

Minutes of the D25 Database/Email Meeting – 30 March 2023

Attendees:

Curtis Barton
Mike Wavada
Neil Montague
Gary Peterson
Steve Ackerman
Mark Oetinger
Sue Miguel

Purpose: The attendees convened to develop a plan to move the remaining tasks in database management and emails from Mike Wavada to other(s).

Key Takeaways:

1. Peter will transfer Mike's data to a new source.
2. Henceforth we will use Mike's data from Peter's source for emails and the like.
3. Peter and Steve will attend the Pianola Master Class to determine whether we can easily port the current system and data to that (ACBL) system.

Meeting Summary

Curtis explained that the purpose of the meeting is to respond to the ExCom action item to complete the transition of data base and email efforts to others.

Mike explained that his files consist of data that can be accessed using MySQL on iPower. He has ACBL data, attendance files, and lists for emails. He noted that we could use the ACBL's Pianola or continue using Excel (it can generate '.csv' files) to download rosters. Or we can use Mike's data base. It is easier to paste from a relational data base.

Peter noted that Mike can transfer his data bases and programs. Steve noted that data bases are a lot of work to maintain. Some things are missing from Pianola. Mike has records of 7 or 8 years of data. We noted that snowbirds are an issue. It is hard to get information from the ACBL now. Peter will discuss the data issue with Joann Glasson. There is no attendance data in Pianola. Peter says we will get this attendance data.

Sue notes that using Pianola is easy. An issue: can we add functionality tailored to our needs?

Mike currently pays for some accounts. Pete volunteered to take the data. Curtis asked whether we could use methods (Mailchimp and Pianola) if necessary to do what we have been doing. (No.) Mike noted that he has 90 audiences for use with Mailchimp. We could have a D25 list and a subset of those who have won master points. Mike noted that there would be issues.

There is a Master Class in using Pianola scheduled (per Peter). Steve and Peter will attend. It will also be recorded, and Neil will view it later.

The second step in the process is to use Peter's source to develop an email. Neil asked about keeping data. Mike said he doesn't throw data away. He maintains and updates his data bases. Gary noted that he has access to ACBL data. An issue we identified is access to attendance

records ('.lzh' files). It should be sent to us. Peter is not giving up on this issue with the ACBL. Neil noted that MySQL is not a problem. Mike noted that unsubscribing is an issue.

The 3rd step: Peter and Mike will set up an infrastructure after attending the ACBL Pianola Master Class. Our next mailing will likely be after the GNTs. We will prove a process before Nashua.

Mike's email:

Emails Past and Future

1 Emails sent from MailChimp require a “campaign” and an “audience”.

1.1

In D25's usage the campaign consists of the text of the email and any embedded images. Variations based on fields on the audience record are possible. MailChimp is now owned by Intuit, the parent company of QuickBooks and other companies. It has recently introduced many other types of campaigns that I have not investigated.

1.1.1 A large number of templates are provided for campaigns, but I never used them. Instead I always copied and pasted HTML code from a text editor. That allowed me to position images anywhere in the document, insert tables, and control the use of fonts and colors with precision.

1.1.2 Email requests from Sue Miguel arrive already formatted.

1.1.2.1 I copy images used in the email to an image editor and save them to .img files in my MailChimp folder. There is usually only one image.

1.1.2.2 I create a new campaign in MailChimp. Usually I “replicate” an old one. 1.1.2.3 I upload the .img files to MailChimp using the “Content Studio” feature. 1.1.2.4 I extract the HTML code from the email and paste it into a document that

has the required <body...> settings, the code for the D25 banner, etc., and closing code. I always make the email exactly 600 pixels wide.

1.1.2.4.1 I remove anything from the extracted code that is not to be sent to the players. Sometimes the “subject” or the target audience is in the email text.

1.1.2.4.2 I locate the statements and replace the src= parameters with the links from the Content Studio. I also add an align= parameter based on the FLOAT designations in the style= parameter. Some email clients do not recognize FLOAT.

1.1.2.4.3 I copy the revised HTML code from the text editor and paste it into MailChimp's WYSIWYG editor.

1.2

1.1.4 MailChimp's campaigns cannot have attachments. Files must be stored somewhere (presumably on NEBridge.org) and linked to text or images in the body of the email.

The audience is a list with one row for each intended email address..

1.2.1 The only required field is the email address. Usually the lists contain first (or familiar) name, last name, and a concatenation of the name and town for identification

purposes. Other possibly useful fields are the district, unit, masterpoints, and rank. 1.2.2 D25's account has over ninety audiences. Years ago I created a new audience for each campaign, but users of the account can no longer create new audiences; we must reuse existing ones. If an audience is deleted, it is gone forever.

1. 1.2.2.1 The name of the audience can be changed, but the creation date cannot.
2. 1.2.2.2 Some or all of the existing records can be removed by “archiving”.
3. 1.2.2.3 If some of the required fields are not on the audience, they should be added

before adding records.

1.2.2.4 New records can be entered one at a time or by importing from a .csv file that has one record per player with the fields separated by commas. If a recipient (even an archived one) unsubscribed from the previous use of an audience, it will

1.1.2.4.4 I check things as well as I can. I send myself a test version to check for spelling, incorrect images, and broken links. If there are mistakes, I fix them. Email requests from others could be in any format, or they could require

1.1.3
composition from an outline.

3.2

3.1.2.1 Most of the fields on each player's ACBL profile record are on the downloaded .csv file. Missing are date of birth, county, and anything that the player asked to be confidential. The order of the fields is listed on the email.

3.1.2.2 The php program updates the existing email address only if the source of the previous email address was ACBL.

The source for the attendance file before the pandemic was a .lzh file received from the ACBL. Negotiations are currently in process for restoring access.

1. 3.2.1 I run a php program to define the tournament in the database.
2. 3.2.2 Two programs in ACBLScore are run to create a .csv file based on the .lzh file.

automatically be tagged as unsubscribed on the new one when the player's email address is added to the audience file.

1.2.3 Email may be sent to a portion of the audience using named “segments” of the audience. So, for example, one segment could be for D3 and D24, and one could be for D25. This assumes, of course that the district is specified as a field on the file. 1.2.4 There is also a feature for tagging audience records, but I have not used it.

The district bought 2 million “credits” several years ago. A credit is used up for each email sent. We currently have 822,574 credits remaining.

1.3

2 Creating the .csv file for the audience.

2.1 2.2

2.3

Currently the .csv file comes from the MySQL database that is stored on my account on iPower. However, the source could be any program (such as Excel) that can produce .csv files.

I extract the records from the database using MySQL statements that I compose. Occasionally I cannot think of a way to select all the records in one statement. In that case I simply do two statements, and when I import the second one, I designate replacement of what was previously there.

2.3.1 2.3.2

Files used for importing:

Players: all ACBL members since 2014. 259,000 records.

Attendance: one record per player per tournament. All sectionals (until recently)

and regionals in D25 and the NABC's since 2014. 135,000 records.

2.3.3 Before the pandemic a file containing annual point totals at D25 events was used for the Best in Class awards.

2.3.4 There is also a file for advancements in rank, but I have never used it for selection. 3 Primary sources:

3.1

The source for most of the information on the players table comes from the ACBL roster.

3.1.1 Rosters can be downloaded on the seventh (or thereabouts) of each month using MyACBL. The player's account must be authorized by a unit or district to do so.

1. 3.1.1.1 I always specify the csv (Excel) format.

2. 3.1.1.2 Selection is by district/unit or by zip codes. My account is allowed to select any range of zip codes. If I don't use zip codes, I can only select unit 126. Why it works like this is anyone's guess.

- 3.1.1.2.1 All active (dues paid) members who meet the criteria are selected. 3.1.1.2.2 I make six separate passes for selections. In the first pass I select zip codes from 00000 to 19999. Subsequent passes select other ranges.

3.1.2

my Inbox, I store the file on my PC and process it using a php program that I wrote.

The files are delivered as an attachment to an email. When the email arrives in

3.3

3.2.3 A php program is used to populate the attendance table in the database. Most of this information could be gleaned from the list of masterpoints winners on

the tournament results page on the ACBL website. I wrote a php program to read these lists, but there are some difficulties.

1. 3.3.1 Only players who won masterpoints are included.

2. 3.3.2 Because no player numbers are listed, the php program must use the player's

name and town for identification. The process of determining the right ACBL number can be lengthy and introduces more chance for error.

4 Issues: 4.1

4.1.2 4.1.3

4.2

How will the database and the necessary programs be migrated?

Who will do the selections for emails and maintain the php programs? If the database is not used:

4.3

If the database is used in the future:

4.1.1 Where will it be stored? The requirements are an Apache server with Internet presence, php, MySQL, and reasonably good tools.

4.2.1

4.2.1.1 Other vendors may be appropriate. My understanding is that Joe has used one that he found reasonable.

4.2.1.2 The ACBL has an arrangement with Pianola. This would eliminate the need for downloading files, but there are (or at least were the last time that I investigated it) limitations that I found far too restrictive.

4.2.1.3 Before selecting an alternative vendor or template, we should make sure that it can handle Sue's messages that are already formatted.

4.2.1.4 I also appreciated Mailchimp's ability to handle tables, but others may not see that as overwhelmingly important.

4.2.2 How will "unsubscribes" be managed?

4.2.2.1 On Pianola the district would have only one list. When anyone unsubscribes, my understanding is that there is no way to send to them again.

4.2.2.2 If multiple lists are used, a process must be established to make sure that no one who has unsubscribed is ever sent an email of the same type. Failure to do so invites blacklisting. I currently consider tournament promotions as one type, For other types (presidential emails, Best in Class, holiday message, club managers, etc.) I reuse the same audience each time.

4.2.3 How will we reach ...?

1. 4.2.3.1 Pros.

2. 4.2.3.2 Players from other districts who habitually attend D25 events.

3. 4.2.3.3 Snowbirds who change addresses.

4. 4.2.3.4 People who are behind on dues.

5. 4.2.3.5 People who are willing to travel to regionals. A couple from England

attended the first tournament in Nashua.

Will Sue compose all of the emails? If not, who is doing the others?

Should we abandon MailChimp?

The database is documented with illustrations at <https://nebridge.org/pages/344/>. Email is documented with illustrations at <https://nebridge.org/pages/345/>.