

# Release notes training

This training includes how to access/use the most recent template, build/send out release notes in Emma, save in the correct location, and additional release notes tips.

## Table of Contents

*Edit in template*..... 2

*Ask for feedback*..... 2

*Build in Emma* ..... 2

*Send test email* ..... 4

*Send/schedule out*..... 5

*Send now* ..... 5

*Schedule for later* ..... 8

*Save as PDF* ..... 10

*Need help?*..... 12

*Tips*..... 12

## Edit in template

In Word, put the release note into our [2025 Release Note template](#).

Include the following elements:

- **[Title] Release Notes xx/xx/xx**
- Intro paragraph (**This release includes updates to...**)
- **Table of contents**
- **What's new in this release?** section
- **Need help?** section

Make edits that promote clarity and conciseness and check for correct punctuation/grammar as well. Try to make the release note as helpful as possible.

## Ask for feedback

Send the release note to a team member to proof. They can catch if you missed anything prior to putting the draft into [Emma](#) (email software).

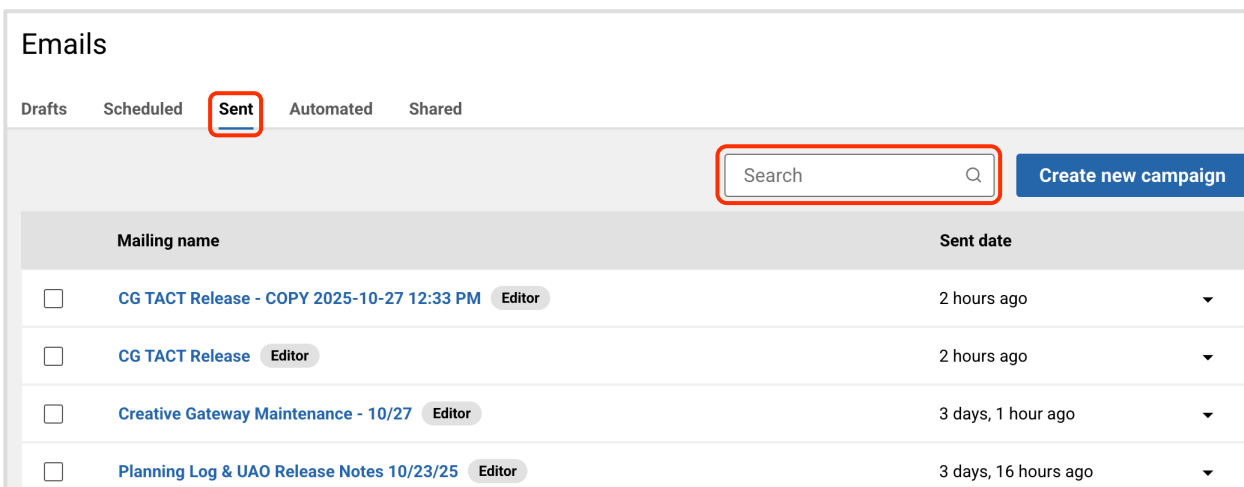
## Build in Emma

Go to Emma at <https://home.e2ma.net/>. Click on the **Campaigns** tab.



You will copy the template of a previous release note for the format of your current release note.

Click on the **Sent** tab and enter in the **Search** bar what type of release you want to copy (e.g., **Salesforce, Planning Log, Universal Pacing & Posts, etc.**).



After choosing which release note to copy, click on the drop-down arrow and select **Duplicate**. A new page opens with a copy of the release note.

<input type="checkbox"/>	Planning Log & UAO Release Notes 10/23/25	Editor	3 days, 16 hours ago	
<input type="checkbox"/>	Transactional Forecaster_ Frequency Enhancement	Editor	4 days, 5	<div>Duplicate</div>
<input type="checkbox"/>	CopyWrite Release Cancelled	Editor	4 days, 2	<div>View response</div>
<input type="checkbox"/>	CopyWrite Release - 10.22.25	Editor	5 days, 21 hours ago	<div>Archive</div>

Remove any unnecessary content from the previous release note.

To change the title of the campaign, click on the **pencil** at the top of the page and the **Edit campaign name** dialog box opens.

Planning Log & UAO Release Notes 10/2...

Template: Salesforce and UWS Release Notes 5/2/25

Enter the **Campaign name** and click **Save**.

Edit campaign name

All fields required

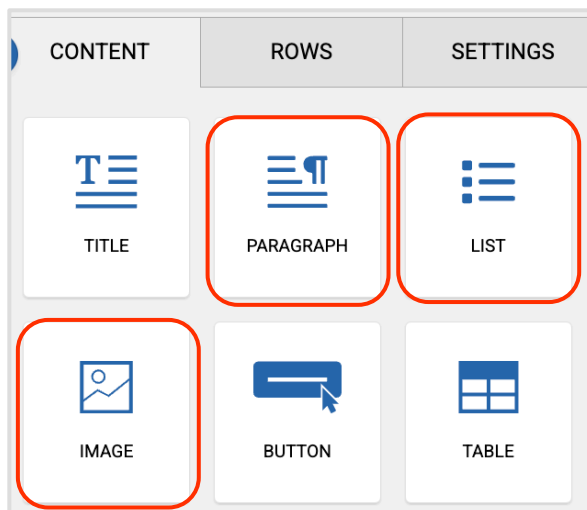
Campaign name \*

Planning Log & UAO Release Notes 10/23/25

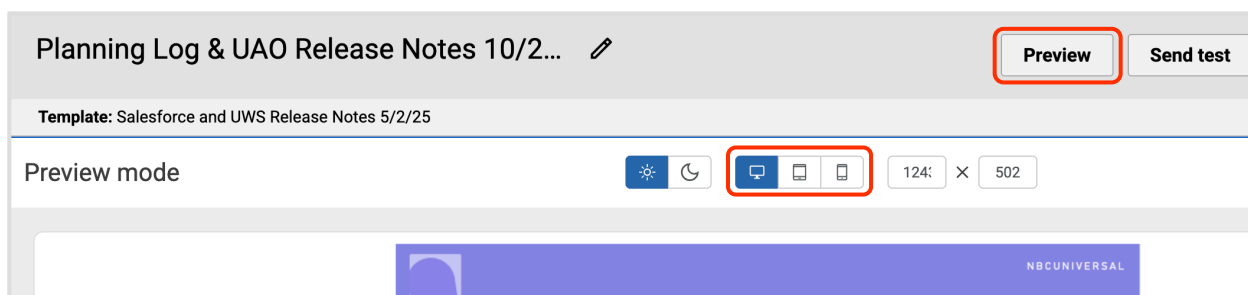
Cancel

Save

Use the drag and drop tools to add, remove, and arrange content and images and copy/paste the release note info from the Word doc into Emma's email builder. You will mainly work with **Paragraph**, **List**, and **Image** content options.



Click on the **Preview** button at the top right to check how the notes look in desktop format.



**Note:** Click on the **tablet** icon at the top center to view the release note as if it's on a tablet. Click on the **mobile phone** icon to view the release note as if it's on a mobile phone.

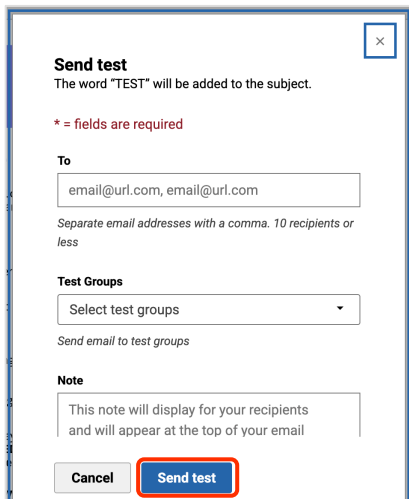
## Send test email

Once satisfied with the draft, click on the **Send test** button at the top of the screen and the test email dialog box appears.



Complete the following:

- Type the recipient of the test email in the **To** field.
- Ensure the **From** field matches the release note.
- Update the **Subject** to correspond with the current release note.

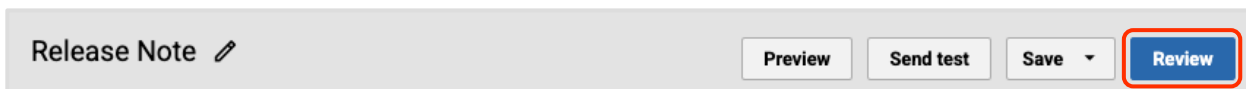
A dialog box titled "Send test" with a close button (X) in the top right corner. Below the title, it says "The word 'TEST' will be added to the subject." and a red asterisk note "\* = fields are required". The "To" field contains "email@url.com, email@url.com" with a subtext "Separate email addresses with a comma. 10 recipients or less". The "Test Groups" section has a dropdown menu labeled "Select test groups" and a subtext "Send email to test groups". The "Note" field contains "This note will display for your recipients and will appear at the top of your email". At the bottom are "Cancel" and "Send test" buttons, with the "Send test" button highlighted by a red rectangle.

Click **Send test**.

## Send/schedule out

Once you hear back that the test email looks good, schedule or send out the release note.

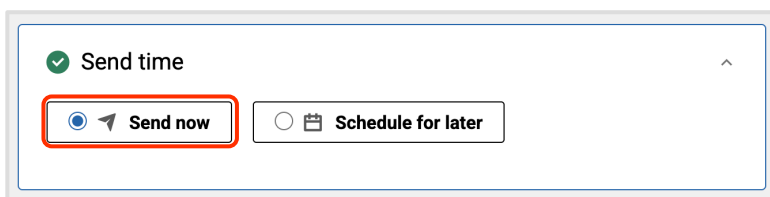
In Emma, click on the **Review** button at the top of the screen.

A horizontal toolbar for a "Release Note" with an edit icon. It contains four buttons: "Preview", "Send test", "Save" with a dropdown arrow, and "Review". The "Review" button is highlighted with a red rectangle.

## Send now

If sending the release note out **now**:

Click on the **Send time** drop-down and choose **Send now**.

A dialog box titled "Send time" with a green checkmark icon and an expand/collapse arrow. It contains two options: "Send now" with a radio button and a location pin icon, and "Schedule for later" with a radio button and a calendar icon. The "Send now" option is selected and highlighted with a red rectangle.

Click on the **Audience** drop-down and add your groups to the **Recipients** text box.

The screenshot shows the 'Audience' configuration panel. At the top, there is a header 'Audience' with a dropdown arrow. Below it, the 'Recipients \*' section is highlighted with a red box. It contains a text input field with the placeholder 'Enter recipients, groups, subscriptions, and/or segments' and a dropdown arrow. A note above the field states 'Audience must contain at least one contact.' Below the 'Recipients' section is the 'Excluding anyone in' section, which also has a text input field with the placeholder 'Enter segments' and a dropdown arrow.

Under the **Subject** drop-down, ensure the **Subject line** is correct.

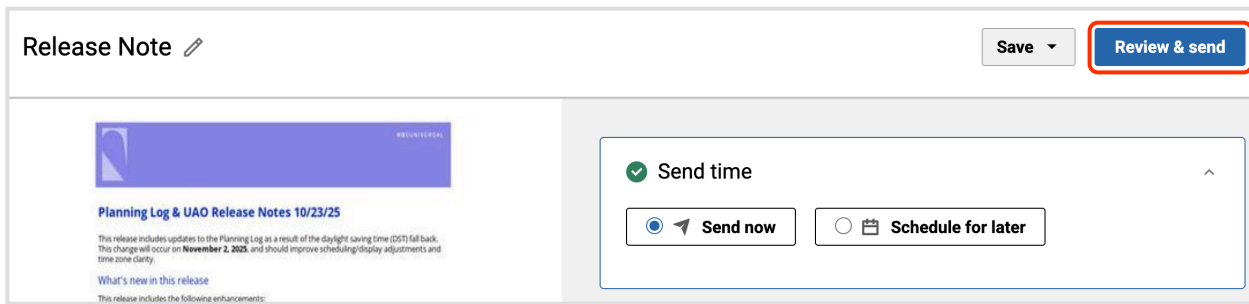
The screenshot shows the 'Subject' configuration panel. At the top, there is a header 'Subject' with a dropdown arrow. Below it, the 'Subject line \*' section is highlighted with a red box. It contains a text input field with the text 'Planning Log & UAO Release Notes 10/23/25' and a dropdown arrow. A character count '41/150' is visible to the right of the field. Below the 'Subject line' section are two buttons: 'Personalize' and 'Switch to split test'. Below these buttons is the 'Preheader text' section, which has a text input field with the text 'optional' and a character count '0/75' to the right.

Under the **From** drop-down, ensure the **Sender name** and **Sender email** are correct.

The screenshot shows the 'From' configuration panel. At the top, there is a header 'From' with a dropdown arrow. Below it, a note states 'Your Sender and Reply-to email address must be working, monitored mailboxes in order to comply with federal regulations.' Below this note is the 'Sender name \*' section, which is highlighted with a red box. It contains a text input field with the text 'UWS Support' and a dropdown arrow. Below the 'Sender name' section is a checkbox labeled 'Make this the default sender name'. Below this is the 'Sender email \*' section, which is also highlighted with a red box. It contains a text input field with the text 'NBCUniCITechOpsSupport@nbcuni.com' and a dropdown arrow. Below the 'Sender email' section are two checkboxes: 'Make this the default sender email' and 'Set a separate reply-to email address. By default, we use your sender email address.'

**Note:** No need to make any changes in the **Advanced** drop-down.

Click on the **Review & send** button at the top right.



The screenshot shows a 'Release Note' interface. At the top left, it says 'Release Note' with an edit icon. At the top right, there are two buttons: 'Save' and 'Review & send'. The 'Review & send' button is highlighted with a red rectangular box. Below the header, there is a preview of a release note titled 'Planning Log & UAO Release Notes 10/23/25'. To the right of the preview, there is a 'Send time' section with a green checkmark icon. Below this, there are two buttons: 'Send now' (selected with a radio button) and 'Schedule for later'.

A dialog box opens asking, **Are you sure you want to send this campaign now?**



The screenshot shows a confirmation dialog box with the title 'Are you sure you want to send this campaign now?'. Inside the dialog, there is a section for 'Send time' with a 'Send now' button. Below this, there is a section for 'Audience' showing 'Sending to 1 individual'. Then, there is a 'Subject' section with the text 'Planning Log & UAO Release Notes 10/23/25'. Finally, there is a 'From' section showing 'Sender name: UWS Support' and 'Sender email: NBCUniCITechOpsSupport@nbcuni.com'. At the bottom of the dialog, there are two buttons: 'Cancel' and 'Send campaign'. The 'Send campaign' button is highlighted with a red rectangular box.

Click **Send campaign**.

## Schedule for later

If sending the release note at a **later** date/time:

- Click on the **Send time** drop-down and choose **Schedule for later**.
- Click into the **Send on** field and a calendar opens.
- Choose the date and time you wish to send out the release note.

**Send time**

☐ Send now ☒ **Schedule for later**

**Send on \***

10/27/2025 03:35 pm

US/F - stern

October 2025							Time
Su	Mo	Tu	We	Th	Fr	Sa	
28	29	30	1	2	3	4	02:45 pm
5	6	7	8	9	10	11	03:00 pm
12	13	14	15	16	17	18	03:15 pm
19	20	21	22	23	24	25	03:30 pm
26	<b>27</b>	28	29	30	31	1	03:45 pm
							04:00 pm
							04:15 pm

**Recipients \***

Click on the **Audience** drop-down and add your groups to the **Recipients** text box.

**Audience**

**Recipients \*** Audience must contain at least one contact.

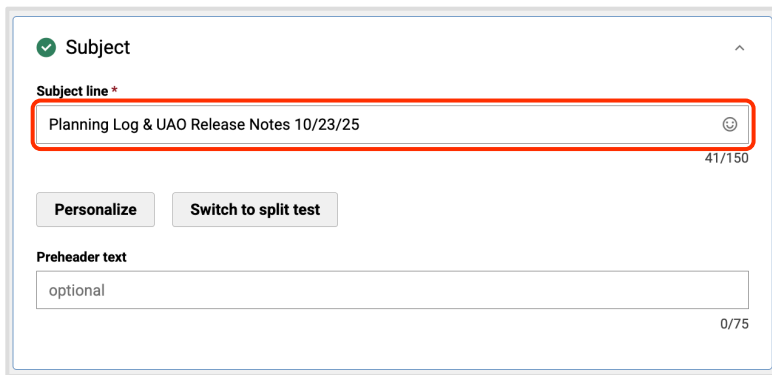
Enter recipients, groups, subscriptions, and/or segments

**Excluding anyone in**

Enter segments

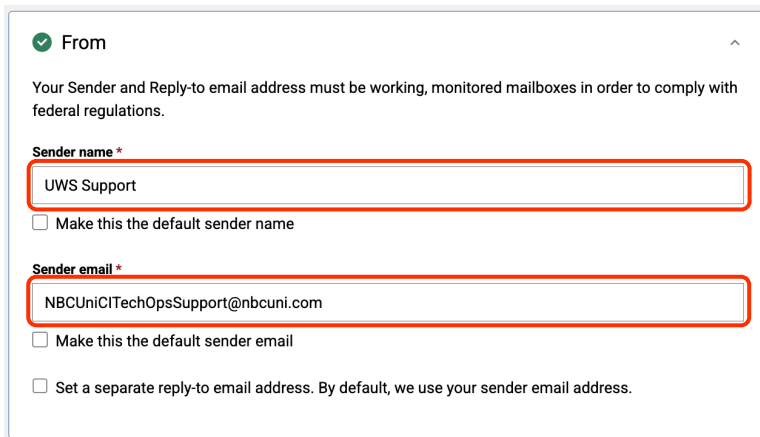


Under the **Subject** drop-down, ensure the **Subject line** is correct.



The screenshot shows the 'Subject' configuration panel. At the top, there is a green checkmark and the word 'Subject'. Below this is a section labeled 'Subject line \*' with a text input field containing 'Planning Log & UAO Release Notes 10/23/25'. To the right of the input field is a character count '41/150'. Below the input field are two buttons: 'Personalize' and 'Switch to split test'. Further down is a section labeled 'Preheader text' with a text input field containing 'optional' and a character count '0/75'.

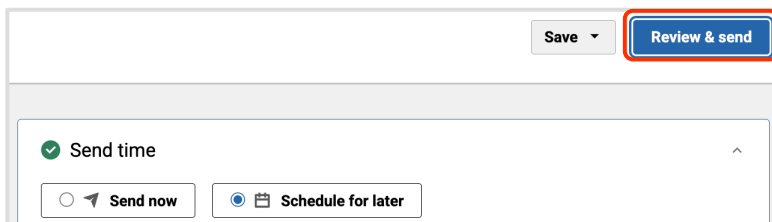
Under the **From** drop-down, ensure the **Sender name** and **Sender email** are correct.



The screenshot shows the 'From' configuration panel. At the top, there is a green checkmark and the word 'From'. Below this is a message: 'Your Sender and Reply-to email address must be working, monitored mailboxes in order to comply with federal regulations.' There are two main sections: 'Sender name \*' and 'Sender email \*'. The 'Sender name \*' section has a text input field containing 'UWS Support' and a checkbox labeled 'Make this the default sender name'. The 'Sender email \*' section has a text input field containing 'NBCUniCITechOpsSupport@nbcuni.com' and a checkbox labeled 'Make this the default sender email'. Below these is a checkbox labeled 'Set a separate reply-to email address. By default, we use your sender email address.'

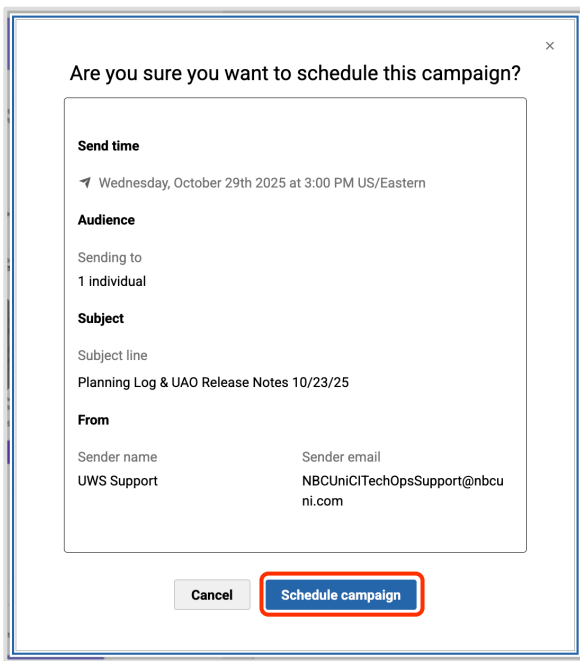
**Note:** No need to make any changes in the **Advanced** drop-down.

Click on the **Review & send** button at the top right.



The screenshot shows the bottom of the configuration panel. At the top right, there are two buttons: 'Save' and 'Review & send'. The 'Review & send' button is highlighted with a red border. Below these buttons is a section labeled 'Send time' with a green checkmark. This section contains two radio buttons: 'Send now' and 'Schedule for later'.

A dialog box opens asking, **Are you sure you want to schedule this campaign?**

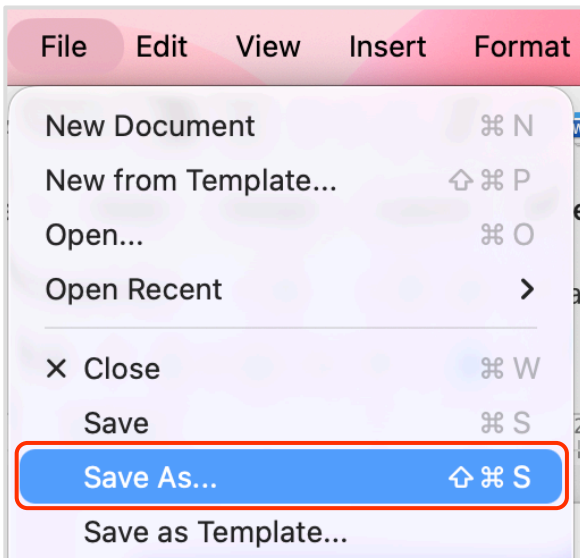


Click **Schedule campaign**.

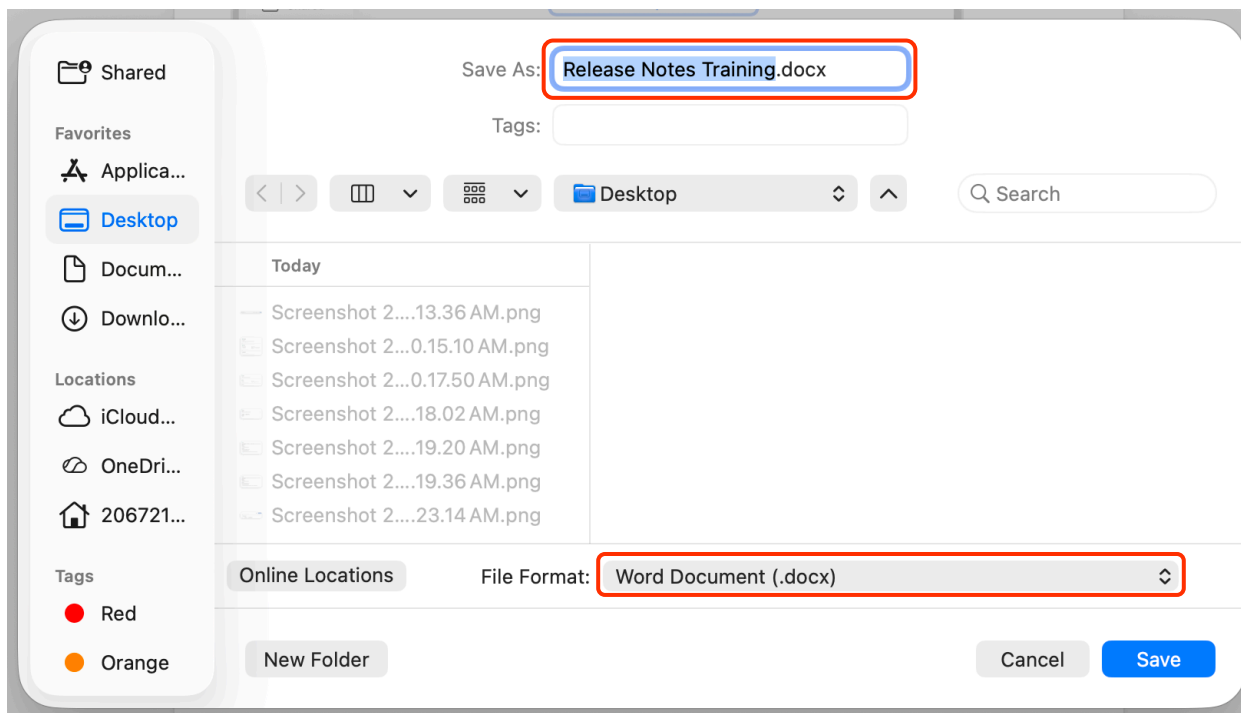
## Save as PDF

Once the release notes get sent out, save the word doc as a PDF into the [UWS FAQs and Release Notes folder](#).

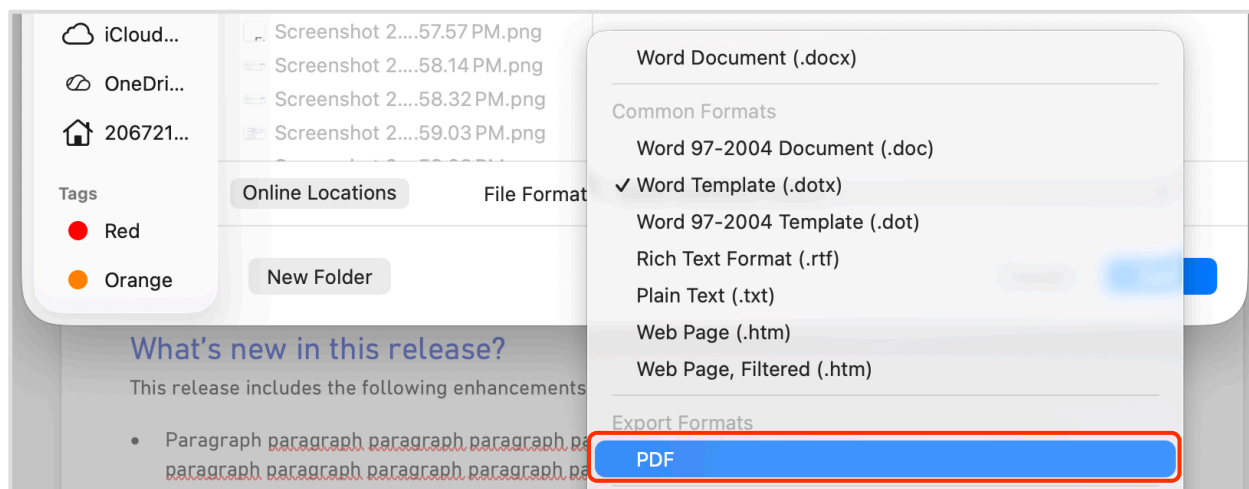
In Word, go to **File** and click **Save As** and the Save As dialog box opens.



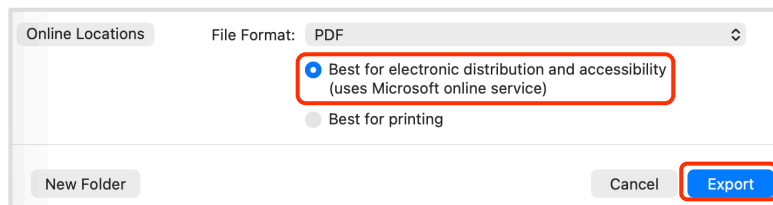
Ensure the **Save As** field is correct.



Click on the **File Format** drop-down and choose **PDF**.



Select the **Best for electronic distribution and accessibility (uses Microsoft online services)** toggle.



Click **Export**.

Save the PDF to the [UWS FAQs and Release Notes folder](#).

**Note:** If the release note is for Universal Planning, save the PDF in the [Universal Planner Training](#) folder.

## Need help?

For assistance with any release notes issues, please reach out to [katie.griffiths@nbcuni.com](mailto:katie.griffiths@nbcuni.com) or [productmarketing@nbcuni.com](mailto:productmarketing@nbcuni.com).

## Tips

### Template:

- Make sure screenshots are neat and not blurry.
- Crop screenshots if there is unnecessary info included—only show what’s most important.
- When you enacting an action to and existing button/tab/field/etc. that exists on the page, make it **bold** and don’t use “quotations.”
- Avoid passive language and check for “to be” verbs (e.g., am, is, was, were, will, be, being, been).

**Test email:** Always send yourself the test emails as well so you know if they “went through” or not.