preserved; otherwise no Reply-To: will be shown.
 - **Sender:** If a Reply-To: exists in the original message, it is preserved; otherwise the Reply-To: is rewritten to point to the author of the message.
 - **Sender Always:** The Reply-To: will always point to the author of the message, regardless of what the original was.
 - **List:** Similar to Sender, but Reply-To: may point to the list's email address.

- **List Always:** Similar to *Sender Always*, but Reply-To: will always point to the list's email address.
- **List Request Address:** Similar to *List Always*, but Reply-To: will always point to the list's administrative email address (*listname-request*).
- **User-specified Value:** You can provide your own email address to use in the Reply-To: field.
- **Personalized Unsub Address:** If the list is serializing posts and the inbound SMTP Server is on, then the Reply-To: line will contain a special email address for easy unsubscription, tailored to each user.
- **Precedence: Header Line for Outgoing Email.** It is normal for mailing lists to have a Precedence: header line present in every outgoing message. This line instructs various subsystems on the Internet how to propagate a list's messages. If you select to use this header, you can choose one of the values provided. If you select a value, then the behavior your end users may experience is unpredictable because this is not a standard header line. However, it is common practice to use a value of bulk or list.
- **Add URN Headers.** You can select to have Siebel Email Marketing Stand-Alone generate list-specific URN headers. These headers usually start with *List-* and *aid mail user agents*, like Pegasus Mail, in providing an easy interface for list administrators (such as *subscription*, *unsubscription*, *help*, and so on).

NOTE: These headers are not standard; some other mail user agents may complain.

The List Files Screen

The List Files screen lets you upload files for a list. These files will be used for various circumstances during an email campaign.

CAUTION: Files of the same name, but different formats, can be supplied. For example, there are two *welcome* files, one in HTML and the other in plain text. Be careful to upload the right file.

To navigate to the List Files Screen, click Lists.

You can specify the following files:

- **Welcome.** This is a list-specific file that is sent when a subscriber subscribes to a list.

The *server welcome file*, which is the global welcome file, is also sent to all users when they subscribe to a list.

- **Auto_responder.** This is a list-specific file that is sent to nonprivileged users posting to the list.

The *server auto responder*, which is the global response file, is also sent to nonprivileged users when they email the list server.

- **Signoff.** This is a list-specific file that is sent when a user unsubscribes from a list.

The *server signoff file*, which is the global goodbye file, is also sent along with this file.

- **Info.** This is a list-specific file that is sent when a subscriber requests information about a list.

- **Header.** The contents of this file are appended to each outgoing message.

- **Footer.** The contents of this file are appended to each outgoing message.

- **Digest_preamble.** This file is included at the start of every digest sent out to users who are subscribed to the digest of a list.

- **WebArchiveTemplate.** This is a list-specific version of the default archive template.

See [“The Default Archive Template File” on page 51](#) to determine what should be included in the webArchiveTemplate.

- **WebArchiveFileIndexTemplate.** This is list-specific version of the default archive file index template.

See [“The Default Archive File Index Template File” on page 51](#) to determine what should be included in the webArchiveFileIndexTemplate.

- **WebArchiveIndexTemplate.** This is list-specific version of the default archive file index template.

See [“The Default Archive File Index Template File” on page 51](#) to determine what should be included in the `webArchiveFileIndexTemplate`.

- **List_icon.** You can provide an image file that will be displayed on the main index screen next to the list.

NOTE: You must convert the file in a format that Web browsers can read (typically GIF or JPEG).

The Default Archive Template File

Siebel Email Marketing Stand-Alone uses this file to display an archived message if the list does not have a *webArchiveTemplate* specified for it.

Special tokens in this file are replaced with values from the archived message. See [Table 5](#) for those tokens.

Table 5. Special Tokens

Token	Description
<code>&EarticleSubject;</code>	The subject of the article being displayed. This is the subject line from the outgoing email message.
<code>&EarticleBody;</code>	The actual message body of the article being displayed.
<code>&EarticleAuthor;</code>	The author of the message.
<code>&EarticleMessageID;</code>	The message ID of the message.
<code>&EarticleDate;</code>	The date the message was sent to the list.
<code>&EarticlePosition;</code>	This is the position of the article in the archive. For example, 2 of 2.

The Default Archive File Index Template File

Siebel Email Marketing Stand-Alone uses this file to display a table of the archived messages in an archive file. This default file is used only if the list does not have a *webArchiveFileIndexTemplate* specified for it.

Special tokens in this file are replaced with values from the archive. See [Table 6](#) for those tokens.

Table 6. Special Tokens

Token	Description
<code>&Etable;</code>	A table of all the messages in this archive.
<code>&EnumArticles;</code>	This is the number of articles in this archive file.
<code>&EarchiveIndex;</code>	An image which is a link back to the index of all archives.
<code>&EarchivePrev;</code>	An image which is a link to the archive before this one (if a previous archive is available). If no message is available, then this will be replaced by the image noprevarch.gif.
<code>&EarchiveNext;</code>	Same as in the preceding line, but link is to the next archive.
<code>&EarchiveSubscription;</code>	This is replaced with either a button to subscribe or unsubscribe to the list. Usually, it will be the subscribe button, but if the user has logged in and is subscribed to the list, then it will be an unsubscribe button.
<code>&EarchiveSubscriptionImage;</code>	This is replaced with either an image to subscribe or unsubscribe to the list. Usually, this is a subscribe button, but if the user has logged in and is subscribed to the list, then it will be an unsubscribe image.
<code>&EarchivePost;</code>	If the user has logged in and they have permission to post to this list, this will be replaced with a button which will take the user to a screen where they may post to the list.

Add Subscribers to a List

This screen only adds subscribers to lists using the internal database. If you have created a new list, you can add subscribers.

To add subscribers to a list

- 1 Click Subs Manager.

The Subscription Manager screen appears.

- 2 Scroll down until the Add/Update/Remove Subscribers section is at the top of your browser.

3 Complete the Add/Update/Remove Subscribers form as desired:

- **Email Addresses.** Enter the email addresses of your subscribers. Alternatively, you can upload a file that contains the email address of your subscribers by means of the Browse button.

You can cut and paste the contents of an existing email message's From line into this field. Accordingly, Siebel Email Marketing Stand-Alone supports entries in the form of:

- ❑ `lisa.jones@yourcompany.com Lisa Jones`
- ❑ `Lisa Jones<lisa.jones@yourcompany.com>`

Siebel Email Marketing Stand-Alone will parse entries in these formats and grab the email address and name.

NOTE: Enter one email address per line and limit the number of subscribers to 200 at a time.

- **Lists.** Select the name of the list you are adding new subscribers to.
- **Preferred language.** Specify the default language.
- **Preferred mail mode.** Specify the default mail mode for new subscribers.

4 Click Add/Update Subscribers.

You can additionally choose to modify other settings, such as Reporting Levels, or Subscription Options, from their default settings. If you choose to do so, see the information regarding those settings located at the top of the Subscription Manager screen.

Remove Subscribers from a List

You can also remove subscribers from a pre-existing list.

To remove subscribers from a list

1 Click Subs Manager.

The Subscription Manager screen appears.

- 2 Scroll down until the View Subscribers section is at the top of your browser.
In the Lists field you can see a list of existing lists.
- 3 Select the list from which you want to remove subscribers and click View Users.
The subscribers for the selected list appears under Email Addresses in the Add/Update/Remove Subscribers section.
- 4 Select the email address(es) to be removed and click Remove Subscribers. In other words, clear the email addresses from the email addresses field that you do not want to delete.

Bounce Handling

To complete the configuration of a list, you should set up procedures for handling bounces.

Introduction to Bounce Handling

The following are the three types of incoming messages that the Bounce Handler can detect:

- **Hard bounces.** These result from a permanent delivery failure, such as an *Invalid Email Account* message, that indicates no possibility of delivering the email to the recipient. Hard bounces usually result in the removal of that particular email address from the mailing list.
- **Soft bounces.** Soft bounces indicate a temporary delivery failure, such as a full mailbox, a mail server temporarily not working, or the recipient having set their email application not to accept incoming email while they are on vacation or out of the office for an extended period of time (in this case, the usual action is to resend the message or to institute a temporary suspension of sending to that address).
- **Replies to the original message.** When a person replies to the original email message, the Bounce Handler detects that the message is not a bounce and the message can be routed to a user-defined mailbox for a personal response.

There is an additional category of bounces, called *unparseable* bounces. Basically, unparseable bounces are bounces that are formatted in such a way that it is difficult for the receiving application to understand. In other words, if Siebel Email Marketing Stand-Alone receives a bounce that it cannot understand, it will send the bounce to the Error Handler as an unparseable bounce. Realistically, there is not much that can be done with an unparseable bounce, but unparseable bounces are a relative rarity with Siebel Email Marketing Stand-Alone.

To configure a list for bounce handling

- 1 Click List Owner.

The List Owner Options screen appears. From here you will see a table consisting of all available lists.

- 2 Click configure for the list you want to configure.

The Configuring List screen for the selected list appears.

- 3 Click the Errors hyperlink.

The Errors section of the Configuring List screen appears. From here you can configure your list for bounce handling.

- 4 Complete the form as desired:

- **What to Do with Bounced Email.** Siebel Email Marketing Stand-Alone can take the following actions regarding bounced email:
 - Ignore it
 - Send unresloved and resolved bounces mailboxto the Error Handler
 - Send it to a specified external service
 - Remove the subscriber immediately when a hard bounce occurs

NOTE: The count for auto-deletions will *not* increment if the email address to be removed is not in the specified database. If you are monitoring this function, first check the `BoldFish.log` file located in the `bes` folder to make sure the operation was successful.

- Remove the subscriber when the maximum number of soft bounces has been reached.

CAUTION: If you choose to have the subscriber suspended when too many soft bounces occur within the grace period, you *must* also provide values for Grace Period for Soft Bounces and Max Number of Soft Bounces Within Grace Period Before User Suspended.

Siebel Email Marketing Stand-Alone Distinguishes Between Hard and Soft Bounces

Siebel Email Marketing Stand-Alone can distinguish between hard and soft bounces:

- Hard bounces are permanent failures
- Soft bounces are temporary delivery failures

If a hard bounce is sent to a list, the user is removed immediately from the list (if so configured). Otherwise, hard bounces will be treated as soft bounces.

If the hard bounce is sent to the server, the user is suspended from all lists and will receive no email.

On soft bounces (whether to the list or to the server), the user is removed from a list (if bounces go to a list) or all lists (if bounces go to the server) if the maximum number of soft bounces is reached within the specified grace period. If the server has stricter rules (for example, a smaller grace period, or fewer bounces within that grace period) it takes precedence over lists; for example, the user is removed from all lists.

When a previously removed user communicates with the system in any way (or server or list administrators take actions on the user's behalf), the user is automatically reinstated throughout the system, and is emailed to that effect. Therefore, a previously removed user's attempt to log in, resubscribe, or contact a list results in automatic reinstatement.

Bounce handling may not always be successful in resolving (parsing) the bounce, and may not be able to identify addresses to suspend or remove. Therefore, you can wish to turn on notification for such cases in order to have the error handlers work manually. On the other hand, turning on notification of resolved bounces will simply send the results of the bounce analysis to the error handlers, who may take further action of their own.

Finally, you can specify the name of a Java class to load and send the bounce to for external processing.

The `String` arguments passed to the classes `main()` can vary.

The first two are the action and the list name as shown in [Table 7](#).

Table 7. String Arguments

Arg0	Arg1	Arg2	Arg3	Arg4	Comments
BounceMail	Listname	Headers	Body	Class name	Either the bounce cannot be interpreted, or you have chosen for Siebel Email Marketing Stand-Alone not to do any bounce analysis, so the bounce is forwarded as is.
RemoveUser	Listname	Email Address	<None>	<None>	Request to remove specified user.
SuspendUser	Listname	Email Address	<None>	<None>	Request to suspend specified user.

Your external service must implement the command line interface. For more information on the command line interface, see [“External Service Interface” on page 60](#).

Class name is the name of a class that can be invoked by your external service to update the statistics screen with the results of your own bounce handling. It also implements the command line interface. For an example on how to invoke Class name, see [“External Service Callback for Statistics” on page 61](#). Keep in mind that the use of this class is optional, but useful. Class name is internally defined; you do not have to write it.

- **Grace Period for Soft Bounces.** This is the grace period for temporary email failures on a per-list basis.
- **Max Number of Soft Bounces Within Grace Period Before User Removed.** Siebel Email Marketing Stand-Alone can suspend a user if the number of bounces from their email address exceeds the threshold.

The counts for auto-suspensions will *not* increment if the email address to be removed is not in the specified database. If you are monitoring this function, first check the `BoldFish.log` file to make sure the operation was successful.

An empty entry disables this feature.

- **Max Number of Bounces Processed per Day.** Specify a maximum number of email bounces the list should process each day.

An empty entry disables this feature.

If you specify a small number, then the system will not waste too much time processing error email, but it may never catch up, either.

- **Who Gets Siebel Email Marketing-generated Errors.** You can select who gets Siebel Email Marketing-generated error messages. They can either be sent to the Author or to the list's Error Handlers, so that users are not overburdened with error messages.
- **What Database Interface Should be Used.** This field is only used in conjunction with external lists. If the list you are configuring is an internal list, the What Database Interface Should be Used field will not be displayed. The database interface is used to define how various responses resulting from a posting are handled in the associated external database. These response types are limited to subscribe and unsubscribe requests, and the processing of hard and soft bounces. Before making any selection changes, make sure the appropriate database stored procedures or java interface implementations exist.

The generic choices are:

- ❑ External db (online bounce processing)
- ❑ External db (batch bounce processing)
- ❑ External db (online bounce processing/no stored procedures)

- ❑ External db (batch bounce processing/no stored procedures)

Any other options that may appear would be the direct result of customized work.

The only difference between the batch and online versions is in how bounces are processed back to the external database. In the online case, they are processed as they occur. In the batch case, they are queued in the source database to be processed at a later time. If this case is chosen, verify that the appropriate code, `processBounces`, is scheduled to run at the correct time and with the correct regularity. The *no stored procedures* forms indicate that stored procedures will not be used for the processing of bounces in the external database. This is required of those databases that do not support stored procedures, but also may be used if the stored procedure approach is not desired for whatever reason.

If one chooses to not use stored procedures, the `ExtDbMailResponseProcessor` interface must be implemented. This interface has three methods:

- ❑ `processBounce`
- ❑ `subscribe`
- ❑ `unsubscribe`

Again, note that this interface defines methods for subscribes and unsubscribes as well as bounces. If you use the stored procedure selections for bounces, stored procedures will also need to exist for unsubscribes and subscribes. These stored procedures will need to exist in each target database in the system. Multiple lists that point to the same target database will use the same stored procedures.

If you use the *no stored procedure* versions, then an implementation will need to exist for every target database, or the default implementation will be used automatically. Implementations must be named in the form:

```
targetDbName + "ExtDbMailResponseProcessor"
```

The default implementation is named:

DefaultExtDbMailResponseProcessor

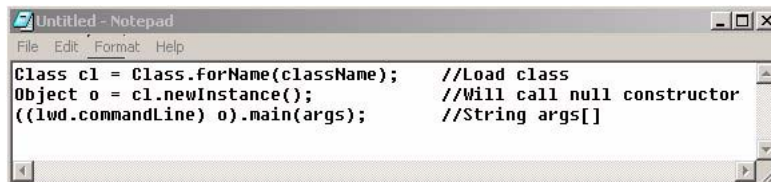
When finished, click SUBMIT or SUBMIT & GO.

External Service Interface

In order to invoke an external service, you must write a java class that implements `lwd.commandLine`. This involves writing a null constructor and a main method that accepts an array of Strings (`String[]`) as the only parameter.

When an external service is called, the class is instantiated through Reflection and the `main()` method is called, as the following code example shown in [Figure 1](#).

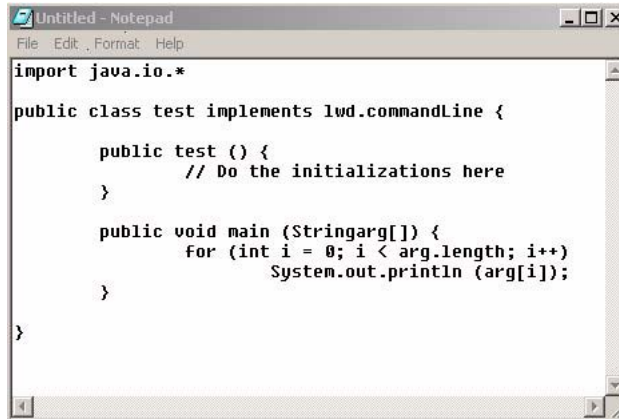
Figure 1. Code Example



```
Class c1 = Class.forName(className);    //Load class
Object o = c1.newInstance();            //Will call null constructor
((lwd.commandLine) o).main(args);      //String args[]
```

The first line loads the class from disk. (Be sure to include the class file in a `jar` file and update your `CLASSPATH` before starting the system, or just drop the `jar` class file in Siebel Email Marketing's `classes/` subdirectory.)

The second line then calls the null constructor. The null constructor should perform the startup tasks you need your external service to do. The third line casts the class to `lwd.commandLine` and calls the `main()` method. Once in `main`, check the arguments as described by the external service for your arguments, as shown in [Figure 2](#).

Figure 2. Code Example

```
import java.io.*

public class test implements lwd.commandLine {

    public test () {
        // Do the initializations here
    }

    public void main (Stringarg[]) {
        for (int i = 0; i < arg.length; i++)
            System.out.println (arg[i]);
    }

}
```

Extending the Global Definition of a Regular Expression

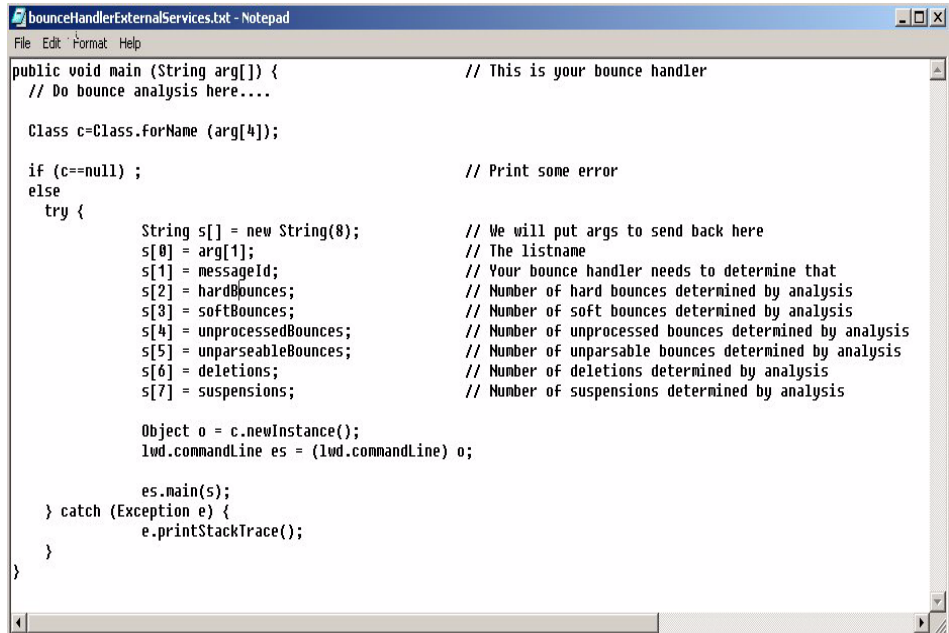
Most of the Posting settings will allow you the option of extending the global definition of a regular expression.

You can turn this option on or off. If it is turned on, the regular expression displayed will be used in addition to the corresponding *Global Regular Expression*.

External Service Callback for Statistics

Here is a code example on how to call back one of the internal classes to update the statistics screen for a mailing, after your bounce handler (the class invoked by Siebel Email Marketing Stand-Alone) has had the chance to do its own analysis, as shown in [Figure 3](#).

Figure 3. Code Example



```
bounceHandlerExternalServices.txt - Notepad
File Edit Format Help

public void main (String arg[]) {           // This is your bounce handler
    // Do bounce analysis here....

    Class c=Class.forName (arg[4]);

    if (c==null) ;                           // Print some error
    else
        try {
            String s[] = new String(8);      // We will put args to send back here
            s[0] = arg[1];                    // The listname
            s[1] = messageId;                 // Your bounce handler needs to determine that
            s[2] = hardBounces;               // Number of hard bounces determined by analysis
            s[3] = softBounces;               // Number of soft bounces determined by analysis
            s[4] = unprocessedBounces;        // Number of unprocessed bounces determined by analysis
            s[5] = unparseableBounces;        // Number of unparsable bounces determined by analysis
            s[6] = deletions;                 // Number of deletions determined by analysis
            s[7] = suspensions;               // Number of suspensions determined by analysis

            Object o = c.newInstance();
            lwd.commandLine es = (lwd.commandLine) o;

            es.main(s);
        } catch (Exception e) {
            e.printStackTrace();
        }
    }
}
```

Additional Information

Additional information about list management includes: user options, uploading files, and SMTP information.

User Options

The following is a list of user configurable options that can be configured with the **SET** request and can be viewed with the **QUERY** request:

- **ENGLISH.** The user's preferred language.
- **CONCEAL/NOCONCEAL.** Whether the user's entry is visible in a **REVIEW** request. The default is **NOCONCEAL**.

- **ACK/NOACK.** Whether the user receives an acknowledgement on a successful distribution of their posting. The default is NOACK.
- **MAIL/TEXT.** The user receives entire individual messages as regular email, entire individual messages as HTML documents. This is the default.
- **NOMAIL.** The user receives no mail at all.
- **HTML.** The user receives the list's postings in HTML format.
- **URL.** The user receives individual Subject:-URL pairs for each message.
- **MIME_DIGESTS.** The user receives MIME digests.
- **DIGESTS.** The user receives plain text digests.
- **SUMMARY.** The user receives daily summary of Subjects with URL locations for the message bodies.
- **FILE_NOTIFY/NOFILE_NOTIFY.** Whether the user gets notified on new or updated list files. The default is NOFILE_NOTIFY.

Uploading Files

Many of the screens in Siebel Email Marketing Stand-Alone user interface that allow you to upload files have the same interface. The screen is essentially split into four columns. The first column is the description of the file, usually a brief one- or two-word description. The next column specifies the format of that file, two files with the same name (description) can have different formats so make sure you are uploading the file in the right format.

The last two columns deal with actions you can do on the specified file. The last column is the easiest; press the Browse button and select a file on your machine. When you click Submit, the file on your machine will be uploaded and used for the specified file. If you do not see a Browse button, it is likely your browser does not support a form input type called FILE.

There are at least four things you can do with the links in the third column. You are always given the opportunity to edit the file. This will send you to a new screen with a large text area that contains the file.

You can edit the file in this text area and, click Submit and the file will be updated in the system. If there is no file in the system, the text area will be empty, you can enter the text for the file, click Submit and the file will be created in the system.

If a file is available in the system, then you have the option of removing it. Select the check box marked with remove and click Submit. Removing files usually means that a default file will be used.

Also, if a file is available you have the option of viewing or downloading it. These will appear very similar, but there are specific differences between them. Viewing a file will expand variables in the file so it should appear like it would on the screen. Downloading the file will not apply any of these variable expansions and it should be sent in such a way that you are prompted to save it to a file on your disk. A common cycle might be to download a file, save it to disk, edit it with your favorite editor and then upload it using the browse button in the last column.

The Inbound SMTP Server

If you want to let incoming email come directly to this server, you should set this option to yes. For more information about configuring this server, see [“The SMTP Port Number” on page 64](#).

The SMTP Port Number

Siebel Email Marketing Stand-Alone can listen for incoming email. If you are running a standard server, you will want to make this value 25. If you are running another server on port 25, you can specify a different port number. If you specify a different number, you will have to remember that inbound email will have to arrive on that port number.

The Default List

All newly created lists inherit default values from a special list, called the Default List. The Default List contains default settings which will be inherited by all new lists; it is the basic template for list creation. It can be used to set upper limits, a global policy on content, and other options.

Although you are free to configure a list as you see fit during creation, it is important to realize that, due to the possibility of *multitenancy* (more than one enterprise using the same Siebel Email Marketing Stand-Alone) the Default List might be reconfigured without your knowledge. Therefore, it is in your best interest not to rely on the values contained in the Default List, as those values could possibly change without your knowledge.

To configure the Default List

- Click Site Manager > Define Default List Options.

The Configuring List screen for the Default List appears.

NOTE: The functionality for configuring the Default List is located under the List Owner section of Siebel Email Marketing Stand-Alone. This means that when you clicked Default List from the Site Manager screen, Siebel Email Marketing Stand-Alone took you to the List Owner screen. The Site Manager is the only user with access to this functionality.

For complete information on configuring each section (General, Archives, Posting, and so on) of the Default List, see [“Configure a List” on page 29](#).

Siebel Email Marketing Stand-Alone (EMSA) provides a shell-launched utility, called `purgeDb`, that provides a number of access points into Siebel EMSA advanced reporting database for the purpose of removing old or irrelevant data.

This chapter covers the following topics:

- [“Execution” on page 68](#)
- [“Examples” on page 68](#)

Execution

On Windows environments, run the following command from under the installation directory:

```
. \purgeDb.bat
```

On Solaris, the `purgeDb.csh` shell is run from the installation directory.

In both cases, the shell executes a Java program that accesses the advanced reporting database and removes data based on the option selected and criteria entered.

Examples

The following examples show the appearance of the utility when run on a Solaris host. It is nearly identical from a command shell on Windows.

First, run the shell to begin the utility and see the menu of options.

```
# ./purgeDb.csh
```

Example 1

In this example, a mailing id is entered. All data in Siebel EMSA advanced reporting database for the specific mailing id is removed. To use this option, the precise mailing id must be known.

To remove mailings with a mailing id

1 Select one of the following options for removing mailings.

- 1) Individual mailing id
- 2) All mailings for a campaign
- 3) All mailings prior to a date
- 4) All mailings for a subject
- 5) All mailings for a Siebel Email Marketing Stand-Alone list
- 6) All detail table orphan records
- 7) All orphanage records
- 8) Exit

1

2 Enter the mailing_id:

<A012345678987654321@arthur.dent.com>

The data for the mailing is now removed.

Example 2

This example allows purging of all data for a campaign. A campaign may have, in general, many mailing ids associated with it. The data for each of the mailings for a campaign are removed from the advanced reporting database.

To purge all data for a campaign

1 Select one of the following options for removing mailings.

- 1) Individual mailing id
- 2) All mailings for a campaign
- 3) All mailings prior to a date
- 4) All mailings for a subject
- 5) All mailings for a Siebel Email Marketing Stand-Alone list
- 6) All detail table orphan records
- 7) All orphanage records
- 8) Exit

2

2 Enter the campaign_id:

Zaphod

The data for the campaign is now removed.

Example 3

This example deletes data for any mailings that were initiated before a specified date. This will remove mailings across campaigns.

To delete data for any mailings initiated before a specified date

1 Select one of the following options for removing mailings.

- 1) Individual mailing id
- 2) All mailings for a campaign
- 3) All mailings prior to a date
- 4) All mailings for a subject
- 5) All mailings for a Siebel Email Marketing Stand-Alone list
- 6) All detail table orphan records
- 7) All orphanage records
- 8) Exit

3

2 Enter the date (MM-DD-YYYY):

04-01-1999

The data for the date is now removed.

Example 4

This example deletes data for any mailings sent out with a particular subject. This is an exact match and it removes mailings across campaigns.

To delete any mailings sent out with a subject

1 Select one of the following options for removing mailings.

- 1) Individual mailing id
- 2) All mailings for a campaign
- 3) All mailings prior to a date
- 4) All mailings for a subject
- 5) All mailings for a Siebel Email Marketing Stand-Alone list
- 6) All detail table orphan records
- 7) All orphanage records
- 8) Exit

4

2 Enter the Subject:

Ford Prefect

The data for the subject is now removed.

Example 5

This example removes data for all mailings associated with a particular Siebel EMSA list name. The data is removed from the advanced reporting database across campaigns.

To remove data for a mailings associated with a list name

1 Select one of the following options for removing mailings.

- 1) Individual mailing id
 - 2) All mailings for a campaign
 - 3) All mailings prior to a date
 - 4) All mailings for a subject
 - 5) All mailings for a Siebel Email Marketing Stand-Alone list
 - 6) All detail table orphan records
 - 7) All orphanage records
 - 8) Exit
- 5

2 Enter the listname:

Marvin

The data for the listname is now removed.

Example 6

This example will remove any detail records, that is, data stored at the email address within a mailing granularity level, that do not have a corresponding summary record. Such records are termed orphans and may result from incorrect mailing ids being retrieved from bounces, for example, for a variety of reasons.

To remove any details

1 Select one of the following options for removing mailings.

- 1) Individual mailing id
- 2) All mailings for a campaign
- 3) All mailings prior to a date
- 4) All mailings for a subject
- 5) All mailings for a Siebel Email Marketing Stand-Alone list
- 6) All detail table orphan records
- 7) All orphanage records
- 8) Exit

6

Example 7

This example does everything Example 6 does and also removes all data from the table that contains the orphan records culled from the detail tables.

To remove any details and all data from the details tables

- 1** Select one of the following options for removing mailings.
 - 1) Individual mailing id
 - 2) All mailings for a campaign
 - 3) All mailings prior to a date
 - 4) All mailings for a subject
 - 5) All mailings for a Siebel Email Marketing Stand-Alone list
 - 6) All detail table orphan records
 - 7) All orphanage records
 - 8) Exit
- 7

Example 8

The eighth and final option exits from the purgeDb utility.

To delete data from the purgeDb utility

- Select one of the following options for removing mailings.
 - 1) Individual mailing id
 - 2) All mailings for a campaign
 - 3) All mailings prior to a date
 - 4) All mailings for a subject
 - 5) All mailings for a Siebel Email Marketing Stand-Alone list
 - 6) All detail table orphan records
 - 7) All orphanage records
 - 8) Exit

8

#

You can configure Siebel Email Marketing's Server, Email Server, and license options from the Server Configuration screen.

This chapter explains the Server Configuration screen, the Email Server Configuration screen, and the Licensing screen. Additionally, this chapter provides a tutorial of a typical system setup.

This chapter covers the following topics:

- [“The Server Configuration Screen” on page 78](#)
- [“The Licensing Screen” on page 90](#)
- [“Basic Setup, A Tutorial” on page 93](#)
- [“Background Information—Email Setup” on page 96](#)

The Server Configuration Screen

The Server Configuration screen allows you to configure all of the options that Siebel Email Marketing Stand-Alone uses. These are the core options that define how many resources the server uses and where it can find external services it may need (like the database). Some global options are also presented on this screen.

To access the Server Configuration screen

- Click Site Manager > Server.

The Server Configuration screen appears.

General Configuration

Use the General screen to update general information about your mailing. To navigate to the General screen, click Site Manager > Server.

- **Your Organization Name.** The name of your organization appears in several places on the Web interface. For example, the main screen displays your organization name.

NOTE: This field must be set.

- **LWD Port.** Siebel Email Marketing database port number tells Siebel Email Marketing Stand-Alone to listen on this TCP port number. If your installation uses any other extension to Siebel Email Marketing Stand-Alone, you should make sure that they use the correct port number.

NOTE: Siebel Email Marketing API also accesses port 2000.

Transmission Control Protocol requires all applications wishing to receive connections from clients to listen on the specified port. The port number can only be used by one application at a time. Some port numbers are restricted for use by the port authority. Generally, the ports below 1024 are restricted to well known protocols.

- **LWD Worker Threads.** Siebel Email Marketing processes emails and Web requests concurrently. You can specify the number of threads Siebel Email Marketing Stand-Alone will use to process its tasks in parallel. The value should be optimized for your machine speed and memory size. A minimum of 1, or ten percent, of these threads are allocated for Web requests, exclusively. Also, keep in mind that as more threads are allocated, the higher the memory requirement will be. Java needs 400 K for stack space per thread, so if you use the maximum number of threads (55), at least 22 MB are set aside for stack.

NOTE: It is recommended at least 256 MB of memory if you are using the maximum number of threads. Using more threads can increase performance, but it slows down the shut down process exponentially if the system is very busy during shut down.

- **Help Desk.** The help desk is the email address your users can send email to for help on your Siebel Email Marketing installation.
- **Siebel Email Marketing System Directory.** The system directory is the `root` directory where Siebel Email Marketing Stand-Alone keeps all of its storage. This directory will need to have sufficient space for ample growth. The amount of space your set up needs depends on a number of parameters, such as the size of the archives, the amount of incoming mail, and so on. Generally, this will be approximately 20 GB of space.

For example,

```
c : /tmp
```

The directory is listed as `'` by default, which signifies the Siebel EMSA home directory.

NOTE: The direction of the *slash* does not matter.

- **Siebel Email Marketing Archive Directory.** This is the directory where a list's archive files will be stored in. A new directory for each list will be created under this directory. This directory may be relative to the system directory or it may be a fully qualified path.

- **Number of Threads for External Services.** The external service thread count defines how many threads are allocated for external services. If you want a high degree of concurrent execution, the thread count should be high (for example, 10). If your system does not execute any external services, then set this parameter low (for example, 1).
- **Confirmation Cookie Timeout.** Siebel Email Marketing Stand-Alone occasionally uses cookies to authenticate certain transactions. The authentication cookie is sent through email to the user and stored in the database. When the user responds, the cookie is removed. However, if the user never replies, the cookie will never be removed. To prevent this situation, setting a cookie time out lets Siebel Email Marketing Stand-Alone clean up the cookies after a given period of time.

For example:

96:15:00

96 hours and 15 minutes

- **Send License Expiration Warnings.** Setting this option to `no` will prevent the system from notifying Site Managers when the license is due to expire.
- **Mailing Detail Memory Buffer.** The Advanced Reporting Module requires that we log information for each recipient; this information is first buffered into memory and then flushed to the ARM database. This option controls the maximum size of this buffer, before its flushed—keep in mind that the buffer is automatically flushed every 60 seconds, or when this limit is reached.
- **Default Delivery Method.** Select the delivery method to be shown as the default in the posting servlet; this will make a difference only if the system has a license for Local Network.

Inbound SMTP Configuration

- **Start Inbound SMTP Server.** If you want to let incoming email come directly to this server, you should set this option to `yes`.

- **Inbound SMTP Server Port.** Siebel Email Marketing Stand-Alone can listen for incoming email. If you are running a standard server, you will want to make this value 25.

If you are running another server on port 25, you can specify a different port number.

If you specify a different number, you will have to remember that incoming email will have to arrive on that port number.

- **SMTP Inbound Server Hosts.** Siebel Email Marketing Stand-Alone has the ability to receive email for lists addresses on the local machine. This field allows you to specify additional hosts for which to accept email.

For example:

```
[ hosta.domain.com, hostb.domain.com ]
```

Outbound SMTP Configuration

- **Outbound SMTP Servers.** Siebel Email Marketing Stand-Alone needs to communicate with at least one SMTP Server in order to transmit email. If you specify more than one server, Siebel Email Marketing Stand-Alone will cycle round-robin style through all of the servers. Each server can also contain a port number. Multiple servers should be comma-separated.

For example,

```
eagle.yourcompany.com:2000,eagle.yourcompany.com:2001,eagle.yourcompany.com,mailhub.yourcompany.com
```

- **SMTP Threads.** Siebel Email Marketing Stand-Alone maximizes the throughput it can achieve while talking to SMTP Servers by multithreading its tasks. You can choose what level of concurrent execution you want by setting the thread count. This parameter should be optimized to the amount of traffic your SMTP Servers can handle. Also, keep in mind that as more threads are allocated, the higher the memory requirement will be. Java needs 400 K for stack space per thread.

- **Max Mail Size.** Siebel Email Marketing Stand-Alone can reject incoming messages based on their size (measured in bytes). It is a good idea to limit the size of messages that people can send.

CAUTION: Large messages consume a great deal of resources from your system, and just one malicious posting of a very large message can slow down, or even crash, your server.

If you are only sending out simple posts, a sensible value is 1,000,000 bytes, or 1 MB.

- **Max Number of Recipients.** An SMTP Server can accept multiple recipients for each outgoing email. The exact maximum number is implementation-defined. If a list has multiple recipients, and its size is larger than this number, then Siebel Email Marketing Stand-Alone will chunk up the distribution into multiple sessions, each containing Max recipient number of addresses, for more efficient mail distribution. A value of 100 is recommended. This value is used as an upper limit for the list specific maximum recipients.
- **Error Delay.** Occasionally, Siebel Email Marketing Stand-Alone encounters errors when communicating with an SMTP Server. These are usually transient errors that have to do with system load. If there is an error, it is likely that the error situation will occur again in the immediate future. Therefore, the Error Delay Time parameter lets Siebel Email Marketing Stand-Alone know how long it should wait before reconnecting to that SMTP Server again.

For example:

00:00:15

15 seconds

This parameter has no meaning if you are using multiple outgoing SMTP Servers.

- **Requeue Delay.** Occasionally, an SMTP Server may complain about an outgoing message, and Siebel Email Marketing Stand-Alone needs to requeue it for later delivery. The Requeue Delay Time parameter lets Siebel Email Marketing Stand-Alone know how long it should wait before requeueing the message.

For example:

00:00:15

15 seconds

This parameter has no meaning if you are using multiple outgoing SMTP Servers.

- **Maximum Messages Per Minute.** Siebel Email Marketing Stand-Alone can be told not to exceed a certain number of outgoing messages per minute. The purpose of this field is to allow some SMTP Servers time to handle other emails.

For example:

15

15 messages per minute

Left unchecked, Siebel Email Marketing Stand-Alone can overwhelm most SMTP Servers.

This value should be set after analyzing the optimal setting for your SMTP Server installation.

Using multiple SMTP Servers for outgoing mail alleviates this problem; experimentation is suggested, as shown in [Figure 4](#).

Figure 4. Maximum Resident SMTP Queue Size

Maximum Resident SMTP Queue Size: <input type="text" value="5000"/>
Resident SMTP Queue Optimization Algorithm: <input type="text" value="Optimistic"/>
Keep Resident SMTP Queue Optimization: <input type="text" value="Yes"/>
Outbound SMTP Hub Server URLs: <input type="text" value="http://qa-ecr1a:5080/listener/"/>
Outbound SMTP Preview Hub Server URLs: <input type="text" value="http://qa-ecr1a:5080/listener/"/>
Client ID: <input type="text" value="GOOGLE"/>

- **Maximum Resident SMTP Queue Size.** Siebel Email Marketing Stand-Alone allows you to manage the size of the internal SMTP queue, and this value cannot be less than 2,000 items. It can be as large as you wish, and it is recommended a value of 6,000 for maximum performance and acceptable memory consumption. The role of the queue is to have enough in-memory SMTP items to deliver, to avoid thread starvation while the server is working on other tasks, such as bounces, and so on.

The queue is automatically optimized as necessary, when messages like this show up in `BoldFish.log`:

```
Got a QUEUE-EMPTY event for queue id 0; using Optimistic  
algorithm; new hi/low watermarks: 400/100
```

- **Resident SMTP Queue Optimization Algorithm.** This option determines how the SMTP queue is optimized, as in how it grows from its initial size to the requested one. The following algorithms are supported:
 - **Optimistic:** Will get to max faster, bigger steps in the beginning, smaller as it gets closer to max.

- **Linear:** Will get to max in equal steps.
- **Conservative:** Will get to max slower, small steps in the beginning, larger as it gets closer to max.
- **Keep Resident SMTP Queue Optimization.** This option determines the state of the SMTP queue size after it has been optimized during a mailing. You can either retain its optimized size, or reset it to its initial value (2,000 items).
- **Outbound SMTP Hub Server URLs.** Siebel Email Marketing Stand-Alone allows you to send mailings to one or more hub servers for faster delivery, instead of using the internal SMTP engine, which depends on external SMTP Servers at your site. This list of hubs is controlled and managed by the Siebel Email Marketing Network.
- A special license is required to use the Siebel Email Marketing Network.
- **Outbound SMTP Preview Hub Server URLs.** Siebel Email Marketing Stand-Alone allows you to send mailings to one or more hub servers for faster delivery, instead of using the internal SMTP engine, which depends on external SMTP Servers at your site. This list of hubs will offer a faster turnaround time when previewing your emails, but cannot be used for actual deliveries to all of your recipients.
- **Client ID.** In order to be able to access the Siebel Email Marketing Network, a unique license key needs to be obtained from Siebel Systems.

Internal Database Configuration

- **Database Host.** In order for Siebel Email Marketing Stand-Alone to connect to your database, it needs to know where the database is located. Usually, the database is on the local host (machine name; `localhost`), but sometimes an organization might have a larger database installed on a remote machine.
- **Database Port Number.** The TCP/IP port number is required for Siebel Email Marketing Stand-Alone to talk to the database.

Use this value unless you have altered the database installation parameters from the default settings.

- **Database Name.** This is the name of the database in your relational database that Siebel Email Marketing Stand-Alone will connect to. This is usually *Listworks*.

- **Database User Name.** The database user account name.
- **Database Password.** The database user password.
- **Database Driver.** The path to the JDBC driver. For example, `oracle.jdbc.driver.OracleDriver`.
- **Database Query Timeout.** Most databases that support transactions will usually allow for query time outs. The number represents a time out in seconds. If a query takes longer than the specified number of seconds to complete, the operation will be aborted, and (depending on its nature) it may get rescheduled (like subscriptions and unsubscriptions). The default value of zero turns off query time outs.
- **Maximum Number of Rows in Size Controlled Tables.** Some tables in the database can grow indefinitely. The Maximum Rows parameter tells Siebel Email Marketing Stand-Alone (EMSA) that these tables should fluctuate around the specified number on a daily basis. This not only reduces disk space usage, but will keep database responses to a reasonable value.

Email Server Configuration Screen

The Email Server Configuration screen lets you to configure options that Email Server uses.

NOTE: The Email Server is defined as the part of the server that deals with incoming email requests.

To configure the Email Server

- 1 Click Site Manager > Email Server (as shown in the following figure).



The Email Server Configuration screen appears.

General Email Server Setup

- **Email Server Address.** This field specifies the address of your Email Server.

This only is the first part of the email address.

For example:

```
listserv, newsserver
```

An email address has two parts, separated by an @. The *address* of an email address is the part that comes before the @. The *domain* of an email address is the part that comes after the @. For example, if the full email address is MACHINE@yourcompany.com, the address is MACHINE, and the domain is yourcompany.com.

- **Email Server Description.** This is a short, one-line description of the Email Server. This is useful for identifying the server in the outgoing From: line.
- **Priority for Handling Requests.** This specifies the priority of the requests to this Email Server. The higher the priority, the more important the requests are considered to be. The range in which the priority can be is -25 to 25.
- **Primary Language.** This specifies the default language for the Email Server.
- **Max. Invalid Requests Before Abort.** This specifies the maximum number of unrecognized requests in a single email message before the Email Server aborts processing the message.

NOTE: It is recommended that you set a reasonable number; for example, 50.

If Notify on Parser Errors is set to No, then the user will not be notified if (and when) processing stops.

- **Max. Messages/Day.** This specifies the maximum number of messages the Email Server will process in a day. This number includes requests, bounced messages, and error messages.
- **Use Reply-To.** This tells Siebel Email Marketing Stand-Alone whether to send replies to email requests to the Reply-To: address (if any), or to the From: address.

NOTE: The From: address is the default setting.

- **Sender Prefix.** This field allows you to specify a prefix that will be followed by the list name. The complete string will show up as the sender of the email message in the Sender: line of the received email message.

The default prefix is `owner-`. This makes the sender of an email message look like:

`owner-listname.`

- **Owners Postfix.** This field allows you to specify a suffix that will follow the listname. The complete string specifies the email address at which a list's owners can be reached.

The default suffix is `-owners`. This makes the list owners address look like:
`listname-owners.`

- **Notify on Parser Errors.** The Email Server usually complains about commands it does not recognize, and (in general) generates errors during parsing. This option allows you to ignore these errors, and in conjunction with the Errors To option, allows you to determine who actually gets these errors. Notice that turning this option to `Yes` can generate a lot of unwanted email. Also, the system will still generate error messages if no commands are recognized in an email.
- **Errors To.** Usually, Siebel Email Marketing-generated error messages to email requests go back to the user. If you specify email addresses (comma-separated) in this field, they will instead get these messages, so they can better help users.

NOTE: If Notify On Parser Errors is set to `No`, then this option does not have much effect, because there will be very few errors generated.

- **What to do With Bounced Email.** You can specify what is done with bounced email messages sent from the server.
- **Grace Period for Temporary Email Failures.** This is the grace period for temporary email failures.
- **Max Number of Temp Failures Within Grace Period, Before User Suspended on all Lists.** Maximum number of temporary failures within a grace period, before the user is suspended from all lists.

The Licensing Screen

The Licensing screen is used to configure your Siebel Email Marketing Stand-Alone license.

In addition, at the top of the screen are options to configure the most basic setup options, which will allow your Siebel Email Marketing Stand-Alone to work within your email system.

The layout of the screen is such that functionality and options are presented in order from top to bottom.

NOTE: For a detailed example of how to configure the Licensing screen, see [“Basic Setup, A Tutorial” on page 93](#).

To access the Licensing screen

- Click Site Manager > Licensing (as shown in the following figure).



The Licensing screen appears.

Minimum Setup Information

Email Server Address. This field specifies the address of your Email Server.

This only is the first part of the email address.

For example:

```
listserv, newsserver
```

NOTE: An email address has two parts, separated by an @. The *address* of an email address is the part that comes before the @. The *domain* of an email address is the part that comes after the @. For example, if the full email address is MACHINE@yourcompany.com, the address is MACHINE, and the domain is yourcompany.com.

- **Start Inbound SMTP Server.** If you want to let incoming email come directly to this server, you should set this option to *yes*.
- **Inbound SMTP Server Port.** Siebel Email Marketing Stand-Alone can listen for incoming email. If you are running a standard server, you will want to make this value 25. If you are running another server on port 25, you can specify a different port number.

NOTE: If you specify a different number, you will have to remember that incoming email will have to arrive on that port number.

- **Outbound SMTP Servers.** Siebel Email Marketing Stand-Alone needs to communicate with at least one SMTP Server in order to transmit email. If you specify more than one server, Siebel Email Marketing Stand-Alone will cycle round-robin style through all of the servers. Each server can also contain a port number. Multiple servers should be comma-separated.

For example,

```
eagle.yourcompany.com:2000,eagle.yourcompany.com:2001,eagle.yourcompany.com,mailhub.yourcompany.com
```

- **Site Managers.** You can add or remove the email address of people you wish to be Site Managers in this box. If you are adding someone who is not a user in the system, an account will be created for them. They will be emailed, with their password, to inform them of their new status. Removing someone from this box will not remove their account from the system, but it will remove their Site Manager privileges.

- **Test Email Setup.** After you have entered all the information correctly, you should test that everything works by clicking Test Email Setup. If everything works, every Site Manager will receive two email messages; one to test outgoing, and one to test incoming. If you do not receive these messages, check your SMTP.log.

If you receive an error message, you should reinput your license, see the Input License section that follows.

NOTE: The SMTP.log file is only activated if logging is set to `DEBUG#3Level1` in the `log4j-config.properties` file located in the `<Siebel EMSA Home>\j2ee\....`

- **Input License.** To input a license, copy and paste the license you received from Technical Support in the Input License field, then click Add License. For more information about licenses, see *Siebel Email Marketing Stand-Alone Installation Guide* on SupportWeb.

Basic Setup, A Tutorial

After Siebel Email Marketing Stand-Alone (EMSA) has been installed on your system, you need to log in to the server and enter some basic information about your set up.

Log in as Site Manager, and click Licensing to go to that screen.

If there is no valid license installed, Siebel EMSA brings you to the Licensing screen. The Licensing screen is where you have to fill in information about the email flow and request a license from Siebel Systems. The top part of the screen tells you what licensing is all about.

To set up basic Siebel EMSA information

- 1 Scroll down until Minimum Setup Information is at the top of the screen.

Before proceeding, you should first review the flow of email in Siebel Email Marketing Stand-Alone system. See [“Background Information—Email Setup” on page 96](#).

- 2** In the Email Server Address field, enter your server's email address without the @company.com information.

For example, if you want to receive email for this server at MACHINE@yourcompany.com, you would enter MACHINE in this text field.

- 3** Enter the name of your outbound Email Servers in the Outbound SMTP Servers field.

If you have multiple outbound email addresses, enter all of them on the same line each separated by a comma (,).

NOTE: For servers listening on different port numbers, enter `servername:port`.

For example:

```
localhost,mail:3000, gateway,br
```

- 4** You can assign as many Site Managers as you need to in this entry field. Make sure that these are all valid email addresses.

After you have completed entering the preceding information, scroll down until you see the three buttons (Update Server, Test Email Setup, and Request License).

- 5** Every time you make a change, click Update Server. This will write the information to your local global configuration file, and make the changes known to the system.

- 6 After you have entered all the information correctly, you should test that everything works by clicking Test Email Setup. If everything works, every Site Manager will receive two email messages; one to test outgoing, and one to test incoming.

If you do not receive these messages, check your SMTP.log. If you received an error message, you should request a license from Siebel Systems by clicking Request License. Let the system run so that it can receive incoming email.

Alternatively, you can copy and paste the license you received from Technical Support in the Input License field, then click Add License. For more information about licenses, see the *Siebel Email Marketing Stand-Alone Installation Guide* on SupportWeb.

NOTE: The SMTP.log file is only activated if logging is set to `DEBUG#3Level` in the `log4j-config.properties` file located in the `<Siebel EMSA Home> \j2ee\....`

Stored Procedures

Siebel EMSA records bounces and unsubscribe information with the use of stored procedures that are edited according to your schema.

To access the stored procedure stubs

- 1 Go to `ddl/sql/install` under the installation directory.

NOTE: The files may also be extracted from the `dmutil.jar` file using Winzip or the `jar` utility.

- 2 Locate the `*.targetdb.sql` file for your particular type of database

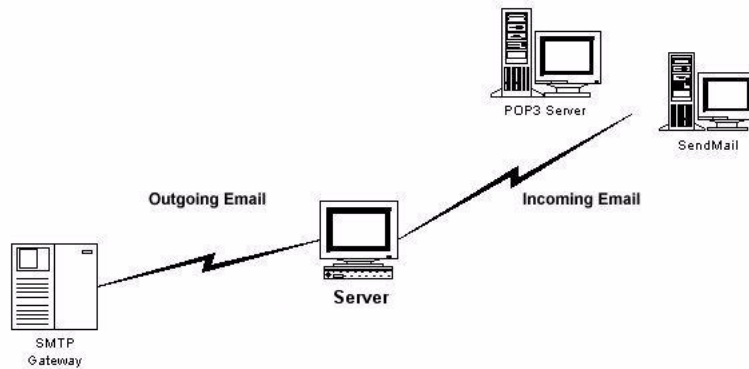
Edit the stubs according to your schema, making sure not to change the signature of the stored procedure.

Background Information—Email Setup

After installing Siebel Email Marketing Stand-Alone (EMSA), some basic flow information is needed about your network configuration so that email can flow in and out of the system.

Figure 5 illustrates three different kinds of servers that are involved in the email flow.

Figure 5. Siebel EMSA Servers



Siebel Email Marketing Stand-Alone (EMSA)

This is the Siebel EMSA application. It contains its own SMTP Inbound Server. This server can only be used if you can direct email to this machine through DNS, and if the machine running Siebel EMSA is not running another SMTP product.

SMTP Gateway

The gateway is responsible for distributing email to the rest of the world. After we deliver email to the gateway, it is assumed that it will get delivered. You should pick a reliable machine for this job. The SMTP Gateway needs to be able to accept incoming email from Siebel EMSA.

If you encounter any problems while using Siebel Email Marketing Stand-Alone (EMSA), you can review the contents of the following files:

- The BoldFish.log file includes information about current general activity with Siebel EMSA.
- The exception.log file includes information about java exceptions thrown by Siebel EMSA. These can be caused by a variety of problems, such as database errors, user interface problems, and an inability to connect to SMTP Servers.
- The console.log file includes information that may prove useful for troubleshooting problems that Siebel EMSA is having with the Siebel Email Messaging Network. The log also includes information about starting up the Siebel EMSA.
- The unparsablebounce.log and SMTP.log files may prove useful in determining problems with bounce handling and connections to SMTP Servers. The SMTP.log file is only activated if logging is set to `DEBUG#3Level` in the `log4j-config.properties` file located in the < Siebel EMSA Home > \j2ee\....
- The in.mbox file includes all email received by Siebel EMSA. web.mbox contains messages posted through Siebel Email Marketing Stand-Alone's Web interface.

This chapter lists some of the most frequently asked questions regarding Siebel Email Marketing Stand-Alone (EMSA).

Question

Is it possible to send a MMM message with a nonmail mode-enabled database?

Answer

Yes, as long as you have previously set the default mode for the database to Text & HTML and have provided both text and HTML content during the posting process.

Question

I am setting up a posting and clicking the Upload Subscriber Files button. When I choose a Configurations Value in the dialog box, I get an error saying “Email Address invalid for HTML.” What should I do?

Answer

Search BoldFish.log for invalid email address. Any email address with this message must be removed from the uploaded file for Siebel Email Marketing Stand-Alone to proceed.

Question

I tried to send out a mailing and got an error message saying I had an “invalid email address.” How does this occur and how do I find out which email address to remove?

Answer

Siebel Email Marketing Stand-Alone assures the validity of the email addresses by making sure they use the format of username@domain.abc. To find out which email addresses need to be removed, look in BoldFish.log for the following message:

invalid email address

Question

When I set up my email variables, I do not get any values showing. What should I do?

Answer

Typically, this occurs if you are using Oracle and not using the correct case. Oracle is case sensitive and usually requires the column names to be in upper case.

Question

How can I set up a list so that replies with a general comment or question (not with UNSUBSCRIBE) will be sent to a valid specified email account, while UNSUBSCRIBE messages are handled properly?

Answer

Do the following:

- 1 Click List Owner.
- 2 From List Owner Options, choose the appropriate list.
- 3 From the Configuring List screen, choose Errors.
- 4 Scroll down to the bottom of the screen until you see Who Gets Siebel Email Marketing-generated Errors.
- 5 Choose Author Gets Usage Errors; Error Handlers Gets All Others.
- 6 Choose the People option on the left hand side, under List Owner.
- 7 Fill in a legitimate email address that can accept the nonunsubscribe requests under Error Handlers.

Question

What directories or files do I need to back up so that I can restore Siebel Email Marketing Stand-Alone in case of hardware failure or other disaster?

Answer

Back up the following directories:

For Windows NT and 2000 (default directories):

```
C:\Program Files\bes\lists
```

C:\Program Files\bes\web

C:\Program Files\bes\bin

C:\Program Files\bes\classes

Also, back up the global_config file.

For Solaris:

{Siebel Email Marketing Installation Directory}/bin

{Siebel Email Marketing Installation Directory}/classes

{Siebel Email Marketing Installation Directory}/lists

{Siebel Email Marketing Installation Directory}/web

Also back up the global_config, boldfish, dbstart, dbshut, and dbconnect files.

