

What is SacSend 2.0 powered by Emma?

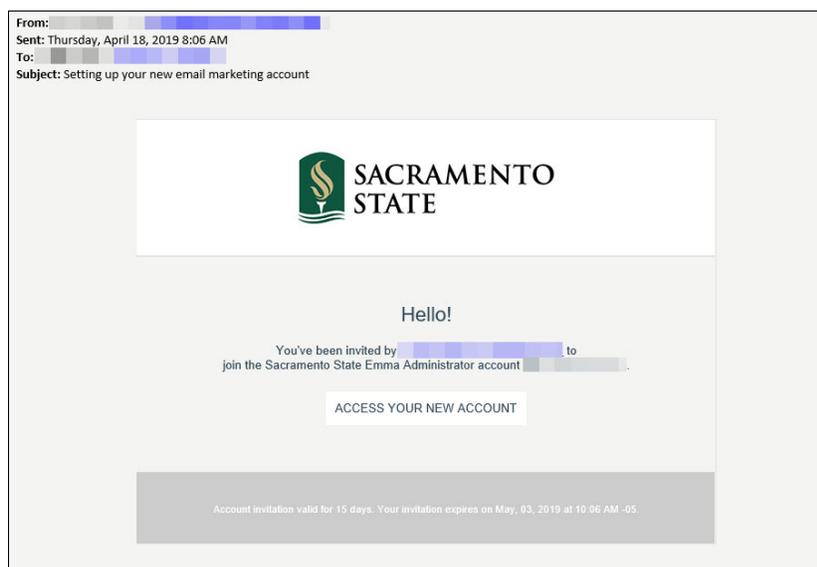
The new version of SacSend is a cloud-based email tool called Emma. This new tool provides University-branded templates, draft and scheduling capabilities, and a drag-and-drop ability when creating messages to integrate photos, videos and social media. It also contains metrics to track when your messages are opened and when the photos and videos are accessed.

Resources

- **Sac State Emma website** – Visit our website at [SacSend 2.0 powered by Emma service page](https://www.csus.edu/information-resources-technology/software-catalog/) (https://www.csus.edu/information-resources-technology/software-catalog/)
- **Editorial Style Guide** – available on the [SacSend 2.0 powered by Emma service page](https://www.csus.edu/information-resources-technology/software-catalog/)
- **Sac State Branding Guidelines**
 - [Editorial](https://www.csus.edu/brand/whatwesay.html) (https://www.csus.edu/brand/whatwesay.html)
 - [Visual](https://www.csus.edu/brand/howwelook.html) (https://www.csus.edu/brand/howwelook.html)
- **IRT Service Desk** – Questions? Contact us at servicedesk@csus.edu, 916-278-7337, AIRC 2005
- **Emma Support Hub** – vendor instructions and videos at the [Emma support website](https://support.e2ma.net/Resource_Center) (https://support.e2ma.net/Resource_Center).

Creating Your Special Emma Account

1. If you haven't already done so, check your SacLink email for a message from Emma to access your new account. This is your special account for Emma, in case My Sac State is not working.



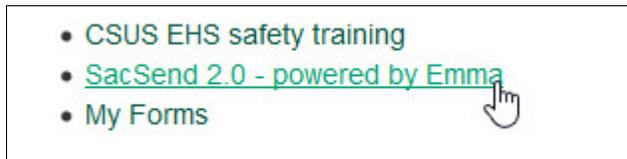
2. Click the **Access Your New Account** link in the email.
3. Complete your new account setup on the Emma website (e.g. create a password). This is a separate user name and password from your SacLink account, and is not updated automatically when you update your SacLink account.

NOTE: Use this special account only when My Sac State and the regular SacLink authentication systems are not working. The direct link is <https://myemma.com>. Your special account and password may NOT be shared with anyone else – the University data security policy applies to the Emma special account.

Accessing Emma

You can access the Emma system through My Sac State.

1. Login to **My Sac State** with your regular SacLink user name and password.
2. In the **Employee Center** channel, click the link for **“SacSend 2.0 - powered by Emma”**.

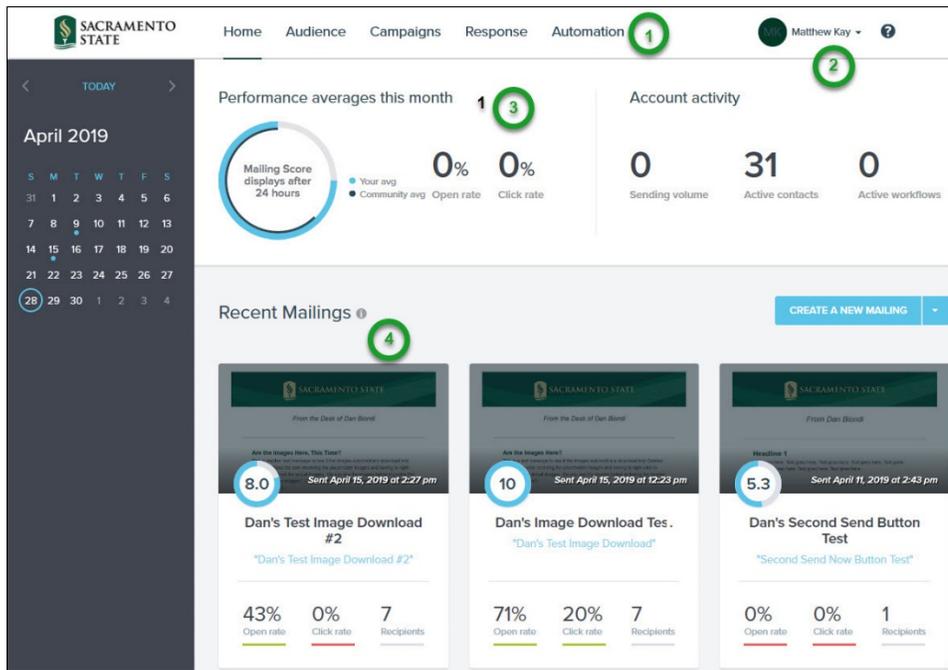


IMPORTANT NOTES

- If the My Sac State system is not working, then try the “Login” link on the [SacSend 2.0 support website](https://www.csus.edu/information-resources-technology/software-catalog/) (<https://www.csus.edu/information-resources-technology/software-catalog/>).
- If both My Sac State and the regular SacLink authentication systems are not working, then you can login directly to Emma (<https://myemma.com>) using your *special Emma account*.
- For true emergency communication, use the Emergency Notification System (ENS).

Overview of Emma

The main page in Emma shows the main tabs, your account information, the overall activity from your mailings, and a summary of your recent mailings, as shown below.



Main Tabs in Emma (1)

Here are the main tabs within Emma.

- **Home** – Summary of your activity and your recent mailings.
- **Audience** – This identifies the complete list of contacts, especially those contacts who will receive your messages (groups, segments). ****Only send to Sac State email addresses****
 - Contacts – DO NOT modify any information. Contacts are automatically updated each night for all Sac State Emma contacts.
 - Groups – The mail lists (category of contacts) you have access to with your account. These may be nonexistent or incomplete between 1:00 A.M. and 6:00 A.M., when the contacts and group lists are recreated each night.
 - Segments – Custom-built categories of contacts based on specific criteria in the Contacts data fields. Once a segment is defined, you can send to these segments just like audience groups. Segments are dynamically refreshed when you send a mailing.
- **Campaigns** – The mailings (emails) that have been sent to your audience. You can view previous mailings based on their status (Drafts, Scheduled, Sent, etc.) and create new mailings.
- **Response** – Review your mailings to see which contacts opened your messages and which clicked various content areas (images, links, social media and videos).
- **Automation** – An advanced feature to send follow-up mailings to specific contacts based on criteria – not covered at this time.

Emma Account Information (2)

The menu available from the down-arrow next to your name in the upper right allows you to change your Emma account password, see your Archived items and Exports, and Log Out of Emma. DO NOT use the other options.

- **Profile** – Change your special Emma account password (separate from SacLink password).
- **Archived Items** – List of items you exported from Emma, e.g. Segments and Campaigns.
- **Exports** – List of items you exported from Emma, e.g. Segments and Campaigns.
- **Log out** - To securely logout of Emma.

Overall Activity (3)

A quick summary of the average statistics for your mailings (Performance averages) and your overall account activity.

Recent Mailings (4)

This area displays thumbnail images of your mailings along with the main statistics for each mailing.

- Previous mailings - Move the mouse cursor over a thumbnail image and click the button to see your responses (View Response).
- **Create New Campaign** – Click this button to begin creating a new mailing from a template.

Audience

The Audience tab is where you can create, edit and view the list of audience members in your Account (Contacts), organize them into groups of contacts (Groups), and generate a list of contacts with similar data fields (Segments). All three types of audiences can be selected when sending a message in Campaigns.

Contacts

- All Sac State contacts in your Account are added/updated nightly (1:00AM – 6:00AM).
- DO NOT add new contacts.
- DO NOT edit contact fields – they are over-written each night.
- DO NOT use Archive feature.
- Click an email address to view the details of the contact.
- Edit contact only when adding user to a Group.

Groups

- Groups for your Account are already created, e.g. "Everyone-Student".
- **DO NOT edit any group whose name begins with "Everyone" – this has a negative impact on all senders.**
- **DO NOT use Archive feature unless you created the group – this has a negative impact on all senders.**
- DO NOT add contacts via this feature.
- Create your own groups, but do not add contacts to groups via this tool (use Contacts tool).
 - **IMPORTANT:** We cannot guarantee the integrity of custom Groups after the nightly Emma Contacts Update process completes. Our recommendations are as follows:
 - DO NOT schedule a message to be sent after the day you create a custom group. Make sure you schedule the message well before the nightly contacts update process.
 - Archive your custom groups after use.
 - If you need to use the same imported group for multiple messages, you need to reimport it before each message is sent.

Segments

- Created based on data from Contact fields, e.g. a student's college or major.
- Refreshed nightly, but member count may not be current (you can manually refresh).
- When selected as audience in a Campaign, the segments are refreshed when the message is sent.
- If you want to see the most current number of contacts in a segment, then you must click "Refresh" after clicking name of the segment.
- **DO NOT edit any segment whose name begins with "Everyone".**

Imports

- **IMPORTANT:** Contact the IRT Service Desk (servicedesk@csus.edu, 916-278-7337, AIRC 2005) for assistance before importing any Contacts.
- Only include the email address, first name and last name fields.
- For immediate one-time use only.

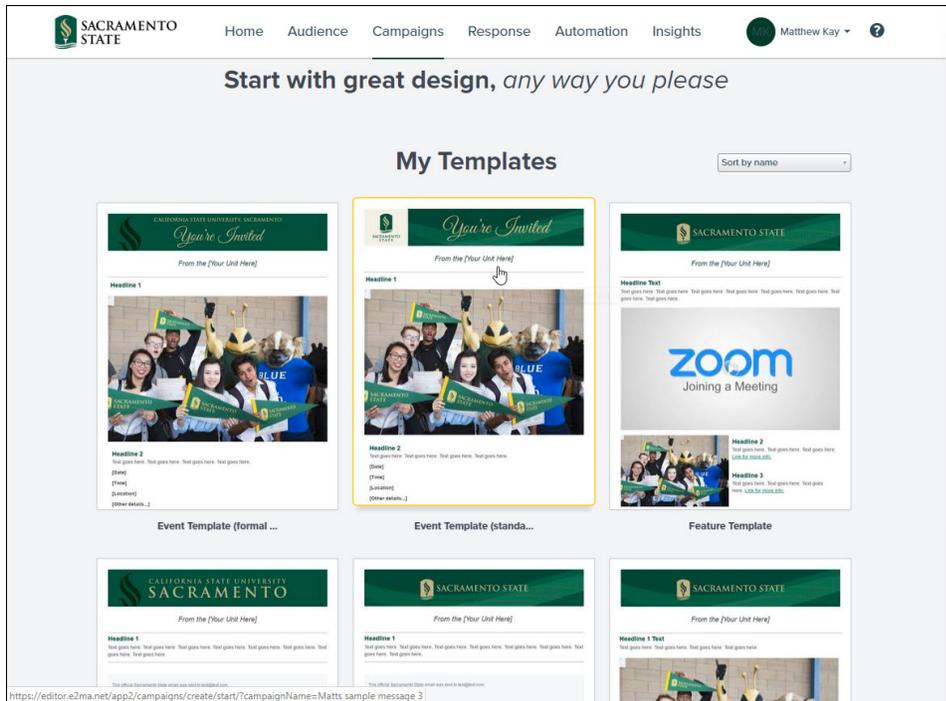
Campaigns

The Campaigns tab is where you create and send messages to your audience (contacts, groups, segments). Campaigns are created from the templates designed specifically for your department or division. You can save new templates from the existing templates for commonly sent messages to your audience.

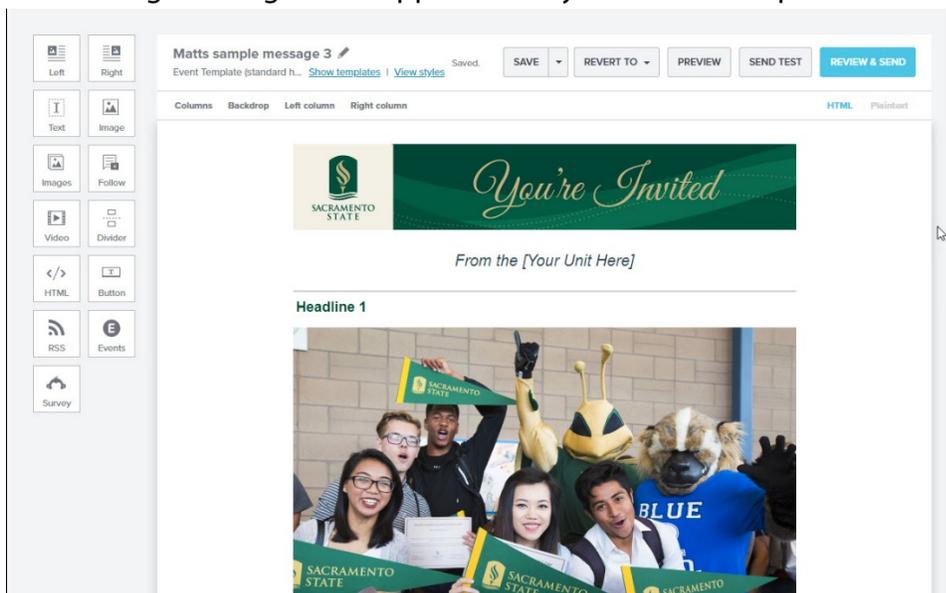
Creating A New Message

1. From the **Home** tab, click **Create New Campaign** button, or from the **Campaigns** tab, click **Create New Campaign** button.

- In the pop-up window type a name for your Campaign and then click **Continue**. Be sure to only use letters, numbers and spaces in the name – no special characters.
- Choose an existing template from those available.



- The message editing screen appears after you select a template.



Making Accessible Messages

Broadcast messages, as well as their attachments, should be accessible to persons with disabilities, or equally accessible alternatives provided, to comply with the [Accessible Technology policy](#). Create accessible content with the formatting toolbar in the editor view, where you can include text descriptions (alternative text) when inserting images, create descriptive links when inserting hyperlinks in your message, and HTML code to insert heading styles for section titles of your message.

Accessible Images

If an image is used in your message, include an alternative text description or the actual text from the image in the Alternate Text description box in the image editing window. Alternative text provides users of assistive technology access to the images' content and function information. Do not start your alternative text description with "Image Of."

Decorative Images

The templates are not programmed for decorative images; and as a best practice, it is recommended to not use them in informational messages.

Accessible Links

If you are including links in your message, be sure to use a descriptive label for your links. Avoid using "Click Here" or the URL on its own. For example, to point users to the campus Technology Training web page, type "Technology Training" as the link name.

Audio and Video

If the message links to a video or audio file, make sure the external file is captioned and/or transcribed. If a video is captioned, you'll see a "CC" button or option available on the video player tool bar. For information on captioning, please visit the [Captioning website](#).

Alternative Formats

Alternative or accessible formats of your message should be made available upon request. For more information about accessibility guidance, visit Sacramento State's [Accessibility website](#).

Editing a Message

After creating a new message from a template, you can immediately start editing your message. Below are the common types of content areas within the templates that you can edit.

To begin editing any content area, place your mouse cursor over the area and it will be highlighted with a box. Some types of content areas also have a small list of options at the top of the content area.

IMPORTANT: Make sure you use fonts, text and colors that are in compliance with University branding colors. Please refer to the ***Editorial Style Guide***, available on the [SacSend 2.0 powered by Emma service page](#). The provided University templates meet Sac State's branding requirements.

Message Header

Edit only the text within the brackets, keeping the same font, size and color; remove the brackets when done.

From the [Your Unit Here] I

Headline Text

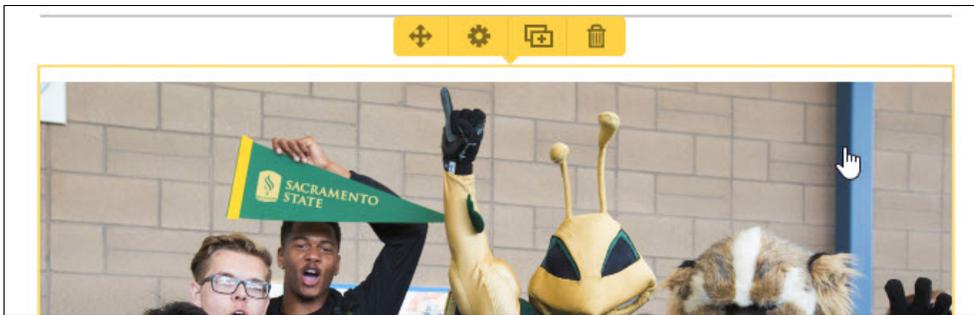
Edit only the headline text, keeping the same font, size and color. This header goes with the image or video that follows in the message. If you need an additional headline text block, please use the Copy button at the top of the toolbar to create a new block with the same properties – it is two boxes with a plus sign.



Headline 1 I

Images

Image placeholders in the templates can be replaced with other images you upload to your Library or from the University's Flickr account.



1. Click the image to replace it, add a link to it, and add alternate text that describes the image.

CHOOSE ANOTHER IMAGE EDIT THIS IMAGE

Give this image a link

<https://www.csus.edu/orientation/>

Alternate text

New students having fun at orientation

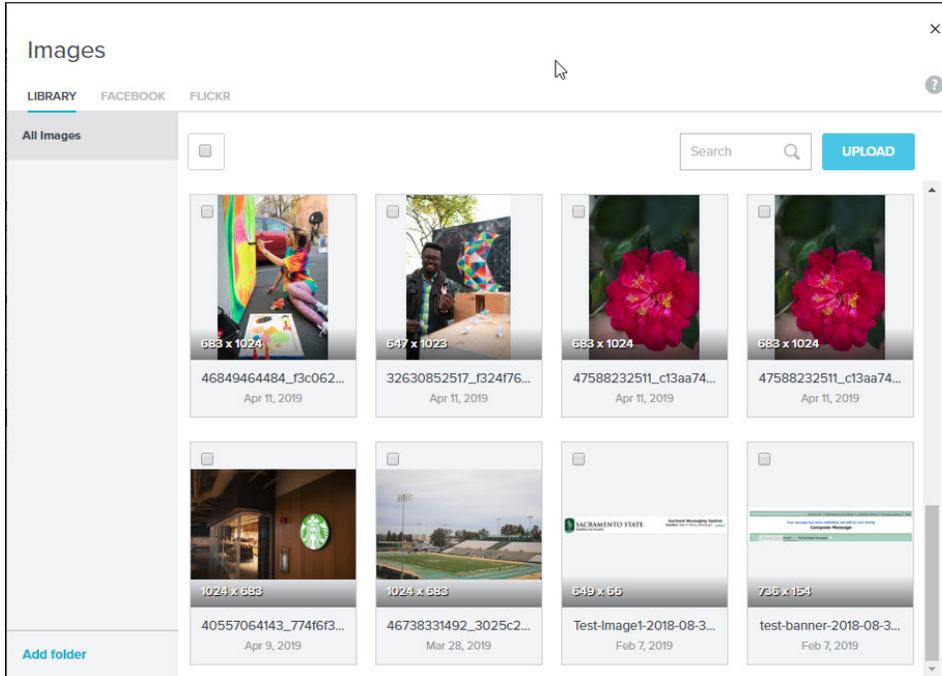
Size: Best fit

Top	Right	Bottom	Left
10	0	10	0

CANCEL SAVE

IMPORTANT: Alternate text is **required** for all images.

2. Click “Choose another image” to select a different image for your message.

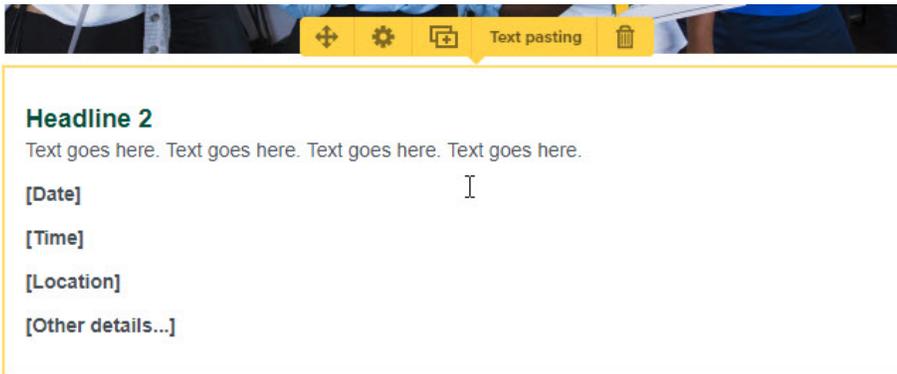


3. In the image selection window, select a new image from your **Library** (available to all users in the same Account) or **Flickr**.
 - a. If you want to add a new image to your Library, click the **Upload** button and choose an image from your computer.

- b. You can also organize images into folders. To create a new folder, simply click the “**Add folder**” link in the lower left of the window.
4. Move your mouse cursor over the image and click **Select**. The image is now placed in the image editing window.
 - a. If you want to add a link to the image, enter the Web address in the box below “**Give this image a link**”.
 - b. **IMPORTANT:** It is required that all images have alternative text. Enter the appropriate alternate text into this box.
5. Click the **Save** button after choosing a new image, adding a link and alternate text.
6. If you select a **Flickr** image, then you **MUST** click the image after it is inserted into your message and add the **alternate text**.

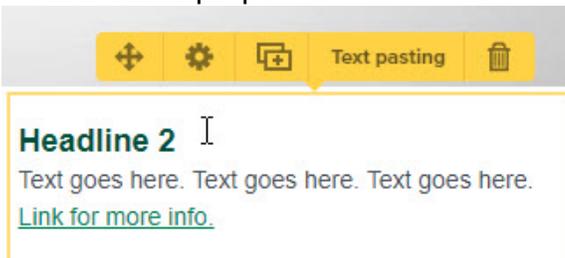
Text Header with Detail

Edit the headline text and content, keeping the same font, size and color. Remove the brackets when done entering your text. If you need an additional text header block, please use the Copy button at the top of the toolbar to create a new block with the same properties – it is two boxes with a plus sign.

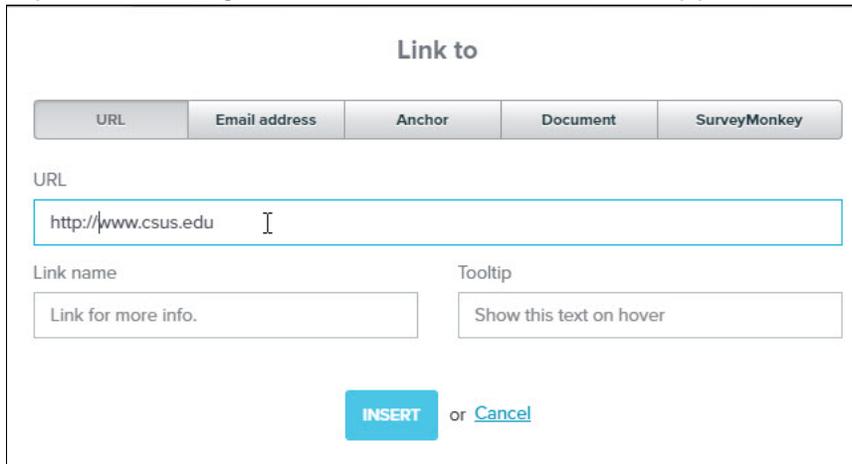


Text Header with Detail and Link

Some templates contain text areas with sample links, such as the feature template shown below. If you need an additional text header block, please use the Copy button at the top of the toolbar to create a new block with the same properties – it is two boxes with a plus sign.



1. To edit the link, click inside the existing link text and click the **Edit Link** button on the toolbar at the top of the editing window. The **“Link to”** window appears, as shown below.



2. To link to a Web address (URL):
 - a. Click the **URL** tab, if not selected.
 - b. Type the complete Web address in the URL box.
 - c. Type a descriptive label in the **“Link name”** box. For example, to point your audience to the campus Technology Training web page, type “Technology Training” as the link name.
3. To link to a document:
 - a. Click the **Document** tab, if not selected.
 - b. Click the **Upload** button to add a new document to your account.
IMPORTANT: Your documents must be accessible, e.g. tagged PDFs. There is a maximum file size limit of 50MB per file.
 - c. Type a descriptive label in the **“Link name”** box.
4. Click the Insert button when finished.
5. Edit your link text, if needed, using a descriptive label. For example, to point audience members to the campus Technology Training web page, type “Technology Training” as the link name.

Button

Some templates contain buttons, such as the invitation template with an RSVP button shown below.



1. To edit the button text, click the button in the message.
2. Type your new text, if appropriate, in the **Text** box of the **Edit Button** window.

DO NOT change the font and color in the button.

Edit Button

Text
RSVP

Font
Helvetica **B** *i* □

Clickthrough URL
http://example.com

Size: Large Shape: Rounded Position: Center

Fill Color
#cbb778

? CANCEL SAVE

3. In the “**Clickthrough URL**” box, enter the appropriate Web address to take the user to when the button is clicked by the user.
4. Click **Save**.

YouTube or Vimeo Video

Some templates contain videos, such as the feature template as shown below. This built-in video tool only works with YouTube and Vimeo videos.



1. To select a video, click the video content area in the message.
2. Enter the Web address of your YouTube video into the box titled “**Enter a Youtube or Vimeo URL**”.
3. Enter the appropriate alternate text into the **Alternate Text** box.

IMPORTANT: It is required that all videos have alternative text in your messages and the videos have captioning.

Insert a video

Enter a Youtube or Vimeo URL

https://www.youtube.com/watch?v=vFhAEoCF7jg

Alternate text

Text shown if images are turned off

Size: Best fit

Padding: Top: 5, Right: 0, Bottom: 5, Left: 0

INSERT VIDEO or Cancel

4. Click **Insert Video**.

Mediasite Video

If you want to add a Mediasite video to your message, you need to insert an image of the video and link that image to your video.

- Capture an image of the video.
 - If needed, login to the [Mediasite server](https://www.csus.edu/mymediasite) (https://www.csus.edu/mymediasite) and click the title of your video. Or, view your video in a browser, but do not play it – stop at the beginning of the video.
 - Capture an image of the video. You can use SnagIt (Mac or Windows), Windows Snipping Tool, or Shift-Command-4 on a Mac to capture a portion of the screen.
 - Save your new image capture.
- Go to Emma and begin editing your message.
- If an image already exists as a placeholder in your message, then click the image.
- If there is no image placeholder, then click the Image button in the left toolbar area and drag it into your message onto one of the “**Drop Here**” areas.
- Click the image.
- Follow the steps in the previous **Images** section to upload a new image.
- Add the Web address (URL) for the Mediasite video to the appropriate box in the image editing window.

8. Add the appropriate alternative text to describe the image.
9. Click **Save** on the image editing window.

Reverting to an Earlier Version of a Message

If you need to revert to an earlier version of a message you are editing (e.g. “undo” your editing), then click the “**Revert To**” button at the top and select the date and time of the previous version. Changes to your message are saved automatically every 15 seconds while editing.

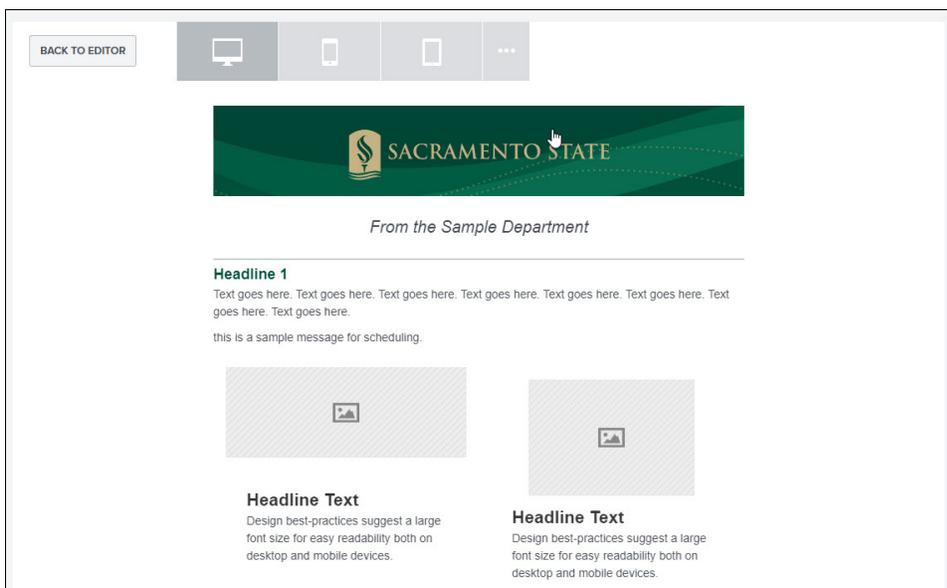
Previewing a Message

You can click the Preview button while editing a Campaign message to view your message as it may appear in an email program, on a smartphone and on a tablet device. Note that what is presented in Preview is not guaranteed to be exactly what recipients see in their actual message. It is only an approximation.

1. Click the **Campaigns** tab and then the title of your message to view the editor screen.
2. While editing a Campaign message, click the **Preview** button in the upper right.
3. The Preview screen gives you three different devices on which to view your message. Select the gray button for either computer, smartphone or tablet.



The next sample image displays a message for a computer device.



- If you want to customize the dimensions of the display for a selected device, then click the ellipse button (...) to the right of the three standard display buttons.

Enter your new dimensions into the boxes and click **Apply**.



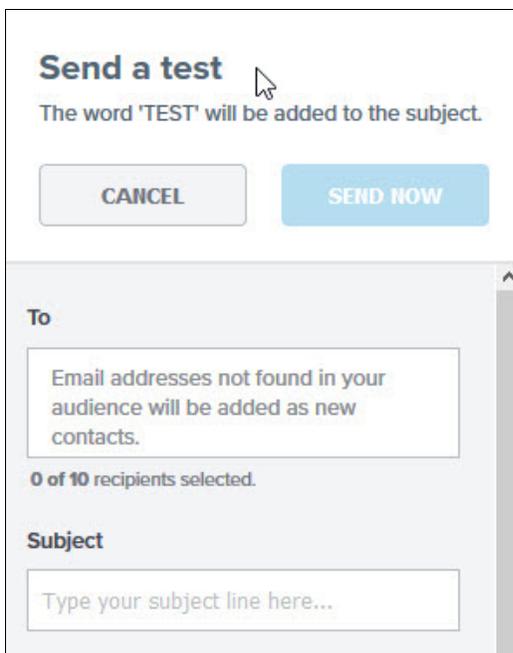
The screenshot shows a user interface for setting device dimensions. On the left is a 'BACK TO EDITOR' button. In the center are three device icons: a desktop monitor, a smartphone, and a tablet. To the right of these icons are two input boxes containing the numbers '1124' and '1215', separated by an 'x' symbol. A mouse cursor is positioned over the '1215' box. To the right of the input boxes is a blue 'APPLY' button.

- Use the scrollbars in the browser window or at the edge of the device preview window within the browser window to scroll up or down to view your message.

Sending a Test Message

You can send a test message to a few contacts before you actually send it to your audience.

- Click the **Campaigns** tab and then the title of your message to view the editor screen.
- While editing a Campaign message, click the **Send Test** button in the upper right. The **'Send a test'** panel appears on the right of the edit screen.



The screenshot shows a 'Send a test' panel. At the top, the text 'Send a test' is displayed in blue, with a mouse cursor pointing to it. Below this, a message states 'The word 'TEST' will be added to the subject.' There are two buttons: a grey 'CANCEL' button and a blue 'SEND NOW' button. Below the buttons is a 'To' field with a text box containing the message 'Email addresses not found in your audience will be added as new contacts.' Below the text box, it says '0 of 10 recipients selected.' At the bottom is a 'Subject' field with a text box containing the placeholder text 'Type your subject line here...'.

- Enter the Sac State email addresses or the name of a test group in the **To** box for the contacts who will receive your test message. **IMPORTANT:** DO NOT enter non-Sac State email addresses.
- Enter the text in the **"Subject"** box. For example, "TEST – Sample message."
- Enter the text in the **"Preheader text"** box. This can be the same as your Subject text. The Preheader text is displayed in some email clients before the message is actually opened.
- Add text in the **"Note"** box for your test recipients to review the message and give you feedback.

- You may want to change the **“Reply-to”** address for the test only, if you want to get direct feedback to your email address.
- Click the **Send Now** button at the top of the **“Send a test”** panel.
- You will receive a message at the top of your screen when the message was successfully sent.

Sending Your Message

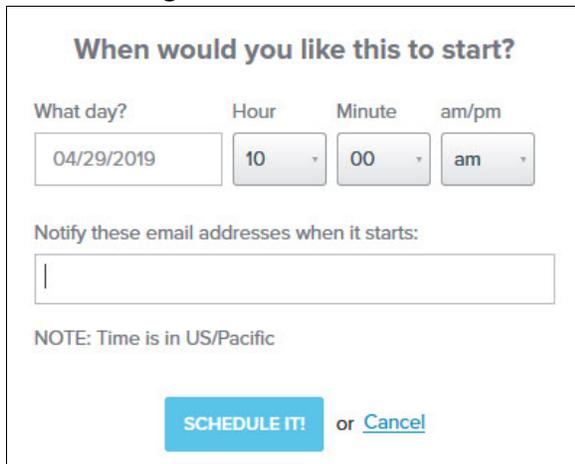
- Click the **Campaigns** tab and then the title of your message to view the editor screen.
- While editing a Campaign message, click the **Review & Send** button in the upper right. Emma will review your message and then display the Send screen, as shown below.

The screenshot shows the email editor interface for a campaign titled "Matt's sample to schedule" (General Template (standard header)). At the top right are buttons for "SAVE", "PREVIEW", and "BACK TO EDITOR". The main content area is split into two columns. The left column displays a preview of the email template, including a header with the Sacramento State logo, a "From" field, and several "Headline Text" blocks. The right column contains configuration options: "Choose recipients" (with a dropdown and a person icon), "Enter a subject line" (with a text box containing "TEST - sending a test message" and a "SWITCH TO SPLIT TEST" button), "Enter preheader text" (with a text box containing "TEST - sending a test message" and a "46" character count), "Sender name" (with a text box containing "[EMMA TEST] IRT-Demo Subaccount" and a checkbox to make it the default), and "Sender email" (with a text box containing "sacsend@csus.edu" and a checkbox to make it the default). Below these are instructions about sender and reply-to addresses and a checkbox to set a separate reply-to address. At the bottom right are buttons for "SEND NOW" and "Schedule for later".

- Enter the names of the groups, segments and/or individual Sac State email addresses into the **“Choose recipients”** box.
- Edit the text in the **“Enter a subject line”** box, if needed.
- Edit the text in the **“Enter preheader text”** box, if needed. The Preheader text is displayed in some email clients before the message is actually opened.
- DO NOT change the text in the **“Sender name”** and **“Sender email”** text boxes.
- To send your message now, click the **Send Now** button at the bottom.
 - After the message is processed by Emma and your message begins to be sent, a screen displays with the heading text, “Preparing to send!” Your recipients should begin receiving their messages within 30 minutes. Emma does not guarantee when messages are actually sent.
- To send your message later, click the **“Schedule for later”** link (see next section).

Scheduling Your Message

1. After clicking the “**Schedule for later**” link, Emma displays a pop-up window, as shown below.



When would you like this to start?

What day? Hour Minute am/pm

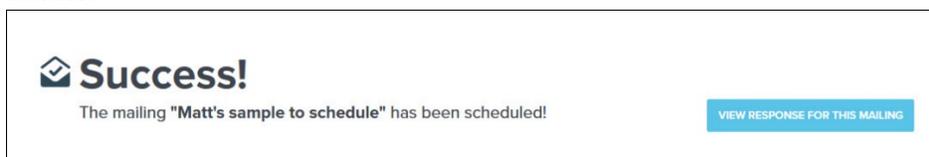
04/29/2019 10 00 am

Notify these email addresses when it starts:

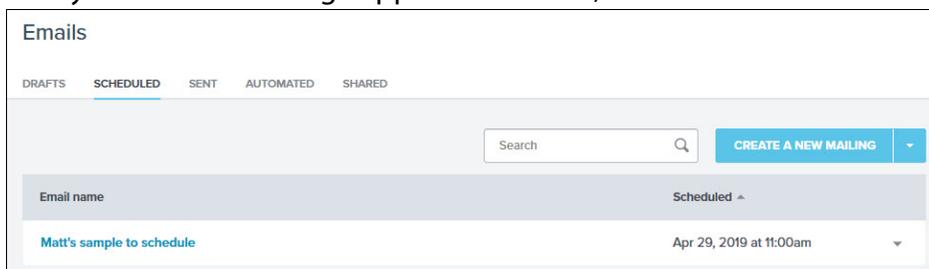
NOTE: Time is in US/Pacific

[SCHEDULE IT!](#) or [Cancel](#)

2. Select the date and time to send your message using the boxes provided.
3. Enter your email address in the “**Notify**” box.
Note: After your message is sent on the scheduled date and time, you will receive a copy of the message with the following text at the top of the message:
“This is a quick heads-up to let you know that the following mailing, whose send-off was scheduled in advance, has just begun sending.”
4. Click the “**Schedule It**” button to save your changes.
5. When Emma is finished processing your schedule request, the **Success** screen appears, as shown below.



6. If you return to the **Campaigns** tab, and then click the **Scheduled** tab in the Emails section, your newly scheduled message appears in the list, as shown below.

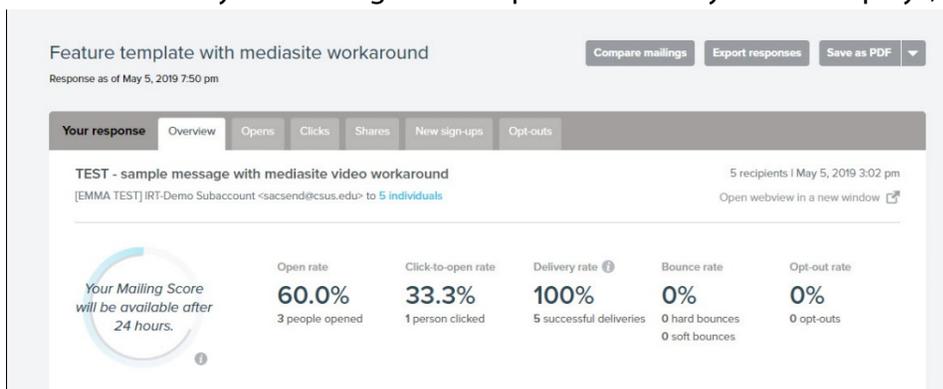


Reading Your Mailing's Response

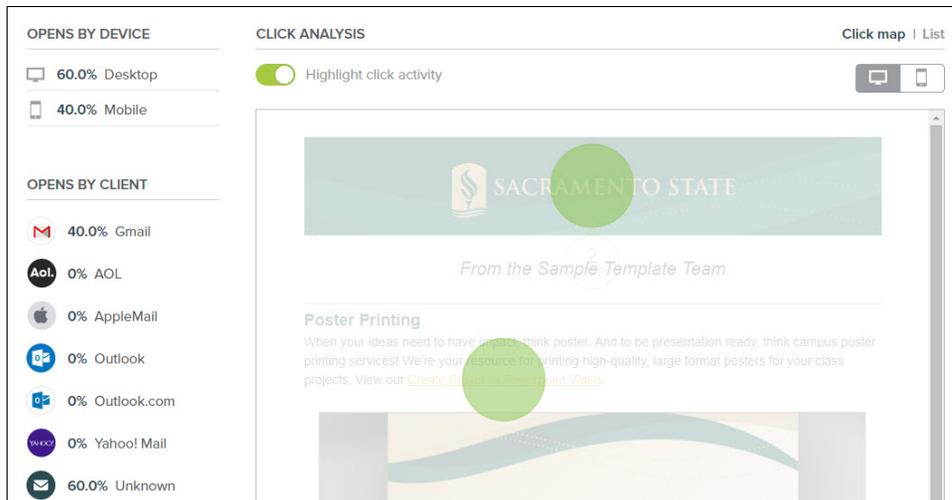
After sending your messages, you can view how your recipients have viewed your messages and what links they clicked. A summary response email is sent to the sender 24 hours after the message was first sent.

IMPORTANT: A mailing's response is available for 18 months after the mailing has been sent. Then, the data is deleted from your account, and is no longer available. If you want to keep your response information after 18 months, then click the **"Save as PDF"** button (upper right) while viewing your responses.

1. Click the **Response** tab.
2. Beneath the Mailings heading, click one of the three tabs: **Sent**, **Test**, or **Automated**.
3. Click the title of your message. The response summary screen displays, as shown below.



4. The **Overview** tab displays several key areas:
 - a. **Mailing score** – This score displays 24 hours after a mailing is sent and factors in open rate, click-through rate, shares percentage, opt-out percentage and sign-up percentage.
 - b. **Opens by device** - Displays whether your recipients viewed your message on their desktop or a mobile device.
 - c. **Opens by client** – Learn which email client was used to open your message.
 - d. **Click analysis** – Find out where in your message your recipients have clicked. Review this analysis to determine image, text and link placement in future mailings. You can click the desktop or mobile device buttons on the right to see the click distribution on each type of device.



5. The **Opens** tab displays the list of recipients who have opened your message in a trackable way. For example, some email clients allow recipients to preview an email without it being registered as opened.
 - a. Click **“Save this tab as a segment”** if you want to save the list of recipients as a Segment to send follow-up messages.
6. The **Clicks** tab displays the list of recipients who clicked specific content in your message, such as images and links.
 - a. Click **“Save this tab as a segment”** if you want to save the list of recipients as a Segment to send follow-up messages.
7. The **Opt-outs** tab displays the recipients who have clicked the unsubscribe link that may appear in some email clients. **Note:** Please check this tab periodically to see if any recipients have opted-out of Emma. If so, please contact the IRT Service Desk to get them subscribed again.
8. The **Shares** and **New sign-ups** tabs track features that are not being used in our templates.

Export Responses

You can save the detail of the different types of response data for each message you send.

1. Click the **Response** tab.
2. Beneath the Mailings heading, click one of the three tabs: **Sent**, **Test**, or **Automated**.
3. Click the title of your message. The response summary screen displays.
4. Click the **Export responses** button in the upper right of the screen.

5. Check the boxes to select which types of responses you want to save.

Export responses

- Overview
- All response details
 - Opens
 - Clicks
 - Shares
 - New signups
 - Opt-outs
 - Received
 - Sent to
 - Bounced
 - In progress mailings

Export

6. Click **Export**.
7. When your export is complete, click your name in the upper right and select **Exports**.
8. Click the **Mailing response** tab.
9. Click the short title of your message in the **File** column to download the zip file with your response data. The zip file contains Comma-Separated-Value (CSV) files for each type of response data you selected.