UNIVERSITY OF SAN FRANCISCO | Office of Marketing Communications

iModules Training Guide

UNIVERSITY OF SAN FRANCISCO | Office of Marketing Communications

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 client manager. If you do not know who your client manager is, contact Tressa Crozier at x2687 or Taylor Cheney at x2634.

This tutorial will teach you how to create emails in our email marketing system, iModules.

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 external, alumni, and/or targeted internal audiences only.

3. **Newsletter:** Curation of multiple content items, such as news, events, social media. These should be sent on a regular schedule.

TURNAROUND TIMES

Pre-built email in iModules:
Three business days

Pre-built newsletter in iModules:
Three to five business days

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

These turnaround times ensure that necessary elements are included (e.g., relevant links and recipient lists), that the email has been proofread and copyedited, and that you have time give your final approval of any changes.

WHAT YOU'LL NEED TO BUILD AN EMAIL

- ☐ Content
- ☐ Email details
  From name/email, reply email, subject line, preview sentence
- ☐ Imagery/graphics
  Edited to appropriate dimensions and file size
- ☐ Relevant links
- ☐ Target audience and/or recipient list
  For recipient lists you'll need CWIDs or a three-column spreadsheet with Email, First Name, and Last Name
- ☐ This tutorial packet

Getting Started

iModules is a web-based application currently used for a number of areas: email marketing, event registration, and online giving. It is supported on both Mac and PC platforms. USF uses iModules to send targeted communications with students, faculty and staff, alumni, donors, and parents. If you have any questions, email ecommunications@usfca.edu.

ACCESS IMODULE

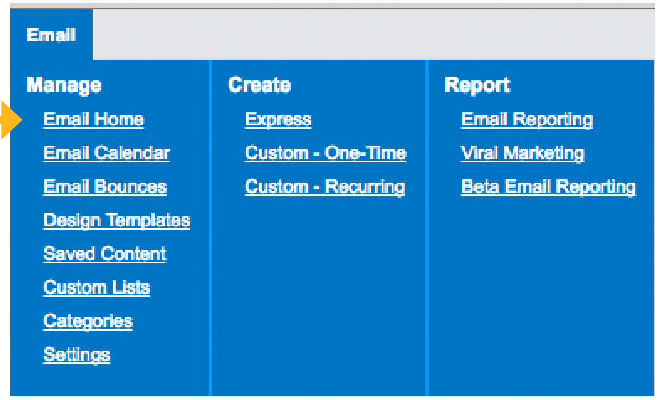
1. Open your browser and go to http://register.usfca.edu

2. Use your myUSF credentials to enter your username (without @usfca.edu) and password. Click Login.

Tip: iModules is optimized for Firefox or Chrome browsers.

EMAIL AUTHOR INTERFACE

Under the **Email tab**, choose **Email Home**.

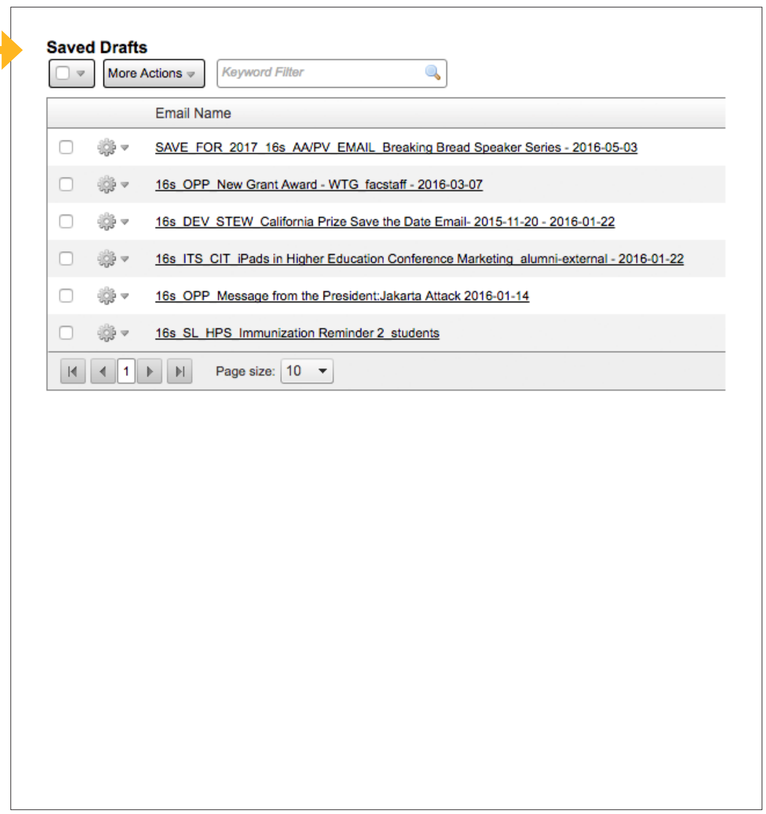


Email Home is broken up into three different sections.

Saved Drafts: where you'll mostly be working to create your emails.

Released Emails: when your email is approved, this is where OMC schedules your email for release. You can also view other emails that are scheduled.

Email History: very useful when you're looking for an old email that you've built after it's been sent out.

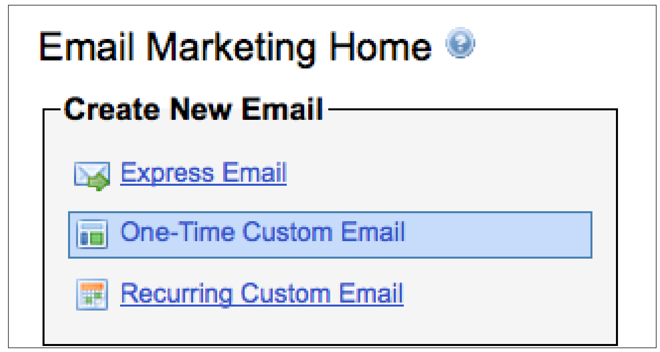


Tips on Finding Emails:

- *All sections can be searched by keyword. You can search keywords in any of the columns displayed.*
- *Due to the way the iModules search currently functions, searching on multiple words will not work. See Email Name on p.6 for more information.*

Create a Custom Email

ONE-TIME CUSTOM EMAIL



Under Create New Email > choose One-Time Custom Email.

Note: Each time you select this option, a new draft email is automatically created. Be sure to delete unnecessary drafts (see p.20)

Alternatively, you may re-use an email you've already sent (see p. 17).

IMODULES EMAIL CHECKLIST

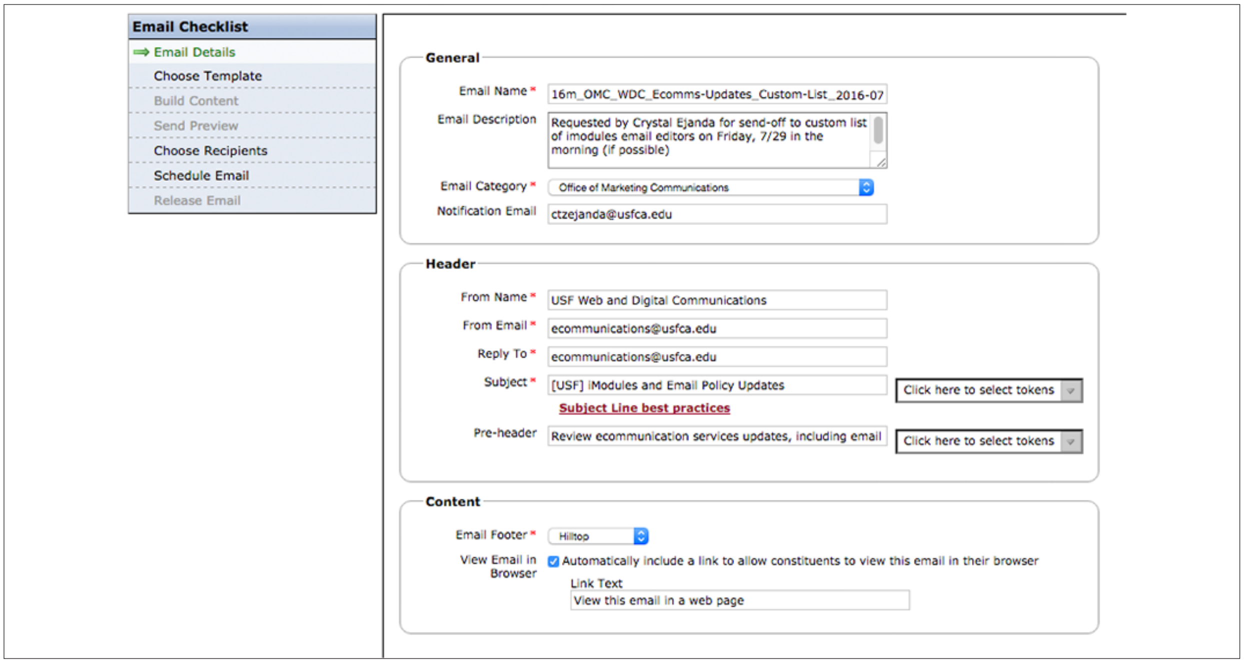
The **Email Builder** will pop-up in a new window and display the following Email Checklist in the left pane:

- ☐ Email Details
- ☐ Choose Template
- ☐ Build Content
- ☐ Send Preview
- ☐ Choose Recipients (for OMC and advanced users; OMC can upload your recipients for you)
- ☐ Schedule Email (for OMC and advanced users; OMC can schedule the email for you)
- ☐ Release Email (for OMC only)

Important! As you move through each step, be sure to click the **Save & Continue** button at the bottom of each screen.

Create a Custom Email, cont.

STEP 1: EMAIL DETAILS



GENERAL

Email Name: By default, when you create a new email, iModules will name it with the date and your name, which isn't very helpful. To help identify your email, please use the following convention: *term_DEPT_Sub-dept_short-email-description_target-audience_SendDate*

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*

Avoid spaces to make it easier to search for your email; use underscores or hyphens/dashes, instead.

Examples:
15f_CRASE_newsletter_FTfac+customList_2015-11-13
16s_CAS_MFAW_Gluck-Reading_facstaffstudentsalum+custom_2016-02-13
16m_HR_Benefits_OpenEnrollment_facstaff_2016-06-01

Create a Custom Email: Email Details, cont.

Email Description: Include requestor, send date, audience, and other relevant information.

Email Category: Choose an appropriate category. If you're unsure, leave this as "General Information," and let OMC know that you need help selecting a category.

Notification Email: Usually your email. After an email is released, a confirmation is sent here.

HEADER

From Name: The person, office, or department from which the communication is being sent.

From Email: Should be the email of From Name. Can also be a department email address.
Note: this email will bounce backs and auto-responses.

Reply To: The email to which replies will be sent.

Subject: Always begins 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.

Pre-header: Preview text in the inbox view. Suggested length is 75-150 characters. If blank, OMC will use the first sentence of the email.

FOOTER

Email Footer: The default footer, "Hilltop," will show the main campus address at the bottom of the email. Change this as needed based on your location (i.e., Pleasanton, Sacramento, San Jose, Santa Rosa, SF Downtown, and SF Presidio).

View Email in Browser: Leave the default options to include a link that allows recipients to view the email in their browser and to display the link text as "View this email in a web page."

When you are finished, click **Save & Continue** at the bottom of the screen.

Creating a Custom Email, cont.

STEP 2: CHOOSE TEMPLATE

USF has one master mobile template, which has been divided into three options that range from simple to complex. Once the initial template options have loaded, click on **Mobile Ready 2 Column w/ Header & Footer** then scroll down until you see templates names that begin with *** **USF - Responsive.**

WHICH TEMPLATE IS RIGHT FOR YOU?

USF - Responsive - One-Column	***USF - Responsive - Newsletter***	***USF - Responsive - All Columns***
Good for letter-type emails. Call-to-action and imagery are optional. Could be used for targeted/ external event invitation.	More robust communication with multiple sections for news, updates, and events. Imagery is encouraged. Should include links to more information on websites (e.g, news stories, program information, calendar event).	Similar to the newsletter, with all configurations available. Three-column with images needs special treatment to display on mobile. Email **ecommunications@usfca.edu** for help.

Note: ***You cannot switch templates once you've selected one; you must start a new email to use a different template.***
You'll also notice other templates inside iModules—Most of them are outdated and not fully responsive, and OMC is in the process of removing these. If you have any questions, please contact ecommunications@usfca.edu.

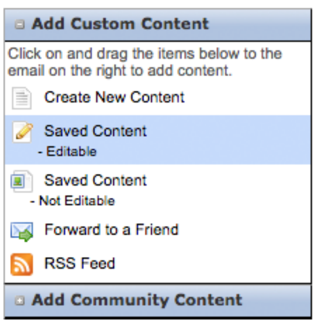
Create a Custom Email, cont.

STEP 3: BUILD CONTENT

This is where you will add your content (text, images, links). You'll notice that there are separate content sections. Each section can be individually moved, edited, or deleted, indepedent of the other sections.

Move section   Edit content   Delete section

CHANGE THE HEADER TO THE SENDER SCHOOL/DIVISION/OFFICE

1. 

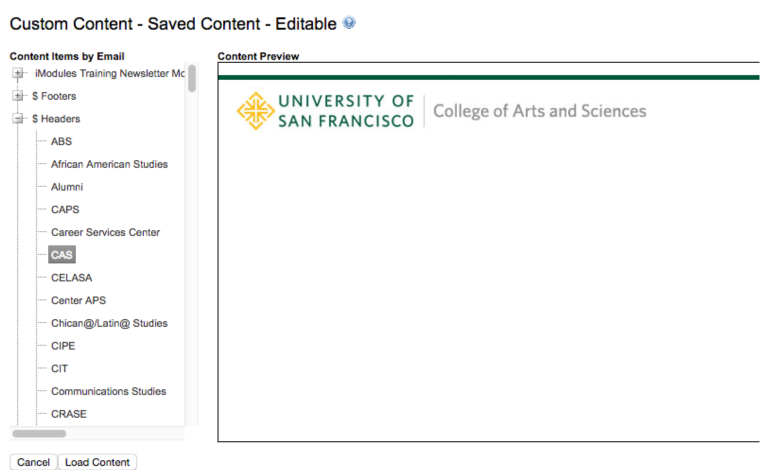
In the left column, go to the Add Custom Content section, then click and drag **Saved Content - Editable** onto the header in the body of the email.

Note: The header will be highlighted in purple and a set of green arrows should appear either at the top left and right or the bottom left and right of the current header.

2. After you unclick (release the mouse) a pop-up window will appear. In the left-hand column of the pop-up, find **$ Headers**, then click on the plus sign to expand the list of available headers.

3. Clicking on one of the listed header options will show a preview of it in the Content Preview box on the right.

4. Once you have found the appropriate header, click the **Load Content** button.



5. At the bottom left of the next screen, click the **Save and Load Content** button to place the header into the email.

Create a Custom Email, Build Content, cont.

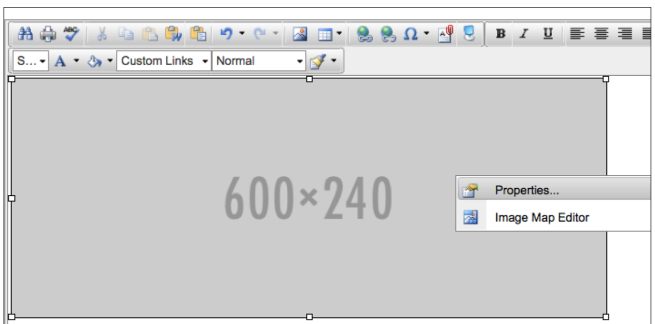
6. The pop-up window will disappear, and the new header will appear in the email.
7. Click on the icon to remove the "Change the World from Here" header.

Note: If you cannot find an appropriate header, please reach out to ecommunications@usfca.edu and your client manager for assistance. If appropriate, OMC will create and add one for you.

INSERT AN IMAGE

Designated Image Areas

1. Right-click (Ctrl+click on a Mac) on the placeholder image and choose **Properties**.



2. Click the icon.
3. In the pop-up window, navigate through the folders to find the image you want, or upload an image using Upload .

   Note: Size images according to placeholder dimensions.
4. In the right pane, go to the **Properties** tab to add Alt Text and Title Text.
5. Add a hyperlink to the image when possible (see best practices for links on p.12).

In the Body (inline with text)

1. To insert an image, place your cursor where you want the image to appear.
2. Click once to position your cursor.
3. In the the toolbar, Click the icon (**Image Manager**).
4. In the pop-up window, navigate through the folders to find the image you want, or upload an image using Upload .
5. In the **Properties** tab:
   a. **Add Alt Text** (this is descriptive text for the image that is needed for accessbility purposes. It will be ready by screenreaders and display if images are turned).
   b. Add Title (this is helpful text that displays when you hover over the image when it isn't linked; otherwise, the link title will show).
   c. You can also float an image left or right and add padding around the image, as needed.
4. Add a hyperlink to the image when possible (see best practices for links on p.12).

Best Practices and Tips for Images

- *Images should always have Alt Text and Title Text filled in to help with accessibility.*
- *Images, especially in a mobile-age, act like big buttons. Link them to relevant web pages.*
- *Crop and size your images before uploading them. Do not upload a 5000x2000px image then use the iModules properties*

Create a Custom Email: Build Content, cont.

panel to scale it down, because the file size will stay big and iModules will not send emails larger than 1MB.

- *Upload all images at 600px wide for retina display. If needed, use iModules to scale the image down using Image Properties.*
- *Keep file sizes low by saving images as 72dpi jpegs (the Save for Web function in photo editors helps).*
- *Don't have photo editing software? You can resize images in Preview (Mac) or MS Paint (PC).*
- *USF has a library full of images. 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 client manager is a great resource.*

ADD CONTENT

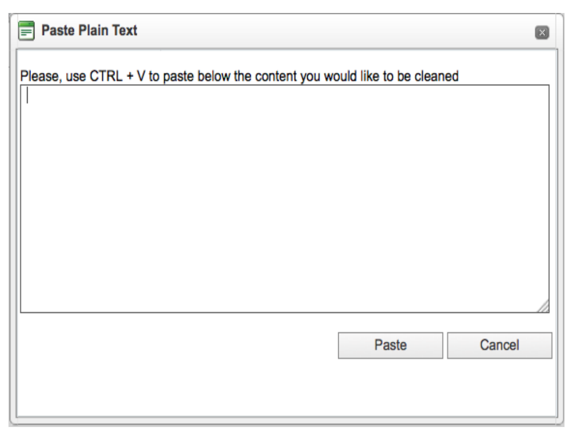
1. To start editing a section and add your content, click on the icon above the section.
2. A new window will pop-up with the heading: Custom Content – Role-Based Content. In the left-hand column, nex to Default for Everyone, click on the icon again.

   Please do not click the Create New Version button or the Save Content for Reuse checkbox.
3. Place your text, links, and images (see instructions below).
4. Click the **Save Version** button at the bottom of the window.
5. On the next screen, click the **Save and Load Content** button.

ADD TEXT

Highlight the placeholder text, then start typing in or pasting the content.

No matter where you are pasting your content from (Internet, Word doc, Google Doc, etc.) **ALWAYS use the Paste Plain Text** option on the toolbar to paste text into the email. Never paste straight into the content area, as this pulls in external styles that will prevent your email from presenting correctly.



Create a Custom Email: Build Content, cont.

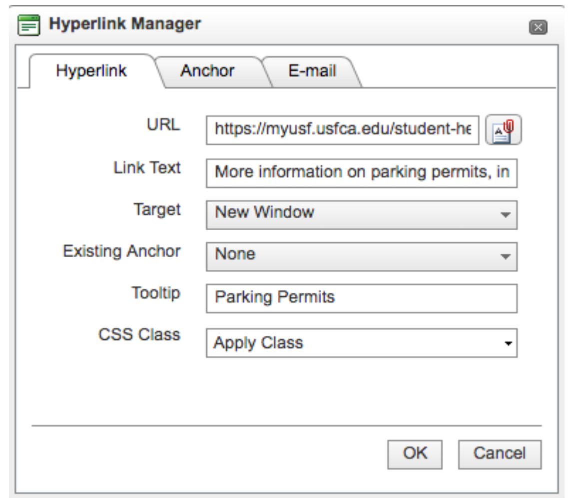
ADD HYPERLINKS

1. To insert a link, select text (or image) and click the hyperlink manager in the toolbar. You can link to a web page, email address, phone number, or uploaded file.

2. For **Target**, select **New Window.**

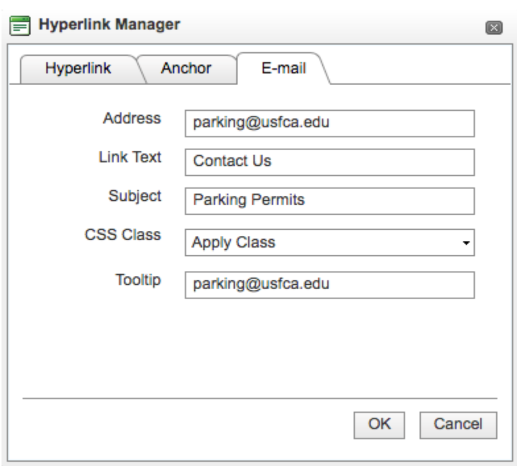
3. For **Tooltip** enter the title of what you're linking to.

4. Click **OK**.



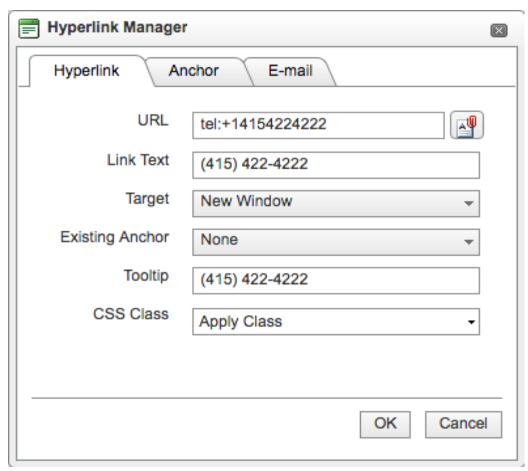
Linking Email Addresses

- *Use the **E-mail** tab to link to an email address, as well as add an optional subject for when recipients click the email link.*
- *For Tooltip: use the email address.*



Linking Phone Numbers

- *Use the **Hyperlink** tab to link to phone numbers.*
- *For URL: use tel:+ before the phone number, e.g., tel:+14154225555.*
- *For Tooltip: use the phone number.*



Best Pratices and Tips for Links

- *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 of "Fill out the registration form here" or "Fill out the registration form at this link," use "Fill out the registration form."*
- *The Tooltip should describe where the link is going.*
- *Links must open in a New Window.*
- *Email addresses and phone numbers should always be linked so that they display properly.*

Create a Custom Email: Build Content, cont.

OPTIONAL: CHANGE THE FOOTER TO THE SENDER SCHOOL/ DIVISION/OFFICE

Changing the footer of an email follows a similar process as changing the header.

1. In the left column, go to the Add Custom Content section, then click and drag **Saved Content - Editable** onto the footer in the body of the email.

   Note: The footer will be highlighted in purple and a set of green arrows should appear either at the top left and right or the bottom left and right of the current footer.

2. After you unclick (release the mouse) a pop-up window will appear. In the left-hand column of the pop-up, find **$ Footers**, then click on the plus sign to expand the list of available footers.

3. Follow steps 3 through 7 above to load the appropriate footer and remove the existing one.

Note: If you'd like a footer made, please fill out this form: myusf.usfca.edu/marketing-communications/email/footer-request. OMC will review your request and, if appropriate, create and add one for you.

ADD ADDITIONAL SECTIONS

1. Click and drag **Saved Content - Editable** into the area of the email where the new section should go.

2. In the pop-up window, find the template you're using (it will be expanded), and select the section type (e.g., 2 column - no image, Listing header) you'd like to add.

3. Click the **Load Content** button.

4. On the next screen, click **Save and Load Content**.

Repeat the above steps until you have all of the sections you need for your email.

Creating a Custom Email: Send Preview

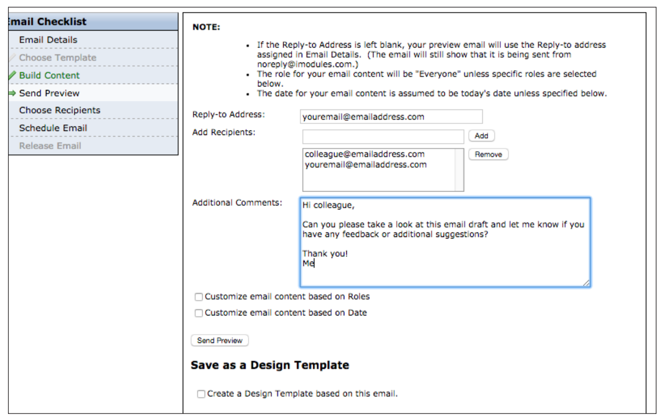
STEP 4: SEND PREVIEW

This is your opportunity to test, test, test! Send a preview to yourself and to colleagues to proofread and test links. Then, when your email is finalized and no other changes are needed, send to OMC for final review and release.

TO COLLEAGUES FOR APPROVAL

1. Add your email in **Reply-to Address**.
2. **Add Recipients >** click **Add**.
3. You can add a message to your colleagues in the **Additional Comments box**.
4. Choose **Send Preview**.

Note: Please do not create a design template based on the email draft. If you'd like a new template, please reach out to your client manager for a consult.



TO OMC FOR RELEASE

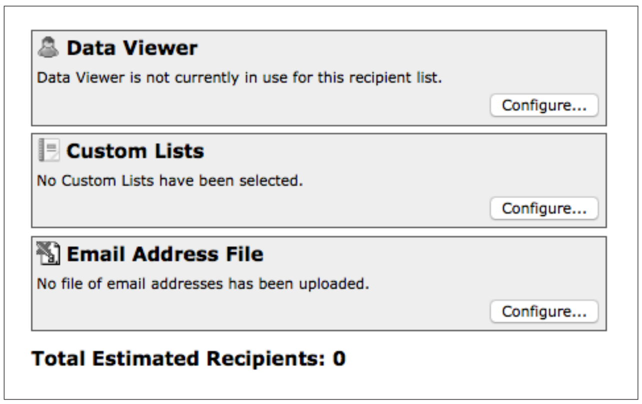
1. From the Send Preview window, copy the URL from your browser's address bar (it should begin with https://adminlb.imodules.com/)
2. Add your email in **Reply-to Address**.
3. Choose **Send Preview** to send a preview to yourself.
4. From your email account, forward the preview to ecommunications@usfca.edu with a message that includes the URL of your draft email (which you copied in step 1), your requested send-off date/time, audience, and other notes for OMC, e.g., if you need help with choosing a category.
5. You'll receive a confirmation of receipt of your request and the copy editing process will begin.

Note: If you need to make updates after sending a preview to OMC, please send a new preview indicating the changes and asking them to disregard the previous email. This will help avoid confusion.

Creating a Custom Email, cont.

STEP 5: CHOOSE RECIPIENTS

There are several options for adding recipients:



Data Viewer: OMC can run queries based on Banner data or upload a list of CWIDs that you provide.

Note: If you'd like a combination of Banner data and CWIDs, please let OMC know. iModules doesn't allow both in the Data Viewer, but they have a workaround.

Custom Lists: If you have a unique group of email addresses that can be reused for multiple emails or newsletters, OMC can create a reusable custom email list that can be updated as needed.

Email Address File: For external recipients and/or email addresses that you compile for a one-time email, OMC will upload the list here.

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:

General information	**Students**	**Employees**
City	Class year	Faculty
County	Major	Staff
State	Minor	School/college
Zip Code	Undergrad (further by freshman, sophomore, junior, senior)	Division
Country	Graduate	Department
Gender	Graduate year	Program
Ethnicity	School/college	Full-time or part-time
Age	Program	ECLS Description
	Campus	

Other fields may be possible; send your inquiry/request in advance to ecommunications@usfca.edu, and OMC will look into options.

Create a Custom Email: Choose Recipients, cont.

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 3 weeks.

PROVIDING YOUR RECIPIENTS

When you forward your final email preview to ecommunications@usfca.edu, please indicate your recipients as follows:

Banner Fields
Let OMC know the fields you would like to use (for example: Full-time faculty in the College of Arts and Sciences or Students at the San Jose Branch Campus).

CWIDS
Attach a .csv file that includes CWIDs in the first column.

iModules does not allow for multiple file uploads, so please make sure that all CWIDs are in one file.

Custom List
Attach a text file or spreadsheet with the list of email addresses that should be in the custom list.

If you already have a custom list, please let OMC know to use it, and provide any updates that need to be made.

Email Address File
Attach a .csv file that includes email addresses in the first column, first name in the second column, and last name in the third column.

Please combine all email addresses into one file, as iModules does not allow for multiple file uploads.

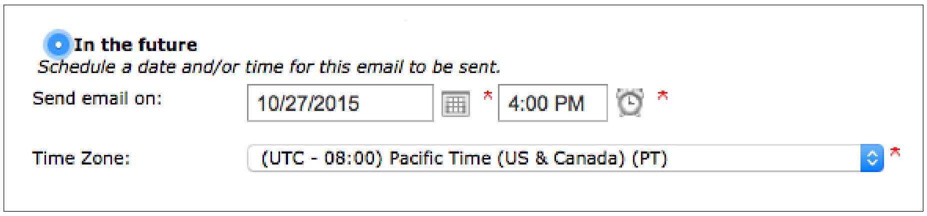
iModules is able to acommodate a combination of the following: (A) Banner Fields or a list of CWIDs, (B) Custom Lists, and (C) one Email Address File.

Tips for Recipient Lists

- *Keep your excel files small by deleting any unnecessary columns other than CWID or email addresses.*
- *Sometimes you'll notice that the total number of valid emails is smaller than your list size. This could be due to a) duplicates, b) invalid email addresses, c) misspelled email addresses, or d) unsubscribes. You can see the Email Exception Report after the email has released for more detailed information (pg. 19).*

Create a Custom Email, cont.

STEP 6: SCHEDULE EMAIL



This is where OMC will scheduled the email for send-off. If you a comfortably, you may select **In the future** and enter your requested send date and time. Depending on other email requests and when your preview is received and finalized, OMC may adjust when the email is released (see Step 7 below for more details).

STEP 7: RELEASE EMAIL

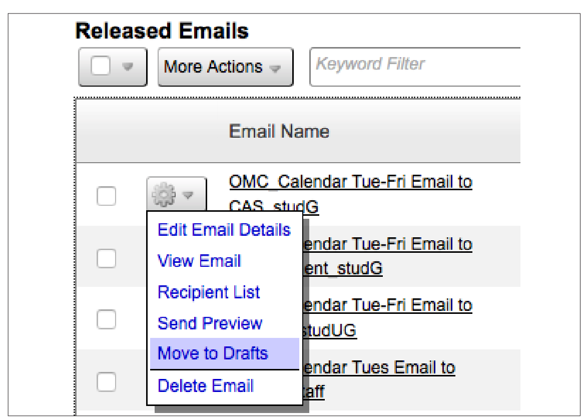
Emails can only be released by OMC's super admins. As an Email Author in iModules, you **do not** have access to release emails. In order to get your email into OMC's queue, it's very important to forward your email preview to **ecommunications@usfca.edu** (see p.14).

After you send your preview, OMC will confirm receipt of your request, and the copy editor 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 (see Turnaround Times on p.2).

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 them apart and typically schedules emails on the hour.

Tips:

- *Need to unschedule an email? Go to the Released Emails section, click the gear wheel to the left of your email and select* ***Move to Drafts****. Please let OMC know if you do this.*
- *Email Details can be updated even while the email is in the released queue, without moving it back to drafts. Please let OMC know if changes need to be made to the email details.*

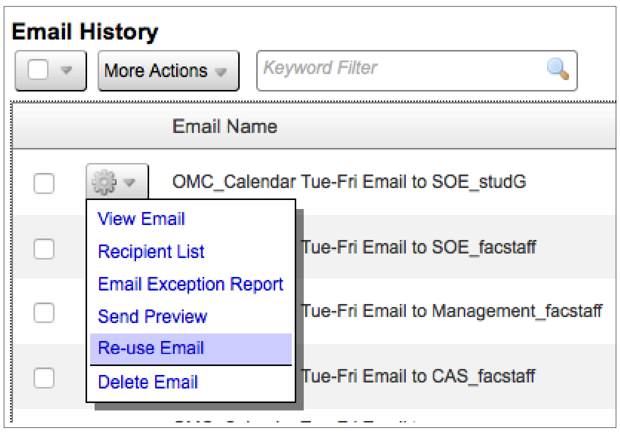


Create a Custom Email, cont.

RE-USE EMAIL

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

1. Go to **Email Home** and scroll down to the Email History section.
2. Find the Email Name of the email you would like to re-use (you may need to use the Keyword Filter to search for it)
3. Once you see the email, click the gear icon to the left of Email Name, and choose **Re-use this Email**.



4. You will be taken to the Email Details screen; make sure update all information (Email Name, Description, Category, From Name & Email, Reply Email, Subject, Pre-header, adn Footer).
5. Finish creating the email as usual.

Handy Email Checklist

EMAIL DETAILS

- ☐ Email naming convention: term_DEPT_Short-Description_target-audience_SendDate (ex: 16m_OMC_test-email_staff_2016-06-01)
- ☐ Email description: requested by/contact, send off date/time, detailed description of audience
- ☐ Accurate Email Details: Category, From Name, From Email, Reply To, etc.
- ☐ Subject line: starts with [USF], simple, concise, 50 characters or less with your most important info in the first 20 characters (for mobile)
- ☐ Pre-header: up to 150 characters, supports content inside of email

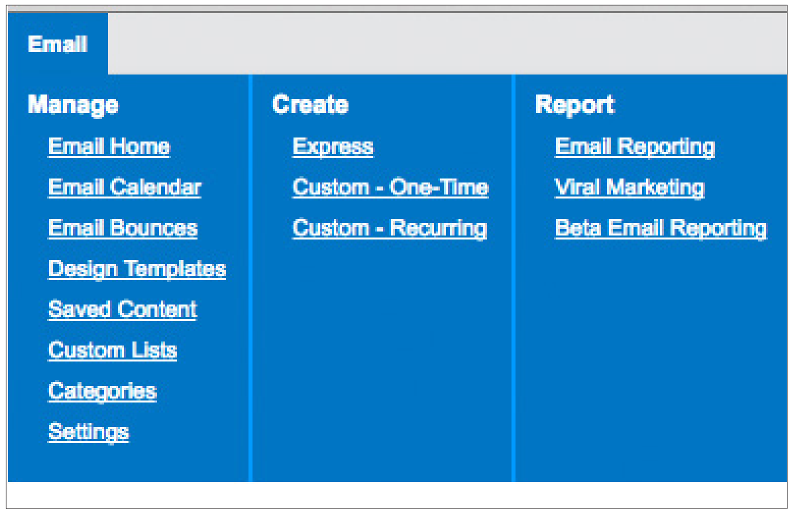
FINAL REVIEW OF EMAILS

- ☐ Accurate email details
- ☐ Spell check
- ☐ Grammar check
- ☐ Style guide check
- ☐ Content: who, what, where, when, why, and how
- ☐ Call to action
- ☐ Images check: linked with alt/title text, image saved in correct dimensions, file size no more than 80kb, non-copyright imagery (no Google images)
- ☐ Link check: embedded (no links spelled out in text), opens in new window, tooltips
- ☐ Review email as the intended audience
- ☐ Recipient approvals
- ☐ Send off date/time approval
- ☐ Email approval (including preview and email details)

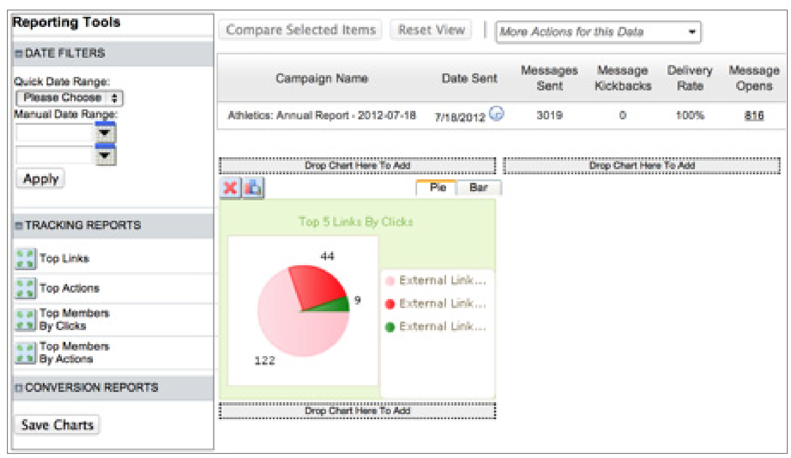
Email Reporting

iModules provides reports that include open rates, click throughs (when someone clicks a link in the email), and unsubscribes.

From the Email tab, choose **Email Reporting**, then click on your **Campaign Name**.



Click on the title of the email for which you wish to see reporting (you may need to narror down the date range to find your email).



Clicks: This number demonstrates the total number of in-message links back that were clicked by readers. Clicks are tracked at both the Message and Campaign level. If John clicks on 3 links in an email, Mary clicks on 4 and Dan clicks on 2, the total number of Clicks recorded for that message would be 9.

Unique Clicks: This number represents the total number of unique member clicks were generated within a particular message or campaign. Using the same example as above, if John clicks on 3 links, Mary on 4 and Dan on 2, the total number of Unique Clicks recorded for that message would be 3 members: one for each unique member who clicked a link within the email.

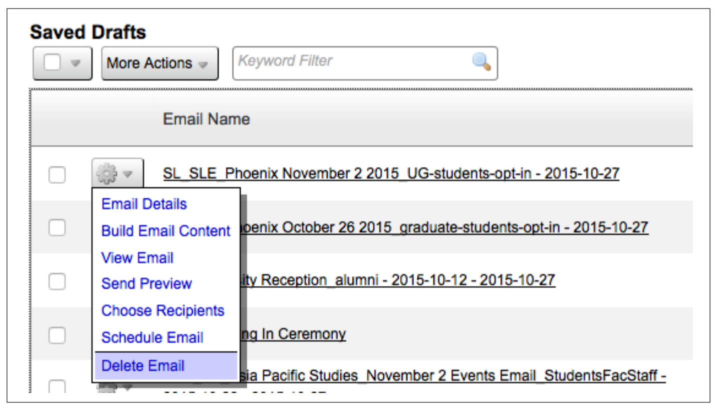
Email Exception Report

Sometimes, not all of your intended recipients will receive an email. OMC can help you determine which of your recipients did not receive your email and possible reasons why. Submit a request for an **Email Exception Report** and include the name of the email and date it was sent to ecommunications@usfca.edu, and OMC will pull this information for you.

Deleting Emails

Go back to the **Email Home** screen, click on the gear wheel on the left next to your **Email Name** and select **Delete Email**.

Tip: Periodically do a search for your last name in Saved Drafts to clean up any emails you no longer need. If you need to save an email for later use, add SAVE_ before the email name.



Notes and Resources

- Emails are generally scheduled on the hour. They need to be approved and sent by the Office of Marketing Communications (ecommunications@usfca.edu).
- **Released Emails** section displays scheduled emails.
- **Email History** section displays past emails. Emails listed here can be reused and altered for a new email.
- When creating an email, please use **One-Time Custom Email** from Email Home or **Re-Use Email** from Email History.
- **Video Treatment**: don't embed videos in emails. If you want to link to a video, take still from the video and esmbed the photo using the photo editor and link this to the online video.

A FEW TIPS ON EMAIL MARKETING

- Deliver relevant content to the right target group. OMC is here to help you pull the right target group. Just define the audience when sending your preview.
- Use USF templates and formatting to build consistency.
- Keep it short and to the point.
- When sending reminders, consider different messaging for those who haven't opened an email versus those who have opened it.
- Focus on using an appropriate subject line and always start with [USF].
- Ask colleagues to review your work.

RESOURCES

- Marketing Communications: https://myusf.usfca.edu/marketing-communications
- USF Editorial Style Guide: https://myusf.usfca.edu/marketing-communications/editorial-style-guide
- Email Standards: https://myusf.usfca.edu/marketing-communications/email
- Email Style Guide: https://myusf.usfca.edu/marketing-communications/email-style-guide