

The purpose of this 'How To' is to guide administrators through the step-by-step process of creating and sending notifications within Knowledge Link.

- A. Create and Send Ad-hoc Notifications from User Search Results
 - a. For example, everyone in an ORG needs to be notified.
- B. Create and Send Notifications Using Send Notifications Tool
 - a. For example, a specific subset of users based on scheduled offerings, items, or curricula and their assignment type or status.

A. Create and Send Ad-hoc Notifications from User Search Results

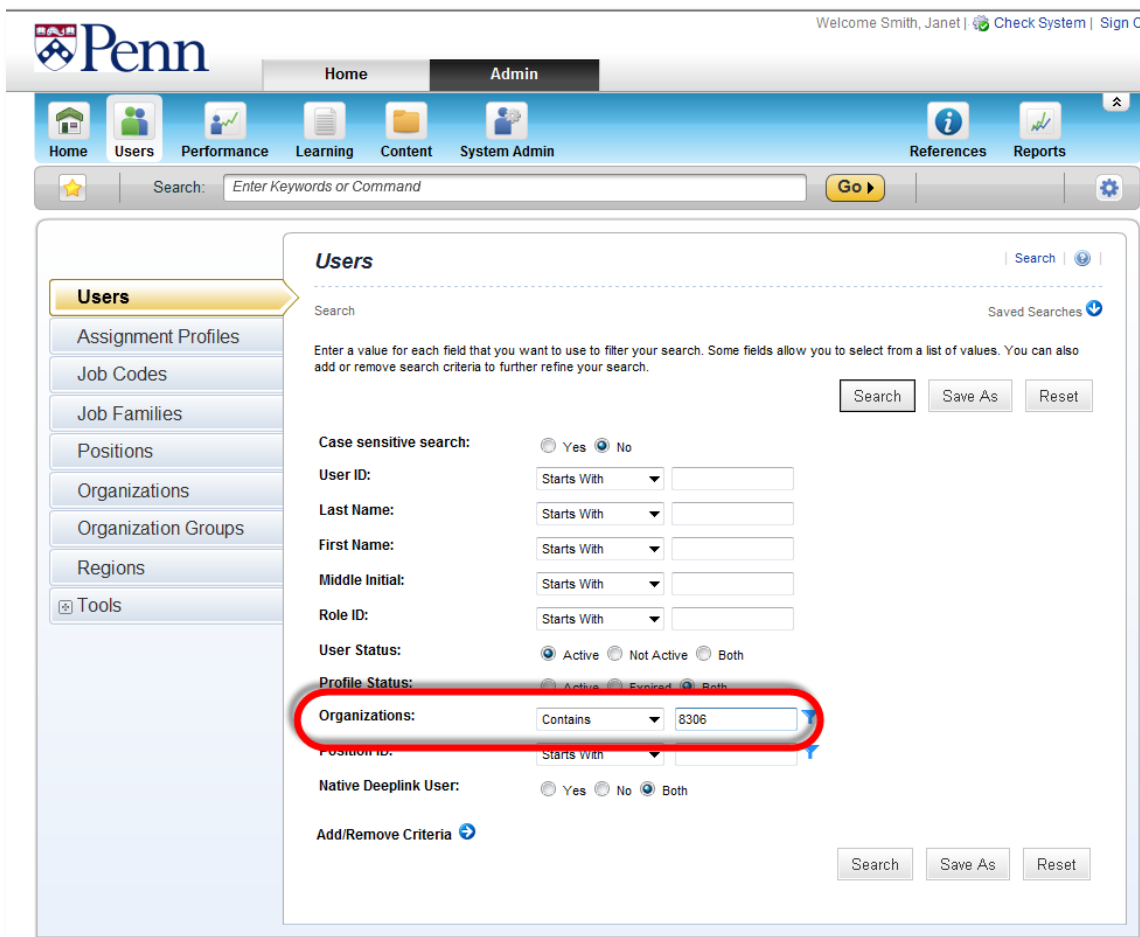
Navigate to **Users > Users**.

Search for a user by entering criteria for one or more fields.

For this example, let's search for all users within a specific organization, ULAR (Org #8306).

Enter the organization ID in the **Organizations** field using "Contains" as the delimiter.

Click **Search**.



The screenshot shows the 'Users' search page in the Knowledge Link system. The page has a navigation bar with 'Home' and 'Admin' tabs, and a search bar at the top. The main content area is titled 'Users' and contains a search form. The 'Organizations' field is highlighted with a red circle, showing 'Contains' as the operator and '8306' as the value. Other fields include 'User ID', 'Last Name', 'First Name', 'Middle Initial', 'Role ID', 'User Status', 'Profile Status', and 'Native Deeplink User'. The 'Search' button is visible at the bottom right of the form.

How to Send Notifications

The results display all the records that meet the entered criteria.

If you wish to send a notification to all members of this organization, change the **View per Page** to **500** to view all records. (1)

Click the **Select All** link to select all users. (2)

Click **Send Notification**. (3) (This does NOT send it right away! The next step will create the email that you want to send.)

Welcome Smith, Janet | [Check System](#) | [Sign Out](#)

Home Admin

Home Users Performance Learning Content System Admin References Reports

Search: [Go](#)

Users

- Assignment Profiles
- Job Codes
- Job Families
- Positions
- Organizations
- Organization Groups
- Regions
- Tools

User Status: Active Not Active Both

Profile Status: Active Expired Both

Organizations: Contains [Filter](#)

Position ID: Starts With [Filter](#)

Native Deeplink User: Yes No Both

[Add/Remove Criteria](#)

[Search](#) [Save As](#) [Reset](#)

[Field Chooser](#) [Download Search Results](#)

3 [Send Notification](#)

[Select All](#) [Deselect All](#)

1 Records per Page: 500 (200 total records)

2

User ID	User Name	Notify
<input type="checkbox"/>	e	<input checked="" type="checkbox"/>
<input type="checkbox"/>		<input checked="" type="checkbox"/>
<input type="checkbox"/>		<input checked="" type="checkbox"/>
<input type="checkbox"/>	t	<input checked="" type="checkbox"/>
<input type="checkbox"/>		<input checked="" type="checkbox"/>
<input type="checkbox"/>		<input checked="" type="checkbox"/>
<input type="checkbox"/>		<input checked="" type="checkbox"/>
<input type="checkbox"/>		<input checked="" type="checkbox"/>
<input type="checkbox"/>		<input checked="" type="checkbox"/>

Select **Reply To** and **From** email addresses. (1) (You can also do a search for these.)
You also have the option of sending a copy to someone and sending a copy to the user's supervisor.
The **Subject** and **Body** (2) of the message should be clearly filled in so the users understand immediately why they are getting the message.
Click **Send Notification**. (3)

Welcome Smith, Janet | [Check System](#) | [Sign Out](#)

Home Admin

Home Users Performance Learning Content System Admin References Reports

Search: Enter Keywords or Command

Send Notifications [Help](#)

> Step 1 > Step 2 > Step 3 > Step 4 > Step 5

* = Required Fields

Step 5: Build Email

Select Template

Email Template:

Specify Email Addresses

1 Reply To: knowledgeink@uphs.upenn.edu
* From: knowledgeink@uphs.upenn.edu

Send copies to: knowledgeink@uphs.upenn.edu

Note: The above recipients will receive 1 email for each user receiving this notice.

Second copy of email to users' supervisors:

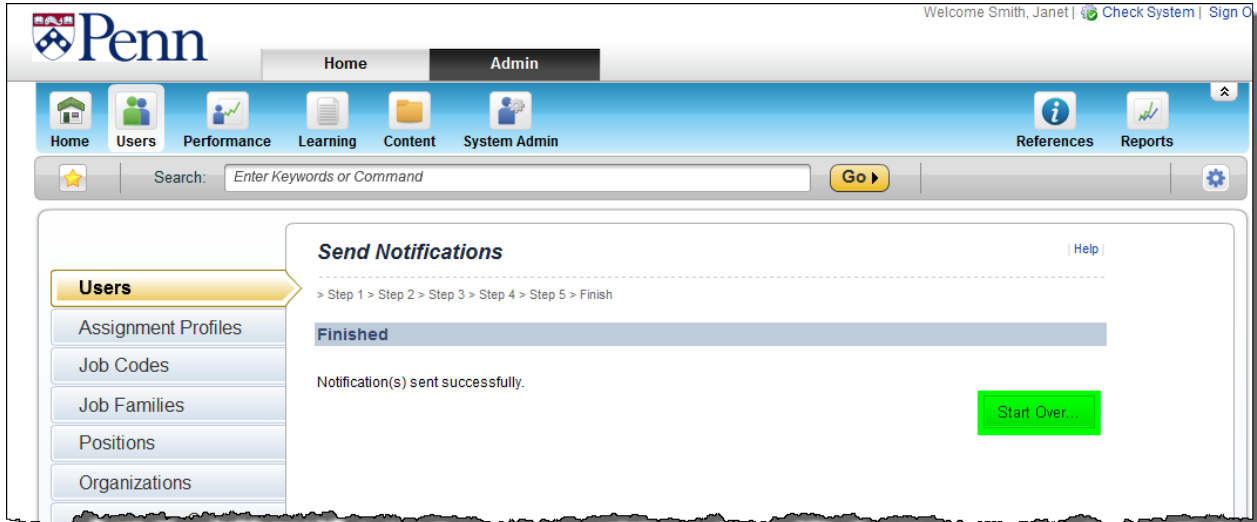
Customize Contents

Attachment:

2 * Subject: New Required Course
* Body: This is to notify you that a new required course has been added to your learning plan in Knowledge Link. Please log in and complete the course within the next 2 weeks.

How to Send Notifications

You have successfully sent a notification to all selected users from ULAR.
Click the **Start Over** button to send additional notifications to a user population based on scheduled offering, item, curriculum, or class.



B. Create and Send Notifications Using Send Notifications Tool (for groups of users based on scheduled offerings, items, or curricula)

Navigate to **Users (1) > Tools > Send Notifications (2)**.

Step 1: Select Criteria Type

Select the criteria type on which the user population is based.

For this example, let's search for all users enrolled in a specific item. **(3)**

Click **Next**. **(4)**

Welcome Smith, Janet | [Check System](#) | [Sign Out](#)

Home Admin

Home Users Performance Learning Content System Admin References Reports

Search: Enter Keywords or Command [Go](#)

Send Notifications [Help](#)

> Step 1

Step 1: Select Criteria Type

* = Required Fields

* Base Population On:

- Scheduled Offering
- Item **(3)**
- Curriculum
- Class

[Next](#) **(4)**

Users

Assignment Profiles

Job Codes

Job Families

Positions

Organizations

Organization Groups

Regions

Tools

- Record Learning - Multiple
- Learning Event Editor
- Send Notifications** **(2)**
- User Needs Mgmt

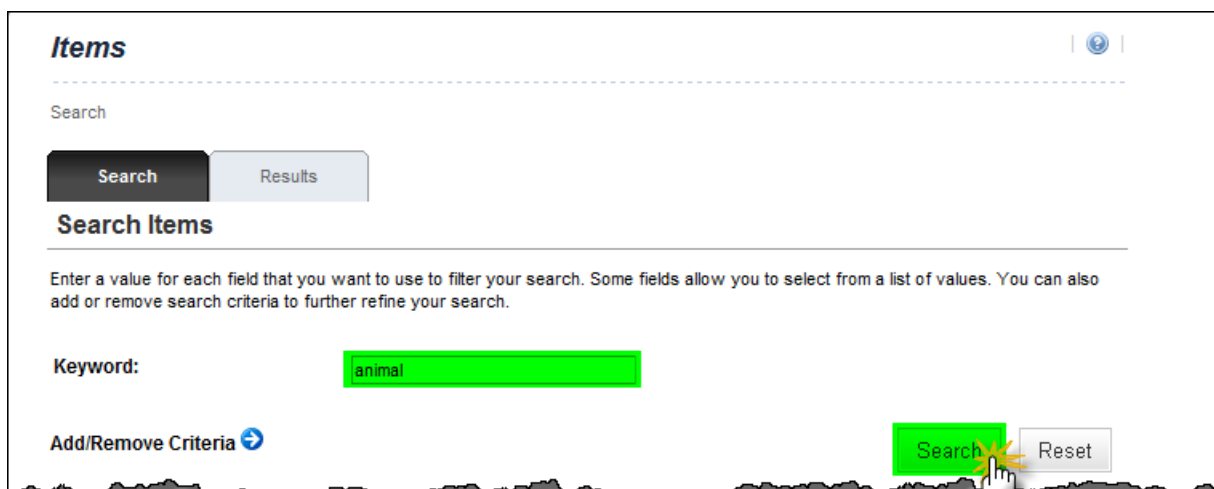
Step 2: Select Item

Add an item to the criteria by clicking the "add one or more from list" link to search for the item. (It's not always easy to remember the **Item ID**.)



Search for an item by entering a keyword, in this case "animal".

Note: use the **Add/Remove Criteria** feature to add additional search criteria if needed. Click **Search**.



How to Send Notifications

Select the item by clicking the **Add** checkbox. (1)
Click **Add** (2) to continue.

Items | Help

> Search Results

Search Results

Select Items

Records per Page 500 (127 total records) Select All / Deselect All

Item	Title	Assign. Type	Add
COURSE UP.83019.ITEM.SSTPNBCLA (Rev 1/1/2000 12:00 AM America/New York)	New Bolton Center - Large Animal Online- ULAR	REQ	<input checked="" type="checkbox"/>
COURSE UP.83019.ITEM.IACUCCSS (Rev 1/1/2000 12:00 AM America/New York)	Animal Cage Change Station and Biosafety Cabinet Training- ULAR	REQ	<input type="checkbox"/>
COURSE UP.83019.ITEM.AFOJMGN (Rev 1/1/2000 12:00 AM America/New York)	Animal Facility Orientation- ULAR - John Morgan	REQ	<input type="checkbox"/>
COURSE UP.83019.ITEM.AFOLYNCH (Rev 1/1/2000 12:00 AM America/New York)	Animal Facility Orientation - ULAR -	REQ	<input type="checkbox"/>

This returns you to Step 2 of the **Send Notifications** wizard.
Click **Next** if you don't want to add any additional items.

Send Notifications | Help

> Step 1 > Step 2

Step 2: Select Items

Previous Next

Add an Item to the Criteria

Enter Item ID or add one or more from list.

Item Type:

Item ID: Add

Update Items

Apply Changes Reset

Select All / Deselect All

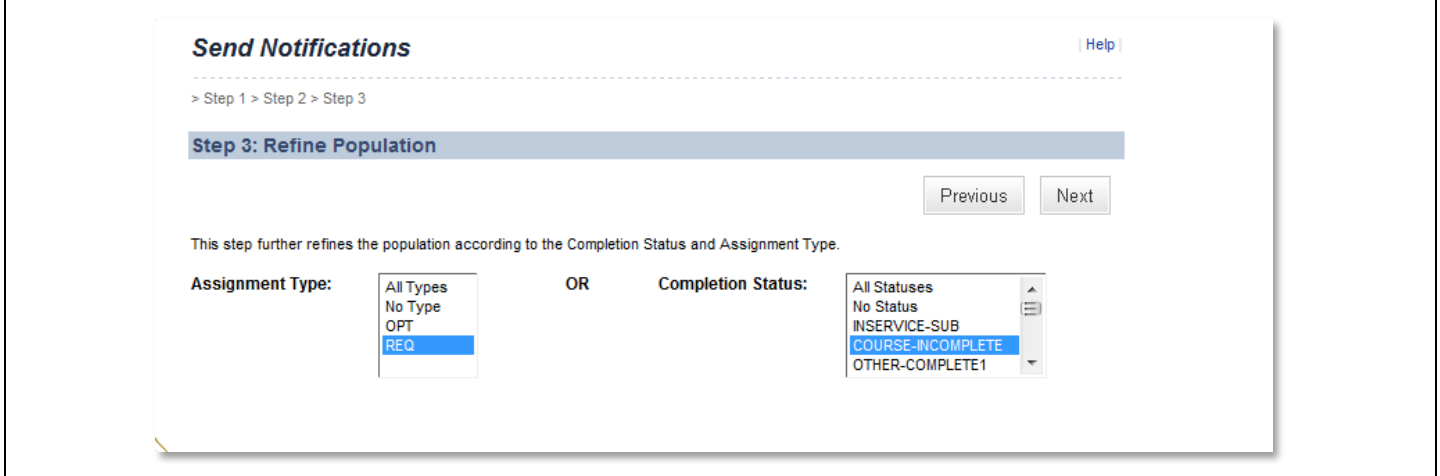
Item ID	Title	Remove
UP.83019.ITEM.SSTPNBCLA	New Bolton Center - Large Animal Online- ULAR	<input type="checkbox"/>

Select All / Deselect All

Apply Changes Reset

Step 3: Refine Population

Select an **Assignment Type** and/or a **Completion Status** for the Item. In this example, let's select all users who are incomplete and have the course required. Click **Next**.



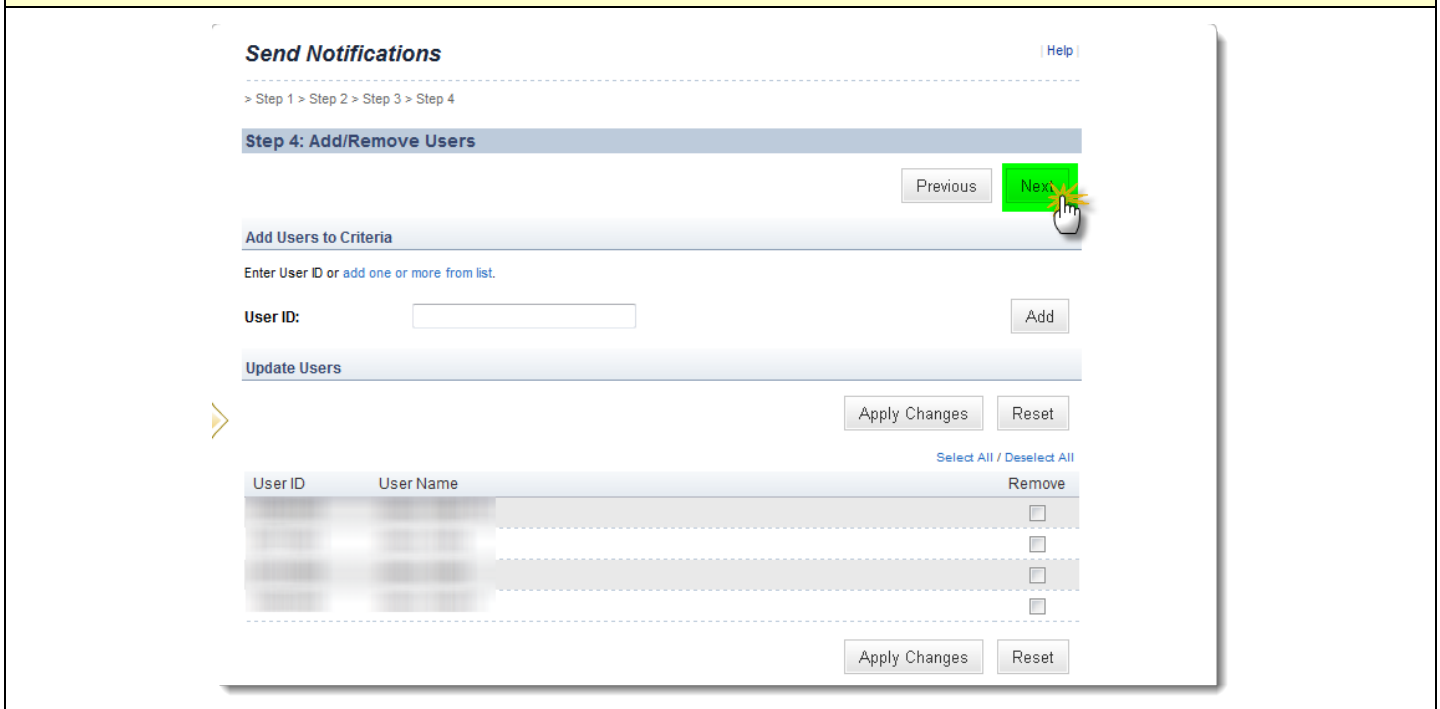
Step 4: Add/Remove Users: Review the list of users and refine it more granularly.

Click the "add one or more from list" link to add more users.

and/or

Click the **Remove** checkbox for users you wish to remove from the list, and click **Apply Changes**.

Click **Next**.



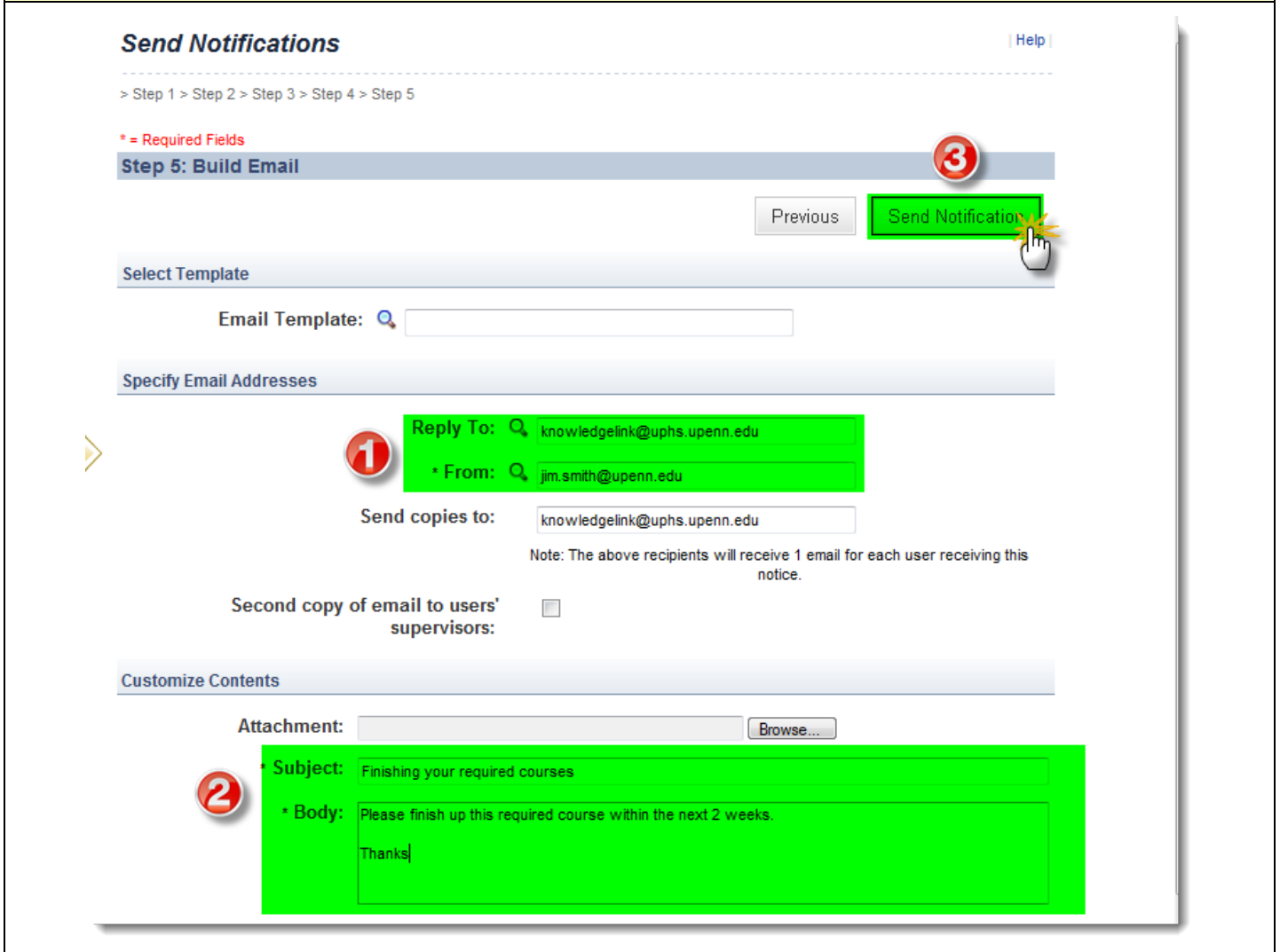
Step 5: Build Email

Click the select icon select an email template if you want to use one. (It's probably clearer to the users if you don't use a template and instead just use your own words.)

Select **Reply To** and **From** email addresses.

Contents of the message can be entered and an attachment included if needed.

Click **Send Notification**.



Send Notifications [Help](#)

> Step 1 > Step 2 > Step 3 > Step 4 > Step 5

* = Required Fields

Step 5: Build Email 3

Previous Send Notification

Select Template

Email Template:

Specify Email Addresses

1 Reply To:

* From:

Send copies to:

Note: The above recipients will receive 1 email for each user receiving this notice.

Second copy of email to users' supervisors:

Customize Contents

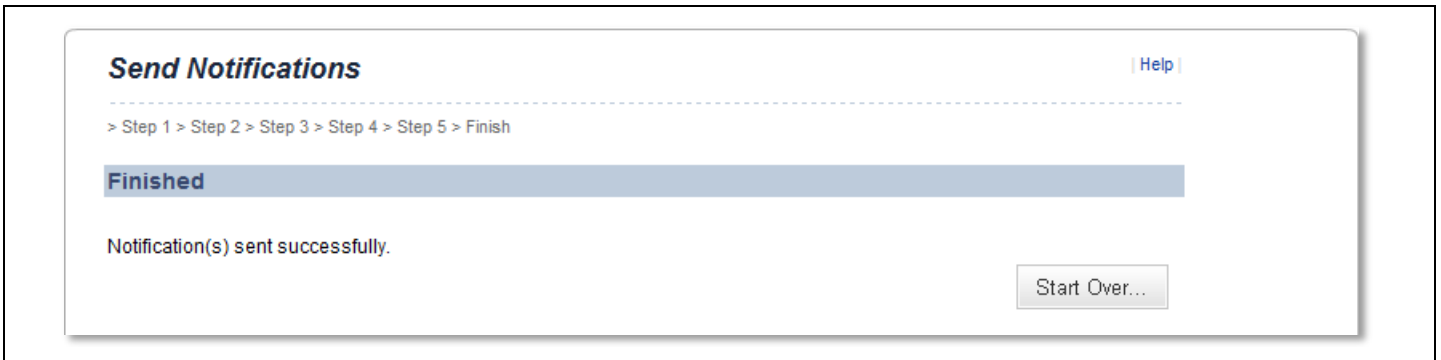
Attachment:

2 * Subject:

* Body:

You have successfully sent a notification to all selected users.
Click the **Start Over** button to send additional notifications

How to Send Notifications



Send Notifications [Help](#)

> Step 1 > Step 2 > Step 3 > Step 4 > Step 5 > Finish

Finished

Notification(s) sent successfully.

Start Over...

There are numerous other ways to send notifications but most of them utilize these same tools. For example, when you are in an item record, you can send a notification by clicking in the **Action** area.