



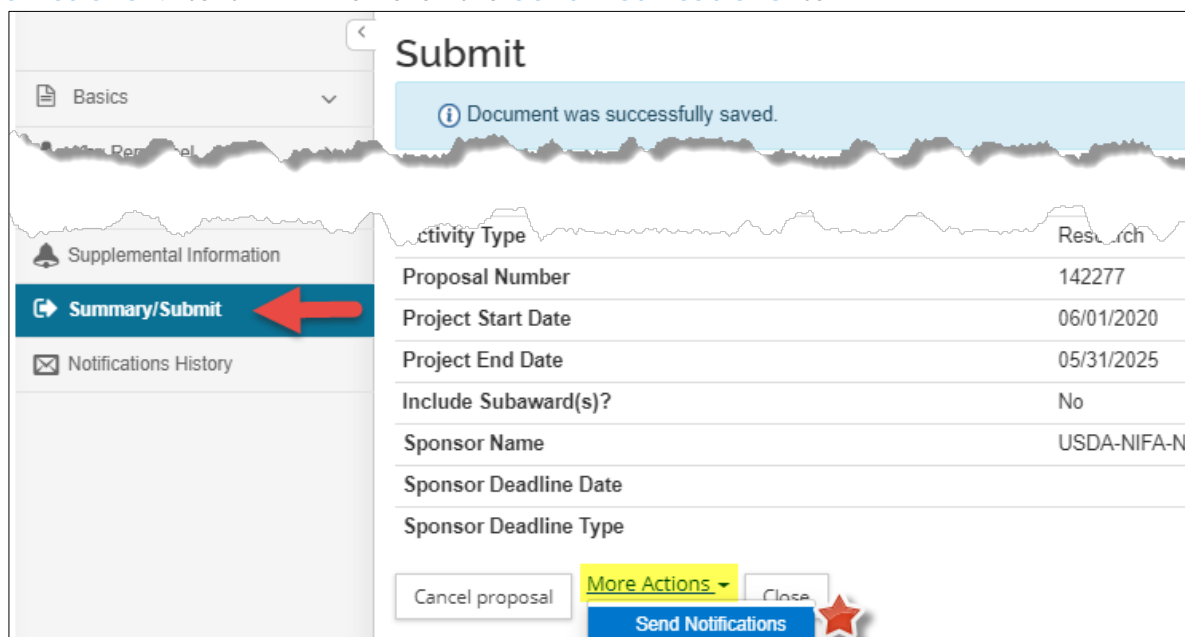
Overview:

KR PD has a customizable notification that can be used for multiple communication purposes. In order for it to send correctly and be useful, the recipients, subject line, and message body must be accurately entered.

A new **Notifications History** section in the KR PD record will track all notifications sent from within the KR PD record, providing date/timestamp information for multiple business processes.

Procedure:

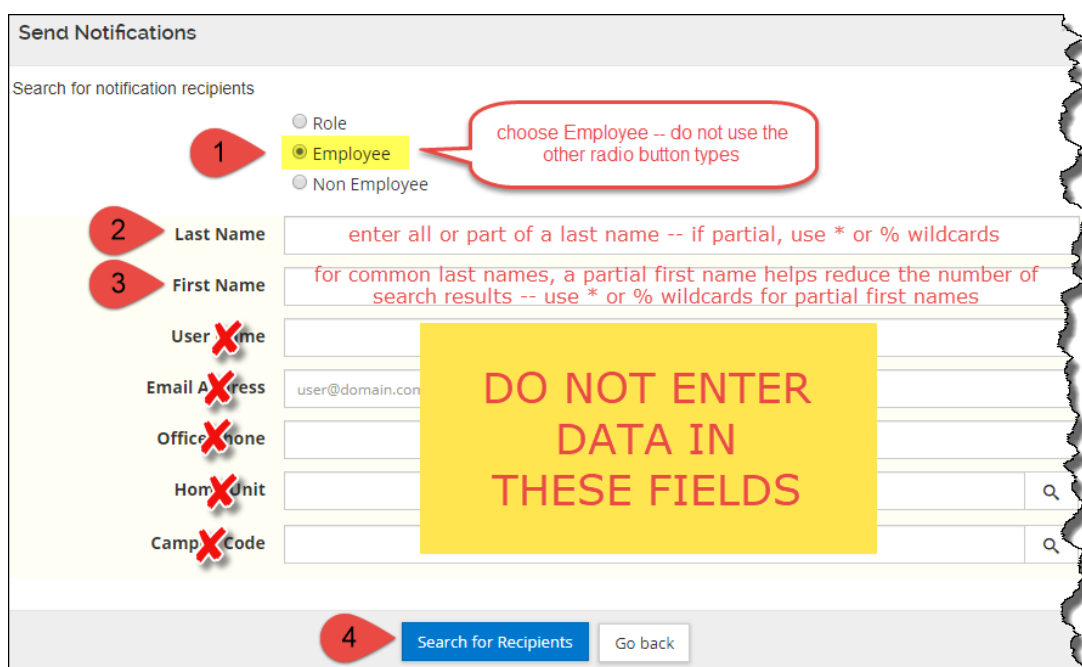
In an open KR PD proposal, navigate to the **Summary/Submit** section. At the bottom of the page, click the **More Actions** ▼ text link. Then click the **Send Notifications** item.



A blank notification person search will open as a lightbox (on top of the current page).

An effective search uses minimal criteria:

1. Click the **'Employee'** radio button.
2. Enter all or part of the recipient's **Last** name.
 - a. If unsure of spelling, use a partial name with * or % wildcard characters. (e.g., *Carst**, to return every person whose last name starts with these five letters)



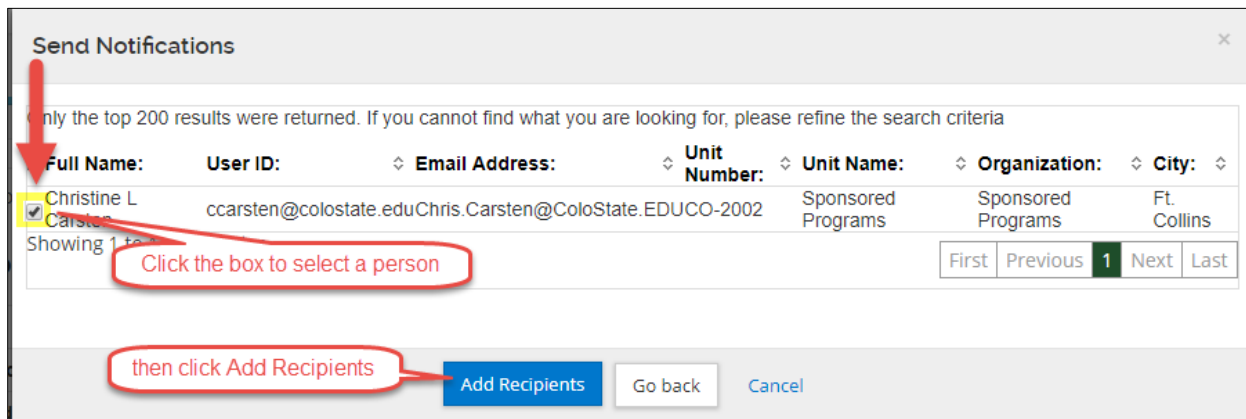


- 3. For common last names, entering part of the **First** name can limit search results, but the system uses the HR 'legal' first name, not preferred first name. (e.g., James instead of Jim, Robert instead of Rob).
 - a. Use wildcard characters * or % to avoid 'no results' (e.g., J*, Rob%).

** Do not enter data in the remaining fields. **

- 4. Click the **Search for Recipients** button.

In the search results, click the box next to the name of the person you want to add as a recipient:



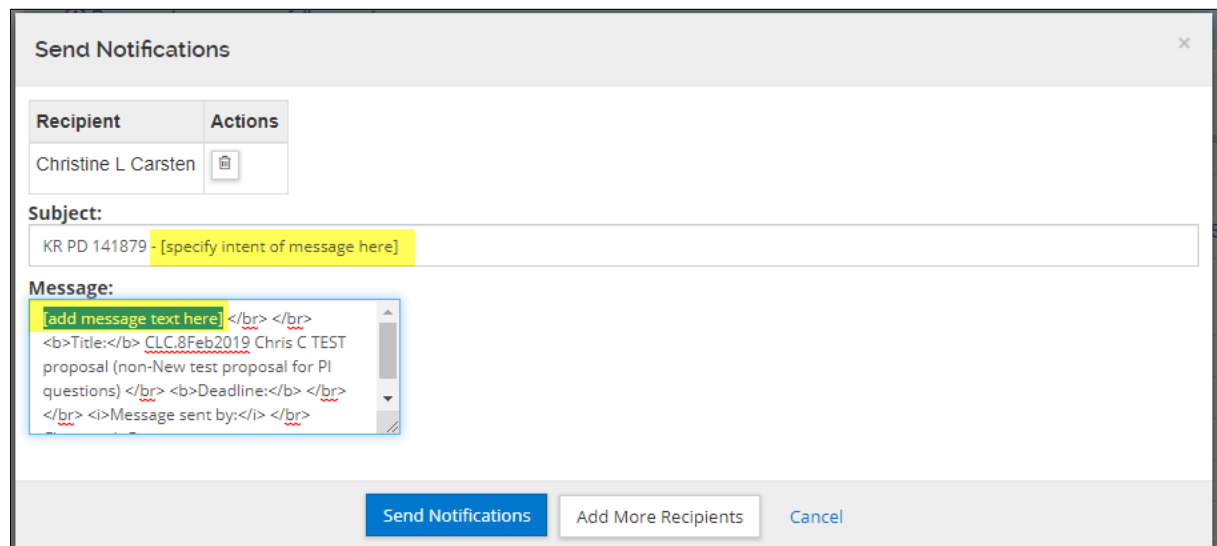
You can choose multiple recipients. Use the **Add More Recipients** button as many times a needed.

NOTE: This search **DOES NOT** use the CSU Outlook address book; it is looking at the Kuali person table. Group and shared mailbox Outlook email addresses are not available.

UPDATE: There is default formatting for this notification as of August 2019. The subject line and message should be completed as needed for the intended action. **Please note** the **placeholders** for you to customize the notification, in the **Subject** line and at the beginning of the **Message** body.

* When you click the **Send Notifications** button, the lightbox will close. (If you click **Cancel**, the lightbox closes, and no message is sent.)

NOTE: The 'sender' will be the Kuali system (*vpr_do_not_reply*), not the person who is creating the notification.



If you want the response outside of KR PD (i.e., in Outlook), put that instruction in the **Message** area.



The **Notifications History** section will show the entry for the sent message:

Date Created	Recipients	Subject	Message
08/07/2019 09:27 AM	ccarsten@colostate.edu	[no formatting]	This is a sample of the information shown on Notifications History. reply to ccarsten@colostate.edu
08/15/2019 10:35 AM	ccarsten@colostate.edu	KR PD 141879 - [specify intent of message here]	[add message text here] Title: CLC.8Feb2019 Chris C TEST proposal (non-New test proposal for PI questions) Deadline: Message sent by: Christine L Carsten

This is the result in Microsoft Outlook:

NOTE: DO NOT reply to this email. A reply will not update the PD record, and the email will not go anywhere to be answered.

