

Leslie Fonbuena
ISYS 520
Section 1
December 8, 2011

MSM Advisement Center Automated Email Survey

Executive Summary

The business I did my project for is the Marriott School Advisement Center. In the advisement center we help students put together their graduation plans, get into the business school, and discuss career and major opportunities.

I am a student adviser there, and as an office we have recently started sending surveys to students to get their feedback regarding their experience with the Center. The current process for sending out these emails is to copy the student's net ID's from the Google document that we use to sign student in, and paste it into an excel sheet. Then, we have to individually look up each net ID and copy the student's email into Outlook and send the email. We send anywhere from 20-40 emails each day.

My project is to automate that whole process so that the user can enter the date for which they want to send the emails, have the macro gather the data from Google doc, filter the data, pull the email addresses from the BYU website, and send the email.

Implementation Document

The macro that I put together is broken down into four parts: 1.) Retrieving data from the Google doc, 2.) Pulling out the data for the specified day, 3.) Retrieving the email addresses from BYU's website, and 4.) sending the email to the students.

1. Retrieving data from Google

To retrieve data from Google, I created a new email address and shared the Google doc that houses all the log-in information. This same email address is also what I use to send out the emails, which I will talk about later.

- I created a sub procedure that opened the Google doc, then opened the HTML version of the Google doc, and then copied that information into a newly created worksheet.
- The email account mentioned above will remain logged in on internet explorer. (Few student advisors use this browser, so staying logged in won't be a problem.) This simplifies the code so only the URL for the Google doc and subsequently for the HTML version of the Google doc are needed.

2. Filtering data by day

This step is designed to loop through the data and gather only the information needed to send the emails. It searches through all the downloaded data for the information collected on the specific day

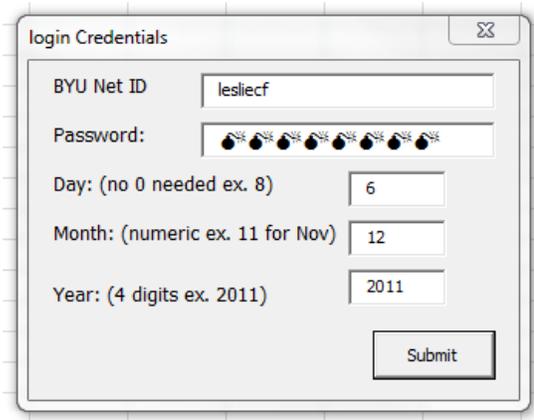
specified by the user, and pulls that information into another new sheet. The pertinent information is the date the student came in, their net ID, and their name.

- When the macro is run, a dialog box pops up and asks for some information, one piece of which is the date the user wishes to search for. (The form is shown below.)
- When students come into the office and are logged in, the Google form records the date the student visited. The procedure searches in that date column for the date specified by the user. When it finds a row with that date, it then copies the net ID and the Name in that same row into the new sheet and loops through each row until the end of the document.

3. Retrieving email addresses from BYU's website

Student advisors have access to certain portions of every student's information. The personal summary page is one of these parts. This section of the project goes to the personal summary page and retrieves the students' email addresses. In order for this section of the project to work, a number of pieces had to fit together.

- The first hurdle in gathering this information is that the user has to log in to the BYU website. The user's net ID and password is the other information gathered from the user form when the macro is run initially. The form is shown below.



The screenshot shows a dialog box titled "login Credentials". It has a close button in the top right corner. The form contains the following fields:

- BYU Net ID:
- Password:
- Day: (no 0 needed ex. 8)
- Month: (numeric ex. 11 for Nov)
- Year: (4 digits ex. 2011)

A "Submit" button is located at the bottom right of the form.

- To ensure that the formatting of the date gathered from the user is the same as the date recorded by the Google doc, I included the instructions above, and put a maximum length for each of the date text fields.
- The macro then opens the BYU log in page, inputs the net ID and password, logs in, and then opens the personal summary page.
- The below screenshot shows the additional input box that appears for student advisers.

Personal Information

Personal Information

Last Name/Identifier: First Name: GO (1 of 1)

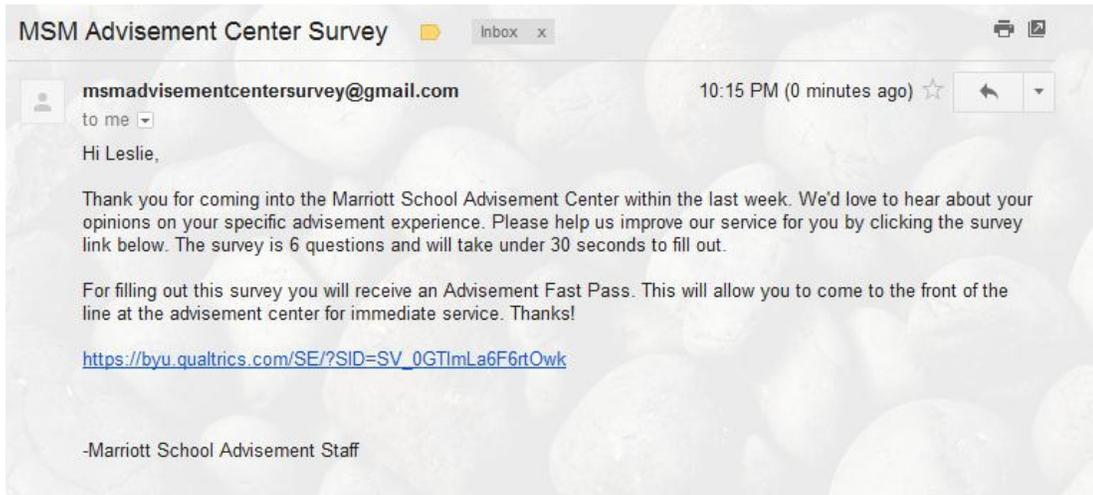
Summary Change Log Contact Names Identifiers Personal Relation

- This section of the macro takes the net ID's that were put on the new worksheet and inputs it into the "identifier" field shown above. It then loops through each net ID, gathering the student's email address from this page and copying it in the workbook.

4. Sending the survey email to students

The final step in the project is to actually send survey to each student via email.

- As mentioned above, I created a Gmail account specifically for sending these emails.
- I saved the message to be sent in the email on a notepad. Then I referenced the message, and substituted in the student's name that was saved on the new worksheet into the message. Below is an example of the email sent using this macro.



- Once the email is sent, the current time is recorded in the first column to indicate to the user that the email was sent successfully. Once it is all finished it looks similar to the snap shot below.

	A	B	C	D	E
	12/8/2011 21:47	lesliecf	Leslie	leslief@gmail.com	

- Also, there is a message box that appears once the emails have been sent reminding the user, that if the time appears the message was sent, and if “Bad Email” appears, the message was not sent.

Difficulties Encountered

I learned a lot from doing this project. I think the most fun part about it was being able to pull together three or four chapters we worked on in class, and see it fit together into something that will save our office 15-20 minutes a day.

Google Document

One of the main things that proved to be conceptually difficult was figuring out how to get data off of the Google document. At first, I tried to parse through the data and pull in the necessary information from the source, but I realized pretty quickly that there had to be a better way. Publishing the document wasn't an option either since it has sensitive information on it. Luckily with the help of Prof Allen, we were able to come up with the solution of going to the HTML version of the document and copying the data that way.

BYU Log in

Another issue I ran into late in my project was that the BYU log in page changed formatting two days before the project was due. It shouldn't have been an issue navigating the new page, but the submit button didn't show a name or ID on the source page. I tried entering a few surrounding names to see if they would work. And I tried to add a Chr(13) to the end of the password to see if that would work. Again with the help of Prof Allen, we found the form ID and submitted the whole form instead of clicking on the button.

I think the main takeaway from this project has been learning how to conceptually outline the whole process of writing a macro. For the other homework projects we have done, I haven't stopped to think how I was going to get from a blank workbook to a working macro because we had already assembled a lot of the code in class, and we just had to manipulate that code to work in a new setting. I really enjoyed the exercise of picturing in my mind what steps the macro needed to take what order those steps needed to be in to accomplish the end goal.