

Job Aid: Send Notifications

Purpose

The purpose of the Send Notifications job aid is to guide you through the step-by-step process of creating and sending notifications.

In this Job Aid, you will learn how to:

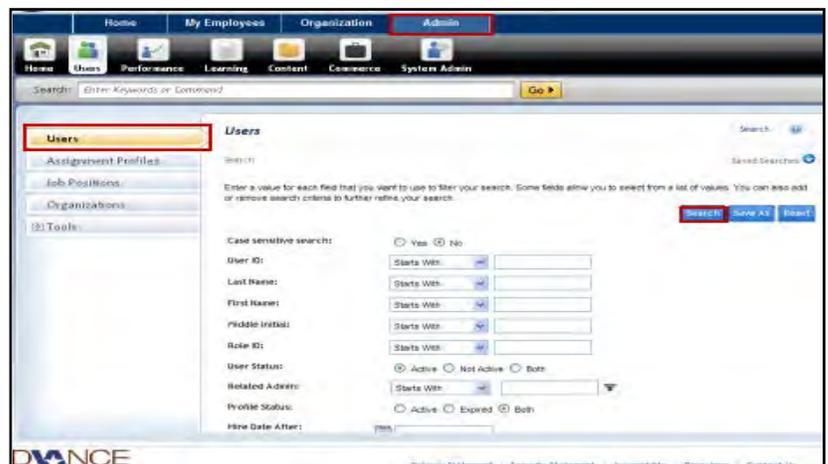
- Create and Send Ad-hoc Notifications from User Search Results
- Create and Send Notifications Using Send Notifications Tool



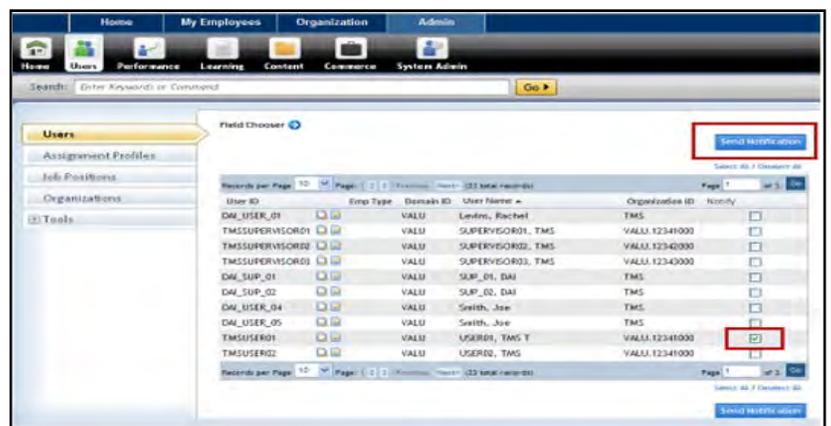
Task A. Create and Send Ad-hoc Notifications from User Search Results

Note: Verify that the **Admin** tab is selected.

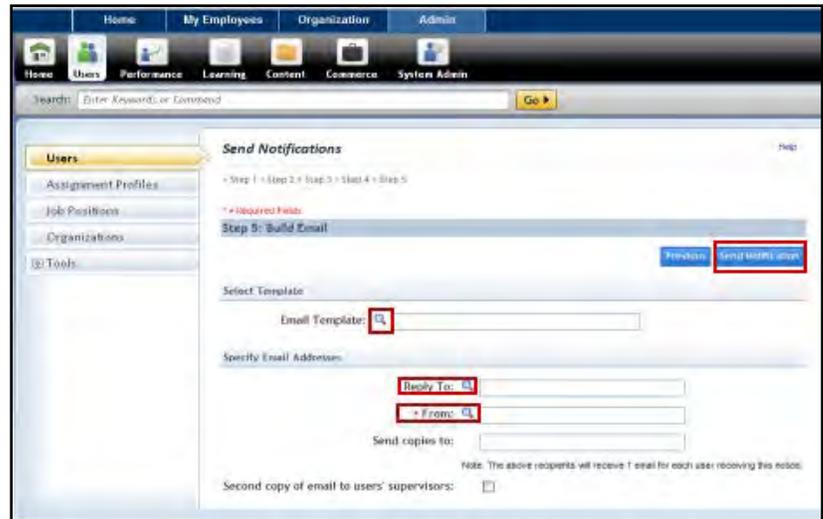
1. Navigate to **Users > Users**.
2. Click **Search** to search for users.



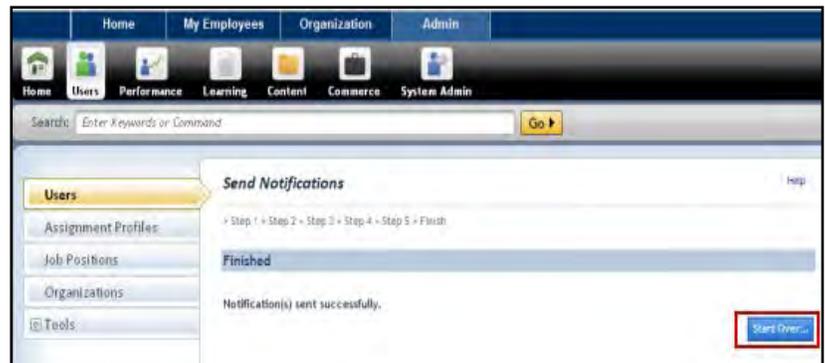
3. Click the **Select All** link to select all users or click the user's check box in the under **Notify** to send it to only one user.
4. Click **Send Notification**. *Step 5: Build Email* of the Send Notifications wizard displays.



5. Click the **Search** icon to select an email template.
6. Select a **Reply to** and **From** email address.
7. Contents of the message can be customized by making any necessary edits to the subject and body of the message, as well as by adding an attachment.
8. Click **Send Notification**. You have successfully sent a notification to all selected users.



9. Click the **Start Over...** button to send additional notifications to a user population based on a scheduled offering, item, curriculum, or class.





Task B. Create and Send Notifications Using Send Notifications Tool

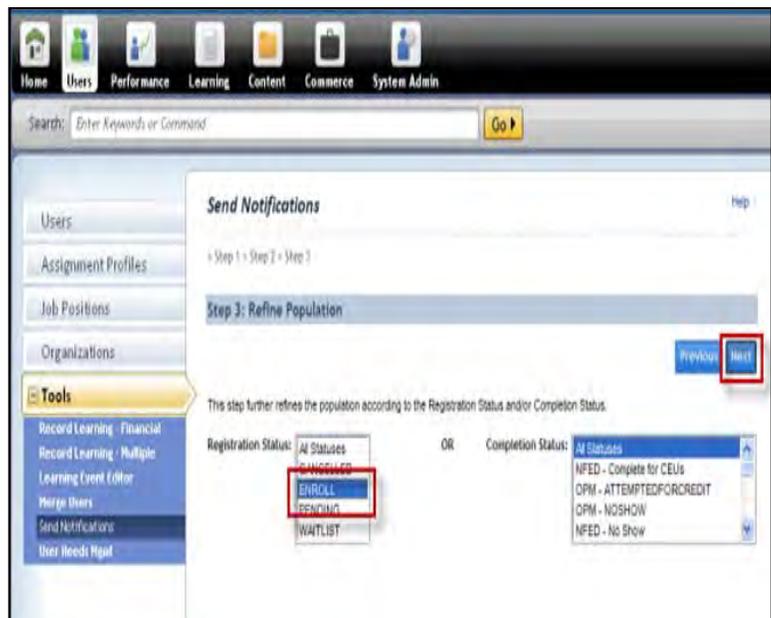
Note: Verify that the **Admin** tab is selected.

1. Navigate to **Users > Tools > Send Notifications**. *Step 1: Select Criteria Type* of the Send Notifications wizard displays.
2. Click the radio button for the criteria type on which the user population is based.
For this example, let's search all users within a specific **Scheduled Offering**.
3. Click **Next**. *Step 2: Select Scheduled Offering* of the Send Notifications wizard displays.

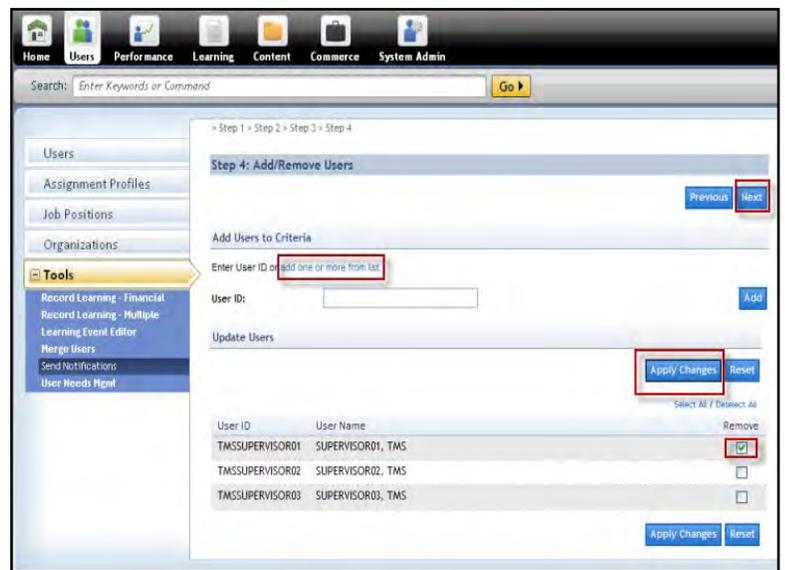
4. Add a scheduled offering to the criteria by clicking the **add one or more from list** link to search for the offering or search for a scheduled offering by entering criteria.
5. Click **Search**.
6. Select the scheduled offering by clicking the **Add** checkbox.
7. Click **Add** to continue.
8. Click **Next**. *Step 3: Refine Population* of the Send Notifications wizard displays.

Scheduled Offering ID	Item/Schedule Block	Description	Start Date/Time	End Date/Time	Remove
601850	HFED 1322012 (Rev 7/8/2010 09:27 AM America/New York)	Webinar	6/5/2011 04:00 PM America/New York	6/30/2011 06:00 PM America/New York	<input type="checkbox"/>

9. Select a **Registration Status** for the scheduled offering or a **Completion Status** for the scheduled offering.
10. Click **Next**. *Step 4: Add/Remove Users of the Send Notifications wizard displays.*



11. Review the list of enrolled users.
12. Click the **add one or more from the list** link to add more users or click the **Remove** checkbox for users you wish to remove from the list, and click **Apply Changes**.
13. Click **Next**. *Step 5: Build Email of the Send Notifications wizard displays.*



14. Click the **Search** icon to select an email template.
15. Select a **Reply To** and **From** email address.
16. Contents of the message can be customized by making any necessary edits to the subject and body of the message, as well as by adding an attachment.
17. Click **Send Notification**. You have successfully sent a notification to all selected users.
18. Click the **Start Over** button to send additional notifications to a user population based on a scheduled offering, item, curriculum, or class.

The screenshot displays the 'Send Notifications' workflow in the TMS. The left sidebar shows the 'Tools' menu with options like 'Record Learning - Financial', 'Record Learning - Multiple', 'Learning Event Editor', 'Merge Users', 'Send Notifications', and 'User Needs Mail'. The main content area shows a progress bar for steps 1 through 5. Step 5, 'Build Email', is the current step. It includes a search bar for 'Email Template', a 'Specify Email Addresses' section with 'Reply To' and 'From' fields, and a 'Send Notification' button. A note at the bottom states: 'Note: The above recipients will receive 1 email for each user receiving this notice.' There is also a checkbox for 'Second copy of email to users' supervisors'.