



Emma Training Guide

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Email Marketing at USF

Every email you send out, even if it is not a direct solicitation or advertisement, is an opportunity to build trust, loyalty, and awareness — of the university, of your program/office, of an initiative — with your recipients. As such, emails should be part of a communications strategy that determines your content and target audience. To devise an effective plan, we suggest partnering with your OMC marketing partner. If you do not know who your marketing partner is, contact Tressa Crozier at x2687. This tutorial will teach you how to create emails in our email marketing system, Emma.

YOUR EMAIL OPTIONS

1. Weekly calendar email: Targeted event listings that go out to the internal USF community once a week. Students receive these during the academic calendar year.
2. One-off email: Single messages, such as a call for submission or event invitation. One-off event emails are sent to *targeted* external, alumni, and/or internal audiences only.
3. Newsletter: Curation of multiple content items, such as news, events, and social media. These should be sent on a regular schedule.

TURNAROUND TIMES

Email built by you:
Three business days

E-newsletter built by you:
Three to five business days

Email to be built by OMC:
Five business days (Request can be made via myusf.usfca.edu/marketing-request or by emailing ecomunications@usfca.edu)

These turnaround times ensure that necessary elements are included (e.g., relevant links and recipient lists), the email has been proofread and copyedited, and final approval is given.

WHAT YOU'LL NEED TO BUILD AN EMAIL

- Content
- Email details: From name/email address, reply email address, subject line, preview sentence
- Imagery/graphics (if including an image in the email)
- Relevant links
- Target audience and/or recipient list: For recipient lists you'll need a three-column spreadsheet with Email Address, First Name, and Last Name
- This training guide

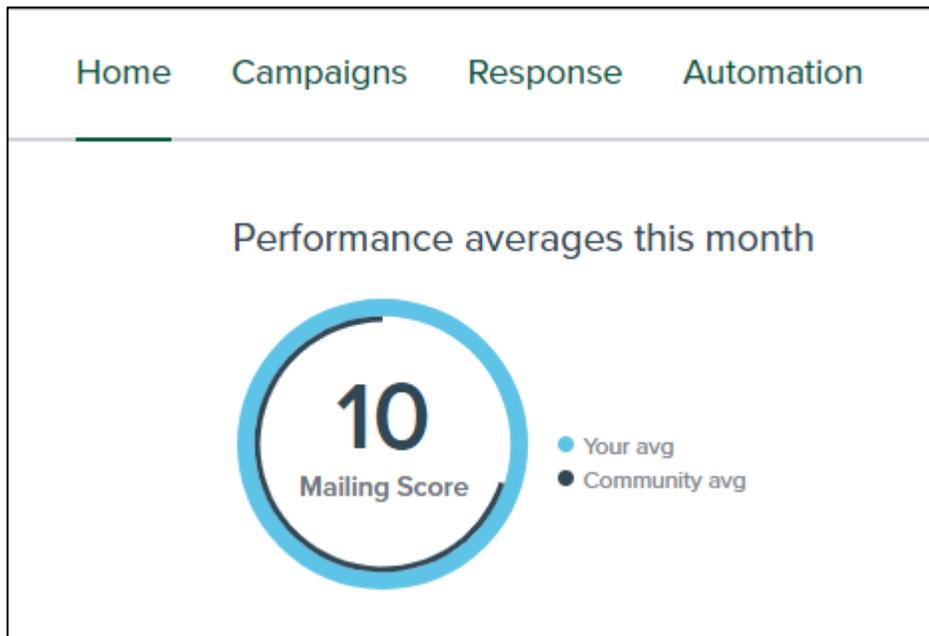
Getting Started

Emma is a web-based application currently used for email marketing. It is supported on both Mac and PC platforms. USF uses Emma to send targeted communications to students, faculty and staff, alumni, donors, and parents. If you have any questions, email ecommunications@usfca.edu.

ACCESS EMMA

1. Open your browser and go to email.usfca.edu
2. Use your myUSF credentials to enter your username (without @usfca.edu) and password. Click Login.

EMAIL AUTHOR INTERFACE



Email Home: Contains the account overview dashboard and links to Campaigns, Response, and Automation tabs.

Campaigns: Where you'll be working to create your emails.

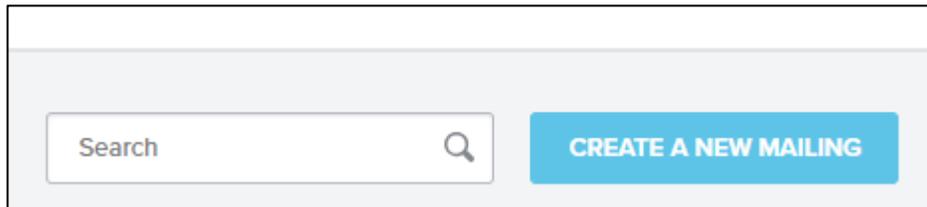
Response: Access useful response data on individual or multiple email campaigns sent from your account, including open, click, and opt-out rates.

Automation: Advanced email marketing feature used to send emails based on your recipients' actions. Not needed for general usage.

Creating a Custom Email

When creating a new email in Emma, you have a few options. You can either build a one-time custom email from scratch; you can re-use and update a message you have sent previously; or you can re-use a shared campaign. More information on these three options can be found in the sections that follow.

ONE-TIME CUSTOM EMAIL



Under the “Campaign” tab, select:

1. “Create a new mailing”
2. Choose the appropriate pre-built template for your school/department

Don’t see the template you need? Email ecomunications@usfca.edu and we will build a new one on your behalf.

RE-USE SENT EMAIL

Once you've sent an email through Emma, you can save time by re-using the same email for future communications.

1. Go to the **SENT** tab under Campaigns
2. Find the email you would like to re-use (you may need to use the Search Filter)
3. Once you find the email, select the drop-down menu and choose **Duplicate**



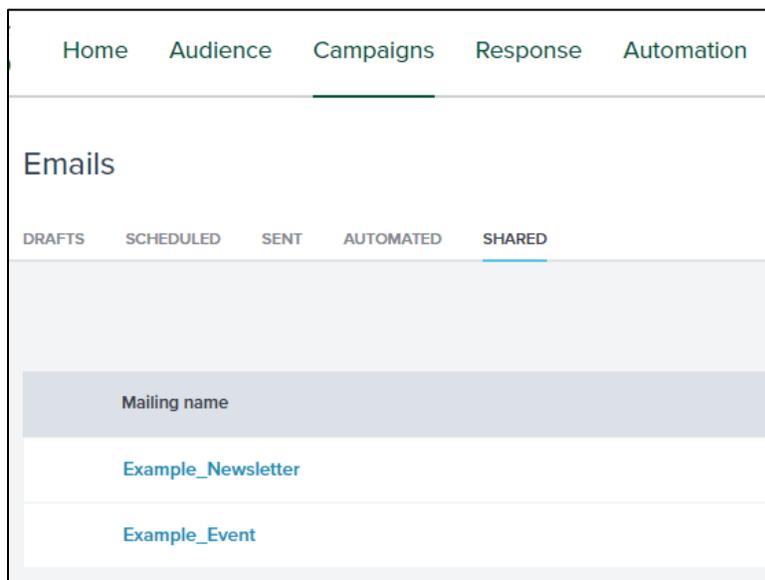
RE-USE SHARED CAMPAIGN

Shared campaigns are more robust email templates that can be used to quickly build e-newsletters or event invitations without having to copy an old email or create a new email from scratch.

If your team would benefit from a shared campaign, email your request to ecomunications@usfca.edu and the eCommunications team will build a custom campaign on your behalf.

Once you have access to a shared campaign:

1. Go to the **SHARED** tab under Campaigns
2. Click on the name of the campaign and a new draft will automatically open.



You can reuse these campaigns indefinitely. You can also request for additional campaigns to be added to your account to accommodate for other, recurring email formats.

Note: DO NOT choose the “Review and send this mailing” option located to the right of each shared campaign. This will permanently remove the campaign from the Shared folder.



BUILDING CONTENT

This is where you will add your content (text, images, etc.). You'll notice there are separate sections in the email body. Each section can be individually moved, edited, or deleted, independent of other sections (with the exception of the email's header and footer).



Icons from left to right:

1. Move section
2. Settings
3. Duplicate section
4. Delete section

EMAIL NAME

By default, when you create a new email, Emma will name it with the date, which isn't very helpful. To help identify your email, please use the following convention:

Term / short-email-description / target-audience / Send-Date

Term:

- Year: use the last two digits
- Fall: f
- Spring: s
- Summer: m

Audience:

- Faculty: fac
- Staff: staff
- Full-time: FT
- Part-time: PT
- Alumni: alum
- Students: student
- External or custom list: custom

Examples:

18f Newsletter FTfac+customList 2018-11-13\

19s Gluck-Reading facstaffstudentsalum+custom 2019-02-13

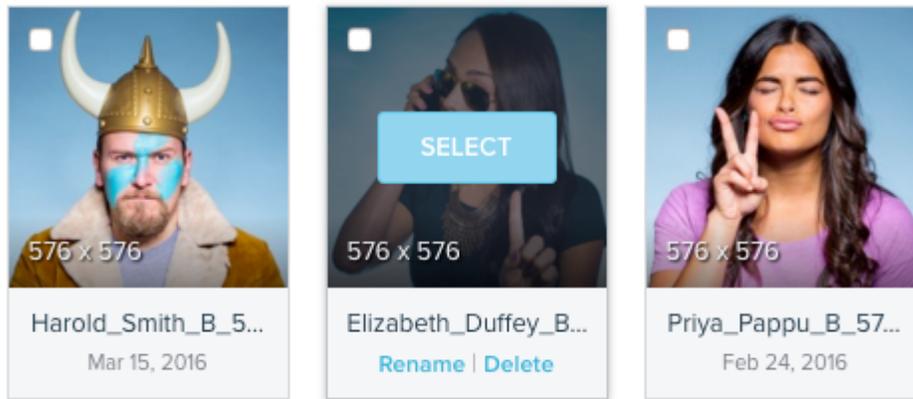
18m Open-Enrollment facstaff 2018-06-01



INSERT AN IMAGE

In the left column, click and drag either the “Image” (for inserting one image) or “Images” (for inserting multiple images in same row) block into the body of the email.

After you unclick (release the mouse), select “Drop image here” to open the image library. You can upload a new image, use a previously uploaded image, or use one of the many shared images under the “Shared Images” tab.



Click the Select button to add the image.

CHOOSE ANOTHER IMAGE EDIT THIS IMAGE



Give this image a link

Alternate text

Size: Best fit Padding: 10

CANCEL SAVE



Next, you'll see the screen shown above where you can add a link and Alternate Text to your image. USF has a legal obligation to make sure all of our digital content meets accessibility standards, which includes adding Alternative Text to all images. More information can be found on the myUSF Web Accessibility Standards page:

<https://myusf.usfca.edu/marketing-communications/resources/web-resources/accessibility-guide>

You can also determine the size of your image using the Size dropdown menu. Add uniform padding to the image, or click the gear icon to expand the padding options. Padding determines the amount of white space that surrounds your image. For banner images, we recommend you set the padding and margins for your photo to zero.

Note:

- *Crop and size your images before uploading them. Do not upload a 5000x2000px image*
- *Upload all images at 640px wide for retina display.*
- *Keep file sizes low by saving images as 72dpi jpegs*
- *USF has a library full of images, in addition to the shared images found in your account. Please contact your client manager if you would like to review them.*
- *If you search for images on the web (Google/Flickr), be sure to check for Creative Commons licensing to avoid copyright infringement.*
- *Contact OMC for help! Your marketing partner is a great resource.*

IMAGE LIBRARY FOLDERS

Images

LIBRARY FACEBOOK FLICKR STOCK IMAGES

The screenshot shows a web interface for an image library. On the left is a sidebar with a list of folders: 'All Images', 'Face Paint' (1), 'Glasses' (2), 'Hats' (3), and 'Staff' (7). Below the list is an 'Add folder' button. The main area contains a grid of 8 image thumbnails. Each thumbnail includes a small square icon in the top-left corner, a search bar with a magnifying glass icon, and an 'UPLOAD' button. The thumbnails are arranged in two rows of four. Each thumbnail has a caption below it, including a filename and the date 'Apr 4, 2016'. The images depict various people in different poses and outfits, including one wearing a 'YOLO' hat and another with a horned helmet.

You can use folders to organize your images. Simply add a folder via the Add folder button in the bottom left corner of the library.

ADD CONTENT

In the left column, click and drag the text block into the email body.

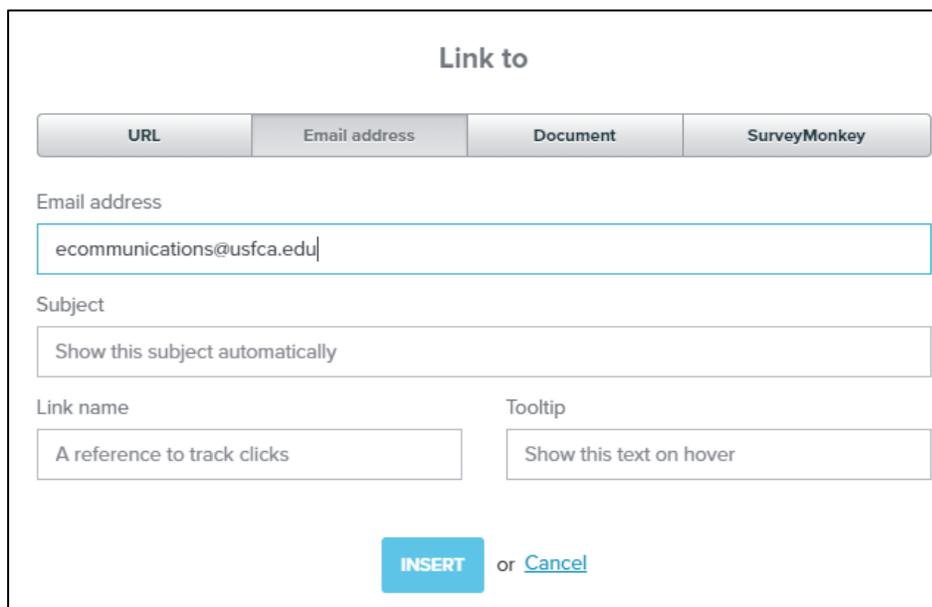


To insert a link, highlight your text and click the "Insert Link" button using the design the tool bar. You can link to a webpage, email address, and phone number.

Use the Tooltip option to enter the title of your link.

LINKING EMAIL ADDRESSES

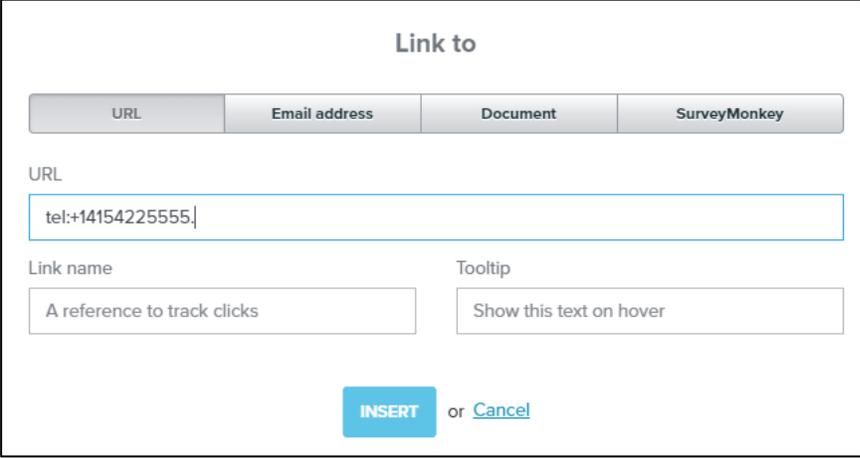
Use the E-mail address tab to link to an email address.

A screenshot of a "Link to" dialog box. The dialog has a title "Link to" and four tabs: "URL", "Email address", "Document", and "SurveyMonkey". The "Email address" tab is selected. Below the tabs, there are several input fields: "Email address" with the value "ecomunications@usfca.edu", "Subject" with the value "Show this subject automatically", "Link name" with the value "A reference to track clicks", and "Tooltip" with the value "Show this text on hover". At the bottom, there is a blue "INSERT" button and a "Cancel" link.

LINKING PHONE NUMBERS

Use the URL tab to link to phone numbers.

In the URL field, use tel:+ before the phone number, e.g., <tel:+14154225555>.



Link to

URL Email address Document SurveyMonkey

URL

tel:+14154225555|

Link name Tooltip

A reference to track clicks Show this text on hover

INSERT or Cancel

Note:

- All URLs must begin with *http://* or *https://* to prevent links from breaking.
- All links should be embedded in the content. So instead of "To visit our website go to: *http://www.myswebsite.com,*" use "Visit our website »" and hyperlink the text.
- Avoid using "here" or "this link," and use descriptive language instead. So instead of "Fill out the registration form here" or "Fill out the registration form at this link," use "Fill out the registration form »"
- Email addresses and phone numbers should always be linked so that they display properly.

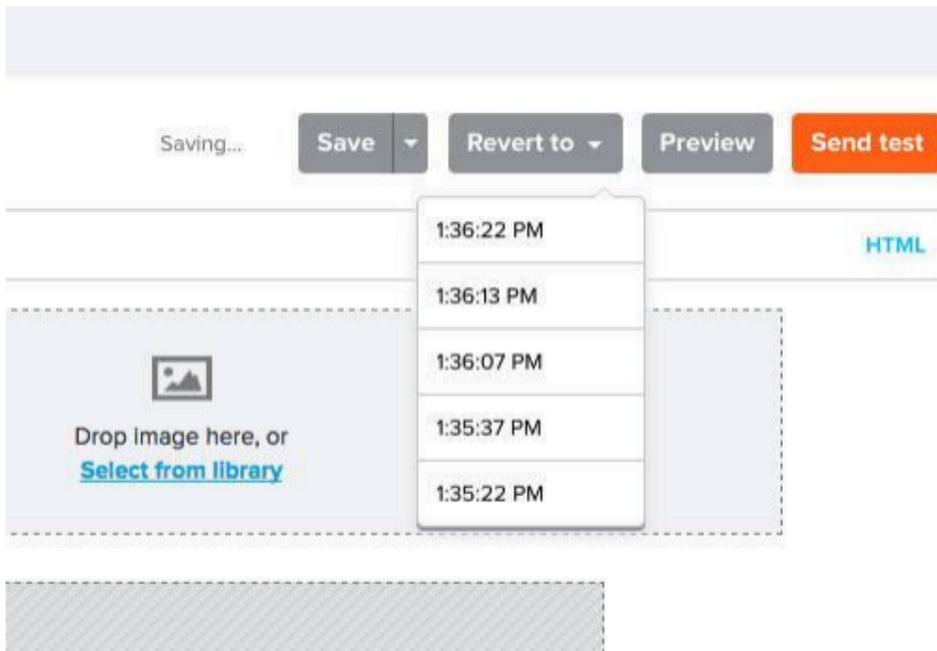
REVERT (UNDO) OPTION

For EACH INDIVIDUAL EDITING SESSION, Emma will check every 15 seconds to see if you've made changes to your mailing and save that version of your mailing.

If you find that you need to revert back to an earlier version, click the "Revert To" button to choose the time-frame that you need to revert back to.

Emma will save up to 30 versions per editing session, at which point the older ones begin to roll off.

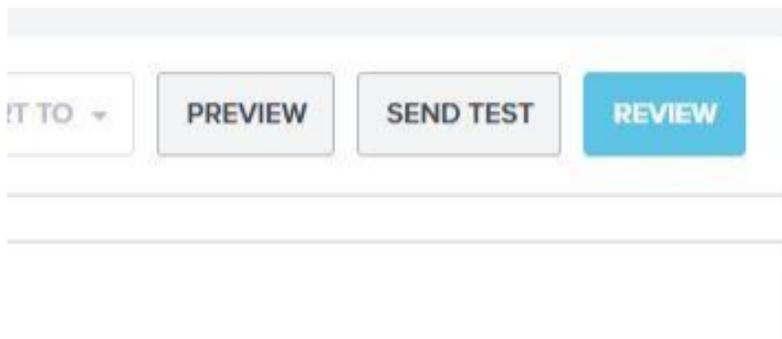
It's very important to note that the "Revert To" only works in a single session and will reset any time you leave the editor (or if you refresh your browser window).



SENDING A TEST EMAIL

This is your opportunity to test, test, test! Send a preview to yourself and colleagues to proofread and test links.

In the upper right corner of the screen click “Send test”.



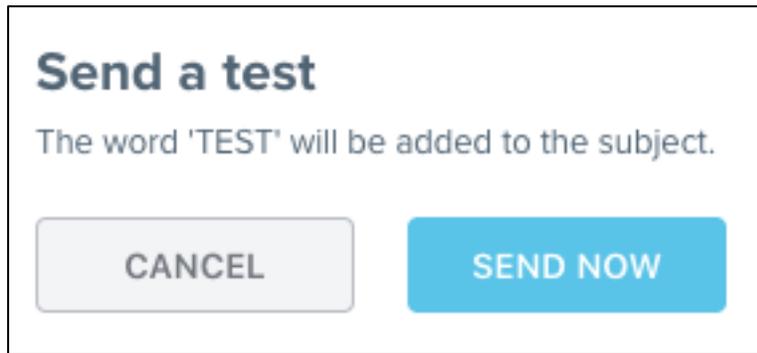
Upon clicking the send test button, a screen will pop-up that says “We’re proofing your email for common issues.” These issues include checking for things like broken links, problems with personalization tags, and the likelihood your email might get filtered to spam.

It is best practice to fix these issues before you send a test message. Click on “Fix Issues” to view the issues that Emma has detected.



Most of the issues that Emma will detect are related to improving deliverability and click through rate of your email. Review the proofing issues and click “Send test” again when you’re ready.

1. Add up to 10 recipients to each test email
2. Add the subject line:
Always begin your subject line with [USF] for spam filtering purposes. Suggested length is 50 characters, with emphasis on the first 20. Best subject lines are short, descriptive, and personalized. Avoid using symbols, special characters, and punctuation.
3. Add Preheader text:
This is the preview text that appears in the inbox view. Length is 50 characters or fewer. If blank, OMC will use the first sentence of the email.
4. You can add a message to your colleagues in the **Note** box.
5. Add sender name and sender email
6. Choose **Send Now**.



TO OMC FOR RELEASE

When your email is finalized and no other changes are needed, send to OMC for final review and release.

1. Prepare to send a final email preview to yourself (as detailed in the **SENDING A TEST EMAIL** section, above).
2. Make sure all four fields are completed and correct: Subject line, Preheader, Sender name, and Sender email.
3. Send the preview to yourself.
4. Complete a final review of your email. Ensure you have alt text for images, as well as correct dates and links.
5. Forward your preview to ecomunications@usfca.edu with the following information in the body of your email:
 - a) desired send date



- b) audience*
- c) additional information/instructions (e.g. additional subject lines for A/B testing)
**If you have a specific recipient list you'd like us to use, attach the .csv file to your email*
- 6. You'll receive a confirmation of receipt for your request and the copyediting process will begin.

IMPORTANT NOTE: Once you submit your request to OMC, **you must email any subsequent changes to ecomunications@usfca.edu**. Do NOT make any edits/additions to your campaign in Emma directly. Having multiple users on the same campaign at the same time may revert changes made by you and/or OMC.

THE BEST EMAILS TARGET THEIR AUDIENCE

Targeting your email recipients helps ensure that the right message reaches the right audience. These are some of the Banner fields we can use to target your email communication:

Students:

1. Major
2. Minor
3. Undergrad (further by freshman, sophomore, junior, senior)
4. Graduate
5. School/college
6. Program
7. Campus

Employees:

1. Faculty
2. Staff
3. School/college
4. Division
5. Department
6. Program
7. Full-time or part-time

Emailing Prospective and Newly Admitted Students:

Emails to prospective and newly admitted students are sent through [Enrollment Communications](#), under Strategic Enrollment Management.

Emailing Alumni:

Emails to alumni are coordinated with Alumni Engagement. To ensure the most accurate alumni lists, please reach out to Development Services at uareports@usfca.edu and allow up to three weeks.

PROVIDING YOUR RECIPIENTS

All contact lists not provided by Alumni Engagement or queried by eCommunications should be stored in Emma within a custom group (e.g. Thacher Gallery Newsletter Group). You should not keep your contacts in a separate Excel list or external file. If your account needs a group to be



created, please email ecomunications@usfca.edu with your list of contacts (include first name, last name, and email).

The custom group can always be updated by the eCommunications team if you receive additional signups, or you can have recipients add themselves to your group directly by using a signup form. Email ecomunications@usfca.edu for more information on creating a signup form.

RELEASING AN EMAIL

Emails can only be released by OMC's managers. As an Email Author in Emma, you do not have access to release emails. In order to get your email into OMC's queue, it's very important to send your final email preview to ecomunications@usfca.edu directly.

After you send your preview, OMC will confirm receipt of your request, and a copyeditor will proofread the email. An updated draft with edits or suggestions will be sent to you for final approval within three-to-five business days.

When OMC receives final approval, the email will be scheduled for release at an appropriate time. To avoid sending multiple emails at the same time, OMC spaces each message apart and typically schedules emails on the hour.

Note: Need to unschedule an email? Let OMC know and your campaign will be reverted back to draft state

YOUR MAILINGS RESPONSE

To view the responses for your mailings, click on "Response" on the top navigation bar.



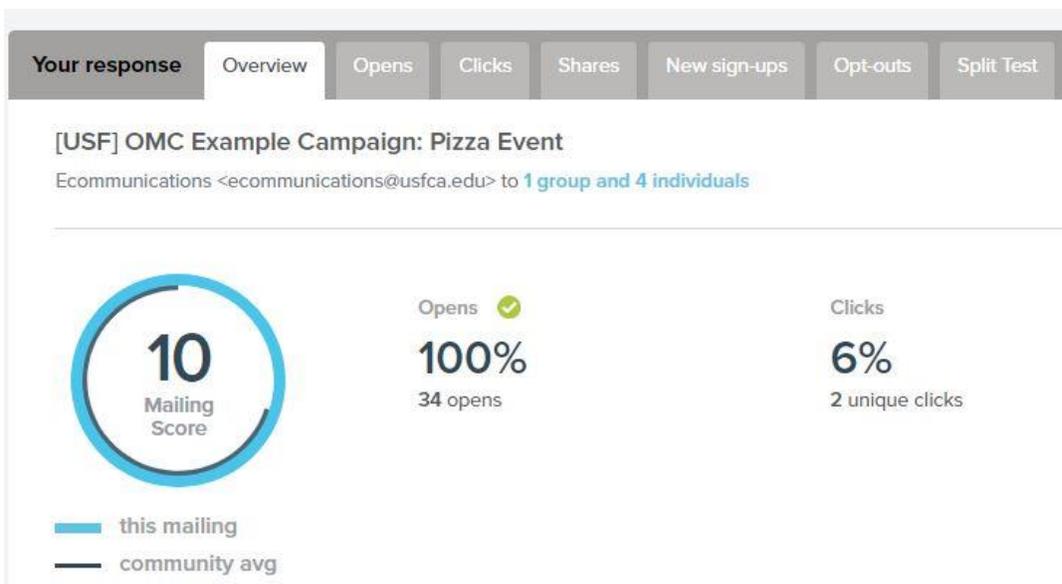
Home Campaigns Response Automation

Mailings

SENT TEST AUTOMATED

Mailing name	
<input type="checkbox"/>	Example Event Test Campaign
<input type="checkbox"/>	Example_Event - COPY 2018-06-11 11:06 AM
<input type="checkbox"/>	Example Newsletter Test Campaign

From the response homepage, click on an individual mailing which will take you to the response overview for that mailing. The overview shows you all of the major data points that were collected for your mailing. For a more detailed breakdown of Opens, Clicks, Shares, New sign-ups and Opt-outs click on the tabs.



The opt-outs tab of a response will show you any users that have opted out from your mailing. These people will automatically be removed from any future mailings.

You are also able to compare mailings to see how effective one message was to another. There is not a direct interface for this comparison, but you are able to generate a spreadsheet that has this detailed information for your further review.

