

O P E N P O R T™  
technology

**Application Note:**

**BROADCAST LIST MANAGER  
GUIDE**

**for IP LaunchPad 1.6  
Version 1**

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**Part Number D5BLM106-01**

# IPLP BROADCAST LIST MANAGER

Broadcast lists are created using the Broadcast List Management application. This application is designed to:

- Display the entries in an existing Broadcast List
- Allow the System Administrator to add new entries to a Broadcast List (one at a time or by batch import).
- Allow the System Administrator to change information about existing entries in a Broadcast List.
- Allow the System Administrator to delete existing entries in a Broadcast List.

This Guide is intended for System Administrators charged with the job of maintaining Broadcast Lists for an IP LaunchPad installation. It presents instructions for installing the Broadcast List Manager and for performing the tasks listed above.

## About This Chapter

This chapter contains the following sections:

**Overview of Message Broadcasting *page 5*** Description of how IP LaunchPad handles the "broadcasting" of a message to a list of destinations.

**Install the Broadcast List Manager *page 6*** Instructions for installing the Broadcast List Manager

**Start/Login *page 12*** Instructions for starting the BLM and logging in.

**Create a Broadcast List *page 14*** Instructions for creating a new broadcast list.

**Add Destinations to a List *page 16*** Instructions for adding new destinations to a Broadcast List.

**Edit Destination Information *page 20*** Instructions for editing the information about an existing Destination.

**Fields in the Destination Attributes Dialog *page 21*** Overview of the fields available for entering information about a destination.

**Edit List Information *page 25*** Instructions for editing the information about a Broadcast List.

**Batch Import for BLM *page 27*** Instructions for preparing a file of Destination information for batch import into a Broadcast List.

## Overview of Message Broadcasting

IP LaunchPad allows a Subscriber to "broadcast" a message simply by specifying two or more destination addresses. In addition, IP LaunchPad supports broadcast lists—precompiled lists of destination addresses.

When submitting a message to the IP LaunchPad system, the Subscriber can enter a broadcast list ID as a destination. (For any message, the Subscriber can enter two or more destinations; this destination list can consist of individual destinations, broadcast list IDs, or a mixture of the two.)

When IP LaunchPad receives a list of destinations for a message, it scans the list for Broadcast List IDs. Each Broadcast List ID is submitted to the IP LaunchPad Subscriber List Server, which returns the complete list of destinations associated with the ID. This list of destinations is added to the complete list of destinations for the message.

The broadcast list ID is a numeric string. This makes it possible to broadcast faxes from a fax machine. If the fax machine is connected to IP LaunchPad through a Redialer, the Subscriber can insert a document into the fax machine as usual, enter the Broadcast List ID, and press the Send button. The Redialer sends the fax into IP LaunchPad; IP LaunchPad detects the Broadcast List ID, expands it into a list of ordinary destinations, and processes the fax for delivery to each of these locations.

The Broadcast List Manager application is a java-based program that enables the System Administrator to:

- Create new Broadcast Lists
- Add Destinations to a list.
- Edit existing Destination and List information.
- Remove Destinations from lists.
- Delete lists.

This Guide contains instructions for each of these tasks.

# Install the Broadcast List Manager

The Broadcast List Manager applications installed by the same installation wizard that is used for the IP LaunchPad Customer Management Application (CMA).

---

*The following instructions provide enough information to install ONLY the Broadcast List Manager, if this is desired. Refer to the User Provisioning for IP LaunchPad document for complete instructions for the CMA/BLM installation wizard.*

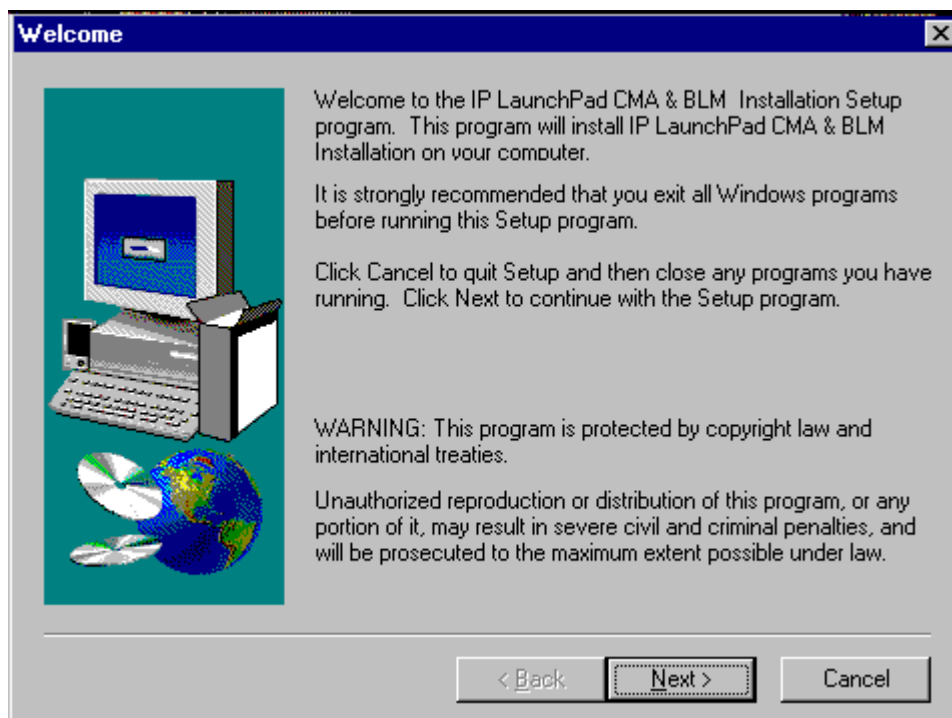
---

To install one or both applications:

### Start the InstallShield Wizard

1. Quit all Windows applications.
2. Inset the IP LaunchPad CD-ROM diskette into the CD-ROM drive.
3. Run "setup.exe" from the CMA directory on the CD-ROM.

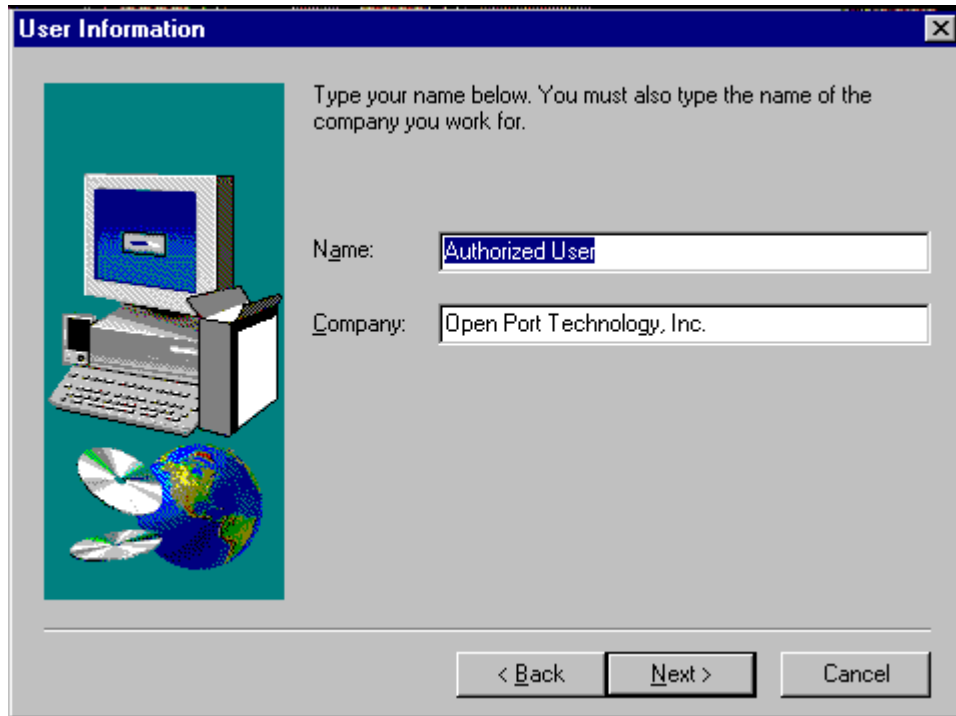
A message box appears with the message "Setup is preparing the InstallShield wizard..." Eventually, the first WELCOME window appears.



4. Click the NEXT button.

The *User Information* window appears. (Go on to Step 5.)

### Check User Information



**User Information**

Type your name below. You must also type the name of the company you work for.

Name:

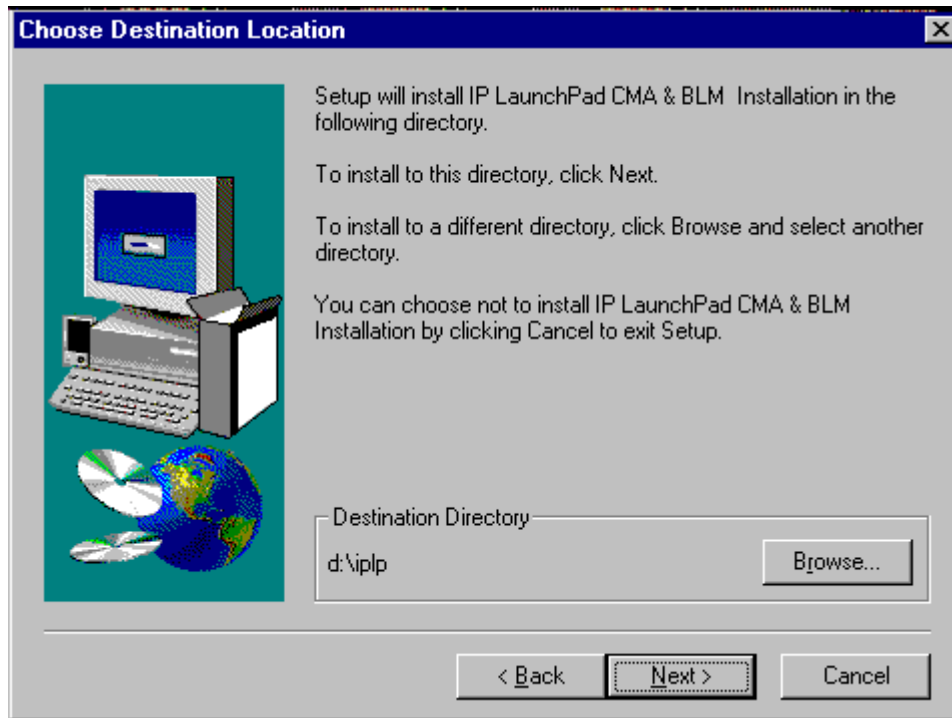
Company:

< Back    Next >    Cancel

5. If necessary, correct the information in the NAME and COMPANY fields. Then click the NEXT button.

The *Select Client Destination Directory* window appears. (Go on to Step 6).

## Accept/Change Destination Directory



The *Choose Destination Location* window lists the default directory (that is, the directory *iplp* on the current drive).

### To Install the CMA in the Default Directory:

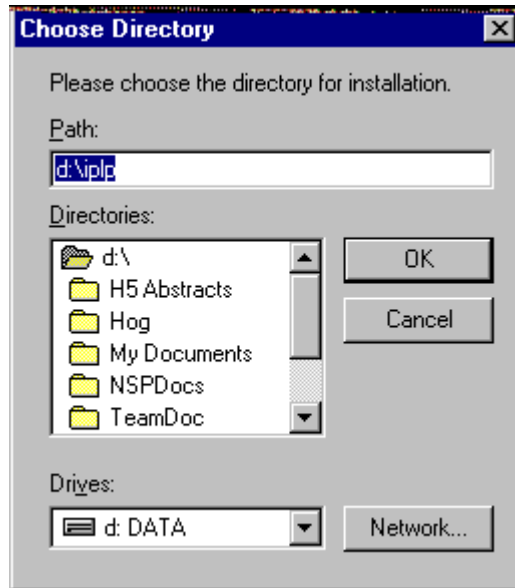
6. Click the NEXT button. Skip to Step 10 below.

### To select a different directory:

7. Click the Browse... button.

The *Choose Directory* window appears. (Go on to Step 810.)



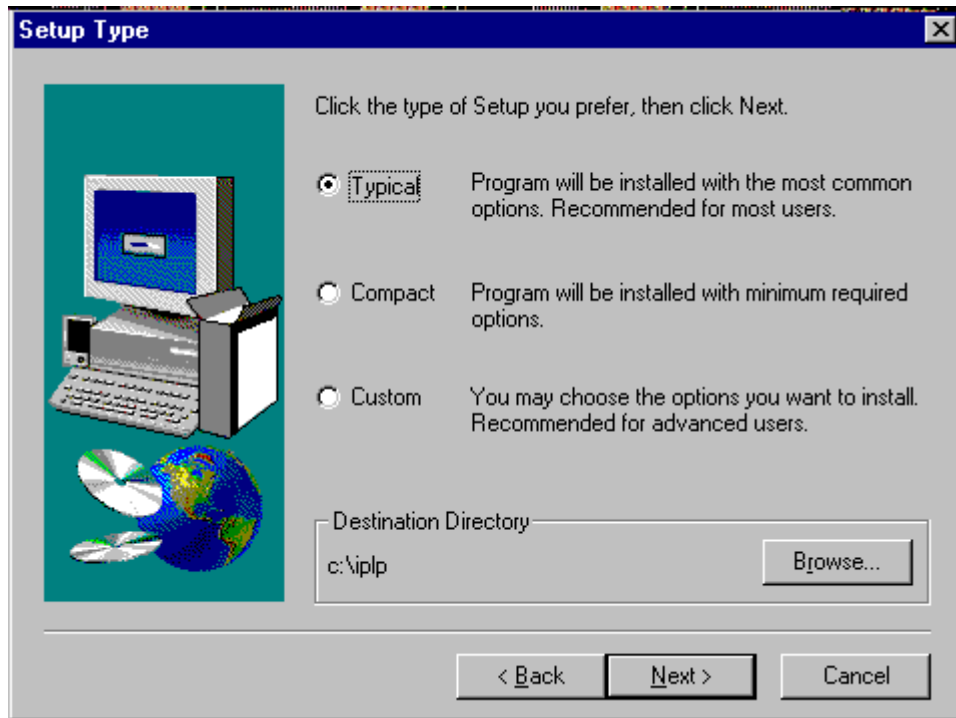


8. In this window, you can specify an installation directory on the local system or on the network.

When you are finished in the *Choose Directory* window, click the OK button. The *Choose Directory* window disappears, and the *Choose Destination Location* window becomes active.

9. When you are finished in the *Choose Destination Location* window, click the OK button. The *Setup Type* window appears. Go on to the next step.

## Select Setup Type



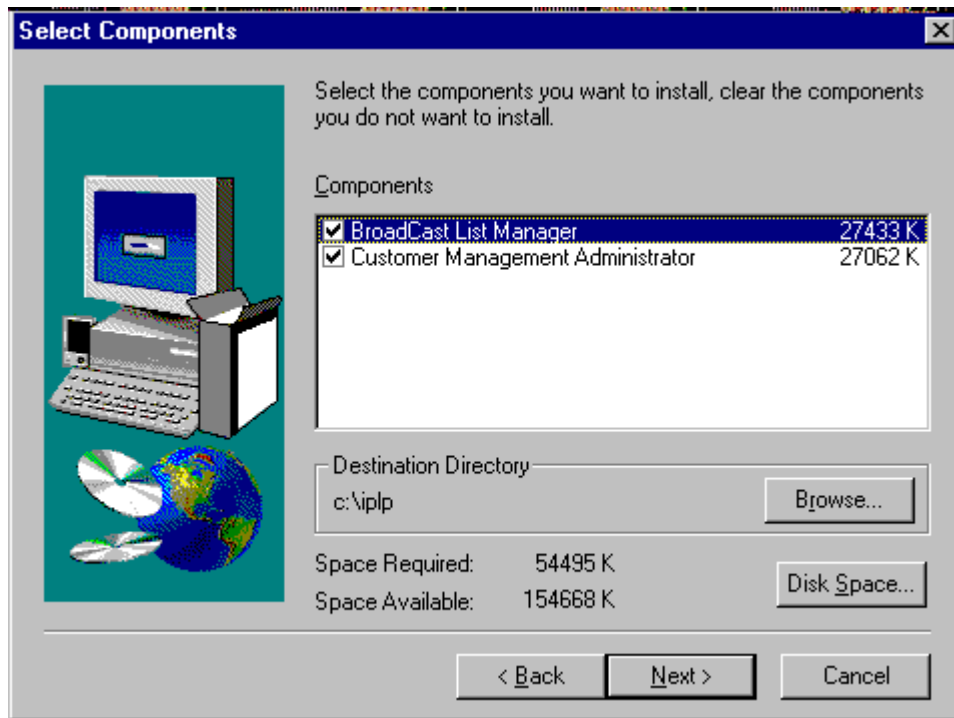
**10.** In the *Setup Type* window, select one of the following setup types:

- Typical - The standard installation.
- Compact - Installation of only the files that are necessary to run the application. (This option omits sample import files, coverpages and notification scripts).
- Custom - Allows you to install either the Customer Management Application or the Broadcast List Management application. (The "Typical" installation installs both.)

### To Install **ONLY** the BLM:

**11.** Click CUSTOM, then click the NEXT button.

The SELECT COMPONENTS window appears.



12. After you have customized the installation, click the NEXT button.
13. Follow the prompts to proceed with the installation.

## Start/Login

To start the Broadcast List Manager application:

1. Click the **START** button in the lower left corner of the Windows desktop.
2. From the popup menus, choose *Programs • IP LaunchPad • Broadcast List Manager*.

The CMA Login window appears:

The screenshot shows a Windows-style dialog box titled "CMA Login". At the top, there are two logos: "OPENPORT" on the left and "IP LaunchPad™ INTERNET SERVICES CREATION PLATFORM" on the right. Below the logos are four input fields: "Hostname:" with the value "lakota.openport.com", "Realm:" with "iplaunchpad.com", "User ID:" with "cmadmin", and "Password:" which is empty. To the right of these fields are three buttons: "Login" (highlighted with a dashed border), "Settings...", and "Cancel". At the bottom of the dialog, there is a section labeled "Connection Information:" followed by a large empty rectangular text area.

3. From the Host Name dropdown list, choose the host name specified by the System Administrator. Then fill in the Realm, UserID and Password fields.
4. Click the **LOGIN** button.

The IPLP Broadcast List Management main window appears:



From the IPLP Broadcast List Management window, you can create, edit, delete, and reload a broadcast list. See the following pages for instructions.

## Create a Broadcast List

To create a new broadcast list:

1. In the CURRENT USER LISTS field in the top left corner of the window, highlight the line PERSONAL LISTS by clicking on it.
2. Click the Create Broadcast List button above the CURRENT USER LISTS field.



The *Subscriber List Attributes* dialog appears:

**Subscriber List Attributes**

General List Attributes

Name:

Description:

DTMF ID:

SL GUID:

Date Created:

Date Modified:

Query Update:

# of Destinations: 0

Access Control List

OK Cancel

3. In the General List Attributes box of this dialog, enter information in the following fields:
  - Name A name for the Broadcast List.
  - Description A brief description for this list (255 characters maximum).
  - DTMF ID A string of numbers that will uniquely identify this list.
4. Click OK.

The *Subscriber List Attributes* dialog disappears. The main window becomes active. The description of the new list now appears in the CURRENT USER LISTS field.

After a new list has been created, you can add Destinations to it. See *Add Destinations to a List* on page 16 for instructions.

## Add Destinations to a List

The Broadcast List Manager application has a dialog box in which you can enter all necessary information for a Destination. It is also possible to "batch import" two or more destinations automatically from a specially formatted text file.

### To Add One Destination

1. Log in to the Broadcast List Manager (if you have not already done so.
2. In the CURRENT USER LISTS field in the main window, highlight the name of the list to which you want to add destinations by clicking on it.  
The list of destinations currently stored in that list appears in the table in the bottom half of the window.
3. Click on the Create Destination button in the bottom part of the window:





The *Destination Attributes* dialog appears.

**Destination Attributes**

Destination Control

Destination ID: **<Assigned After Creation>**

Destination Description

Primary Delivery Address: Fax

Destination Status: Active

Live link to User Server Entry

Browse User Server

General | Codes

Names & Descriptions

First: \_\_\_\_\_

Last: \_\_\_\_\_

Company: \_\_\_\_\_

Title: \_\_\_\_\_

Mailing Address

Street: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_

Zip Code: \_\_\_\_\_ Cntry: \_\_\_\_\_

Address Characteristics

Attribute	Value
Areacode	
CentralOffice	
InternationalEs...	
CountryCode	
NumDigitsLoca...	

Addresses

Type	Address Data
Email	
Fax	
Voice	
Pager	
Mobile	

OK Cancel

### Required Information

The following steps cover the minimum required information that should be added for a new destination.

4. In the Destination Control box in the top part of the window, select one of the following address types from the PRIMARY DELIVERY ADDRESS field:
  - Email
  - Fax
  - Voice
  - Pager
  - Mobile
  - Home
  - Web-URL
  - OnNet
  - GlobalVMID
5. In the Addresses table in the bottom right corner of the dialog, scroll down until you find a line for the address type that you chose in the previous step. Double-click in the field to the right of the address type. An input dialog opens.
6. Enter an address that corresponds to this address type and click OK. The input dialog disappears. The new address appears in the appropriate field in the Addresses table.

---

*Example: if "Fax" was selected as the Primary Delivery Address type, you MUST enter a fax number in the Addresses table, or the new destination will not be added to the list.*

*Although the Primary Delivery Address type and the address are the only required pieces of information, it makes sense to add a description, name, title, etc. This information will help you identify the destination later.*

*See page 21 for a complete list of fields in the Destination Attributes window.*

---

### Other Information

7. Add other information as desired.

### **Adding the Destination**

8. When you have finished adding information about the new Destination, click OK.

The *Destination Attributes* window disappears; the main window becomes active. The Destination you just added appears in the table in the bottom half of the window.

### **Adding Destinations by Batch Import**

The "Batch Import" process allows you to add a long list of names to a Broadcast List by entering the names (and other information) into a text file and then importing that text file into the current Broadcast List. Although this is a complex process, it can be much faster than entering each name in the *Destination Attributes* window.

See page 27 for complete instructions for Batch Import.

## Edit Destination Information

To edit an existing Destination:

1. Log in to the Broadcast List Manager (if you have not already done so).
2. In the CURRENT USER LISTS field in the main window, highlight the name of the list to which you want to add destinations by clicking on it.

The list of destinations currently stored in that list appears in the table in the bottom half of the window.

3. Use one of the following methods to open one of the Destinations listed in the table:
  - Highlight a Destination by clicking on it, then click the EDIT DESTINATION button above the table.



- Double-click the Destination.

The *Destination Attributes* window appears, displaying the current information for the chosen Destination.

---

*See page 21 for a complete list of fields in the Destination Attributes window.*

---

4. When you are finished making changes in this window, click OK to save the changes or CANCEL to exit without saving.

The *Destination Attributes* window disappears; the main window becomes active.

## Fields in the Destination Attributes Dialog

**Destination Attributes**

Destination ID: 79F2BEAE-7829-11D3-09D1-8000A07...

Destination Description  
Boyd Marconi

Primary Delivery Address: Fax      Destination Status: Active

Live link to User Server Entry     

General | Codes

**Names & Descriptions**

First: Boyd  
Last: Marconi  
Company: Letterall Services  
Title: Trainer-Southeast

**Mailing Address**

Street: 221 Enterprise Drive  
City: Cody      State: MD  
Zip Code: 55661      Cntry: USA

**Address Characteristics**

Attribute	Value
Areacode	218
CentralOffice	
InternationalEs...	
CountryCode	1
NumDigitsLoca...	7

**Addresses**

Type	Address Data
Email	bmarc@letterall.com
Fax	2188119100
Voice	2188119056
Pager	
Mobile	2186648521

OK      Cancel

Enter information about the Destination in the following fields:

### Destination Control box

**Destination ID** A unique ID for this Destination. This is assigned by the system.

**Destination Description** A brief description of the Destination.

**Primary Delivery Address** The type of address being used for this Destination. To enter information in this field, choose one of the following from the dropdown list:

- Email
- Fax
- Voice
- Pager
- Mobile
- Home
- Web-URL
- OnNet
- GlobalVMID

---

*After choosing an address type here, you must enter an address of the same type in the Address box further down in this window. See page 18 for instructions.*

---

**Destination Status** The status of this destination. Choose one of the following:

- **Active** Tells IP LaunchPad to sent messages to this destination when its Broadcast List is chosen.
- **Disabled** Tells IP LaunchPad to skip this Destination when this Broadcast List is chosen.

### General Tab / Names and Descriptions box

**First** The Destination's first name (up to 255 characters).

**Last** The Destination's last name (up to 255 characters).

**Company** The name of the Destination's company (up to 255 characters).

**Title** The Destination's job title (up to 255 characters).

### **General Tab / Mailing Address box**

**Street** Three fields for the Destination's street address (up to 255 characters each).

**City** The Destination's city (up to 255 characters).

**State** The Destination's state or province (up to 255 characters).

**Zip Code** The Destination's Zip code or postal code (up to 255 characters).

**Cntry** The Destination's country (up to 255 characters).

### **General Tab / Address Characteristics table**

In this table there is one field for each of the data items in the **Type** column. To enter data in an Address Characteristics field, double-click on the field, enter the data in the dialog box that appears, then click **OK**.

**AreaCode** The local Area Code.

**CentralOffice** The Central Office number.

**InternationalEscape** The international escape code for the Destination's country.

**CountryCode** The country code for the Destination's country.

**NumDigitsLocal** The number of digits that constitute a call within the Destination's area code.

**NumDigitsLDCall** The number of digits needed to dial a long-distance call from the Destination's location.

**LongDistanceEscape** The prefix used in front of a long-distance number in the Destination's location.

### General tab / Addresses table

In this box there is one field for each of the address types in the dropdown menu for the PRIMARY DELIVERY ADDRESS field. To enter data in an Addresses field, double-click on the field, enter the data in the dialog box that appears, then click OK.

**Email** The Destination Email address (up to 255 characters).

**Fax** The Destination fax number (in E.164 format).

**Voice** The Destination voice phone number (in E.164 format).

**Pager** The Destination pager number (in E.164 format).

**Mobil** The Destination mobile phone number (in E.164 format).

**Web-URL** A URL to this Destination web page.

**VM-ID** The Destination Global VoiceMail ID.

### Codes tab / Billing Keywords table

In this box, you can assign one or more predefined Billing codes to this Destination. Each Destination can have a unique set of billing codes. The numeric Billing codes are attached to each message sent to this Destination; these codes, and/or the text strings they represent, can be used when tracing or reporting on outbound messages.

### Codes tab / Keyword Associations table

In this box, the you can define one or more predefined Keyword codes to this Destination account. Each Destination can have a unique set of Keywords. The numeric code associated with each Keyword is attached to each message sent to this Destination; these codes, and/or the text strings they represent, can be used as search criteria or included in onscreen or printed reports about the message.



## Edit List Information

To edit information about an existing Broadcast List:

1. Log in to the Broadcast List Manager (if you have not already done so.
2. In the CURRENT USER LISTS field in the upper left corner of the window, highlight the description of list you want to edit by clicking on it.
3. Click the EDIT BROADCAST LIST button above the CURRENT USER LISTS field:



This *Subscriber List Attributes* window for the selected list displays.

**Subscriber List Attributes**

General List Attributes

Name:  SL GUID: {7676CC58-7828-11D3-09D1...}

Description:  Date Created:

DTMF ID:  Date Modified:

Query Update:

# of Destinations: **11**

Access Control List

## IPLP Broadcast List Manager

*Edit List Information*

---

4. Edit the information in the NAME, DESCRIPTION and.or DTMF ID fields.

---

*The Access Control List in the bottom part of this window is not enabled in this release.*

---

5. When you are finished making changes in this window, click OK to save the changes or CANCEL to exit without saving.

The *Subscriber List Attributes* window disappears; the main window becomes active.

## Batch Import for BLM

This document focuses on the BLM Batch Import functionality, which allows the System Administrator to add new Destinations to a Broadcast List by importing a source file of account data. This document presents instructions for importing, offers troubleshooting advice, and documents all data fields that could be included in a source file for import into the Broadcast List.

### A Note About These Instructions

For best results, read this document thoroughly and carefully before attempting a batch upload. The addition of improperly formatted records can make the Broadcast List unusable.

### Prepare a File for Import

To prepare for the BLM import process, you must collect all the data for the new accounts into one source file. (For example: the data file can be exported from another database, entered "by hand" using a text editor, or taken from a source text file and "massaged" into the proper format.)

### Import File Requirements

In order for a file to import successfully into the IPLP Customer database, it must follow these formatting rules:

- The file must be a text file that uses ASCII, Unicode or UTF-8 formatting. It can have any name or extension.
- All data for a single Destination must be collected into one record. Each record should be separated from the next by a Return character.
- Each field in the record must correspond to one of the standard fields defined for a BLM list entry.

---

*See the Guide to Importable Fields on page 43 for a complete listing of all fields that can be represented in a source file.*

---

- At absolute minimum, each record for import must contain:
  - Primary Delivery Address Type.
  - An address of the same type.
- Within each record, the List entry data must be separated into fields. The order of the fields must be the same in each record.
- Within the records, one of three methods can be used for separating one field from the next:
  - **Double-quote Format** In this format, the data for each field is enclosed in quotation marks, and separated from the next field by a comma.  
Example:  
`"John" , "Smith" , "Open Port Technology" <return>`
  - **Fixed Field Format** In this format, each field is defined as a fixed number of characters. If the data in the field has fewer characters than the fixed number, the field must be padded out to the required length with spaces. No delimiters are needed.  
Example using fields of lengths 8, 8 and 22 characters:  
`John Smith Open Port Technology <return>`
  - **Custom Delimiter format** In this format, each field is separated from the next by some character specified for this operation. Any character can be used, just as long as it is not used within the data of an field. It is not necessary to enclose the field data in quotes.  
Example using the "pipe" character ("|"):  
`John|Smith|Open Port Technology<return>`

---

*If the Double-quote format is being used, and the data being imported for each record includes data for the "Default Address Characteristics" field, this field must be the last one in the record. See page 47 for more information about Default Address Characteristics.*

---

- The method for separating fields must be consistent within all records.
- No field in any record must contain more than 255 characters of data.
- Any line in the import file that begins with a "#" character will be interpreted as a comment. The batch import program will ignore it.

## Optional: the Field Specification Header

Before the BLM can import a source file, it must be told what fields are in each record, and the order in which they occur. You can input this information just before importing the file in the BLM's *Subscriber Import* dialog box (See *Specify the Order of Fields in the Source File* on page 35 for complete instructions).

It is also possible to specify the field names and the field order in a series of lines at the beginning of the source file itself. This makes it possible to create self-contained batch import files that can be uploaded with minimal operator interaction.

This field specification header must conform to the following rules:

- The field specification header lines must be the first lines in the file.
- Each line in the field specification header must begin with a "\$" character.
- The header must contain one line for each field in the record being imported.
- Each header line must have the following format:

```
$ IMPORT SUBCMD=SET FIELD_NAME="fname" FIELD_SIZE=#fsize
```

Where `fname` is the name of the field, and `fsize` is the number of characters.

---

*The field name must exactly match one defined within the BLM, and must have a valid FIELD\_SIZE value. See Guide to Importable Fields on page 43 for a sample Field Specification line for each importable field. (The sample line for each field includes a valid FIELD\_SIZE value.)*

*In the Guide to Importable Fields on page 43, the entry for each field also includes a sample Field Specification line for that field. The field size is only important when the source file is in a Fixed Field format (see above). Nevertheless, each header line must have a FIELD\_SIZE value.*

---

- The order of the header file lines must exactly match the order of the fields in each source file record.

### A Sample Source File with a Field Specification Header

The following sample source file shows how the field specification header should look.

```
$ IMPORT SUBCMD=SET FIELD_NAME="First Name" FIELD_SIZE=#100
$ IMPORT SUBCMD=SET FIELD_NAME="Last Name" FIELD_SIZE=#100
$ IMPORT SUBCMD=SET FIELD_NAME="Company Name" FIELD_SIZE=#100
$ IMPORT SUBCMD=SET FIELD_NAME="Title" FIELD_SIZE=#100
$ IMPORT SUBCMD=SET FIELD_NAME="Street Address 1" FIELD_SIZE=#100
$ IMPORT SUBCMD=SET FIELD_NAME="Street Address 2" FIELD_SIZE=#100
$ IMPORT SUBCMD=SET FIELD_NAME="City" FIELD_SIZE=#100
$ IMPORT SUBCMD=SET FIELD_NAME="Fax Number" FIELD_SIZE=#100
Robert,Smith,Master Dynamics,President,675 Center Street,Suite850,Terre
Haute,555-8600
Mary,Cleary,Master Dynamics,VP Sales,675 Center Street,Suite850,Terre
Haute,555-8600
Antoine,Macaleer,Master Dynamics,VP Development,675 Center
Street,Suite850,Terre Haute,555-8600
Martin,Voorhees,Master Dynamics,HR Director,675 Center Street,Suite850,Terre
Haute,555-8600
Maureen,Wade,Master Dynamics,Senior Engineer,675 Center Street,Suite850,Terre
Haute,555-8600
```

---

*If the source file contains field specification information, and the operator specifies a different set of fields or a different field order during the import process, the BLM will override the field specification header and attempt to import and upload the new records using the field order specified by the operator.*

---

When the file is ready, it can be imported into the BLM. Follow the instructions that start on the next page.

## A Note About International Text Formats

The BLM Batch Import utility can process text files that use any of the following encoding schemes:

- ASCII
- Unicode
- UTF-8

For records created in English, using an English-language version of Windows, the ASCII format is sufficient. The Unicode or UTF-8 formats are preferred for text containing Chinese, Dutch German, Greek or Japanese characters.

See *Specify the Import File* on page 34 for information about specifying the encoding format of a batch import file.

Microsoft Windows NT provides two applications that can be used to convert an ASCII-encoded file to a Unicode-encoded file (or Unicode to ASCII):

- WordPad (this only works in the version supplied with the double-byte-enabled version of Windows NT).
- NotePad (all versions of Windows).

### Import a Broadcast List File

To import a source file into an existing Broadcast List:

1. Log in to the Broadcast List Manager (if you have not already done so).
2. In the CURRENT USER LISTS field in the main window, highlight the name of the list to which you want to add destinations by clicking on it.

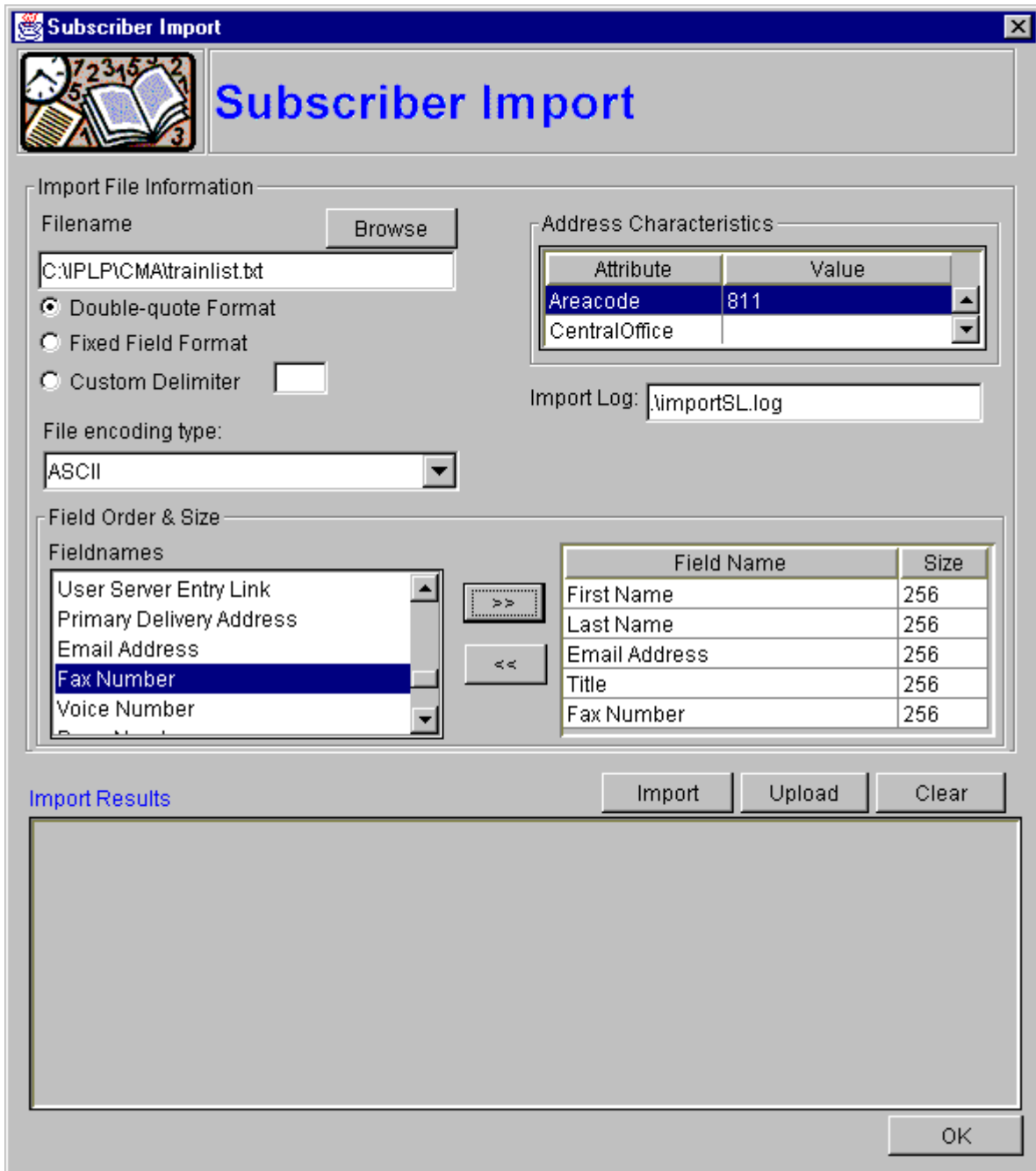
The list of destinations currently stored in that list appears in the table in the bottom half of the window.

3. Click the IMPORT SUBSCRIBERS button to the right of the Customer Tree.





The *Subscriber Import* dialog appears.



### Specify the Import File

4. In the FILENAME field, enter the complete path and filename of the source file. Or, click the BROWSE button and browse to the filename using the standard Windows OPEN dialog box.
5. Specify the format of the source file by clicking one of the radio buttons under the Filename field--either Double-quote Format, Fixed Field Format or Custom Delimiter.
6. If the source file format is Custom Delimiter, enter the delimiter character in the field to the right of this choice.
7. Select the encoding type of the import file from the dropdown menu in the *File encoding type* field.

### Choose Other Import Options

8. If you want the results of the import process to be written to a log file, enter the path and filename in the Import Log Filename field. The default is a file called `import.log`, which is created in the CMA's home directory.

---

*If this file does not exist, it will be created during the import process. If the file does exist, the import process will over-write it.*

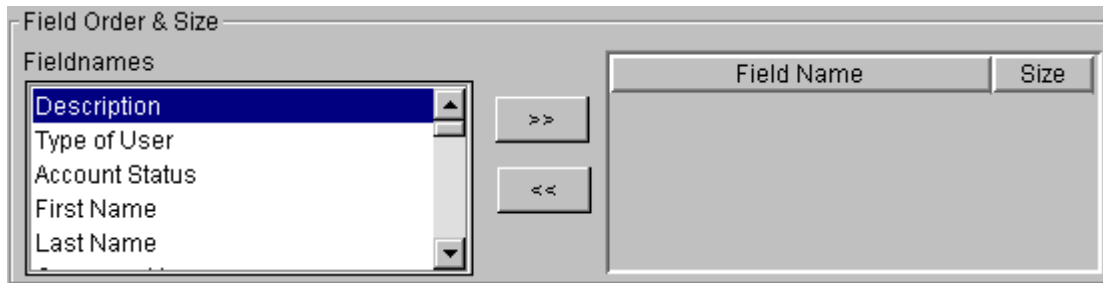
---

9. If you want to specify Address Characteristics that will be applied to every imported record, enter them in the Address Characters box.

### Does Your File Have a Field Specification Header?

10. If the source file has a field specification header (see *Optional: the Field Specification Header* on page 29 for explanation) skip to Step 15 below (the *Import the New Destinations* section).

## Specify the Order of Fields in the Source File



- 11.** In the FIELDNAMES field in the Field Order & Size box, select the name of the Destination field that corresponds to the first field in each record in the source file. Highlight that field name by clicking on it, then click the >> button to the right of the Fieldnames field.

A new row is created in the table to the right of the >> button. The selected fieldname appears in the first box in the row.

---

*Not all the fields listed in the Fieldnames field are importable in this version of the BLM. Check the alphabetical listing of importable fields starting on page 43 to make sure the field you want to use is importable.*

---

- 12.** If the source file is in Fixed Field Format, a Size column appears to the right of the Field Name column in the table. To enter the size of this fixed width field:

- Double-click inside the box to the right of the fieldname. An input dialog box appears.
- In this input box, enter the number of characters defined for this field.
- Click OK. The input box disappears. The number of characters appears in the size column to the right of the field name.

- 13.** Go back to Step 11 above to specify the next field in the source file record.

---

*Important: the number and order of the fields specified here must exactly match the number and order of data fields in the source file.*

---

14. When you have defined all the fields in the source file record, go on to the next step.

---

*If you have defined fields for a source file that already contains a Field Specification Header, the BLM will override the information in the file and use the fields you have just defined. See page 29 for more information about the Field Specification Header.*

---

### Import the New Destinations

15. Click the IMPORT button in the lower part of the Subscriber Import dialog.

As the import process goes forward, each new list entry is displayed in a new row in the Import Results table. The text above the Import Results table shows how many records were actually imported, and how many lines were in the import file (example: 123 / 125 RECORD(S) IMPORTED.

For each record that cannot be imported, the program writes one line to the log file.

---

*The log file will NOT contain entries for entries that were imported successfully.*

---

16. Check the rows in the Import Results table to make sure that the data in the field corresponds with the field name, etc.

---

*See Troubleshooting the Import Process on page 38 for information about possible problems you may see during this process.*

---

17. If there are problems with the imported records, click the CLEAR button to delete them. Follow the steps above to redefine the import parameters, then re-import the records.

18. After verifying the imported records and fixing any problems you have found, click the UPLOAD button to commit them to the Customer database.

For each record that cannot be uploaded, the program writes one line to the log file.

---

*The log file will NOT contain entries for records that were uploaded successfully.  
See Troubleshooting the Import Process on page 38 for information about possible problems you may see during this process.*

---

**19.** After you have imported all records, click the OK button.

The *Subscriber Import* dialog closes. The newly imported records appear in the Subscribers table at the bottom of the main BLM window.

### Troubleshooting the Import Process

Within the BLM, creating new Destination records from a source file is a two-phase process:

- **Import** Creating temporary Destination records from the data in the source file.
- **Upload** Writing these new records to the Broadcast List.

This section offers background information and advice about problems that may occur during each of these phases.

#### The Import Phase

During the Import phase, the BLM does the following:

- Attempts to create new Destination records from the data in the source file.
- If the user specified a log file name, the BM writes one entry for each record to the log file. The entry reports on whether the BLM succeeded or failed in importing this record.

In general, the Import process is extremely "fault-tolerant"--it will do its best to create new records no matter what problems may exist in the source file. For this reason, it is a good idea to carefully examine the resulting Destinations before uploading them to the database.

## **Checking the Results of the Import Phase**

If you specified a log file name before importing the new records, display the log file to check the temporary Destinations created during the Import phase. This file reprints each record imported and follows the line with the message `Valid entry processed`. For some records, however, the log file may contain an error message that can help you track down a problem with that record.

### **Problem: 0 Records Imported**

If the status line above the imported records table reports that there were zero records imported, check the following:

- Make sure the entry in the Filename field points to an existing file.
- If you are trying to import a file with the Fixed Field format, check the Size parameter for the first field specified in the right side of the Field Order & Size box. If this field size is larger than the total length of the record (if, for example, it has not been reset from the default value of 255), none of the records in the source file will be imported.

### Problem: Correct Data, Wrong Fields

Example: the First Name came through intact, but it shows up in the Address1 field in the *User Attributes* dialog.

Possible causes:

- You have specified the wrong field names in the Field Order & Size box, or you have specified the right fields in the wrong order. Return to the *Subscriber Import* dialog and carefully check the list of specified fields against the order of the data in each record of the source file.
- One or more records in the source file have out-of-order data elements. Again, check the fields in the suspect record against the order specified in the *Subscriber Import* dialog.
- In a "Custom-Delimited" source file, you have left out one or more delimiters in a record. This has the effect of writing every piece of data following the missing delimiter to the wrong field in the Destination.
- The Field Specification Header in the source file lists the fields in the wrong order. If the source file has a Field Specification Header, check it carefully to see that it accurately reflects the order of the fields in the records themselves.

### Problem: Garbled or Missing Data

Example: fields in a new Destination contain parts of the data from two different source file fields, or comma, quote or delimiter characters that should not be there.

Possible causes:

- You have specified the wrong source file format.
- In a "Double-quote" source file, you have left out one or more quotation marks.
- In a "Fixed Field" source file, you have specified the wrong field lengths. (If this has happened, it is also likely that the last field specified in the Field Order & Size box was left out of the new Account.)
- The Field Specification Header is not properly formatted. Example: if one of the lines in the Field Specification Header is missing the "\$" character at the beginning, the BLM will try to import that line as a record, and fail to import data for that specified field in each record of the source file.



## The Upload Phase

During the Upload phase, the BLM attempts to write each new list entry to the Broadcast List. If there is a problem with a new account, the BLM will skip it and go on to the next Destination. Successfully uploaded Destinations are deleted from the Import Results table, so that the only records listed in this table after an Upload are the ones with problems.

### **Problem: the system hangs**

If the Upload button does not "come back up" and you are unable to do anything else within the BLM, the first thing to do is to see whether IP LaunchPad is still running. If it is not, you must restart IP LaunchPad and go through the import process again.

### **Problem: "ENTRY ALREADY EXISTS" Error Message**

This message appears when one of the new Destinations you are uploading duplicates an existing Destination.

### **Problem: No New Accounts Uploaded**

Example: during the upload process, a message box with the message `UseCreateFF() Failed` appears once for each new Destination; afterward, no Destinations have disappeared from the Import Results table at the bottom of the *Subscriber Import* dialog box.

Possible causes:

- You have specified too many or too few fields in the Field Order & Size box.
- You have specified the wrong source file format.
- When importing a "Fixed Field" source file, you have specified the wrong field lengths.

### **Problem: Some New Accounts Not Uploaded**

For each new Destination that fails, the BLM displays a message box containing the message `UseCreateFF() Failed`. After the Upload process is complete, the failed records will still show up in the Import Results table at the bottom of the *Subscriber Import* dialog box.

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---

Possible causes:

Any of the format problems described in the Import Phase section (see page 38). If you did not catch and fix these problems after the Import phase, they could cause problems now. Check each of the failed Accounts for formatting problems, then try to re-upload them.

## Guide to Importable Fields

Each piece of data you put in a source file for BLM Batch Import must correspond to a field that is defined for Destinations in an IP LaunchPad Broadcast List. As part of the process of importing the new records, you must specify the Destination field that corresponds to each piece of data in each field of the source file.

This section lists all the list entry fields that can be filled with imported data. For each field type, this section lists:

- The field name (which you choose from the Fieldnames menu in the *Subscriber Import* dialog).
- A description of the data stored in that field.
- A list of possible values for that field.

As you enter data in the source file, be sure to follow the "Possible Values" guidelines for each field you want to include. If the data for a field is incorrectly formatted, or out of the range of possible values, the record containing the bad data may not be uploadable (or may corrupt the database when uploaded).

---

*Not all the fields listed in the Fieldnames menu are importable in this release of the BLM. Check the listing of each field you want to use in the following pages to make sure you can import it. For easy reference, these field descriptions have been sorted in alphabetical order. They are not in the same order as in the Fieldnames menu.*

---

### Account Status

The current status of this Destination.

**Possible Values** One of the following:

- Active
- Disabled

---

*To populate this field properly, this corresponding entry in the source file must contain one of the above choices, EXACTLY as displayed here (same spelling, same capital letters, same spacing).*

---

**Field Specification Line** To identify this field, include the following line in the Field Specification Header:

```
$ IMPORT SUBCMD=SET FIELD_NAME="Account Status" FIELD_SIZE=#100
```

## Billing Codes

The Billing Codes associated with this Destination. Each Destination can have a unique set of up to twenty character strings. Each string is associated with a number between one and twenty. When adding a Destination to a Broadcast List, you can associate one or more of these Billing strings with it. IP LaunchPad stores the numeric billing codes with the message. When generating any report or status display regarding the message, IP LaunchPad can substitute the string value for the numeric code.

**Possible Values** To define one or more Billing Codes in a source file record, list all the character strings you want to associate with Billing codes, separated by commas. When the BLM creates a new Destination based on this record, it will assign the first string to the Billing Code zero, the next one to Billing code 1 etc.

---

*If you are using the "Double-quote" format, make sure that the entire list of Billing Code strings is enclosed in one set of quotation marks.*

---

**Field Specification Line** To identify this field in the Field Specification Header, include the following line:

```
$ IMPORT SUBCMD=SET FIELD_NAME="Billing Codes" FIELD_SIZE=#100
```

## City

The Destination's city.

**Possible Values** Any combination of letters and numbers (255 characters maximum).

**Field Specification Line** To identify this field in the Field Specification Header, include the following line:

```
$ IMPORT SUBCMD=SET FIELD_NAME="City" FIELD_SIZE=#100
```

### Company Name

The Name of the Destination's company

**Possible Values** Any combination of letters and numbers (255 characters maximum).

**Field Specification Line** To identify this field in the Field Specification Header, include the following line:

```
$ IMPORT SUBCMD=SET FIELD_NAME="Company Name" FIELD_SIZE=#100
```

### Country Name

The Destination's country.

**Possible Values** Any combination of letters and numbers (255 characters maximum).

**Field Specification Line** To identify this field in the Field Specification Header, include the following line:

```
$ IMPORT SUBCMD=SET FIELD_NAME="Country Name" FIELD_SIZE=#100
```

## Default Address Chars

The set of fields that contain local characteristics of the Destination's fax number.

**Possible Values** The BLM uses the following names for the Default Address Characteristics it stores:

- AreaCode
- CentralOffice
- InternationalEscape
- CountryCode
- NumDigitsLocal (the number of digits needed to call another phone number within the local area code)
- NumDigitsLDCall (the number of digits in a long-distance call from this location)
- LongDistanceEscape

To define one or more of these Default Address Characteristics in a source file record, put the following in one field (in this order):

- The name of the Characteristic
- a space
- The value for the Characteristic, enclosed in quotes

To add another Characteristic to the list, add another space, then the Characteristic name (followed by a space, followed by the value in quotes, etc.)

**Field Specification Line** To identify this field in the Field Specification Header, include the following line:

```
$ IMPORT SUBCMD=SET FIELD_NAME="Default Address Chars" FIELD_SIZE=#100
```

---

*If the Double-quote format is being used in the import file, the "Default Address Characteristics" must be the last one in the record.*

---

## Description

A description for this Destination.

**Possible Values** Any combination of letters and numbers (255 characters maximum).

**Field Specification Line** To identify this field in the Field Specification Header, include the following line:

```
$ IMPORT SUBCMD=SET FIELD_NAME="Description" FIELD_SIZE=#100
```

## Email Address

An Email address for this Destination.

**Possible Values** Any valid EMail address.

**Field Specification Line** To identify this field in the Field Specification Header, include the following line:

```
$ IMPORT SUBCMD=SET FIELD_NAME="Email Address" FIELD_SIZE=#100
```

## Fax Number

A fax number for this Destination.

**Possible Values** An E.164-compliant phone number.

**Field Specification Line** To identify this field in the Field Specification Header, include the following line:

```
$ IMPORT SUBCMD=SET FIELD_NAME="Fax Number" FIELD_SIZE=#100
```



## First Name

The Destination's first name.

**Possible Values** Any combination of letters and numbers (255 characters maximum).

**Field Specification Line** To identify this field in the Field Specification Header, include the following line:

```
$ IMPORT SUBCMD=SET FIELD_NAME="First Name" FIELD_SIZE=#100
```

## Global Voice Mail Address

The Destination's global Voice Mail address.

**Possible Values** Any E.164-compliant phone number.

**Field Specification Line** To identify this field in the Field Specification Header, include the following line:

```
$ IMPORT SUBCMD=SET FIELD_NAME="Global Voice Mail Address" FIELD_SIZE=#100
```

## Home Number

The Destination's home phone number.

**Possible Values** Any E.164-compliant phone number.

**Field Specification Line** To identify this field in the Field Specification Header, include the following line:

```
$ IMPORT SUBCMD=SET FIELD_NAME="Home Number" FIELD_SIZE=#100
```

## Keywords

The Keywords defined for this Destination. Each Destination can have a unique set of up to twenty Keyword character strings. Each string is associated with a number between one and twenty. When adding a Destination to a Broadcast List, you can associate one or more of these Keyword codes with it. IP LaunchPad stores the numeric codes with the message. When generating any report or status display regarding the message, IP LaunchPad can substitute the string value for the numeric code.

**Possible Values** To define one or more Keyword Codes in a source file record, list all the character strings you want to associate with Keyword codes, separated by commas. When the BLM creates a new Destination based on this record, it will assign the first string to the Keyword Code zero, the next one to Keyword code 1 etc.

Example: If one source file record includes the following value for the Keyword Code field:

```
Internal,East Coast,West Coast
```

When the BLM creates a Destination based on this record, it will create the following Keyword Codes:

Code	Text String
0	Internal
1	East Coast
2	West Coast

---

*If you are using the "Double-quote" format, make sure that the entire list of Keyword Code strings is enclosed in one set of quotation marks.*

---

**Field Specification Line** To identify this field in the Field Specification Header, include the following line:

```
$ IMPORT SUBCMD=SET FIELD_NAME="Keywords" FIELD_SIZE=#100
```

## Last Name

The Destination's last name.

**Possible Values** Any combination of letters and numbers (255 characters maximum).

**Field Specification Line** To identify this field in the Field Specification Header, include the following line:

```
$ IMPORT SUBCMD=SET FIELD_NAME="Last Name" FIELD_SIZE=#100
```

## Mobile Number

The phone number of the Destination's mobile phone.

**Possible Values** Any E.164-compliant phone number.

**Field Specification Line** This field cannot be specified in the Field Specification Header.

## Page Number

The Destination's pager number.

**Possible Values** Any E.164-compliant phone number.

**Field Specification Line** To identify this field in the Field Specification Header, include the following line:

```
$ IMPORT SUBCMD=SET FIELD_NAME="Page Number" FIELD_SIZE=#100
```

### Primary Delivery Address Type

The type of address that IP LaunchPad will attempt to deliver to when the Subscriber sends to the List containing this Destination.

### Possible Values

ONE of the following:

- Email
- Fax
- Voice
- Pager
- Mobile
- Home
- Web-URL
- OnNet
- GlobalVMID

---

*To populate this field properly, the "Password Policy" value must contain one of the above choices, EXACTLY as displayed here (same spelling, same capital letters, same spacing).*

---

**Field Specification Line** To identify this field in the Field Specification Header, include the following line:

```
$ IMPORT SUBCMD=SET FIELD_NAME="Password Policy" FIELD_SIZE=#100
```

---

*If a value for this field is NOT included in a batch import source file, the BLM will use the default value "Email" when creating the new Destination.*

---

## State

The Destination's state.

**Possible Values** Any combination of letters and numbers (255 characters maximum).

**Field Specification Line** To identify this field in the Field Specification Header, include the following line:

```
$ IMPORT SUBCMD=SET FIELD_NAME="State" FIELD_SIZE=#100
```

## Street Address1, 2 and 3

Three fields for the Destination's street address.

**Possible Values** In each field: any combination of letters and numbers (255 characters maximum).

**Field Specification Line** To identify these fields in the Field Specification Header, include the following lines:

```
$ IMPORT SUBCMD=SET FIELD_NAME="Street Address 1" FIELD_SIZE=#100  
$ IMPORT SUBCMD=SET FIELD_NAME="Street Address 2" FIELD_SIZE=#100  
$ IMPORT SUBCMD=SET FIELD_NAME="Street Address 3" FIELD_SIZE=#100
```

## Title

The Destination's job title.

**Possible Values** Any combination of letters and numbers (255 characters maximum).

**Field Specification Line** To identify this field in the Field Specification Header, include the following line:

```
$ IMPORT SUBCMD=SET FIELD_NAME="Title" FIELD_SIZE=#100
```

### Type of User

The IP LaunchPad user type associated with this Destination.

**Possible Values** ONE of the following:

- User
- Redialer
- Fax Machine

---

*To populate this field properly, this corresponding entry in the source file must contain one of the above choices, EXACTLY as displayed here (same spelling, same capital letters, same spacing).*

---

**Field Specification Line** To identify this field in the Field Specification Header, include the following line:

```
$ IMPORT SUBCMD=SET FIELD_NAME="Type of User" FIELD_SIZE=#100
```

### Voice Number

The phone number of the Destination's voice phone.

**Possible Values** Any E.164-compliant phone number.

**Field Specification Line** To identify this field in the Field Specification Header, include the following line:

```
$ IMPORT SUBCMD=SET FIELD_NAME="Voice Number" FIELD_SIZE=#100
```

### Website URL

A URL for the Destination's web site.

**Possible Values** An valid URL (255 characters maximum).

**Field Specification Line** To identify this field in the Field Specification Header, include the following line:

```
$ IMPORT SUBCMD=SET FIELD_NAME="Website URL" FIELD_SIZE=#100
```

### Zip Code/Postal Code

The Destination's Zip code or postal code.

**Possible Values** Any valid Zip or postal code

**Field Specification Line** To identify this field in the Field Specification Header, include the following line:

```
$ IMPORT SUBCMD=SET FIELD_NAME="ZipCode/Postal Code" FIELD_SIZE=#100
```

### Listing of BLM Import Sample File

When the BLM is installed, the file *template\_BLMimport.txt* is created in the CMA folder. This file contains basic import information, and a sample Field Specification line for all fields that can be specified in the header of the import source file. (See *Optional: the Field Specification Header* on page 29 for more information.) A printout of *template\_BLMimport.txt* starts on the next page.

# IPLP Broadcast List Manager

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---

```
# -----
# -----
# Broadcast List Management Import Information
#
# =====
# =====
# To import in successfully, Batch Import for Broadcast List Management must
# have the following conditions:
#
# 1) Default Address Chars must appear at the end of the line for Quoted field
# format (comma separated) only.
#
# 2) There must be a field which will contain the primary delivery address
# type.
# Valid values for the this field are:
# Email
# Fax
# Voice
# Pager
# Mobile
# Home
# Web-URL
# OnNet
# GlobalVMID
#
# 3) There must be a field which contains the delivery address
#
# 4) It is suggested that Firstname and Lastname also be provided
#
# Check the CMA/BLM manual for the format of keywords, billing codes and
# destination address
#
# -----
# -----
#*****
#*****
# -----
# -----
# This is an example of a Double-quote Format. If importing Default Address
# Chars, they
# must appear at the end of each line for this format.
# -----
# -----
"First1","Last1","first1_lastname@iplaunchpad.com","13128675100"
"First2","Last2","first2_lastname@iplaunchpad.com","13128675101"
"First3","Last3","first3_lastname@iplaunchpad.com","13128675102"
#*****
#*****
# -----
```



```
-----
# This is an example of Fixed Field Format
# -----
-----
First1      Last1      first1_lastname@iplaunchpad.com  13128675100
First2      Last2      first2_lastname@iplaunchpad.com  13128675101
First3      Last3      first3_lastname@iplaunchpad.com  13128675102
#
# This is an example of a Custom Delimiter Format
# -----
-----
First1|Last1|first1_lastname@iplaunchpad.com|13128675100
First2|Last2|first2_lastname@iplaunchpad.com|13128675101
First3|Last3|first3_lastname@iplaunchpad.com|13128675102
# -----
-----
# The following is to be used for the template header
# -----
-----
$ IMPORT SUBCMD=SET FIELD_NAME="Description" FIELD_SIZE=#100
$ IMPORT SUBCMD=SET FIELD_NAME="Type of User" FIELD_SIZE=#100
$ IMPORT SUBCMD=SET FIELD_NAME="Account Status" FIELD_SIZE=#100
$ IMPORT SUBCMD=SET FIELD_NAME="First Name" FIELD_SIZE=#100
$ IMPORT SUBCMD=SET FIELD_NAME="Last Name" FIELD_SIZE=#100
$ IMPORT SUBCMD=SET FIELD_NAME="Company Name" FIELD_SIZE=#100
$ IMPORT SUBCMD=SET FIELD_NAME="Title" FIELD_SIZE=#100
$ IMPORT SUBCMD=SET FIELD_NAME="Street Address 1" FIELD_SIZE=#100
$ IMPORT SUBCMD=SET FIELD_NAME="Street Address 2" FIELD_SIZE=#100
$ IMPORT SUBCMD=SET FIELD_NAME="Street Address 3" FIELD_SIZE=#100
$ IMPORT SUBCMD=SET FIELD_NAME="City" FIELD_SIZE=#100
$ IMPORT SUBCMD=SET FIELD_NAME="State" FIELD_SIZE=#100
$ IMPORT SUBCMD=SET FIELD_NAME="ZipCode/Postal Code" FIELD_SIZE=#100
$ IMPORT SUBCMD=SET FIELD_NAME="Billing Codes" FIELD_SIZE=#100
$ IMPORT SUBCMD=SET FIELD_NAME="Keywords" FIELD_SIZE=#100
$ IMPORT SUBCMD=SET FIELD_NAME="Country Name" FIELD_SIZE=#100
$ IMPORT SUBCMD=SET FIELD_NAME="Default Address Chars" FIELD_SIZE=#100
$ IMPORT SUBCMD=SET FIELD_NAME="Fax Number" FIELD_SIZE=#100
$ IMPORT SUBCMD=SET FIELD_NAME="Email Address" FIELD_SIZE=#100
$ IMPORT SUBCMD=SET FIELD_NAME="Voice Number" FIELD_SIZE=#100
$ IMPORT SUBCMD=SET FIELD_NAME="Page Number" FIELD_SIZE=#100
$ IMPORT SUBCMD=SET FIELD_NAME="Mobile Number" FIELD_SIZE=#100
$ IMPORT SUBCMD=SET FIELD_NAME="Home Number" FIELD_SIZE=#100
$ IMPORT SUBCMD=SET FIELD_NAME="Website URL" FIELD_SIZE=#100
$ IMPORT SUBCMD=SET FIELD_NAME="Global Voice Mail Address" FIELD_SIZE=#100
$ IMPORT SUBCMD=SET FIELD_NAME="Primary Delivery Address Type" FIELD_SIZE=#100
```

# **IPLP Broadcast List Manager**

*Batch Import for BLM*

---