

The New ASOA *EyeMail*

Part 1 - Introduction

This is the first in a series of posts to the ASOA List about the new *EyeMail*, a long-awaited replacement of the software that manages the present list. We've listened to requests from members for quite some time and believe we've incorporate them, along with a few others, into the new application.

Although we will have this information available separately, you may wish to save these individual emails for quick and easy reference later on if needed.

We've included a fair amount of information with the understanding that it's more than many people want but what still others appreciate knowing.

You may have heard the term "Web 2.0." Here's a quote from Wikipedia:

Web 2.0 is a trend in **World Wide Web** technology, and **web design**, a second **generation** of web-based communities and **hosted services** such as **social-networking sites**, **wikis**, **blogs**, and **folksonomies**, which aim to facilitate **creativity**, collaboration, and sharing among users.

The ASOA List is a discussion group commonly known as a "list server." We're all aware of the benefits of interacting on a list. But lists are just the beginning of the Web 2.0 phenomenon. The new technology is pushing out the frontier at a rapid rate with an emphasis on enhanced interactivity and collaboration. Popular websites such as YouTube, FaceBook, and MySpace are examples of trends designed to allow individuals greater control over what they do and to facilitate interactivity among like-minded groups. Our new *EyeMail* application is moving us in this direction.

A huge limitation of ordinary list servers is that they use plain text email. Imagine going to any website and seeing information displayed only in text form. That's what our old *EyeMail* software is like. The new *EyeMail* is web-based and has far more features than a plain-text system.

The new *EyeMail* is very different from the old system, simply because it's web-based. The first thing you will notice is that it looks and functions quite differently. You'll still see posts to the list in your email (like Outlook) exactly as you do with your regular email. But when you open a post you will be logged in automatically to the new system and taken to the *EyeMail* homepage. From there, things look and behave quite differently. The good news is that the learning curve is gentle, and you'll soon discover the many additional features and advantages of this new system. If all you do is "lurk" (read but don't post), there's really no learning curve. If you post occasionally, that too is really easy.

A question that frequently comes up involves the process of logging in. People ask, "Do I have to go to a website and login?" No. When you open any post (message) to the list, you are *automatically* logged in to the *EyeMail* homepage. From there you can reply and post new messages. This is by far the quickest and easiest way to post a new message – just open any previous post and click the button to post a new message. You can, however, go directly to the *EyeMail* homepage which should be saved as a "favorite" or "bookmark" in your browser. Taking this route requires you to enter your username (email address or

membership number) and password. You can click the box to have the system remember you in case you log off then return.

A major problem with ordinary email systems and most discussion lists is the jumble that occurs when people start replying. Subject lines get changed, and threads become difficult to follow, especially for those who want to receive a daily digest rather than real-time posts. The archives end up being a mess. The new system solves these problems by controlling the way replies are handled. You will see this almost immediately. You should never do an "ordinary" reply as you would in Outlook by simply hitting the "reply" button within Outlook itself. If you do, the recipient will receive your coded login information! The correct way to reply is by using the buttons provided within the *EyeMail* software. You'll choose whether to reply to the group or only to the sender – a really convenient new feature.

In Part 2 we'll provide a bullet-point outline of what's new.

Part 2 – What's new in *EyeMail*?

Here's a bullet-point list of what's new in *EyeMail*.

- Web-based interface in HTML
- Easier to read
- Easy to change subscription options
- Vacation mode
- Reply to sender or the entire group
- Better threading for improved archiving and searching
- Click on "subject" to see recent posts on that subject
- Click on "author" to see his/her recent posts
- The "daily digest" mode is greatly improved
- Attachments are downloaded only by those who want them
- Resource Library holds important documents
- Member bio and picture can be incorporated

We'll discuss these in subsequent posts.

In Part 3 we will talk about the notion of an "Egroup" which is simply new terminology for the name of a list.

Part 3 – Egroups

"Egroups" is simply another name for our new *EyeMail* software. It's a custom-developed application that's feature-rich and user friendly. It handles email through Lyris, the top-end commercial list management software, except that E-Groups gives us a world of features not available in Lyris while avoiding the most nagging issues with that application and most other commercial ones.

The name *EyeMail* continues to be our proprietary name. Most list server forums have multiple lists based on specialty areas, and each list is called an E-group. The system now has the flexibility of easily establishing new lists, or egroups, if the Board of Directors feels the need.

Why HTML?

HTML is the "language of the Internet," and E-Groups is a web-based product that uses HTML to make pages look better and easier to read. Plain-text mail is simply too limiting, and the list server software is now so robust that it requires programming in HTML to make its features available. There is an option to receive only plain text email, but this greatly compromises the usefulness of the system.

It's important to keep your computer protected with the latest virus and firewall software, and it's always wise to know who's sending you messages. With *EyeMail* we find that many subscribers prefer to set up "rules" within their own email. For example, you can have all email from any given e-group list go into its own folder. That keeps posts delivered in real time separate from your main INBOX.

In part 4 we'll talk about subscription options and preferences

Part 4 – Subscription options and preferences

Daily Digest or Real-time subscription mode?

The new ASOA *EyeMail* offers a "digest" mode that's truly easy to use. The old system's digest mode was so cumbersome and difficult to read that nearly everyone subscribed in the real-time mode. Now, it's easy to see the individual messages in a digest and pick out what you want. By clicking on a subject, you can see all the emails in that digest on that particular subject. You can do the same by author. One customer using this same software has over 40 egroups, and any person can subscribe to as many as required. Where an egroup is of maximum importance, the real-time mode is frequently selected, but when a list is of marginal interest, the digest mode is often preferred since it allows a quick review. It's nice having the option to choose.

Setting Preferences

Managing your subscriptions is much easier with the new system. It's simply a matter of clicking options within the application itself rather than having to login to your ASOA member account and navigating to the *EyeMail* section. One handy new addition is the vacation mode where it's easy to stop posts temporarily while you're on leave – you no longer have to completely unsubscribe and re-subscribe.

In part 5 we'll talk about accessing *EyeMail*, usernames, and passwords

Part 5 -- Accessing *EyeMail*

To open *EyeMail* simply open any email post you've received and you'll automatically be logged into the *EyeMail* homepage. You can also bookmark the *EyeMail* homepage in your web browser and login from there.

One major improvement in the new system is that it's tied to the membership database. Only current ASOA members are allowed to use the system.

If you are receiving posts from the current ASOA List and are not a current member of ASOA, you will receive a message to that effect and can rejoin ASOA online. If you are in

fact a current member and the system does not recognize you, please contact us and we will scope out the problem. Sometimes there is a lag between the time someone renews a membership and the time the new expiration date is updated in the database (blame it on those folks in accounting!). We might also have the wrong email address. See the next section.

Login and Password

As already explained, opening any posted message in your email will automatically log you in to the *EyeMail* system. You may go directly to the *EyeMail* homepage and login from there, but you can elect to have the system remember you the next time you visit the site.

The system accepts your email address as well as member ID number as your username. With the old system it was possible to have an email address in *EyeMail* different from what's in the membership database. Now, they must be the same. If you have any trouble logging in with your email address, we might have to check the address in the database. If you don't know your membership ID number, give us a call.

The password is, by default, your first initial and last name up to a total of 8 characters. We highly recommend that you login to your ASOA member account (from www.asoa.org) and select a custom password. We will not be able to see your password, but the system will send your password hint to you if you click the "forgot password?" link. For this feature to work, the email address you type in must match what's in the membership database.

In part 6 we will discuss sending messages. There's a very cool feature that allows you to reply ONLY to the sender with one click – no cutting and pasting individual email addresses. This feature is perfect for the "me too" replies and personal wishes. Also, has anyone ever meant to send something sensitive to the sender but mistakenly replied to the entire list? You realize what you've done about two seconds after hitting the "send" button. Then you get one of those "Oh, heck" feelings and a lump in your throat!

Part 6 – Sending messages

Sending New Messages

The easiest way to post a new message is to open any previously posted message in your email software (Outlook, etc.). Just opening a message automatically logs you into the system, and from there posting a new message is easy. Alternatively, you can go to the *EyeMail* homepage and login using your username and password. Once you're in the system, you can send a new post simply by clicking a button.

Replies

All replies are handled through E-groups – NOT your email software (such as Outlook). The benefit is that we have much greater flexibility and control over the system. Not only does this enable the software to have new features, but it avoids many of the aggravating issues with Lyris and other list management applications. *EyeMail* keeps your messages in the handy "My Messages" area for quick and easy reference.

When replying to messages you must choose between replying to the entire list or only to the sender. This feature not only makes it easier to reply to the person who sent the email, but it should also help eliminate sending a reply to the entire list by mistake.

Replies to individuals versus replies to the entire group

There's probably no complaint from list subscribers heard more often than about the "me-to" replies. And there's probably nothing more embarrassing than posting a message intended for one person to the entire list by mistake. *EyeMail* gives you the clear options every time you send – reply to the group or reply to the sender only – and you have to choose. Replying only to the sender no longer requires you to copy and paste or re-type the recipient's email address.

We often hear from members who wish there was less "personal chat" on the list – they simply want the list to stick to business. The "reply to sender" feature makes it easy to send personal messages back to someone without blasting the entire list.

[Recently there have been a few examples – and listmembers have pointed them out – where this feature will be very useful!]

When you send a reply to the sender of a post, it's different than the reply to the group. Replies to individuals are sent in plain text format like an ordinary email. There is a message header saying that the message is being sent in response to your e-group message. The message will not contain any links to the E-Groups functionality or the original message – a nice feature and safeguard..

Forwarding List Posts

All forwarding in the new *EyeMail* is handled from within the software. You will no longer use your email software (such as Outlook) to forward messages. The process is very intuitive and is both important and beneficial. Forwarding from within the system is necessary to allow the recipient to download any document you want to attach. Your message will also be forwarded in "plain text" format – that's an important courtesy for your recipient, but it's even more important for you in that it avoids sending any embedded links such as those that log you in. You'll also avoid sending credentials that might be a part of your regular email software such as Outlook. So ALWAYS forward messages from within the *EyeMail* system.

To forward a message, simply provide the necessary information in the "Forward Message" template.

Note that you can forward a message, including a document from the resource library, to someone who is not a member of ASOA, but you should do so through the system. Of course, always be mindful of what's appropriate to share with non-members (and ALWAYS encourage them to join you in your society).

In part 7 we'll discuss attachments. That's a little tricky, because the attachments go into the "Resource Library" rather than being sent directly as with ordinary email. This is where the "social media" aspect really comes into play since you have the opportunity to "tag" documents with keywords you think are appropriate. It increases interactivity and collaboration, resulting in better information for all members. Isn't this what an

“association” is about – like-minded people working together? Nobody understands this better than you.

Part 7 – Attachments to *EyeMail* posts

Attachments

One of the new features of ASOA's E-Groups is the way attachments are handled. When you include an attachment in a post, the actual attachment doesn't get sent to everyone. Instead, it's uploaded to the Resource Library. Subscribers who see your message and attachment will simply click on the “paperclip” icon as they would for a regular attachment. The attachment then downloads from the Resource Library, and only those who want it will receive it. This may help keep INBOXES from getting too full.

Most *EyeMail* posts are sent without attachments, but for those who wish to send them, the process requires a couple of steps more than simply attaching something to an ordinary email. Once you've done it a few times the process is straightforward.

Adding “Tags” to Attachments

The new system allows for a “ratings” system and “tags” (keywords) that you may assign to documents sent as attachments.

Documents intended for more or less permanent inclusion in the resource library should be tagged. During the process of attaching documents to your post, you will have the opportunity to select boxes with tags set up by ASOA. And you may also add tags of your own.

Other members of the list can add their own tags to documents created by others, but they cannot remove the tags originally assigned. It's through such a collaborative effort that documents get better identified and thus become more searchable in the archives. The new “social media” is being driven by such opportunities to interact and work together.

In part 8 we'll mention searching and the list archives

Part 8 -- Searching *EyeMail* Posts

You may search *EyeMail* messages a number of ways, including with advanced features such as by author, subject, words, exact words, exact dates, and date ranges. There's even a 1-click feature that allows you to see the posts within the last 24 hours, last week, and last month.

Archives

We are planning to leave the old list (i.e., the present one) up for quite some time to allow members access to the archives. You won't be able to post new messages, but you can search the archives. However, if you've ever searched for something in those files, you know how frustrating it can be. This is mainly due to the lack of control offered by ordinary list server applications. The new Egroups application provides the much-needed flexibility to handle message threads and thereby create a more organized and searchable file.

Having this sort of control is one of many answers to the often-heard question, "Why do you have to switch from a plain-text list system to a web-based one?"

At this time we are planning to do our best to convert the archives from the old system, but there are inherent limitations given the previous lack of structuring and ordering.

In part 9 we'll discuss the new Resource Library

Part 9 – The Resource Library

The Resource Library is a repository for all electronic documents that ASOA wants to house. Current ASOA members can upload documents two ways – directly and by attaching to an email. If you have a document you wish to share with the membership and want your fellow list members to know about it, you may wish to upload it as an attachment – that way the list will be notified at the same time you upload the document. If, on the other hand, you have several documents to upload, it may be better to upload them directly to the resource library and then post a note (without attachments) letting fellow list members know.

On the *EyeMail* homepage simply click the Resource Library tab to access that feature. You must be logged in, however. You can do that by opening any previous post or by going to the EyeMail homepage and logging in directly.

Uploading directly to the Resource Library

When you have a document you want to upload to the Resource Library, it's generally best to do so directly rather than attaching it to a post to the list. This is especially true if you have more than one document.

The resource library is mainly for business purposes, so everyone will appreciate your uploading documents relevant to practice administration.

As mentioned in a previous section, the Resource Library allows the use of "tags" or keywords used to describe and categorize the document. This is an important part of the "social media" functionality in "Web 2.0" as it increases the ability of people to work collaboratively. Your assigning tags to a document you upload helps others find the right information.

The staff has set up a number of categories and sub-categories that allow you to click a box for the appropriate tag or group of tags. Simply see if your document falls into one of the broad categories, then click the particular tags that apply. If you see no appropriate tags, or want to add one you think is important, you may do so in the space provided.

Other features

Documents that you upload to the resource library are marked as your personal documents and are displayed for you when you click "My Documents." You can mark documents submitted by other list members as your favorites and locate them more readily.

You may delete documents that you have uploaded. You can also remove a document from the "My Favorites" designation to keep what you want in your list.

There are simple and advanced search modes that you can explore. One useful feature allows you to search by "tags."

You may download documents from the resource library and may wish to do so if you want to have the document available on your computer more readily.

Feedback and Suggestions

We are anxious to hear feedback and suggestions. Rather than post them to the list, please send them to us directly. We will collect and evaluate all suggestions for possible inclusion as enhancements to the software.

That's it for the introduction! Look for future posts about our go-live date!

Part 10 – Going Live with the new EyeMail

We're planning to go live April 14 with the new EyeMail. We'll post notes about the conversion as we get closer. Meanwhile, here's some important information to keep in mind and some things to do.

The present list will be kept open for searching the archives, but new posts will no longer be allowed except at the administrator level. We may post some general notices on the old system as a way of communicating with any subscribers who perhaps cannot be verified by the new system. Recall that only current members of ASOA will be logged into the new system. If you have a problem and know that your membership is current, you can contact me directly or anyone on the ASOA staff.

In the meantime, it would be good if all of you try logging into your member account on the ASOA homepage. Your username is your membership number or email address, and your default password is your first initial and last name UP TO a total of 8 characters (lower case, no spaces). Be sure to try logging in using your email address. If that does NOT work, but your membership number does, then your email address might not match what's in our membership database, or perhaps there's not even an email address in database.

Assuming you can login to your account using your membership number, the next step is to check your personal information. Look for the link "My Contact Information" and click to enter the page where you can add/change your email address. While you're in that section, it's a good idea to check the other information and make any necessary changes. You'll also see a link that allows you to set a private password and provide a password hint. If you forget your password there's a "Forgot Password?" link that emails you the hint.

The current subscriber list will be subscribed en-mass to the new system. By default we will choose the "HTML" option. You can always change to "plain text" if you need to, but you will lose the features that make the new system so valuable.

Right before the conversion we'll send out notice on the old list telling you that it's being shut down. The next post you receive should be from the new list. It will show up in your Outlook (or other email client) as do current posts. When you open the post you will automatically be logged in and will be able to check things out and start posting. We'll also send you the direct link (URL) for the EyeMail homepage so you can make it a "favorite" or "bookmark" in your browser and get to EyeMail that way.

If you have filters set up for the old list (to direct posts into a specific folder), they will have to be adjusted. Example: Suppose your filter ("rule" in Outlook) sends all messages "from" the ASOA list to a special folder you've set up. Your new EyeMail messages would not go to that folder since the "from" will be different. You would have to modify the rule (or make a new one) to accommodate the new sender address.