

How to Assign an Item or Curriculum, Remove an Assignment or Modify One – Single User

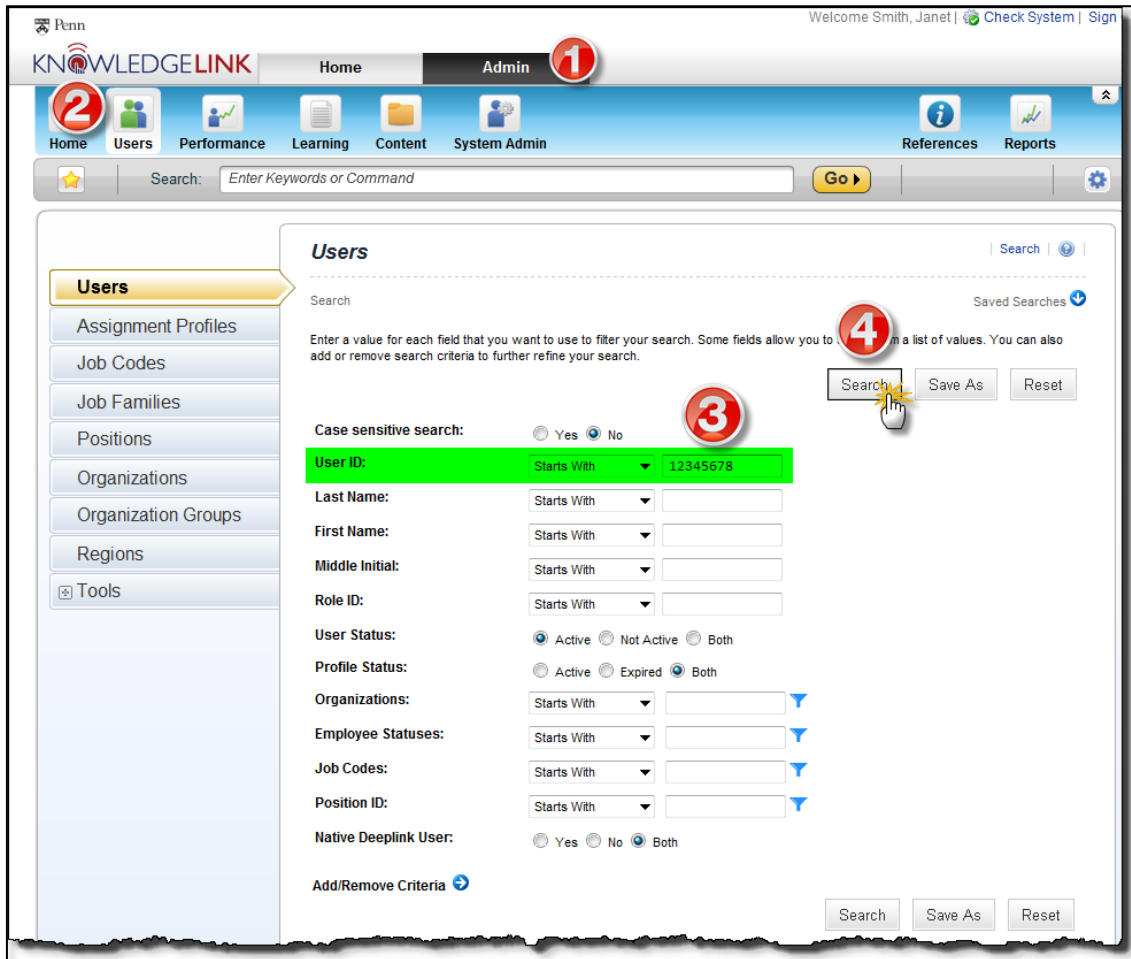
The purpose of this 'How To' is to guide administrators through the step-by-step process of assigning items or curricula, removing pre-existing assignments, and modifying assignments for single users.

- A. Assign Items Directly to an Individual User Record
- B. Assign Curriculum Directly to an Individual User Record
- C. Remove an Assignment
- D. Modify an Assignment

A. Assign Items Directly to User Record

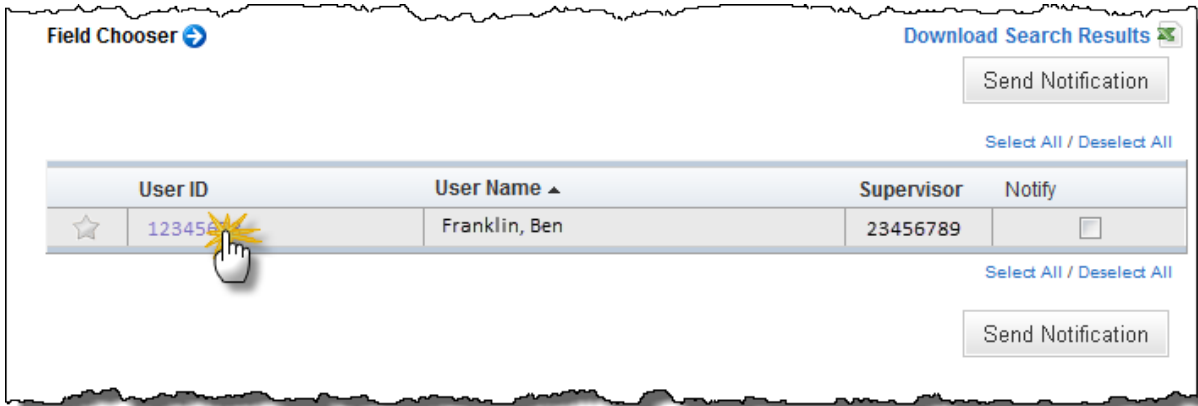
PENN EXAMPLE: You need to assign as required two mouse courses to Ben Franklin.

1. Verify the **Admin** tab is selected.
2. Click on **Users**.
3. Enter criteria to find the user record. Here we just used the user's Penn ID number (**User ID**)
4. Click **Search**.

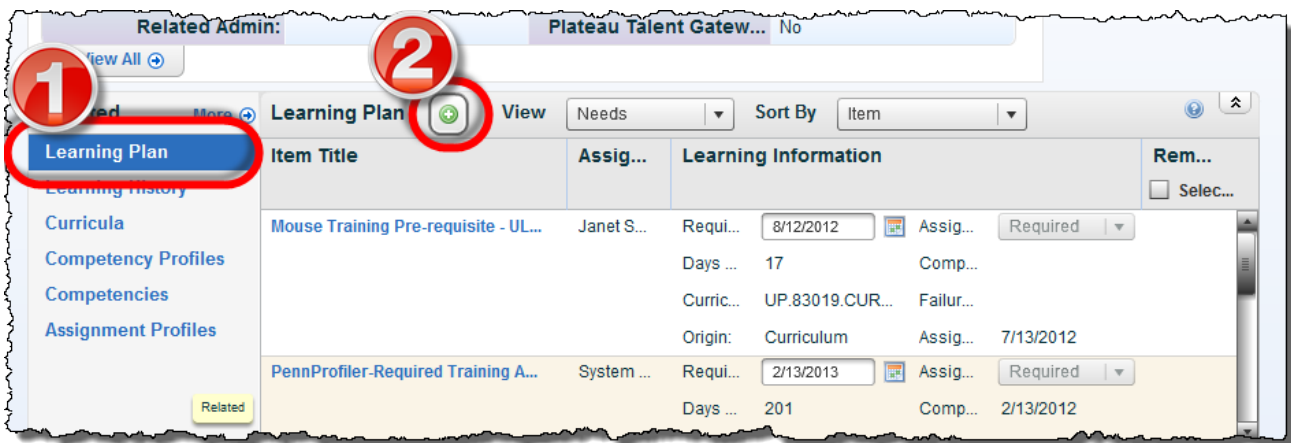


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Click the **User ID** link.



1. Select **Learning Plan** from the **Related** section of the user's record.
2. Click the green plus sign to add to the learning plan, i.e., Assign another course.



Enter criteria to search for the item to assign—'mouse' in this example.

1. Click **Search**.



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1. Click the **Add** checkbox(s) to select the item(s) to add. Modify the **Assign Date** as necessary.
2. Click the **Add** button to add the item(s) to the user's **Learning Plan**.

Learning Plan

Keyword:

Add/Remove Criteria [↗](#)

Add Items To User

Records per Page: 10 (9 total records) [Select All / Deselect All](#)

Item	Title	Assign Date (MM/DD/YYYY)	Add
COURSE UP.83019.ITEM.SSTPM (Rev '1' - 1/1/2000 12:00 AM America/New York)	Mouse Training Pre-requisite - ULAR	7/26/2012	<input type="checkbox"/>
COURSE UP.83019.ITMC.CURRMOUSE (Rev '1' - 1/1/2000 12:00 AM America/New York)	Mouse Training Curriculum -ULAR	7/26/2012	<input type="checkbox"/>
COURSE UP.83019.ITEM.INTROM (Rev '1' - 1/1/2000 12:00 AM America/New York)	Mouse	7/26/2012	<input type="checkbox"/>
COURSE UP.83019.ITEM.SSHOTM (Rev '1' - 1/1/2000 12:00 AM America/New York)	Species-Specific Hands-on Training -- Mouse - ULAR	7/26/2012	<input checked="" type="checkbox"/>
COURSE SSHOTM (Rev 1 - 5/21/2012 03:33 PM America/New York)	Introduction to Mouse handling	7/26/2012	<input checked="" type="checkbox"/>

1. Add/edit the required date using the calendar icon and select an **Assignment Type** from the drop-down menu. (You can also enter the date manually by typing it.)
2. Click **Save**.

Learning Plan Needs Item

Item Title	Assigned By	Learning Information	Remove
Introduction to Mouse handling	Janet Smith	Required Date: 7/30/2012 <input type="button" value="Calendar"/> Assignment Ty... Required <input type="button" value="Dropdown"/>	<input type="checkbox"/> Select All
Mouse Training Pre-requisite - ULAR	Janet Smith	Required Date: 8/12/2012 <input type="button" value="Calendar"/> Assignment Ty... Required <input type="button" value="Dropdown"/>	
PennProfiler-Required Training Assessment...	System AP	Required Date: 2/13/2013 <input type="button" value="Calendar"/> Assignment Ty... Required <input type="button" value="Dropdown"/>	

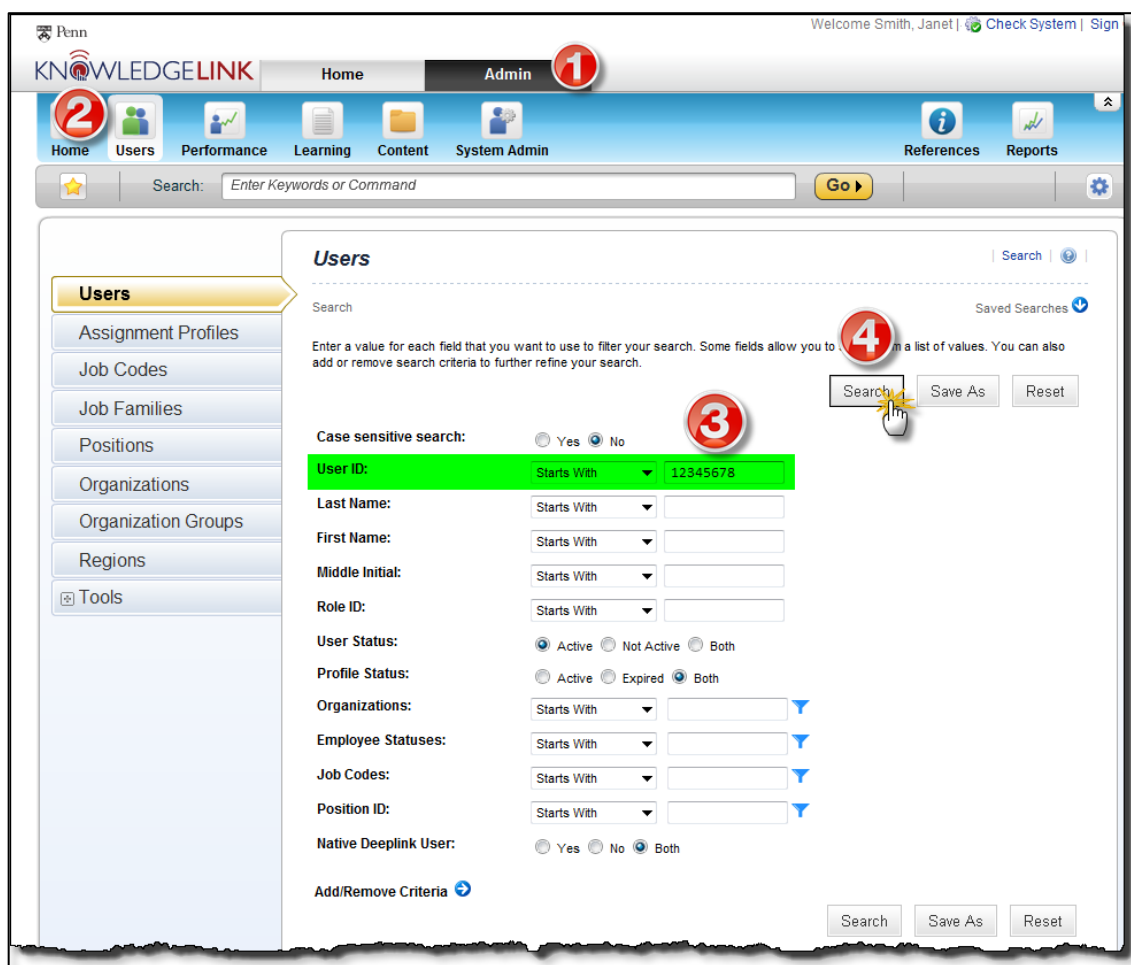
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B. Assign Curriculum Directly to User Record

PENN EXAMPLE: You need to assign a guinea pig curriculum to Ben Franklin.

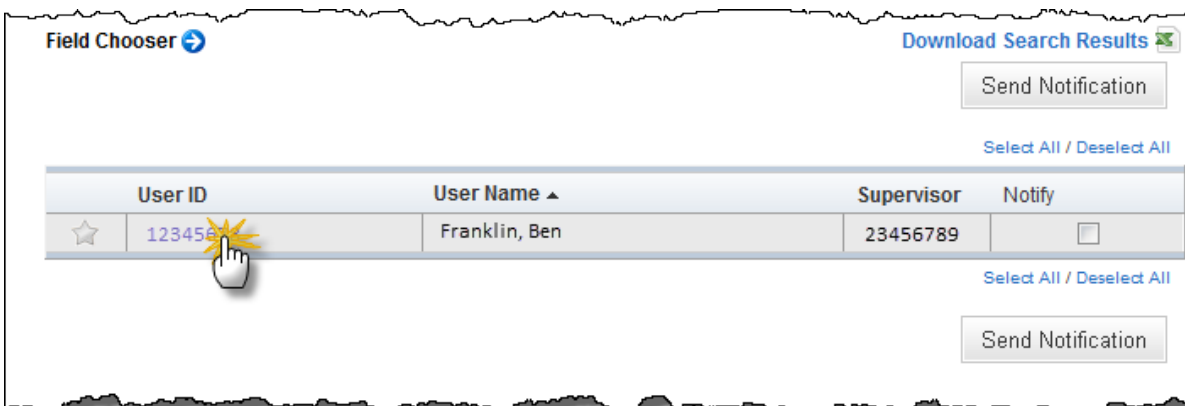
The assignment technique is the same for curricula as for items.

1. Verify the **Admin** tab is selected.
2. Navigate to **Users > Users**.
3. Enter the **User ID** to find the persons record.
4. Click **Search**.

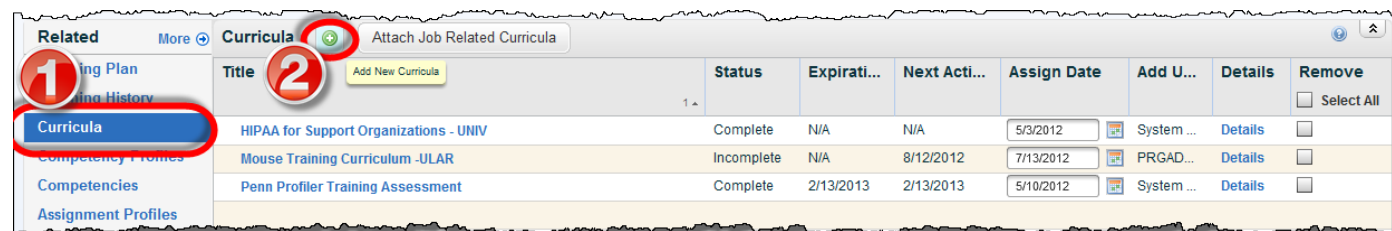


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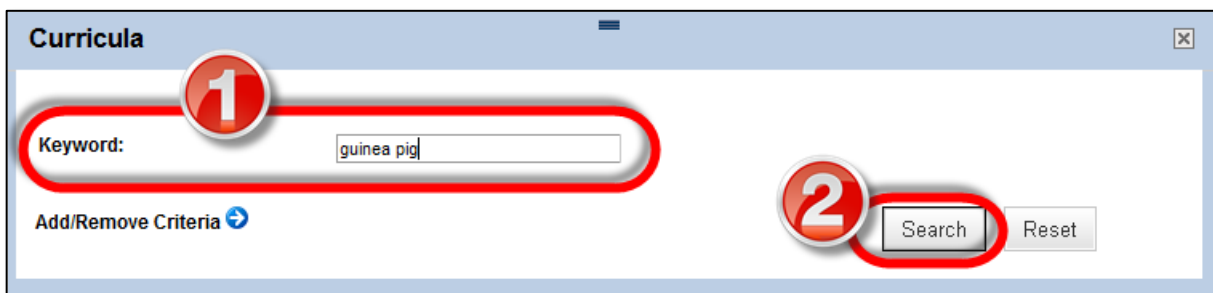
Click the **User ID** link.



1. Select the **Curricula** tab from the **Related** area.
2. Click the add new curricula button.



1. Enter **Keywords** to search for the curriculum to add, in this case "guinea pig".
2. Click **Search**.



How to Assign an Item or Curriculum, Remove an Assignment or Modify One – Single User

1. Click the **Add** checkbox next to the curricula to add. Modify the assign date as necessary.
2. Click **Add**.

Curricula

Keyword:

Add/Remove Criteria [↔](#)

Add Curricula To User

Records per Page: 10 (6 total records) [Select All / Deselect All](#)

Curriculum ID	Title	Assign Date (MM/DD/YYYY)	Add
UP.83019.CURR.CURRGUINEAPIG	Guinea Pig Training Curriculum - ULAR	7/26/2012	<input checked="" type="checkbox"/>
UP.83019.CURR.SSHOTGPE	Species-Specific Hands-on Training -- Guinea Pig-Exemption-ULAR	7/26/2012	<input type="checkbox"/>
UP.83019.CURR.SSTPGP	Guinea Pig Training Pre-reg... ULAR	7/26/2012	<input type="checkbox"/>

From the **Curricula** tab, view the assignments to verify the curriculum was added.

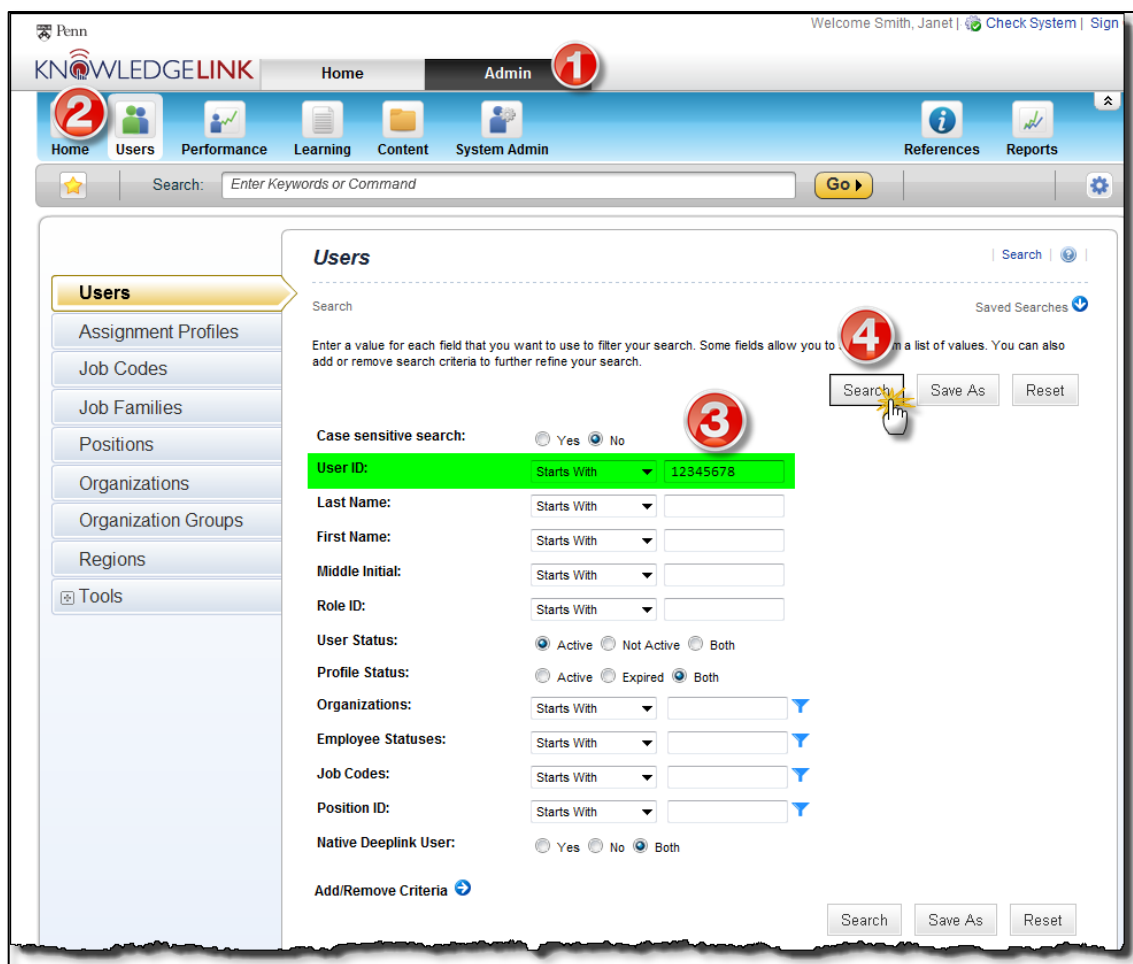
Curricula	Guinea Pig Training Curriculum - ULAR	Incomplete	N/A	N/A
View Profile	View Profile	View Profile	View Profile	View Profile

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C. Remove an Assignment

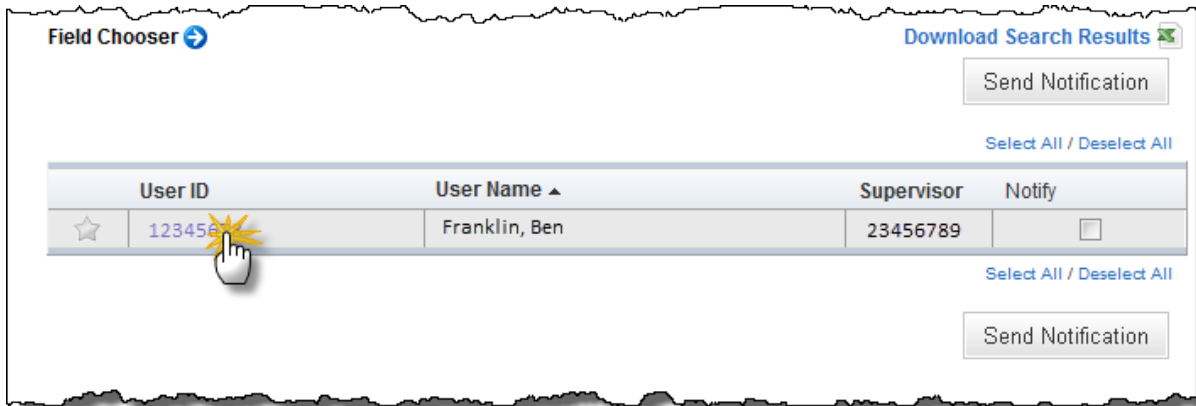
Removing an item assignment and a curriculum assignment are so similar that we will show only the item one here as a detailed example and just a screen shot of the curriculum removal.

1. Verify the **Admin** tab is selected.
2. Navigate to **Users > Users**.
3. Enter criteria to find the user record.
4. Click **Search**.

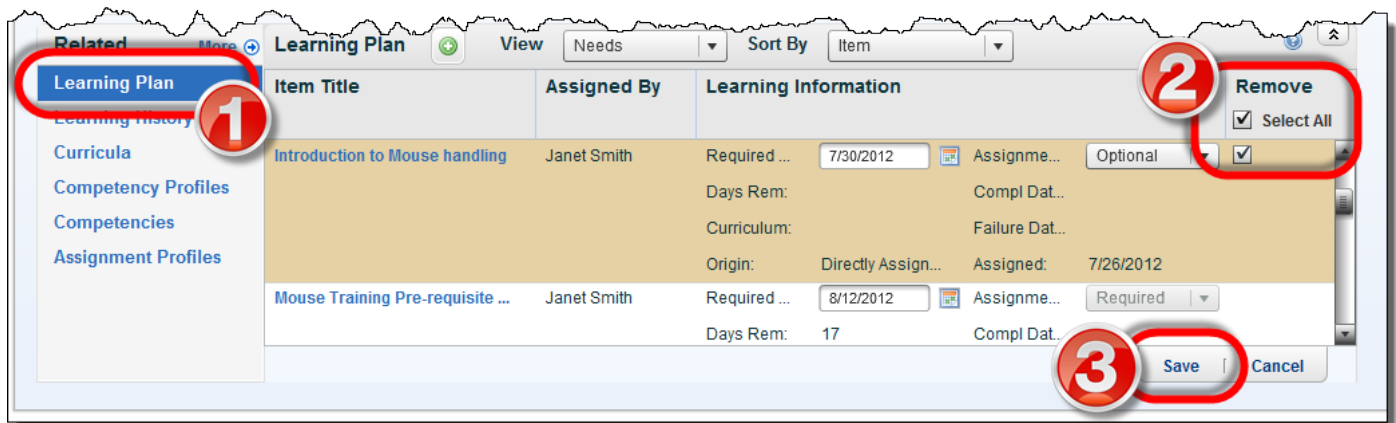


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Click the **User ID** link.



1. Select the **Learning Plan**.
2. Find the assignment that you need to remove and click the checkbox on the right under **Remove**.
3. Click **Save** and the assignment is removed.



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This screen shot shows the similar action to remove a curriculum assignment for a single user.

1. Select **Curricula**
2. Click on the checkbox to the right of the curriculum that you need to remove
3. Click **Save** and the assigned curriculum is removed.

Title	Status	Expirati...	Next Acti...	Assign Date	Add U...	Details	Remove
CITI Responsible Conduct of Research Training - UNIV	Incomplete	N/A	8/16/2012	7/17/2012	Migrated...	Details	<input type="checkbox"/>
HIPAA for Support Services - CURR	Complete	N/A	N/A	10/6/2012	System ...	Details	<input type="checkbox"/>
Occupational Health and Safety Animal Users Orientation ...	Complete	5/17/2013	5/17/2013	10/12/2012	UP.PEN...	Details	<input type="checkbox"/>
Radiation Safety-Irradiator Users Training-EHRS	Incomplete	N/A	10/26/2012	10/12/2012	UP.PEN...	Details	<input checked="" type="checkbox"/>

D. Modify an Assignment

Follow the instructions in Part C above. Find the assignment that you need to modify and make changes to assignment type and/or dates. Click **Save** and the assignment is modified.

Additional Assign/Remove Resources

- [How to Assign an Item or Curriculum - Group](#)
- [How to Batch Add/Remove Required Item & Curriculum Assignments With the User Needs Mgmt Tool](#)