

USING THE PCI BROADCAST TOOL- REFERENCE GUIDE

INTRODUCTION

PCI is a broadcast email tool used by various campus groups. This tool allows you to create and send broadcast email messages to the campus at large.

BROWSER NOTE: When using this tool, Firefox and Internet Explorer are the recommended browsers. Other browsers can be used, but it is not recommended at this time.

WORKING WITH LISTS

The PCI broadcast tool uses email lists as a basis for communication. Sending to an email list, eliminates the need to add email addresses individually and ensures that the message, with all of its design attributes, is delivered accordingly.

There are several email lists that have been created and imported for use, but if you need to import a new list, please review the next section titled, *Importing an Email List* for further information. Otherwise, skip to the section titled, *Preparing and Sending a New Broadcast Message*.

IMPORTING AN EMAIL LIST

If an existing email list does not work for you, the first step in creating your broadcast is to import the email list/s you plan to use. Email lists must be in the proper format for the import to be successful. What is outlined below is only one way to format your file. There are additional options for formatting a file and they provide you with a bit more flexibility when creating your message.

If you'd like to review these other options, please review the section of this document titled, *Advanced Features*.

What is a Properly Formatted Import File?

There are a few things to consider when working with an import file:

- In Excel, the file should contain one column of email address only.
 - This means no Header cell. The first email address should be the first line entry.
 - Save the file as a "text" file [Tab delimited (*.txt)].
 - Other formats may work, but this is the recommended file type. Please see the *Advanced Features* section for information on the other formats available.

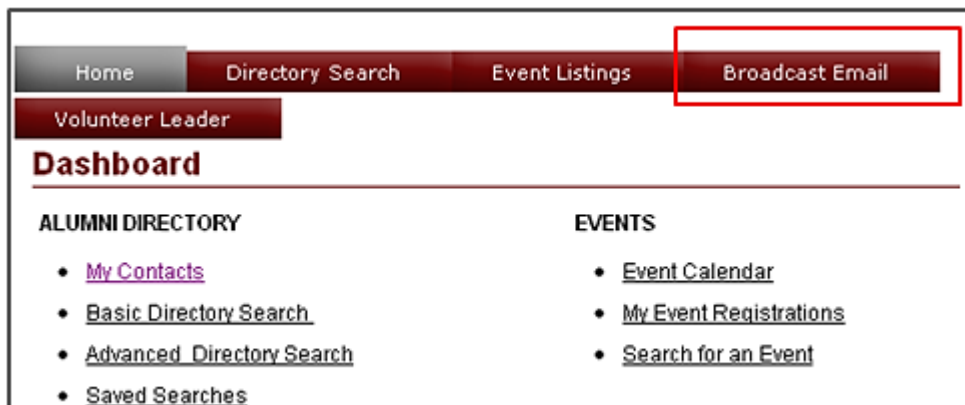
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Importing the File

1. Go to <http://www.csun alumni.com> to access PCI.
2. Enter your username and password.
3. Select the **Login** button.

A screenshot of a web login form. At the top is a red header with the word "Login" in white. Below the header are two input fields: "User name" and "Password". Under the "Password" field is a checkbox labeled "Remember Me". Below the checkbox is a blue "Login" button. At the bottom of the form are three links: "New User? Register Here", "Forgot Your Password?", and "Forgot Your Username?".

4. From the **Dashboard**, select the **Broadcast Email** tab.



5. From the **Recipient and Data Management Tools** section, select **Manage e-mail recipient groups**.
6. Select the **Add new text upload** button, located at the bottom of the page.
7. Complete the following fields:

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- a. Enter a group name in the **Text upload group name** field. This is the name the list will be saved under. The list should start with the prefix agreed upon for your area (for example, for A&R it should start with “AR_...”).
- b. Under **Display options**:
 - i. Select the **Only display to following** radio button.
 - ii. Select the category that applies for your group in both fields.
8. In the **Format of file upload** section, select **Email** from the dropdown menu. Please note, the file format you choose will depend on the type of broadcast you are sending. Any of the file formats available from the dropdown menu will work (see figure).

9. In the **File Upload** section, select the **Choose File** button to search for the properly formatted file. Select and add the file as you normally would. If successful, the file name will appear next to the **Choose File** button (see example, next page).

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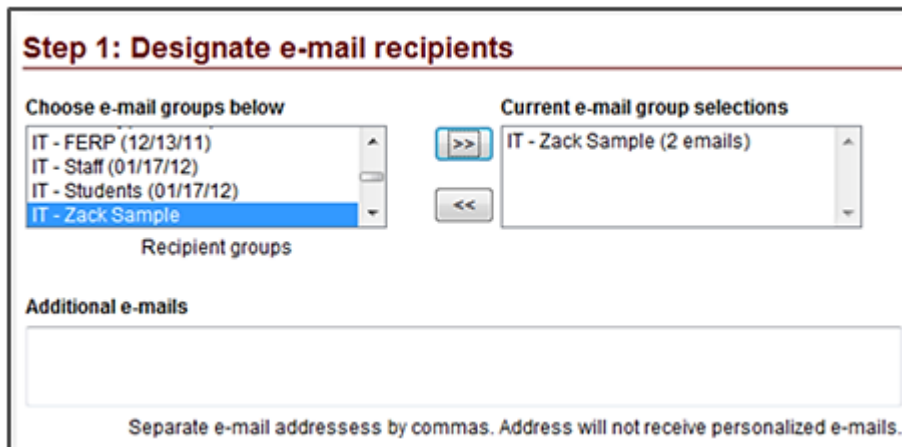


10. Select the **Add** button to complete the import process.

PREPARING AND SENDING A BROADCAST MESSAGE

Creating a New Broadcast

1. From the **Dashboard**, select the **Broadcast Email** tab.
2. In the **Create an E-mail** section, select **Send e-mail using e-mail builder**.
3. In the **Step 1: Designate e-mail recipients** section, enter the following:
 - a. Highlight the appropriate email list(s) on the left, and select the **right arrow** button to assign it/them to the **Current e-mail group selections** section on the right.
 - **Note:** list should start with the prefix agreed upon for your area.
 - b. If you need to add additional email addresses that are not on the list, add them in the **Additional e-mails** section.



4. In the **Step 2: opt-out type/suppression groups** section, enter the following:
 - a. From the **E-mail opt-out type** dropdown, select the category that applies for your area (be sure it indicates "(0 optin)(0 optout)").
 - b. Skip the **Choose suppression groups** section.

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Step 2: Select opt-out type/suppression groups

E-mail opt-out type *
Information Technology (0 optin) (0 optout)

Choose suppression groups

--- Select groups ---
20120109_Budget-Cut-Advocacy-Mes
20120109_Budget-Cut-Advocacy-Mes
AAA Exclude List

Recipient groups

Current suppression selections

Total suppressions: 0

5. In the **Step 3: Create e-mail content** section, enter the following:
 - a. In the **Subject** field, enter the subject of your email.
 - b. Enter the “From” Name and e-mail address.
 - c. Enter the “Reply” Name and e-mail address.
 - d. Add an attachment (if needed).
 - **Note:** the “attached” file is displayed as a link in the email.

Step 3: Create e-mail content

Subject *

From Name *

From e-mail *

Reply name

Reply e-mail

Attachments:

Remove Attachment

Choose File No file chosen Add

6. In the **Step 4: Design message body** section, enter the following:
 - a. Select an option based on the content of the message.
 - If the message is solely text, select the **Send message in Text Format** option.
 - If the message will have formatting, select the **Send message in HTML and Text format** option.

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Step 4: Design message body

Send message in HTML format Text format Send message in HTML and Text format Send message in Text format

Launch e-mail designer now

- b. Select the **Launch e-mail designer now** button.
- c. The **Email Designer** displays (see figure).

The screenshot shows the Email Designer interface. At the top left is a Rich Text Editor toolbar with options for font, size, color, bold, italic, underline, bulleted list, numbered list, and link. Below the toolbar is a large blank area for entering content. To the right is an Actions menu with a dropdown for selecting a template and a list of email options: Email options, User personalization, News articles, Custom content, Dynamic role content, Events, Dynamic links, Wall Feed, and Fundraisers In Action. At the bottom right are buttons for 'Save changes' and 'Save changes and close'. At the bottom are five tabs: Design, Edit HTML, Preview HTML, Design Text, and Preview Text. The 'Design' tab is currently selected.

Rich Text Editor Options: (bold, italic, hyperlink, insert image, etc.) Hover over icons to see what they do.

This blank space is where you enter your content.

Actions Menu: Use this menu to add additional email options such as current date, first name and last name fields, etc. Refer to the section in this guide titled *Advanced Features* for more information.

Preview Tabs: Used to create/view the email in Design view or HTML view.

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- d. Enter the contents of the message:
 - Be mindful of how the **Preview HTML** and/or **Preview Text** tabs look, once the content has been entered.
 - In the HTML portion, you may experience problems with line spacing, when pasting in content from another source (lines are double-spaced).
 - A work around is to copy/paste the contents of the message into notepad, then copy/paste them into the designer page. At that point, you will need to apply any required formatting.
- e. When complete, select **Save changes and close**.
7. In the **Step 5: Advanced options** section:
 - a. Leave all default options. No changes needed.
8. In the **Step 6: Send test preview e-mail** section:
 - a. In the **Email address(es)** section, enter the email address of anyone who needs to receive a sample of the broadcast email.
 - b. Select the **Send test** button.
 - **Note:** the sample broadcast will have “(preview)” at the end of the subject line.
9. In the **Step 7: Send email** section, you can do any of the following and the broadcast message process will typically complete in less than 30 minutes.
 - a. Select the **Do not send but save as draft** radio button.
 - In most cases, you will need to save the draft first, before sending or scheduling the broadcast message.
 - Enter a name for the draft (beginning with the prefix agreed upon for your area).
 - Select the **Save draft** button.
 - b. If ready to send immediately, select the **Send e-mail now** radio button, and then select the **Send email** button.
 - c. Select the **Schedule for specific time/date** radio button.
 - **Note:** this system is on Central time, so it is two hours ahead of our time. Be sure to add two hours to the time that you actually want the message to send at.
 - Be sure to use military time
 - Select the **Schedule email** button

REVIEWING OR RE-OPENING A BROADCAST

1. From the **Dashboard**, select the **Broadcast Emails** tab.
2. Look for the **Review E-mails** section.
 - a. Here you can view broadcast status:

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Review E-mails (Type)	Description
Scheduled e-mails	Scheduled for a future date/time that has not yet passed.
Sent e-mails	Record of previously sent broadcasts.
Saved e-mails	Any broadcasts that have been saved as a draft.
In Queue Emails	Broadcasts that have just been scheduled, but have not actually gone out yet. Messages stay in this state for approximately 10 minutes after you choose Send now.

3. Review/ re-open broadcasts as needed by selecting the appropriate option.
4. To log out, from the **Home** menu on the left, select the **Logout** option.

ADVANCED FEATURES

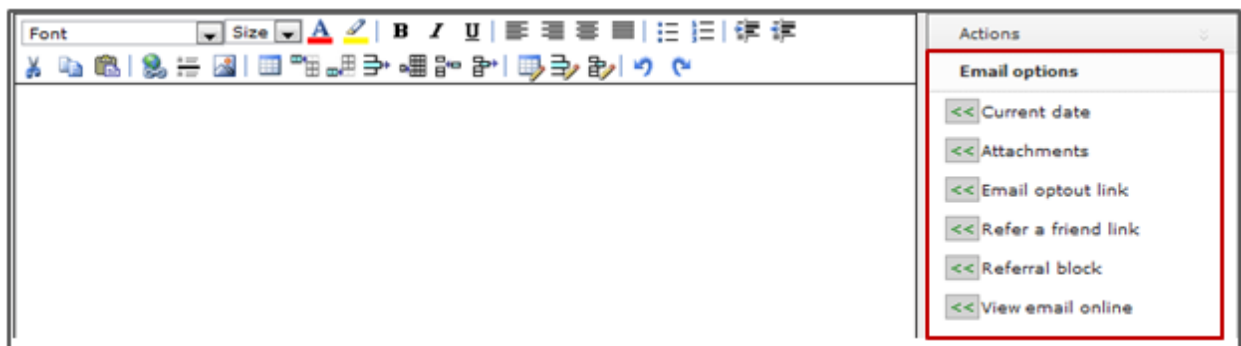
Actions Menu: Inserting Dynamic Content

The e-mail designer includes an **Actions Menu** that enables you to further personalize your message by adding dynamic content. This is content that you add once, such as FirstName LastName and the e-mail builder will automatically pull the data from the data file you are working with so that each message is addressed accordingly.

Email options

To add additional email options:

1. From the e-mail designer, select **Email options** from the **Actions** menu.



2. To add dynamic content to your message, hover over the arrow buttons for each piece of content you want to add, and drag it to your message.

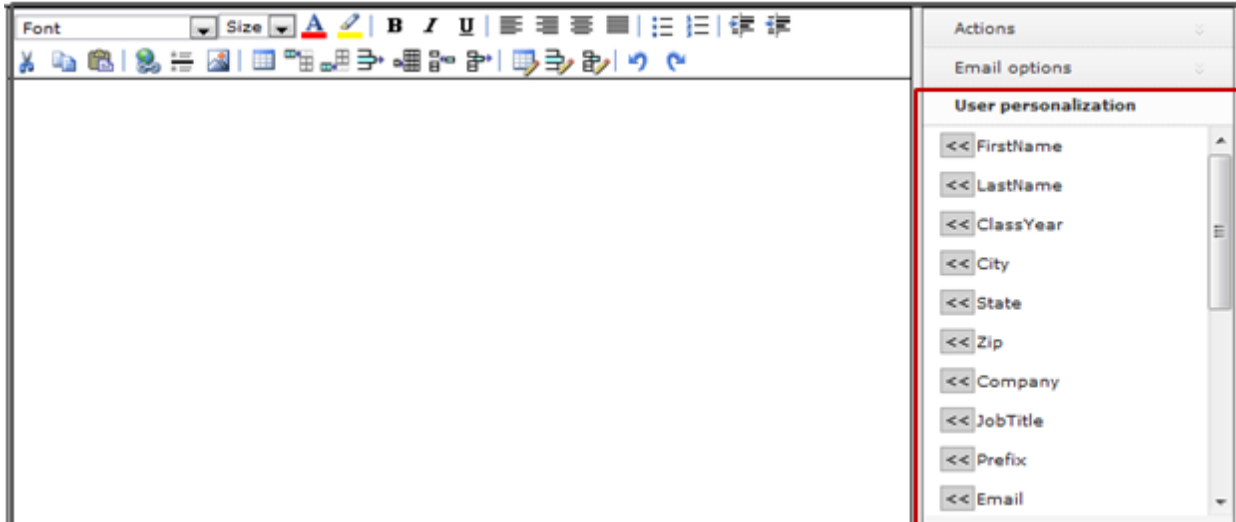
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NOTE: Attachments are added when you first create the email content. However, here, you may select the **Attachments** option to add a link to the attachment.

You may also select the **Current** date option, to automatically insert the current date into your message.

User personalization

1. From the e-mail designer, select **User personalization** from the **Actions** menu.



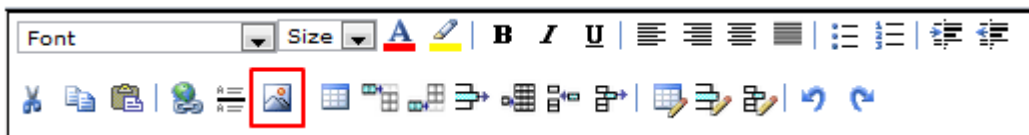
2. To add dynamic content to your message, hover over the arrow buttons for each piece of content you want to add, and drag it to your message.

NOTE: For this dynamic content to work, the data file used must match what you see here (FirstName, LastName, etc.)

Working with Images

The first step to working with images is to upload any images that you want to use. Each department has a specific folder for this purpose. A user simply uploads the image to the appropriate department folder. Once uploaded, the user may then insert the image into their message.

1. From the e-mail designer, select the **Insert Image** icon.

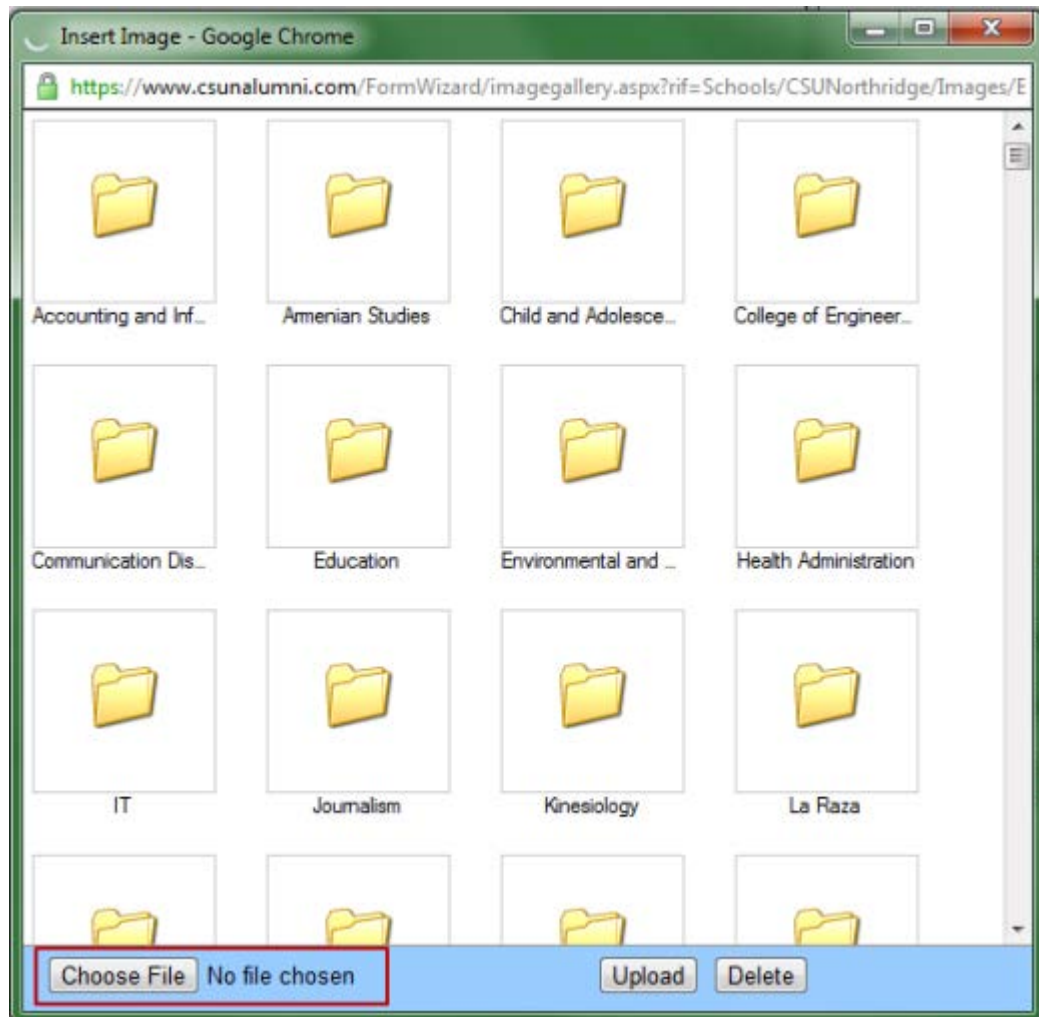


2. Select your department's folder to view its contents. If the photo you need, is already there, select it by double-clicking on it and it will be added to your message.

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OR

3. If you need to upload a new image, with your department's folder already open, select the **Choose File** button at the bottom of the **Insert Image** window.



4. Search for, and select the image you'd like to use.
5. Select the **Upload** button to upload the file to your folder.
6. Once uploaded, double-click on the image to add it to your message.
7. If you made a mistake, and uploaded the wrong image, just use the **Undo** button located within the e-mail designer window.
8. Continue to build your message by adding additional content as needed.

NEED HELP?

Contact the IT Help Center by phone (818-677-1400), online at (<http://techsupport.csun.edu>) or in person in (Oviatt Library, Room 33).