

## Sending Email on Blue Hornet®

### STEP 1 – Gathering Your Data

- A. For existing data from Advance or Outlook, pull email address, first name, last name, and any other variable data you would like to use in the email message. Export the list to a Microsoft Excel file.
- B. If you're starting from scratch, set up your Excel file with the following columns:
  - a. First Name (separate from the last name, so that you can address individuals by first name in your messages)
  - b. Last Name
  - c. Email Address
  - d. Anything else you would like to track. Other columns include: salutation, title, company, affiliation, etc.

### STEP 2 – Preparing Your List in Excel

- A. Clearly arrange list in Excel, deleting any unnecessary data. Arrange list in columns such as "first name," "last name," and "email."
- B. Save the list as a tab delimited text file (.TXT or .CSV). This is a selection in the "Save As" feature in Excel. Click on the "save as type" drop down once in the "Save As" screen.

#### Tips:

- Be sure to name your list descriptively so that you can easily locate it later when you are importing into Blue Hornet®.
- Keep your lists in the same place by creating a file called "LISTS" on your hard drive or on your server. This way you will always know where to find the lists

### STEP 3 – Log into Blue Hornet®

- A. Username: \_\_\_\_\_
- B. Password: \_\_\_\_\_

### STEP 4 – Creating a Static Segment

- A. If your list is new, move your mouse to "Segmentation," then to "Create Static Segment" under the "Static Segments" heading.
- B. Name your static segment (a good description helps you remember the list at glance). Then select a category from the pull down menu. Your category is your department. If you need to create a new category, please contact the law school communications department at 4207. Finally, under the "Type" section, select "Live" or "Test" as the type of list you are uploading. Select "Live" if this is your list of intended recipients. Select "Test" list if you wish to test complex messages that include variable data (like a mail-merge with specific data from your list inserted for each individual recipient). For simple messages you can use the basic test list,

which has already been created for you in a different area. 99 times out of 100, you're uploading a "Live" list.

## STEP 5 – Import Data into Your Static Segment

- A. You cannot import data unless you are using a previously created static segment or have created a new static segment (See step 4).
- B. Move your mouse to "Subscribers," and then to "Import Subscribers" beneath the "Import" section on the far right of the pop-up menu. Click on "Import" and a new screen appears.
- C. Click the "browse" button and locate your tab delimited text file you created with Excel.
- D. Leave all other information on the top part of the screen as is. These are advanced features we are currently not using.
- E. Select the Static Segment you created in step 4. Static Segments are arranged alphabetically under your Category (department). Click "Continue" at the bottom of the page.
- F. On the next screen, match the fields you are importing with the standard fields provided by Blue Hornet®. This way your variable data will be correct in each of your email messages. Click "Upload."
- G. On the next screen, Blue Hornet® asks you to please describe the origin of your imported list. It does this to ensure the university is not contributing to SPAM. Be descriptive and then click "Continue." Review your explanation and click "Continue."
- H. On the next screen, Blue Hornet® asks for an email address to alert when the import is complete. Input your email address and click "Upload."

IMPORTANT NOTE: Wait until you receive the confirmation email before you proceed.

## STEP 6 – Creating Your Email Message: The Basics

- A. Once you have received the list upload confirmation email, log back into Blue Hornet®.
- B. Move your mouse over "Messages" and then "Create Messages" and a new screen appears.
- C. Type in the name of the message (not to be confused with the subject line of the message—that's on the next screen). Be descriptive in your message line. This is the easiest way to spot your message in a list of many.
- D. If you have a series of messages that will be going out to the same list, you may elect to use BlueHornet's® campaign feature. **You do not have to use this feature.** If you wish to, select a campaign from the dropdown menu in the "Assign Campaign" section. Or create a new campaign.
- E. In the "Bill Codes" section, please type in your username so that we know which department to bill for the message you are creating.
- F. In the "Message Notes" section you may add whatever you wish in order to remind you of the message's content. This is extremely helpful if you have a series of emails going out to the same group. You could say, "Message 3 of 5 for SD-area judges in the series of oral arguments event reminders."

- G. In the “Message Type” section, select “Basic Test Message” for now. The box below will change to show you who is on your basic test list. Click the “Edit List” button to add or remove recipients. Once satisfied with your list, click the green “Next” button at the foot of the page.
- H. On the next screen, enter the desired message subject line into the “Subject” field.
- I. The “From Name” field should already be populated with your default from name. If not, select the desired from name from the dropdown menu. Do the same for the “From Email” and the “Reply Email.” Again, your defaults should already be set. If you need to add a new from or reply email address or name, please contact law school communications at 4207.
- J. The “Message Footer” is set for a default as well. You do not need to change this. If there isn’t a message footer selected, please contact law school communications at 4207.

### STEP 7 – Creating Your Email Message: The HTML Version

- A. Continuing from Step 6, move down to the HTML box. Get familiar with the buttons by mousing over each button. A descriptor will pop up to show you the use of each button.
- B. **Always use the templates.** Don’t just copy over a message from a previous version as you may be missing important updates to the back-end coding that keeps us compliant with federal law.
- C. Hover over the buttons to find the template button. Middle icon bar, far right. It looks like a document. From the pop up screen (Content Templates), select the desired template by clicking on the radio button and then clicking the blue “Select” button. If you cannot locate the template you want, please contact law school communications at 4207.
- D. Once the template is loaded properly into the window, you may edit the text easily. To update buttons or hyperlinked text within the email, click on the button or hypertext and then click on the link icon (looks like a chain). Fill in the appropriate destination URL, and click “OK” to return to the message.

**NOTE:** Check your spelling, punctuation and capitalization. For more detailed information about USD’s communications style guidelines, visit the online brand manual at:

<http://www.sandiego.edu/marketing/brand-manual.php>.

### STEP 8 – Creating Your Email Message: The Plain Text Version

- A. Click the “Convert HTML to Text” button. Once complete, you have some clean-up to do.
- B. Strip out any extra space and the “View Online” link at the top of the message. This feature does not work in the text version.
- C. Replace any linked text with the actual URL so that readers of the message will be able to get more information or register for your event.

### STEP 9 – Creating Your Email Message: The View Online for Mobile Version

- A. At this time, we do not use this feature, so leave the default selection (“Use HTML format above”) as is.
- B. Click the green “Next” button at the foot of the page.

## STEP 10 – Reviewing Your Email Message

- A. The next step enables you to review your work before submitting your email message for approval. Review all the sections and click the blue “Edit” button if you need to make changes.
- B. Once you are satisfied with your edits, click the green “Submit for Approval” button at the foot of the page. If you are submitting a “Test” email, the message will be sent to your test list without the review process happening. The review process is where someone from law school communications reviews the message to ensure the coding is correct and that all USD style guidelines are followed.
- C. Review the email once it reaches your inbox. Click on every link in the email to ensure it goes to the correct destination. Check again for spelling, punctuation and style. Once you send the message (in the next step), there is no getting it back. This is one of your last times to ensure accuracy.
- D. To ensure your message is understood, send a test email to another member of your team. Check to see if they understand the actions asked of the recipients.

## STEP 11 – Sending Your Email Message

- A. Once you’ve checked your email message for accuracy in Outlook, log back into Blue Hornet®.
- B. Move your mouse over “Messages” and then click on “Edit Drafts” and a new screen appears.
- C. A list of your current message drafts will load. To retrieve your message, **EITHER** click directly on the message name **OR** click the box next to the message you want and then click “Edit.” Either action will lead you to the “Message Details” screen. You’ll remember this screen from Step 6 of this manual. If you want to send out another test message, select “Basic Test” in the “Message Type” section, edit your test list, and resubmit your message.
- D. If you’re ready to send your message out to your list, scroll down to the “Choose Recipients” section. You will select the Static Segment you created before starting your message. Click on the “Include Segments” button. A pop-up window opens with a list of all your segments. Select the segment or segments you want and click the “Choose Segments” button.

**NOTE:** “Include Segments” are lists of those you want to receive the message. “Exclude Segments” are lists of those you wish NOT to receive the message. This works well when you want to send a reminder message for an event but don’t want those who have already signed up to be reminded. Create a new Static Segment of attendees (or add to the existing list of attendees if this is your third or fourth message) using Steps 1-5.
- E. Once you are satisfied with your include and exclude segments selection, click the green “Next” button at the foot of the page.
- F. Make any necessary changes to the header and/or HTML or text versions of your message. Once satisfied with the changes, click the green “Next” button at the foot of the page. This opens the next screen: “Manage & Track Links.”

## Step 12 – Managing and Tracking Links in Your Email Message

- A. You can track which recipients go to the hypertext or button links in your email message. This is helpful when gauging interest in specific subjects or a desire for more information. You can even automatically place those who click on certain links into a segment.

- B. To track the links only, select the boxes next to the links you want to track, edit the “Easy to Remember Name” (for your eyes only), and simply click the green “Next” button at the foot of the page.
- C. If you want to automatically add those who click on certain links into a segment, click on the “Add to Segment” button and select the segment you wish to populate. Follow Step 4 to create any new static segments you may need.
- D. Once satisfied with your tracking, click the green “Next” button at the foot of the page.

### Step 13 – Scheduling Your Email Message

- A. To send your email as soon as the message is approved, select the “Send Now” radial button and click the green “Next” button at the foot of the page.
- B. To schedule your message for a later delivery, select the “Schedule to Send at Later Date/Time” radial button, and a date field opens up. Fill out the date and time you want the message to deliver, and then click the green “Next” button at the foot of the page.
  - NOTE:** *Please remember to take into account a 24-hour-turn-around-time for the law school communications office to review your message once it has been submitted for approval.*
- C. The next screen is the review screen which you saw when you sent out your test email. Review all the sections and click the blue “Edit” button if you need to make changes. ***This is your last chance to make any necessary edits.***
- D. Once you are satisfied with your edits, click the green “Submit for Approval” button at the foot of the page. Your message has been sent to the law school communications office for approval. An email is sent to the law school communications team alerting them that there is a message awaiting approval. Please allow 24 hours for processing.

You’re done!