BACKPACK

# MANAGING EDITOR HANDBOOK

22 May 2020

Managing editors work closely with a handful of content creators, track workplan progress, edit stories for grammar and CLA style, post Backpack stories to departmental websites, and assemble e-newsletters in the U's mass email tool. This position works in the Office of Institutional Advancement office suite (135 Johnston Hall) and completes other duties as assigned.

## Table of Contents

# EMPLOYEE RELATIONS

How does the ME position relate to the other positions in Backpack?

## Senior Editor (SE)

As of 6.5, there are two SEs, Colleen Ware and Amanda Haugen. Colleen edits Social Sciences stories and Amanda edits Arts and Humanities stories. SEs work closely with departments and CLA to identify stories and plan the alumni newsletters. They also advise departments on content strategy for their websites, help make media pitches to University Relations, among other communication and marketing efforts for the CLA Office of Institutional Advancement (OIA).

SEs edit stories after MEs have approved them and, in addition to looking for any potential developmental or line edits the ME may have missed (it happens to the best of us!), they critically evaluate the story for any content that may be a concern. Because part of the SEs' jobs is to build trusting partnerships with their departments, they have insights into how departments function (for example, poli sci has two newsletters a semester, comm studies' newsletter is called COMM post, etc.) and historic perspective on past stories. They also track on individual  department preferences, like terminology or a feature of the department that they like to talk about. SEs edits will hopefully prevent any unintentionally incorrect or objectionable content from passing on to subjects or departments.

In addition, SEs are a resource for editing questions, comments, or concerns. If there is a story that is difficult to edit, if you have a question about CLA style, or any other concerns, request the assistance of your SE. They may have unique insight into the issue. Plus, it's always good to have a second set of eyes on the story, especially if you have been working on it intensely.

Finally, the SE is a good resource for difficult CCs. It rarely happens, but occasionally there are CCs that are not doing their jobs. If a CC continually disrespects an ME or ignores the inquiries of an ME, enlist the SE for assistance.

You may schedule a meeting between the ME, CC, and SE to discuss the issue. Again, it happens very rarely, but when it does happen, discuss with the SE.

In summary, SEs are a team member, editing resource, department expert, and a colleague of higher authority. When in doubt, ask the SE!

## Editorial Director (ED)

The editorial director is an ME with leadership responsibilities. The editorial director is involved in the hiring, training, and onboarding of new CCs. They are assigned between five and seven content creators, recommended one less than the other MEs. They assign the content creators to departments and assign MEs to CCs.

The editorial director is in charge of ensuring that the production of content is going smoothly. This includes explaining/facilitating the process of acquiring photographs to accompany features, organizing in-lab training opportunities, fostering communication among the editorial team (via weekly meetings or other methods), and being available to CCs for questions/concerns.

The CLA team is the largest team at Backpack, so it is important that the editorial director work to create a sense of community within the team. They may organize weekly social hours, team-building activities, or other tactics to maintain communication throughout the team.

The editorial director acts as part of the leadership team, meaning that they must attend leadership meetings, represent CLA during capabilities presentations, and advocate for the CLA Client during Backpack planning meetings.

To become the editorial director, it is recommended that the employee have been an ME for at least one semester. If more that one ME is available for promotion to the ED position, MEs will have to undergo interviews.

## Content Creators (CC)

MEs are assigned anywhere from five to seven content creators, who are each assigned to write two stories for two departments. This means that MEs manage anywhere from 20 to 27 stories a semester. Although CCs should direct the progress of their stories, MEs manage and keep track of story deadlines and progress, especially by moving stories in the semester's master Asana board and by inquiring with the CC if there's a long gap of time between tasks. Do not hesitate to ask about deadlines and story progress!

The CC should notify their ME when: a problem arises with the story, such as an unresponsive subject; the CC can't make a deadline; a story is ready to be reviewed; the story is ready for final edits; there is an emergency (eg, they won't be working for the next two weeks because of a personal emergency).

That being said, feel free to check in with CCs regularly, for work or just to get to know each other outside of work. Backpack provides students with jobs, yes, but it can also be a community.

Because Backpack is a University agency (and proud of it!), most CCs and MEs will be within a few years of age with each other. This may make some staff feel uncomfortable, as they may assume that the ME role indicates a position of higher authority of power. This is not necessarily the case. Although you as an ME may be setting deadlines and ensuring the CC gets their work done, the relationship between the CC and ME is one of partnership, not of boss and employee. Reiterate to your CCs that you are a voice for the CCs concerns in editorial meetings.

It is best to establish yourself as an advocate of the CC. Emphasize that you are there to help improve the story, not to tear it apart. Even the best authors need editors to offer guidance, assistance, and copy edits.

# BEGINNING OF THE SEMESTER

This an overview of what is expected of the managing editors at the beginning of every semester. Tasks should be led and supervised by the editorial director.

- Create the production calendar for CLA feature stories, photography, publishing, and newsletter deadlines for the semester. Stagger deadlines about two weeks apart.
- Update the CLA Client Handbook: Update the production calendar in the CLA Client Handbook, in addition to names, job titles, unit numbers, dates, etc.
- Assign content creators to departments. Use the assignment spreadsheet.
- Update and prepare CLA Client Orientation Presentation. This should be presented to new content creators before the first lab.
- Update and prepare the CLA Feature Stories Strategy Presentation to be given on the first day of lab.
- Set up google folders for each department. Folders should contain one newsletter mock-up document and two folders for two stories. Update templates as needed.
  - CLA Feature Story Template
  - Newsletter Mock-Up Template
- Create Asana workplan boards for each department. Use Asana Workplan Template: [dept] [semester]
  - Follow these instructions in order: Add deadlines to template tasks > Duplicated template board for each department and fill in [blanks] > Add the correct people to each new board > Update their notification settings > Assign tasks to respective team members.
- Archive old Asana boards if necessary.
- Prepare content, presentations, and handouts for CLA team orientation.

# END OF THE SEMESTER

This an overview of what is expected of the managing editors at the end of every semester. Tasks should be led and supervised by the editorial director. Most CCs do not work much following the end of the semester, but MEs always have work, so ensure you are being paid for the work you do, either through winter break or through the summer.

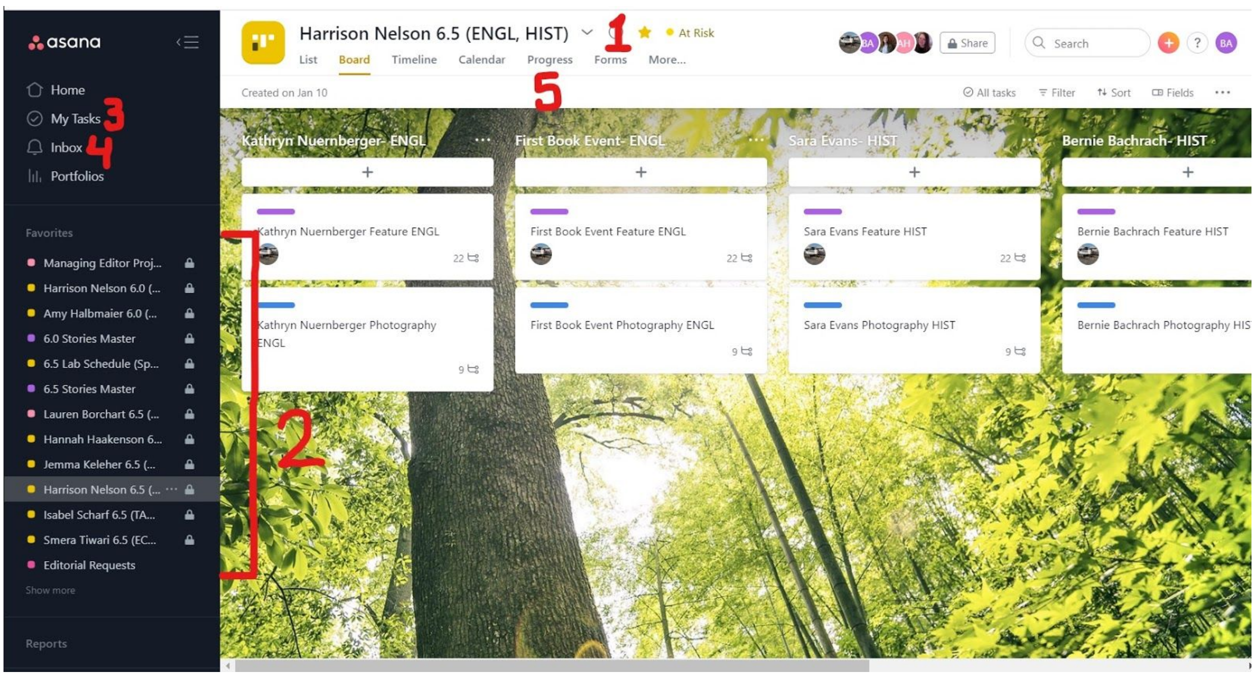
- A few weeks before the semester is over, begin collecting chair letters.
    - In past years, this was done by CCs using a template email request, and other years SEs have done this personally. Discuss the process with the editorial team to decide on a process for your semester.
- Create Google Docs newsletter mock-ups.
    - This should be done throughout the semester to ease the workload at the end of the semester.
    - Once the chair letter is received, you will need to edit it.
    - SEs will share the mock-up with the department and will let you know when you can begin drafting the Salesforce version.
- Continue to publish feature stories as they come in, following the guidelines in the Drupal section.
- Draft and send newsletters, as outlined in the Salesforce section.
- Collect newsletter statistics at least a week after the SE has sent the newsletter. This process is outlined in the newsletter statistics section.
- Archive old Asana boards once all stories have been published and the newsletter sent.
    - If there are incomplete stories, add them to the upcoming semester's master board, and then archive the original board.
- Begin training new MEs if possible! Bring them into the office, show them how to publish stories, and watch over them as they publish their first stories.

# ASANA

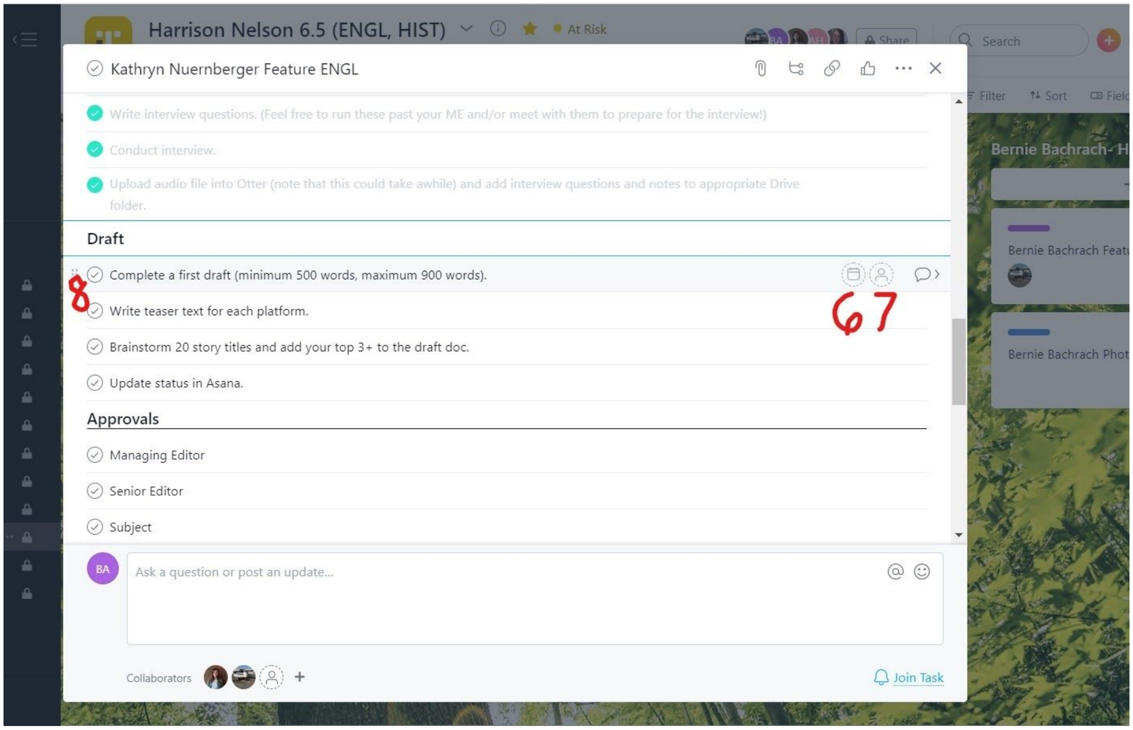
Asana is used to store content, manage updates, assign tasks and due dates, and generally to keep track of all stories in one place. As an ME, you should have access to all of your CC's boards, the editorial requests board, and the semester's master board.

(Note: the editorial tasks board is being temporarily used to assign non-story editorial work to MEs, like documents from the accounts team that need copy edits.)

## Getting Started




Instead of searching for boards each time you log in, navigate to each of the boards mentioned above and favorite them by clicking the star in the top left, by the board's title (1). This will pin the board to the left-hand list of boards (2).




To assign a task to someone, navigate to a task on any board. Move your cursor to the three icons to the right of the task. To assign a due date, click the calendar icon (6), choose a date, and click done. To assign a person to a task, click the person icon (7) and type their name or email. You can also assign the task to yourself. To add subtasks or notes, click the text box icon (this is rarely used by Backpack staff). If you have finished a task, make sure to click the checkmark to the left of the task (8) and, if need be, assign the next task.

To find a list of tasks that you have been assigned to, navigate to the top of the left hand sidebar and click “my tasks” (3)

To review recent changes to boards you frequent or to see any messages others have “@” you in, click “inbox” (4), just below “my tasks.”

CCs should keep all boards and story cards up to date by checking off tasks and adding notes, but for a good summary of story updates, navigate to the “progress” tab of a board (5). This will be near the top of the page, in the menu bar. In the “progress” tab, CCs are expected to briefly update the status of all four of their stories, usually each Friday before lab. The format should be:

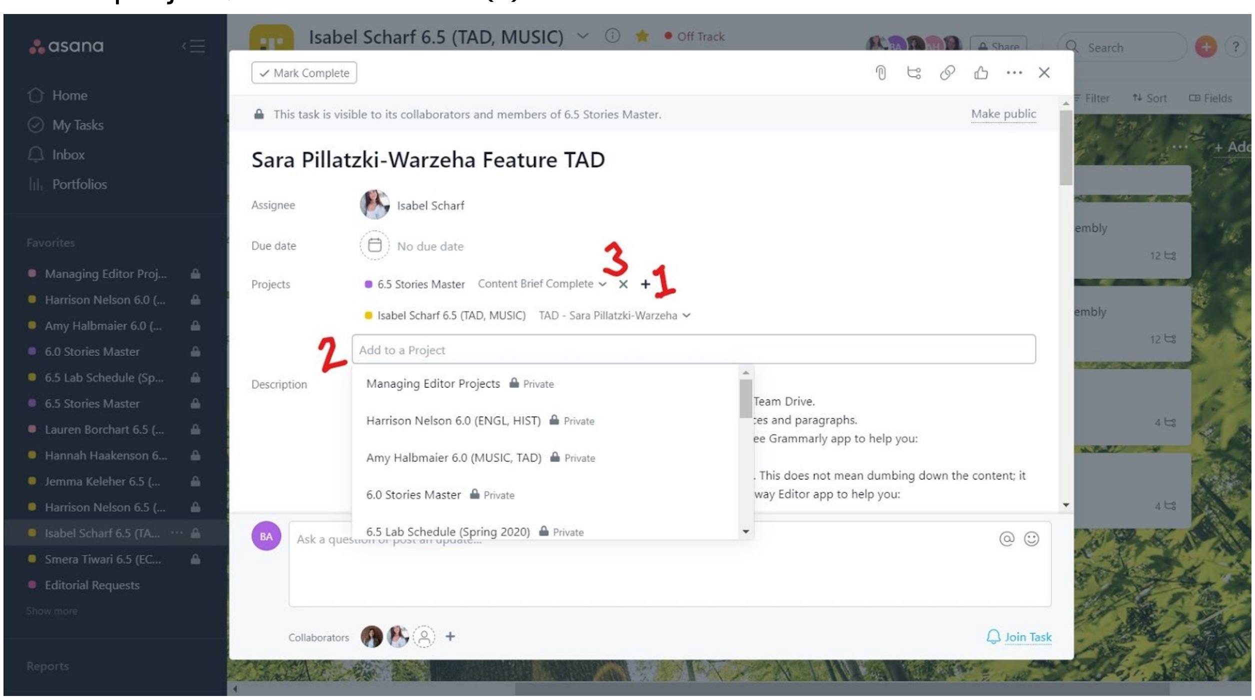
[Dept 1]
[story 1] - update

[story 2] - update
[Dept 2]
[tory 1] - update
[story 2] - update

## Master Board

The master board is particularly important in keeping track of stories. Sometimes someone involved in the editing process doesn't get a notification, or maybe a CC is spotty in updating their Asana boards. Regardless, the semester master board should have the most recent information about stories. In some cases, SEs may rely on the master board to know when a story is ready for their review (they get a lot of emails, and notifications can easily be lost in the flood!)

The first step in using the master board is adding stories to it! This is usually done at the beginning of the semester when setting up CC asana boards. To add a task to another project board, click on the task, click on the plus icon near the top of the task (1), and search for the project (2). To remove a task from a project, click the x icon (3).




Once the stories are in the master, it's pretty easy to use! Just click and drag individual stories from category to category as needed.

# FEATURES EDITING

Editing feature stories is the primary work MEs do throughout the semester. It is rewarding but difficult work. Each workplace has their own style of editing, but, in general, Backpack promotes comprehensive and respectful edits based on CLA style, PR writing, plain language, and writing for the internet.

The vast majority of stories follow this process:

- CC writes full draft (with teasers and titles)
- ME reviews the draft, usually goes through two or three rounds of edits
- SE reviews with edits, usually two or three rounds of edits
- Subject reviews, may or may not leave edits
- Department reviews
- Blurbs and teasers finalized (usually the SE chooses the titles)
- Final copy edit by ME
- ME or web content editor publishes the piece online via Drupal

## Tone

When leaving any sort of comments, suggestions, or guidance, your tone should be respectful and professional, if not open, inquisitive, and kind. CCs will have their story reviewed by at least four people, if not more, all who will request changes made to the document. It can be overwhelming and disheartening, so ensure you are never rude, harshly critical, or patronizing. Make as many edits as possible so that hopefully everyone else in the process has less editing to do, but let the CC know *why* you make the edits: to collaboratively create a stronger story.

When writing comments, be sure to be professional; don't use slang, write in full sentences, and never, ever insult or patronize anyone involved in the process, including the subject (who can view the document at any time). Rather than saying "this person is probably wrong so change it," ask for clarification, "is this what this person intended, or would XXXX make more sense?"

Ensure your words read as friendly and helpful. To do this, you may have to overcompensate with questions or exclamation marks. Most comments read as more negative online, without audible intonation and visible expressions to inform the CC.

In addition, ensure you leave compliments on each document you receive. This could be praise for structure, clever headers, flowing sentences, poetic word choice, prompt response to edits, etc. This is both to boost their confidence and to inform them about what they should continue to do.

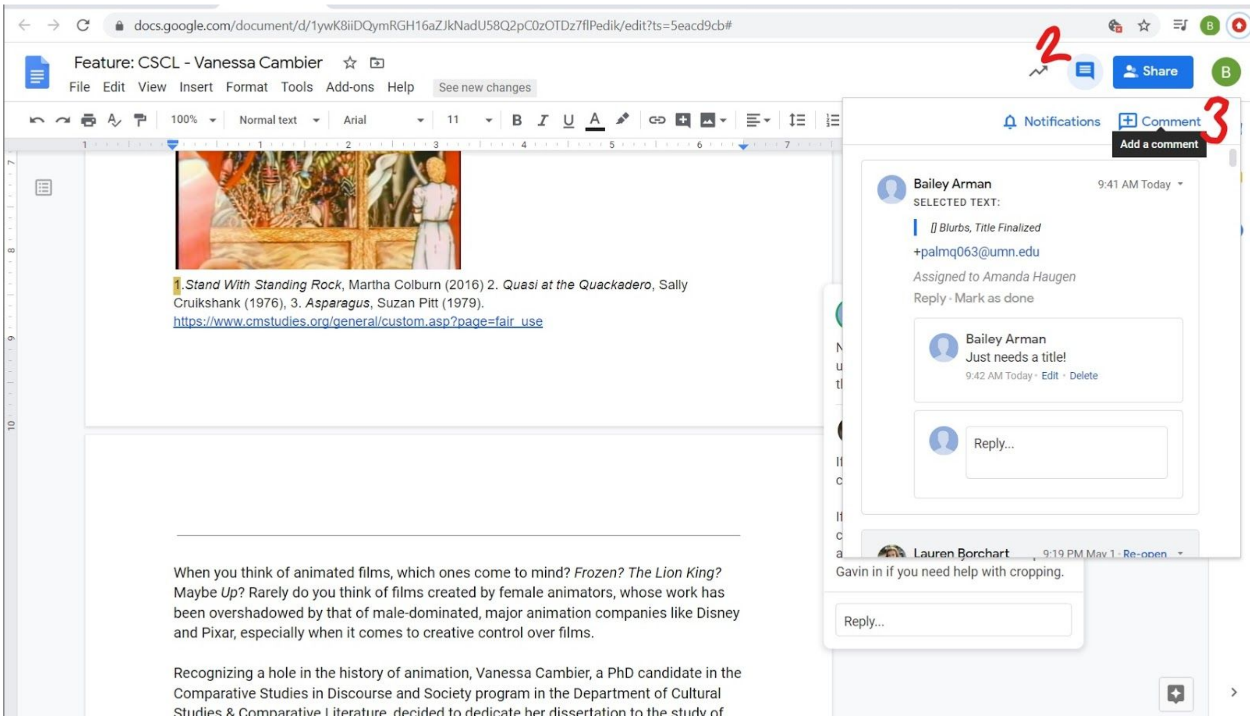
## Editing: Technical

Although we are editors, we edit in "suggesting mode." Though we can offer advice, the story ultimately belongs to the CC and to the department, and we allow these people to reject our suggestions. To enter suggesting mode, click the pen icon in the top right, below the blue "share" button. In the drop down menu, click "suggesting."

To assign a piece to someone, usually the SE or CC, highlight a name in the "approvals" section (your own if it's going back to the CC), open a comment, and in the comment type a "+" and then the person's name. Their email should pop up, and then you can click "assign." This will usually notify the person that the piece is assigned to them, but assign the piece to them in Asana as well.

### Leaving Comments


To leave a comment on a google doc, highlight the text in question and click the plus inside a textbox icon that appears to the right of the document (1). If the text already has a comment and you would like to leave another one, highlight the text, click the textbox with three lines icon in the top right (2), next to the share button, and click "comment" (3).




## Editing: Abstract

MEs perform all levels of editing: developmental, line, and copy. In general, remember that, unless you can point to a rule in the Chicago Manual of Style, edits can often straddle a fine line between ease of reading and personal taste. Do not edit based on personal taste.

For all edits, write specific and actionable comments. Instead of saying “this sentence doesn’t really work with the piece,” which is vague and doesn’t offer specific action, write “this sentence, about her job, seems to make more sense in the previous paragraph. Try moving it up, in between the first and second sentence of the previous paragraph.”

Common editorial requests: please use a transition here; move this sentence; specify [name, job, title, place]; add a sentence to clarify; rewrite the header/title to better reflect the theme of the paragraph/story; use a plain language synonym.

In addition, although editing is split into three categories here, recognize that the reality of editing is hardly ever so clean. These three categories cross over one another, and many edits fit into multiple categories. The definitions below are intended to provide editors with a clearer plan for the editing process.

## Developmental

Developmental editing is big picture, major changes editing. Developmental editing takes place in the first round or two of edits, and should, in the vast majority of cases, not have to be done by SEs. Developmental edits involve moving paragraphs and sections, narrowing in and questioning purpose, and deleting or requesting the addition of large amounts of text, perhaps a chunk of multiple sentences.

If you are confused about the content, unsure about the angle of the story, or just need more background information about the piece, check out the CC's content brief. This should provide all the aforementioned information, in addition to contacts and the CC's preliminary research. Think of it as a guidepost for the story.

Another excellent resource in times of confusion or just a blah story is the interview audio. As of 6.5, this can be found on Otter. Review the interview for more context on the topic from the subject themselves, or for interesting quotes or stories if the story is lacking any particularly intriguing content.

A few guiding questions for developmental edits include: What is the purpose of this story? Is it framed as a profile of a person, engagement, or research, and is that different from the intended purpose? Is the author's intended purpose clear in the story, or are they perhaps missing the mark a bit? Does the order of sections or paragraphs make sense, or should they be moved around? Do the titles and headers reflect the purpose of the story? Is this paragraph necessary to further the purpose of the story, or is it a distraction? Is the reason why the audience should care present somewhere in the piece?

## Line

Line editing takes place across all rounds of editing except the final copy edit, though it is best practice to leave the first round of edits to developmental editing, as any line edits made in the first round of edits may be rendered void by the developmental edits. Line edits are exactly what they sound like: focused on individual lines. Focus on adding, deleting, or breaking up sentences; word choice; and tone.

Guiding questions for line edits: is the takeaway of this sentence clear enough, or should it be explicitly said? Is there a transition from one paragraph to another (aka from one idea to another)? Is this sentence too long (more than three lines is generally too long)? Is this sentence too short? Are the adjectives or terms used in the sentences too vague (passionate, unique, good/bad) or too specific/jargon-heavy? Is the tone respectful of all groups and individuals involved in the story? Could the takeaway be perceived as insulting or reductive of anyone involved? Is a paragraph too long (paragraphs should be no more than 5 lines according to usability.gov), and where can it be broken up?

## Copy

Copy edits should be made based on the Chicago Manual of Style or the CLA style guide. To access these, see the Resources section. If you are unsure of an edit, look up the answer. No matter how long an editor has been editing, they look up the answer in their style manual or on the internet (just ask Colleen or Amanda!).

Copy edits can take place across all rounds of edits, but the very last edit of the story should be focused on copy edits and copy edits alone. Any other line or developmental edits would be changing the story that the subject and department approved of.

Copy edits, in addition to correcting grammar and punctuation, also involve fact checking. Look up job titles, book titles, name spelling, academic year, majors, locations, etc., to ensure that it is spelling correctly in the story. A common mistake is using “professor.” Many UMN teaching staff are actually associate professors, assistant professors, lecturers, teaching specialists, senior lecturers, or senior teaching specialists. To call them a professor would be incorrect, as you must be tenured for a number of years (as any of those previous positions) in order to become a “full” professor.

Other common errors: use an em dash, not two hyphens; capitalize job titles, like professor, only when they come before a name; do not capitalize majors unless they are languages; do not capitalize departments unless it is the formal name; do not include periods in acronyms; do not capitalize seasons.

## Tips and Tricks

- Write in present tense (for example "'Lena says she is happy to be at UMN," not "said").
- Leave compliments!
- Set up meetings with CCs to talk through difficult stories. You get a lot more work done discussing it in person rather than going back and forth online.
- Common headers are: A Difficult Past; A Love of XXX; Bringing the History to the Present; A Passion for XXX; Research for Good; XXX wears many hats. Although it may be the CCs first semester and it's the first time they're seeing headers, request more specific or clever headers.
- As a rule of thumb, use at least a quote or two in each section. Stories should not be told entirely with subject quotes, but nor should there be a complete lack of quotes.
- Examples of well-written (and well-edited) stories: CLA Sample Texts Resource document

# DRUPAL

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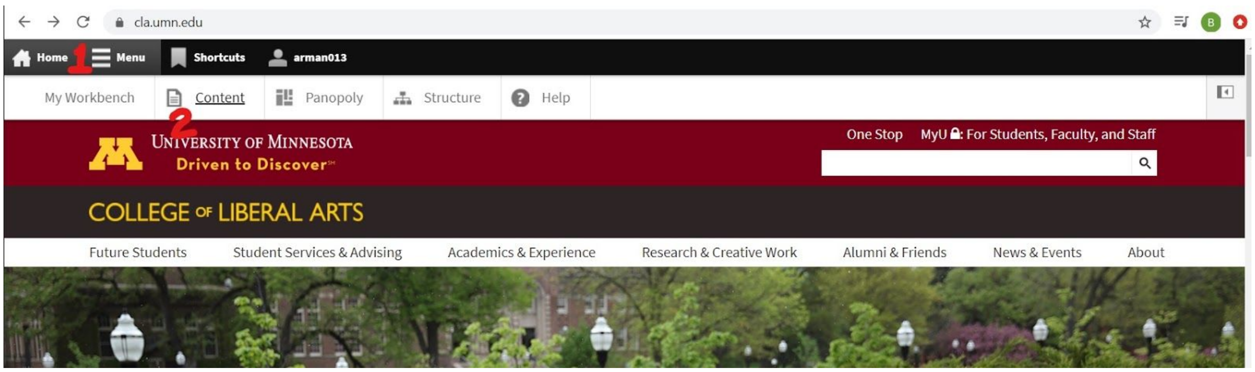
## Publishing an Article




After logging into Drupal via [https://cla.umn.edu/saml_login](https://cla.umn.edu/saml_login), click Menu (1), Content (2), Add Content, then Article.

**Headline:** title of story
**Subheadline:** add in the subheading (only if the story has one)
**Byline:** name of author

**Text box:** paste in story using SHIFT–COMMAND–V which will allow you to paste text while removing the formatting. If the formatting from the original doc isn't removed, it messes with the formatting in Drupal. Note that removing the original formatting means you must re-add all italics, hyperlinks, and headings.

- When using headings, always use heading 2. If there are subheadings, use the next numerical heading, heading 3, and so forth. Going out of numerical order will cause accessibility issues.
- Use styles to call out special text. For example, use a callout to [draw attention to the subject's website]() or [a play's opening day]().
- All articles should end with a z.link to the Backpack team page: *This story was written by an undergraduate student in Backpack. [Meet the team.]()* You may also link directly to the node (link url>/node/202526), which avoids any potential broken links.

**Teaser:** paste in story teaser. Note that teasers do not allow formatting like hyperlinks, bold, and italics.

**Feature Image:** Add the feature image. You can use any of the following options:

- Use the photographer's photo. Download the photographer's 580x870 image (which they should place in the story's google folder). Then, upload it from your computer into Drupal.
- Use an image already in our database (UMN Library), or find a photo you've already uploaded (UMN My Files).
    - If you use an image that was not produced by Backpack or CLAgency, you cannot edit the caption or the alt. text.
- Use a photo gallery. Search for the name of the gallery in the "Slideshow" bar. Otherwise, you need to use a full page override - content. Use this page as an example.
    - If you are using a photo gallery for the feature image, you must also add a teaser image.

All photos must have:

- Correct size: 870x580
- Alt Text: a brief description of what the photo is, necessary for screen readers. Our standard alternative text is "Portrait of [subject]"
- Caption: we typically use "Photo by [photographer's name], Backpack student" without a period.
    - If the photo is taken by University staff, no caption is needed.
    - If the photo is submitted by someone outside the University, credit must be given.
    - It's best that photo gallery images all have descriptive captions explaining what is going on in the photo along with the photo credit.
- Primary Unit: tag the primary department (do not tag Backpack).

Once the image has been uploaded, you may need to crop it. Ensure that the subject's head is not cut off or that important parts of the photo (like an instrument, building, or object) are not excluded. Note that Drupal's crop tool does not actually cut off parts of the photograph, it only specifies which section is visible if the image is used as the teaser image.

**Teaser Image:** Add the teaser image. If you add a feature image (that is not part of a photo gallery), you don't need to add a teaser image, as the feature image will automatically apply to the teaser. However, you cannot upload a teaser image without having a feature image.

**Article Type:** select the correct type. Most Backpack feature stories are a "story". When publishing a Backpack alumni profile, the article must be marked as a "blog," and tagged as an "alumni" piece for it to show up on the "Our Alumni" page.

**Primary Units:** search the primary department.

**Related Units:** add the CLA tag and Backpack tag. Some interdisciplinary stories may be tagged with a secondary department, but this is rare. For example, a story about a club of students who major in both math and art may be tagged primarily under "mathematics" and secondarily under "art."

**Category:** select 1-3 appropriate tags.

## Tips and Tricks

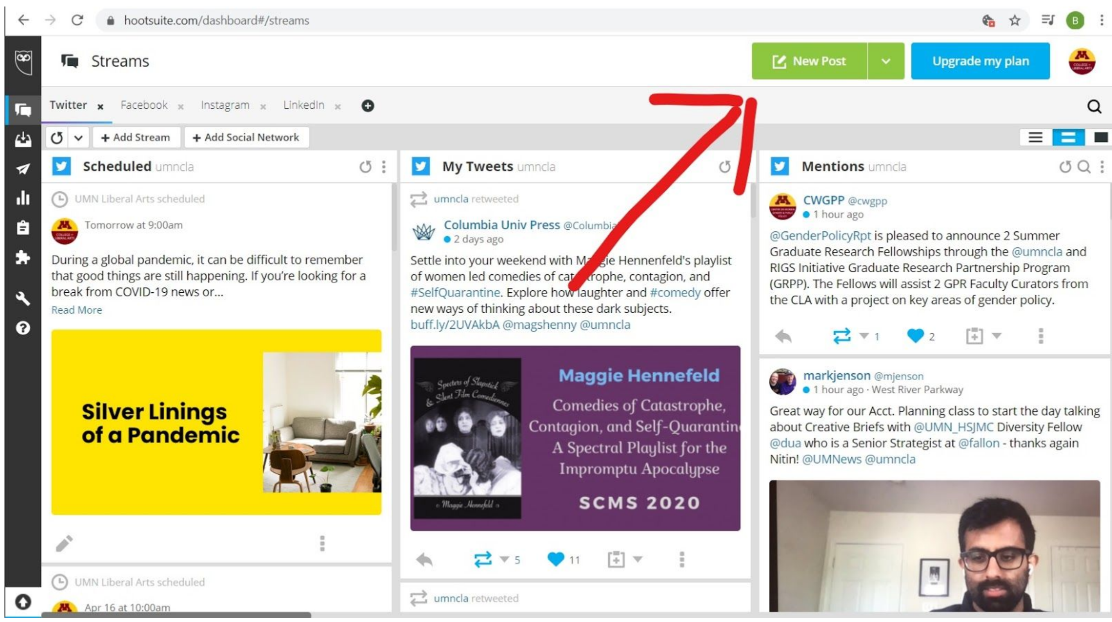
- When pasting in text, use shift-command-V to paste. This will remove formatting from the Word/Google doc.
- If changes aren't appearing on a page, try a hard refresh by adding /?[insert literally any letters or numbers] to the end of the URL.
- Click the "source" button in the text box to access HTML code.
- Under Publishing Options you can select or unselect published. This is helpful to have un-selected so you can save and preview what the piece will look like before it's published. Once it's ready for publication, reselect the box and hit save.
- If you make a major mistake and can't reverse it, navigate to the "revisions" tab while editing a story and click the "revert" button. This will return the page to how it was prior to your edits.

# HOOTSUITE

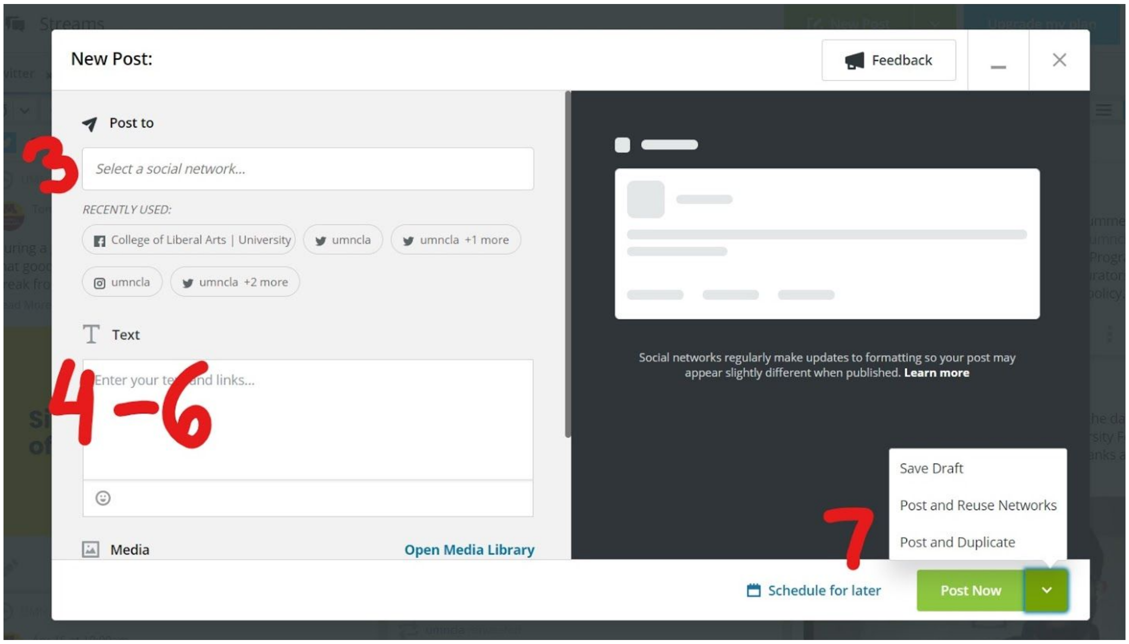
Use the CLA Hootsuite to post the Facebook and Twitter CLA teasers. Do not use this account to post departmental teasers.

## Drafting a Social Media Post

1. Log in
2. Click “new post”




3. Select a profile you want to post to, Twitter, Facebook, or Instagram.




4. Paste in social media blurb from CC's story document.
5. Paste the link to the published story in the link bar, then hit "shorten with Ow.ly.
    a. For Facebook, a preview window will appear as so you don't need the condensed URL in the post so make sure to delete it.
    b. For Twitter, the URL will be condensed and inserted at the end of the tweet. Since Twitter won't generate a preview window, the shrunken link must stay in the post.
6. Add all relevant tags: departments, colleges, campaign hashtags, etc. Example: #UMNProud or @umncla
7. Click the arrow next to "post now" and then click "Save as draft"

# SALESFORCE MARKETING CLOUD

At the end of the semester, we use Salesforce Marketing Cloud software to assemble and send the department newsletters.

## Creating a Salesforce Marketing Cloud Account

To start using this software, the first step is to have the U's Marketing Cloud administrators set up accounts for you.

1. Go to the ServiceNow website.
2. Select Request Catalog (left-hand side under Self-Service.)
3. Then select Mass Email System Access (ME-ARF) under User Support Services.
4. Select your Campus: Twin Cities
5. Select your Business Unit: Mass Email - TC - Liberal Arts
6. Select your Key Contact: Colleen Ware
7. Then click the "Order Now" button (blue) on the far right-hand side of the screen.

When your access is approved, you'll get an email with links to mass email policies and information that you will need to familiarize yourself with. Then, we can get you trained in using the software.

## Mock-Ups

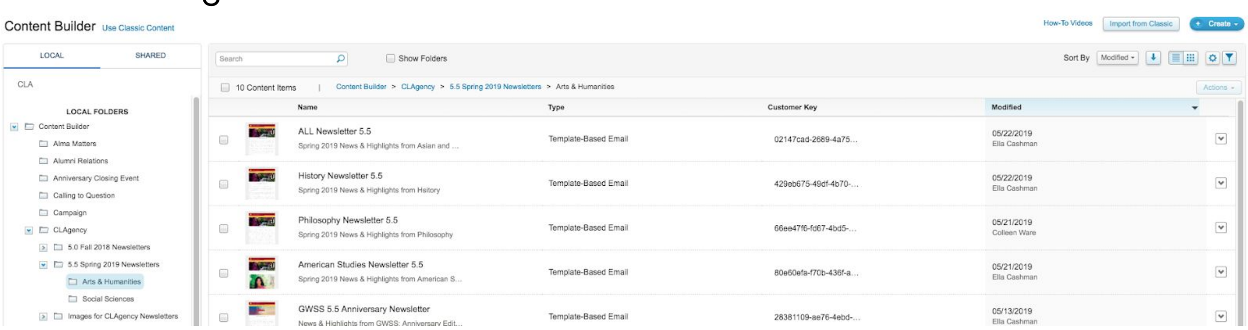
Before assembling each newsletter in Salesforce, place each component into a google doc mock-up. This allows the necessary people to review the article order, chair's introduction, and teasers. Once the mock-up is finalized, download the chosen photos to your computer and be sure they are sized at 600x400 pixels.

# Salesforce Navigation

1. Log in to Salesforce Marketing Cloud with the URL is https://z.umn.edu/smclogin. You will log in with your x500 and UMN password.
2. Mouse over the email studio button and click the drop down (note that clicking the icon doesn't work).
3. A rather blank page loads. Select content in the top navigation.
    a. Make sure you are in content builder and not class content.
4. Right click on "Backpack Newsletters" and navigate to the current semester, appropriate corridor, and department.
    a. If it doesn't already exist, add a new folder for the semester you are in.
    b. Right click on the semester folder and add a new folder for Arts and Humanities and Social Sciences.
    c. Finally, create a department folder in the respective corridor.
    d. See previous semester folders for examples, if need be.

# Creating a Newsletter

1. Upload all the photos you will be using in the correct image/units folder. Again, all images need to be 600x400.
2. Go to Backpack > semester unit > create (blue button top right) > email message




3. Use "Backpack Newsletter Template"
4. Name email **[department] Newsletter [unit]**. e.g. History Newsletter 5.5
5. Fill in template accordingly

**Subject line:** [season] [year] News & Highlights from [dept. Name]

- eg Spring 2019 News & Highlights from History

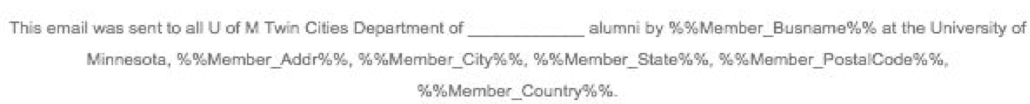
**Yellow header:** Department of [department  name]
**Blue Header:** (In all caps) [season] [year] NEWSLETTER

- eg SPRING 2019 NEWSLETTER

**Chair letter:** Paste in chair letter. Use shift + control + V to remove formatting. Remember to reapply any bold, italics, or hyperlinks.
**Content blocks:**

- **Photo:** add photo by clicking the . Add alt text. Add the published story link at the very bottom. Make sure to give the link a title, typically Read "[story title]". Add tracking alias so we know which links were clicked when we gather newsletter stats, typically Read "[story title]" Link.


- **Story Title:** paste in title using paste as plain text so the formatting stays the same. Should be in all caps.
- **Teaser:** paste in teaser using Shift + Control + V. Bold names.
- **Read more link:** write Read "[story name]" and hyper link to published story. If the title is really long/has a colon, use a shortened version.
- **Support header:** Support the Department of [dept name].
- **Make a Gift button:** add link to gift page. See master spreadsheet for giving links. Change title to reflect department name.
- **Social media buttons:** Add social media URLs for the department's socials. See masterlist of social media accounts. Otherwise, social media handles can always be found in the footer of the department's homepage.
- **Footer:** Make sure footer has the correct department name. Fill in the bank.


This email was sent to all U of M Twin Cities Department of ___________ alumni by %%Member_Busname%% at the University of Minnesota, %%Member_Addr%%, %%Member_City%%, %%Member_State%%, %%Member_PostalCode%%, %%Member_Country%%.

# Sending (test) Newsletters

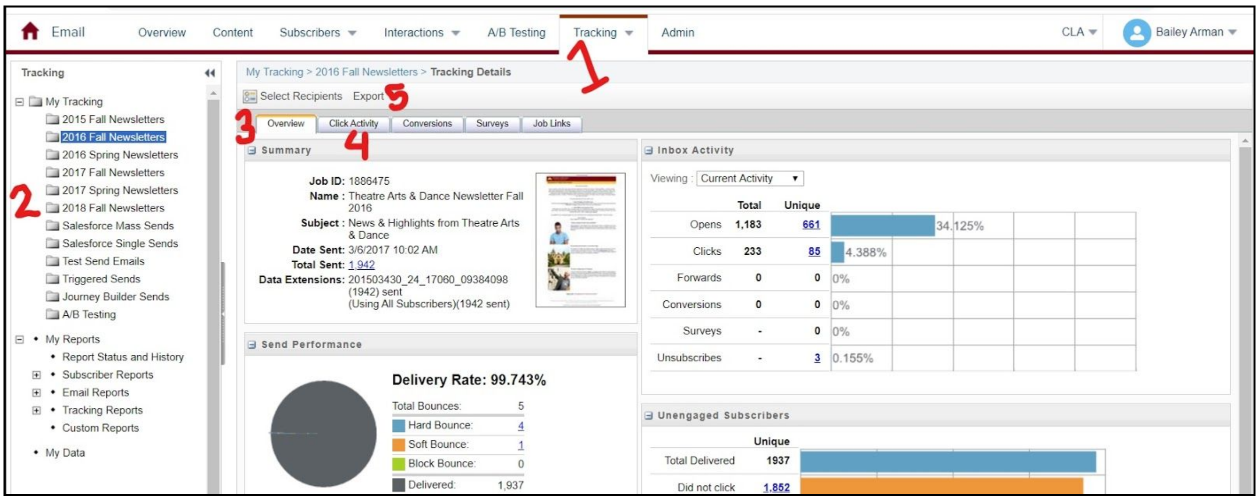
Before sending the newsletters, it is imperative to send a test version.

1. ----
2. -----
3. Send to yourself and to the SE.
4. When you receive the test send (which can take a few minutes), click all the links to ensure they are correct

5. The SE will notify you of any changes and may or may not send it to the department for their review as well.

## Collecting Newsletter Statistics

A week after the newsletter has been sent, you may collect the statistics. Collecting newsletters statistics is important because this data allows departments to see how many alums interact with their content, and what content their alums are interacting with.




1. After logging into Salesforce and navigating to the Email studio, click "Tracking" (1) and find your folder in the left-hand list.
2. After clicking into a semester folder (2), choose the appropriate newsletter from the list that appears in the main screen. Then, data on sends, opens, subscribers, etc. should appear. This is the "overview" (3).
3. Click "export" (5).
    a. You need to export three different statistics: overview, click activity email overlay, and click activity link view.
4. A list of choices will appear. Rename the file following this template: [Content] - [Semester] [Department] Newsletter Statistics
    a. For example "Overview - 4.5 Art Newsletter Statistics" or "ClickActivity - 5.5 SOC Newsletter Statistics"
5. Click "export" at the far right. The document will download to your computer.
6. Upload to the Backpack Drive.
    a. Right now, the location is Teams > CLA Clients > Newsletter Statistics > [corridor] > [department] > [semester]
7. Follow steps 2-6 for click activity (4).

8. In the department folder in the Backpack Drive, fill in the necessary data in the departmental Newsletter Statistics Summary
9. In the Newsletter Statistics folder, ensure that the Newsletter Masterlist is up-to-date.

## Tips and Tricks

- Use command+shift+v to remove extra html/formatting issues. Sometimes it acts fussy and you must manually alter the HTML
- Always send yourself test emails and check to make sure the links work.

# RESOURCES

## Backpack Branding

Find all the rules and guidelines of our brand in the creative team folder.

### Brand colors

| Primary | Secondary |
|---|---|
| **RED** #f05623 | **BLACK** #000000 |
| **YELLOW** #ffcc33 | **GRAY** #DCE1E9 |
| **BLUE** #3a499c | |

## Design

Canva: to design graphics, if need be.
University Branding: Brand resources for the entire University of Minnesota
CLA Photo Library: Photo library specific to the College of Liberal Arts

## Editing

Hemingway Editor: to determine reading level. We generally aim for a high school reading level. Hemingway also identifies phrases to edit.
Thesaurus: for synonyms
Grammarly: download for Google Chrome
Merriam-Webster's Dictionary: for spellings that are not covered by CLA Style Guide
Outline Resources: for writing outlines and blocking out stories
CLA Sample Texts Resource document: examples of well-written (and well-edited) stories

# Master Lists

- CLA Feature Story Master List
- Airtable
- Department Giving Links
- CLA Client Social Media List
- Department Assignment List

# Style Guides

For University/college specific style rules refer to our Style Guide. For the full version see CLA Style Guide. If a style rule isn't in our style guide, we use the Chicago Manual of Style, which you can access for free online while you are on campus.

For official names and abbreviations: buildings, departments, programs, majors use the University's directory.

CLA voice pamphlet

# Additional Resources

CLA's online user guide is a helpful overarching resource, including the pattern library, a drupal guide, and a style guide.

Meet the Team z.link https://z.umn.edu/Backpack-Meet-The-Team

Writing for the web by usability.gov

# LOGINS

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## Drupal

**URL:** http://cla.umn.edu/saml_login
**Login credentials:** your x500 and password
You'll be given access to Drupal when you go through Drupal training.

## Hootsuite

**Username:** umncla@gmail.com
**Password:** Cla*1868

## Johnston Hall

**135:** 4-6-5-3-9-#
**135B:** 1-4-7-8-#

## Salesforce Marketing Cloud

**URL:** https://z.umn.edu/smclogin
**Login credentials:** your x500 and password
You will need to contact Colleen Ware for instructions on getting a Marketing Cloud account.