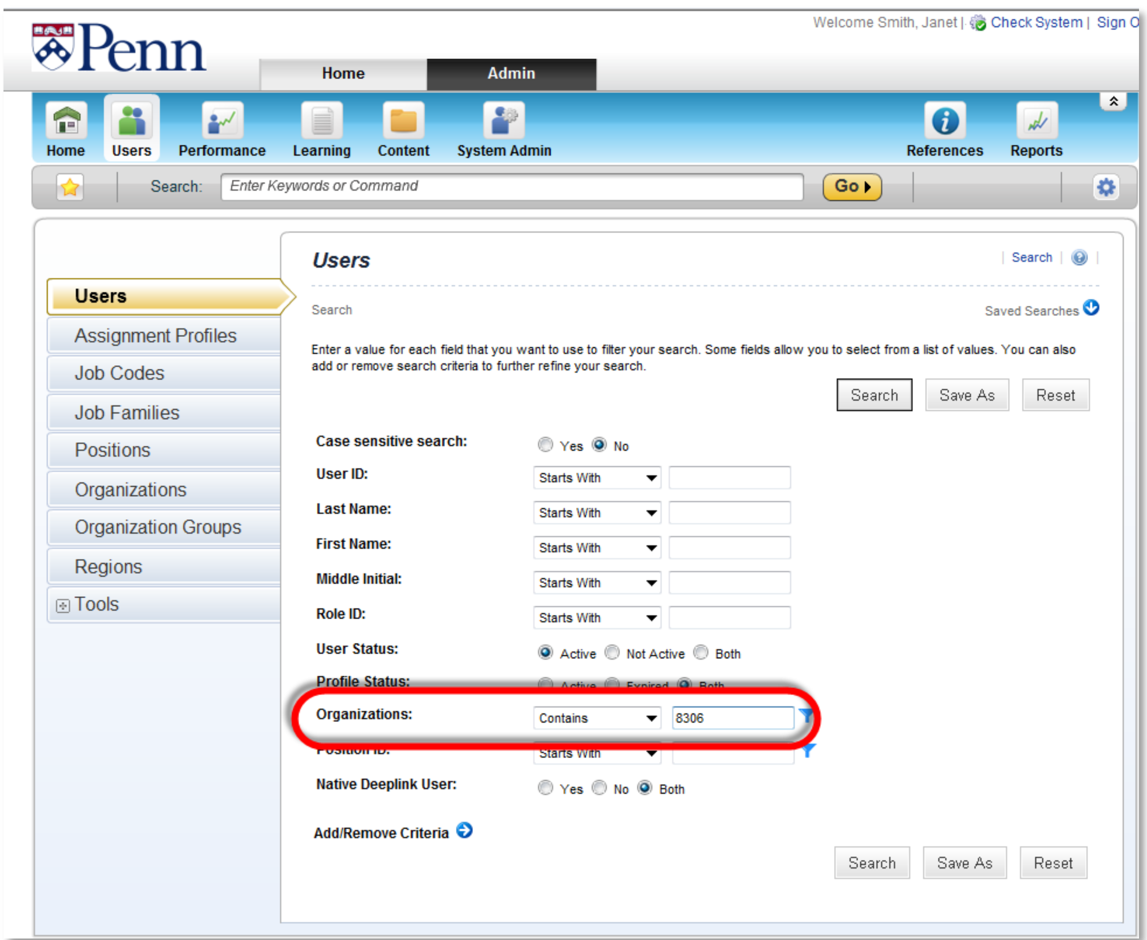
How to Send Notifications

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**.



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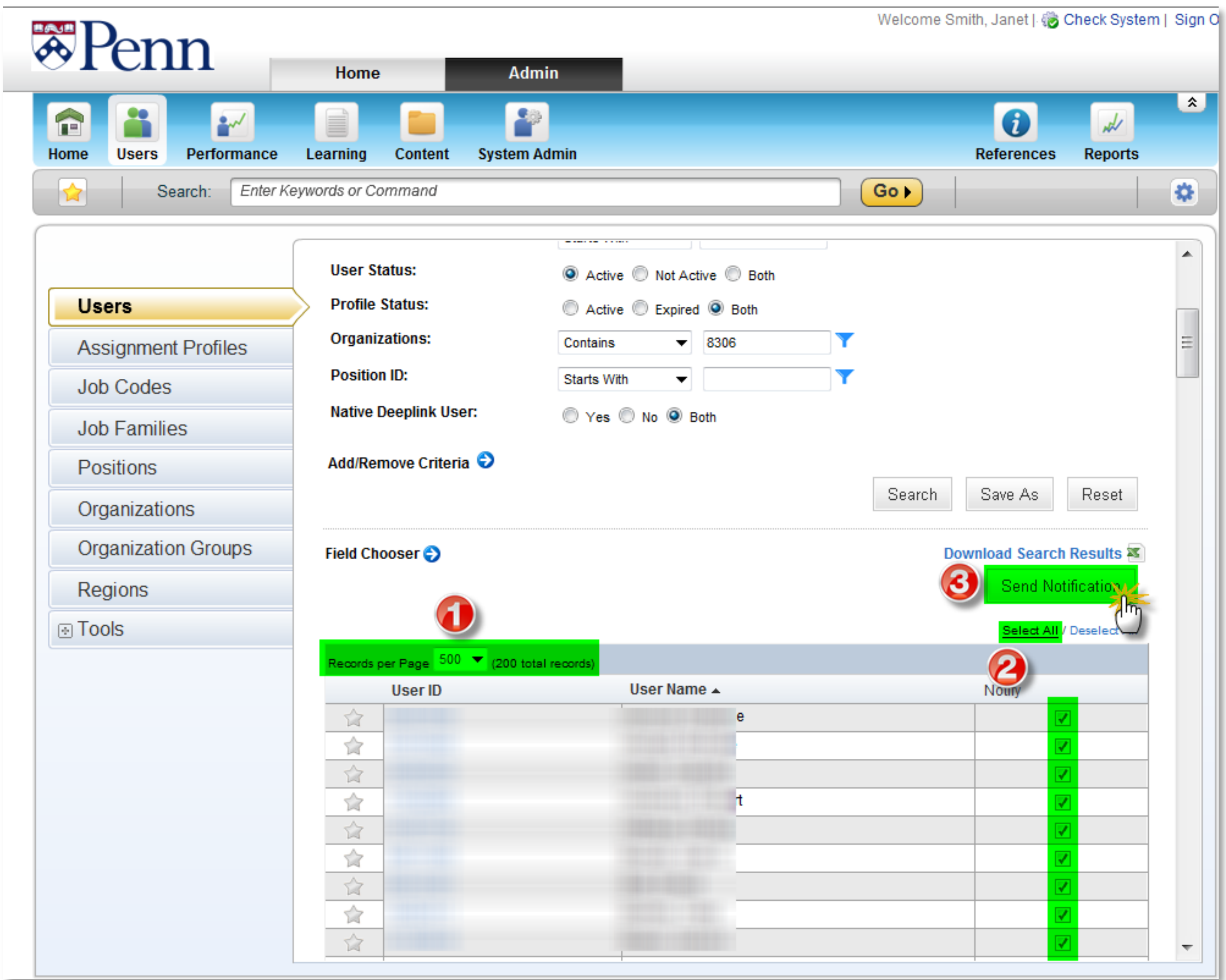
The results display all the records that meet the entered criteria.
If you wish to send a notification to all members of this organization, change the **View per Page** to **500** to view all records. **(1)**
Click the **Select All** link to select all users. **(2)**
Click **Send Notification**. **(3)** (This does NOT send it right away! The next step will create the email that you want to send.)



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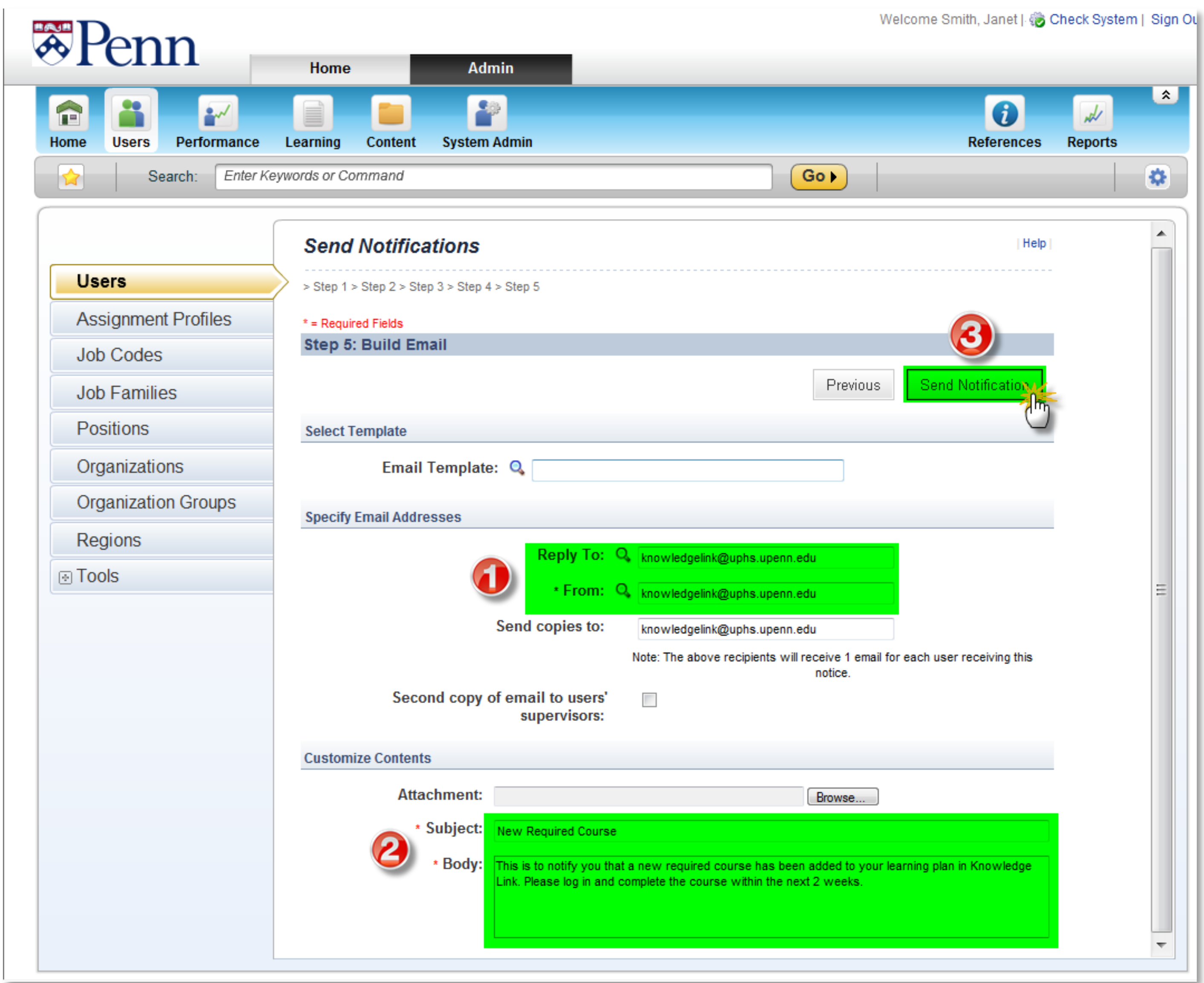
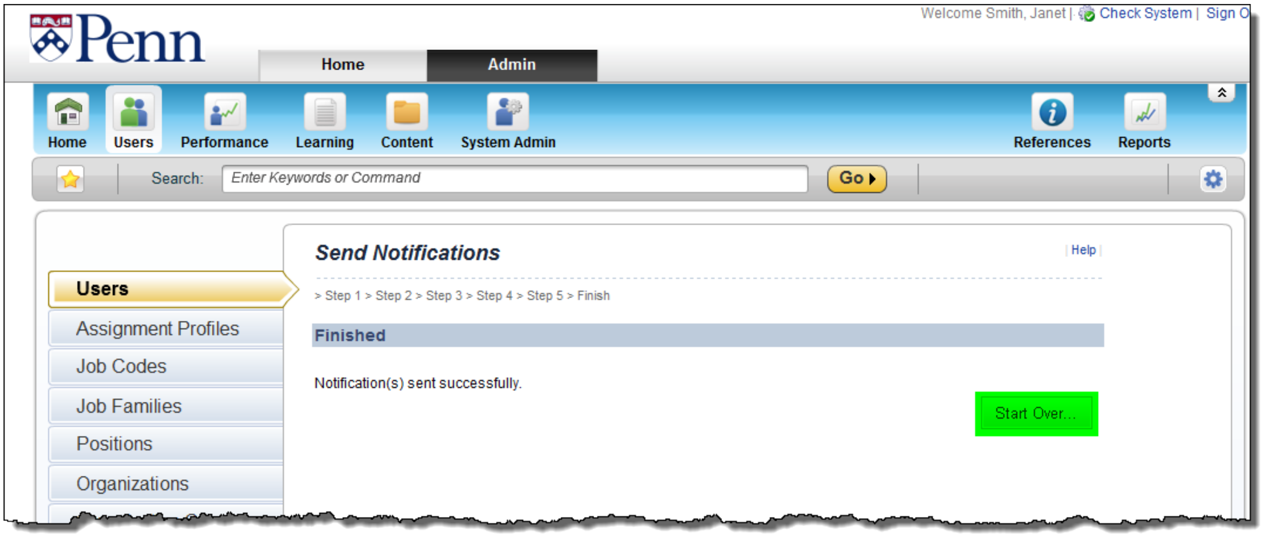
Select **Reply To** and **From** email addresses. **(1)** (You can also do a search for these.)
You also have the option of sending a copy to someone and sending a copy to the user's supervisor.
The **Subject** and **Body (2)** of the message should be clearly filled in so the users understand immediately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



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.



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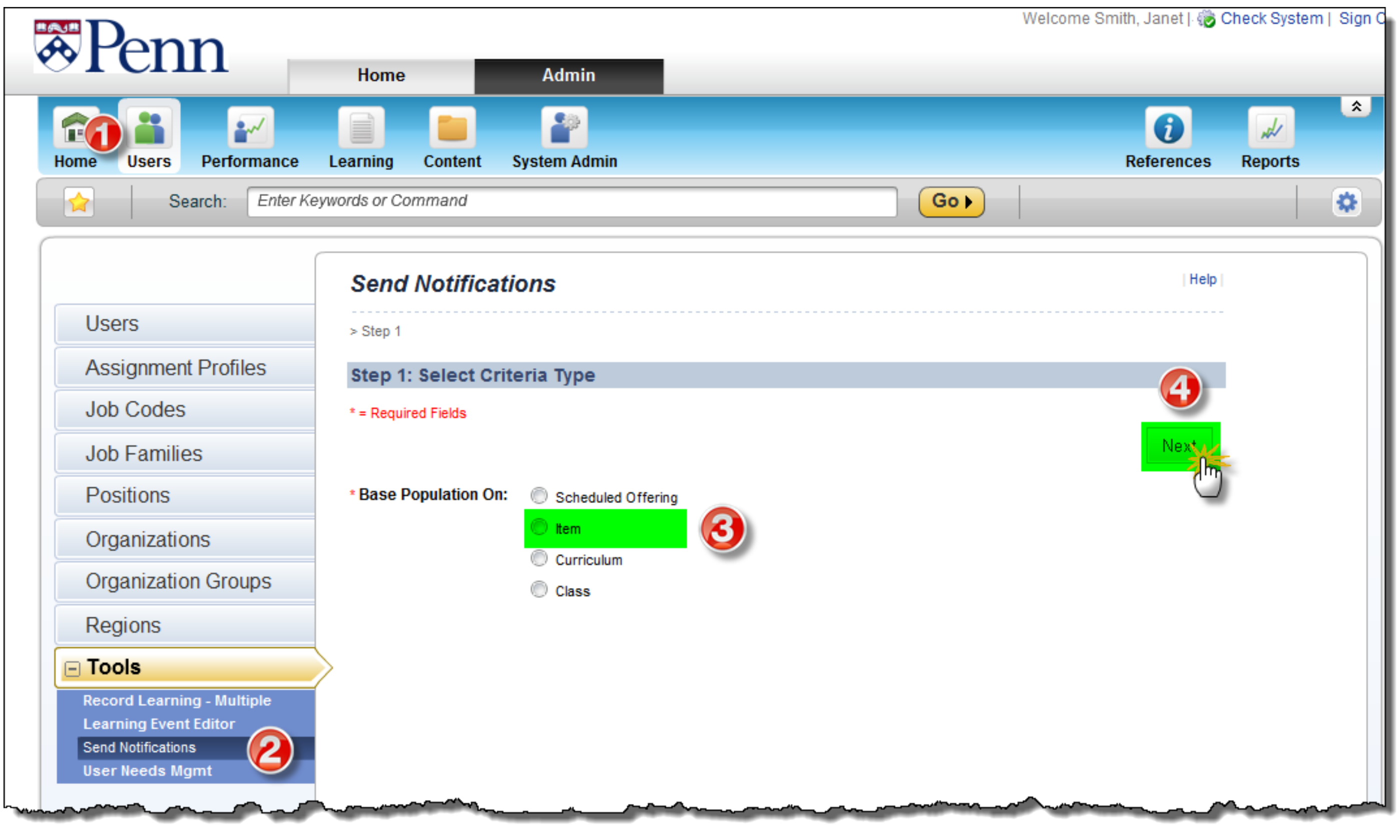
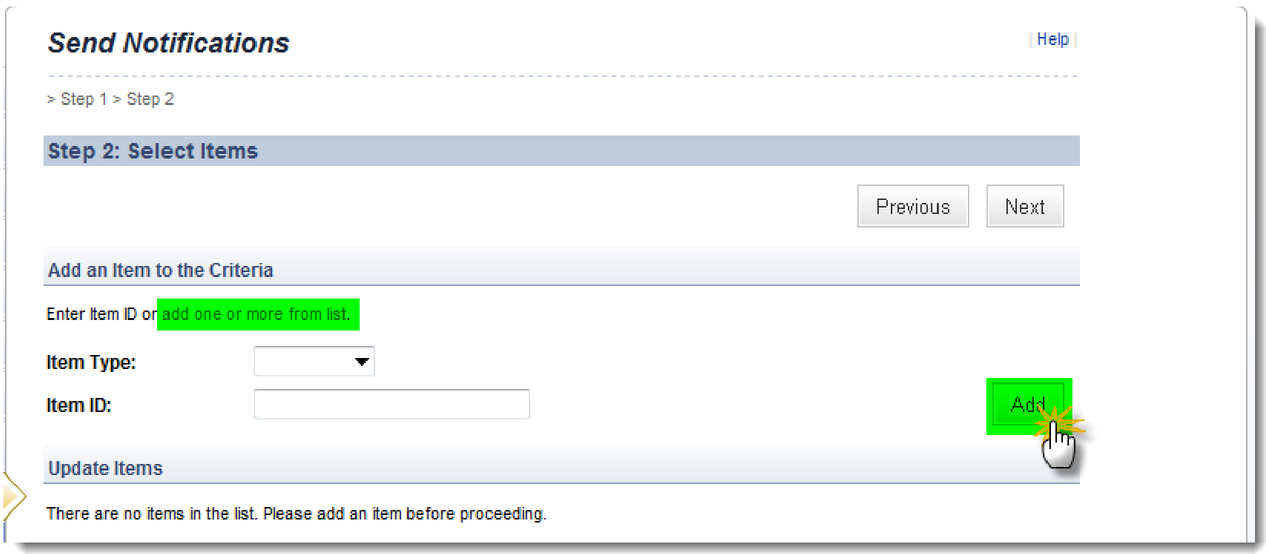
B. Create and Send Notifications Using Send Notifications Tool
(for groups of users based on scheduled offerings, items, or curricula)

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

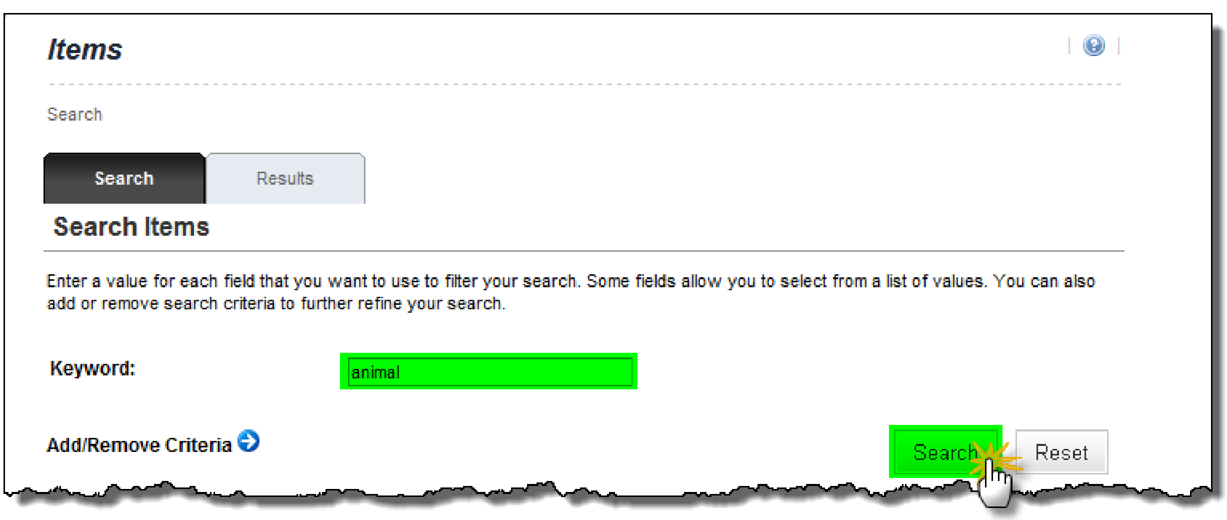
Step 1: Select Criteria Type
Select the criteria type on which the user population is based.
For this example, let's search for all users enrolled in a specific item. **(3)**
Click **Next**. **(4)**



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**.



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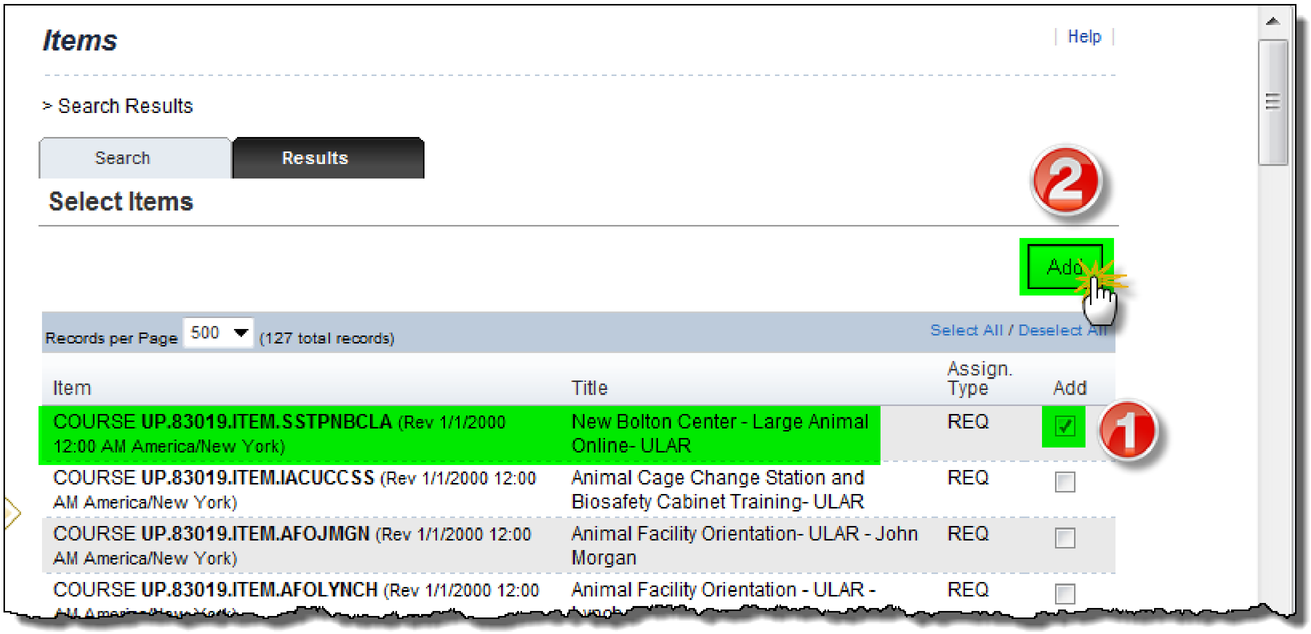
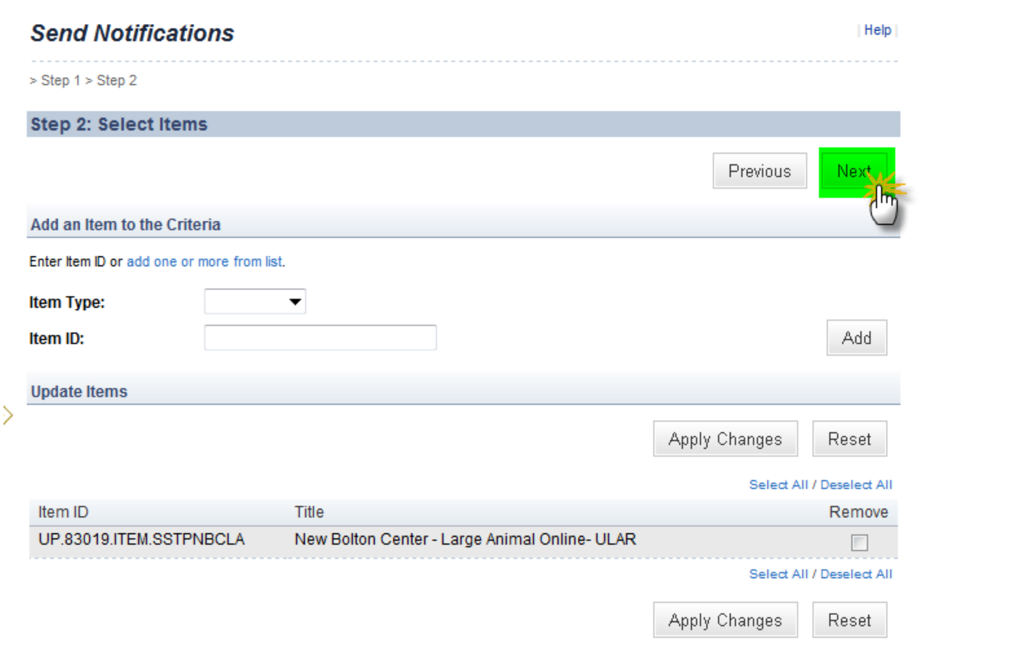
Select the item by clicking the **Add** checkbox. **(1)**
Click **Add (2)** to continue.



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



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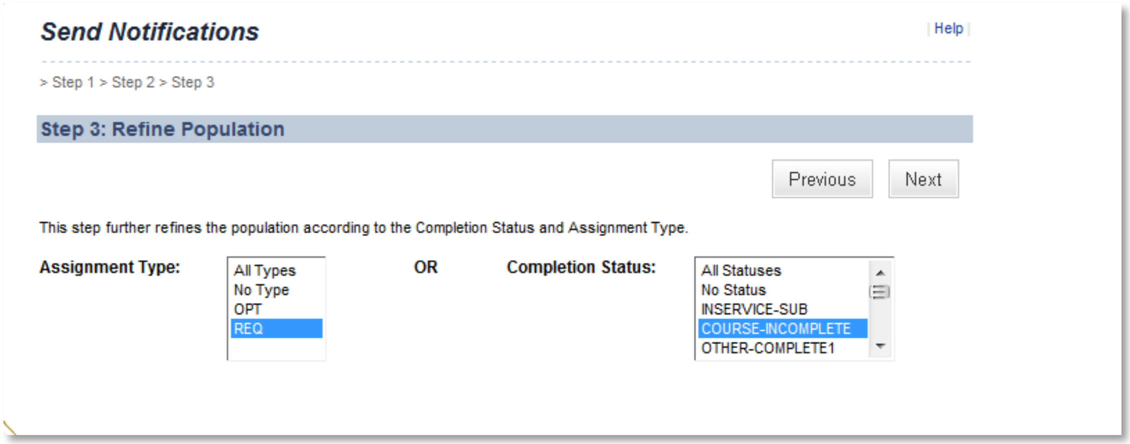
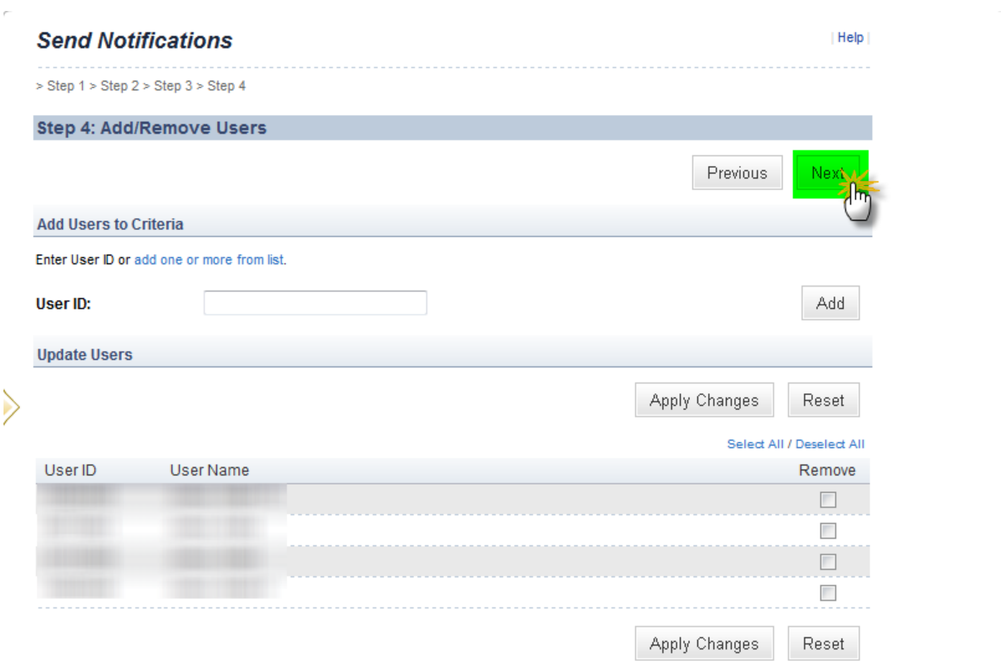
Step 3: Refine Population
Select an **Assignment Type** and/or a **Completion Status** for the Item. In this example, let's select all users who are incomplete and have the course required.
Click **Next**.



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**.



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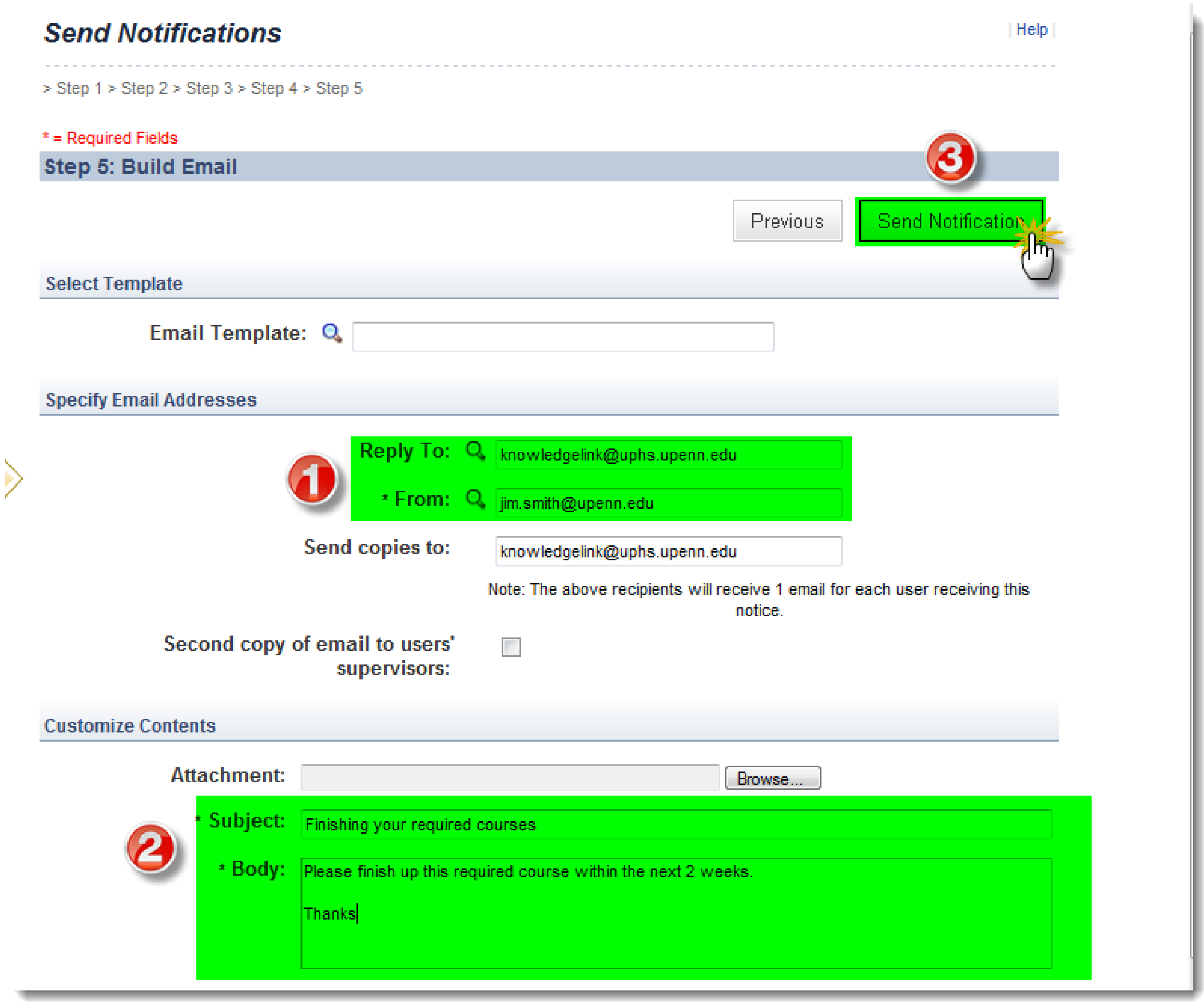
Step 5: Build Email

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**.



You have successfully sent a notification to all selected users.

Click the **Start Over** button to send additional notifications

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.