

How to Batch Add/Remove Required Item & Curriculum Assignments With the User Needs Mgmt Tool

The purpose of this 'How To' is to guide administrators through the step-by-step process of batch adding/removing required item or curriculum assignments using the **User Needs Management** tool.

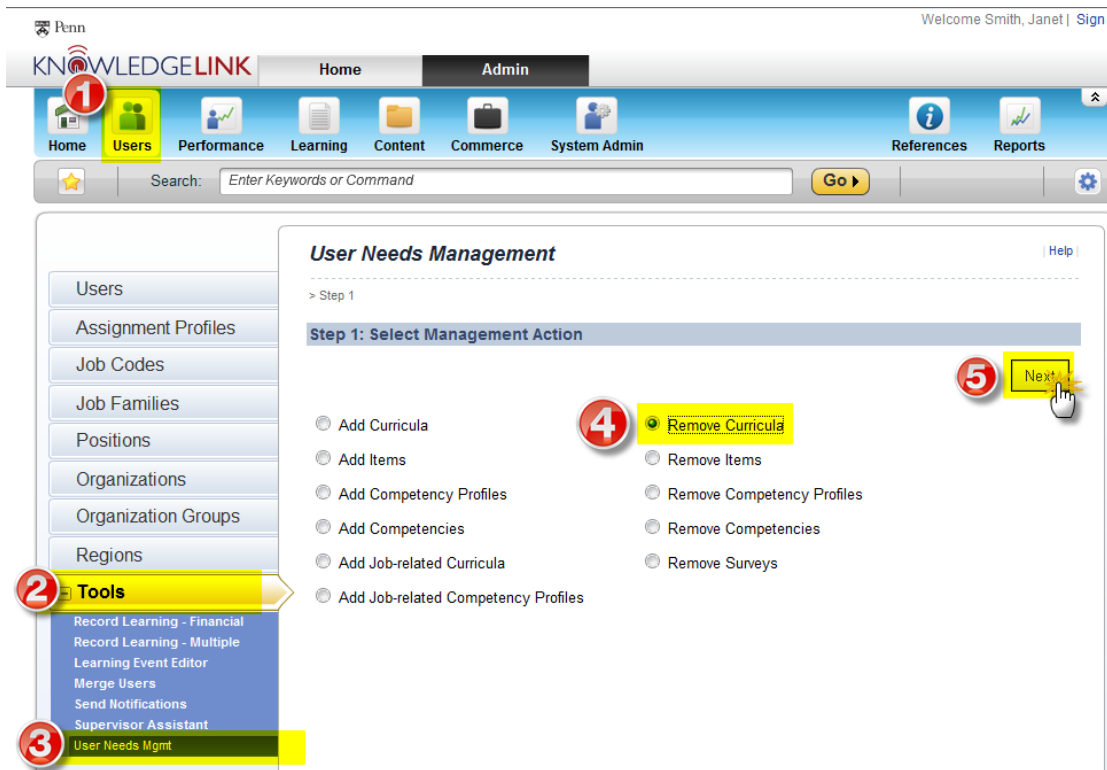
It is crucial to know whether the assignment is of an item or a curriculum. If you remove the item(s) but not the curriculum, for example, the curriculum requirement will remain active in the user's Learning Plan. We will show the removal process. The addition process is almost exactly the same.

- A. Remove a Required Curriculum
- B. Remove a Required Item

A. Remove a Required Curriculum

PENN EXAMPLE: You need to remove the required Bird Training Curriculum (UP.83019.CURR.CURRBIRD) from several Penn IDs.

1. Click on the **Users** button
2. Expand the **Tools** menu
3. Select **User Needs Mgmt**
4. Click on the **Remove Curricula** radio button
5. Click on the **Next** button



How to Batch Add/Remove Required Item & Curriculum Assignments With the User Needs Mgmt Tool

Click on the link "add one or more from list"

User Needs Management Help

> Step 1 > Step 2

Step 2: Select Users

Previous Next

* = Required Fields

Add Users

Enter User ID or add one or more from list.

* User ID:

Add

When you need to find multiple users, create a comma separated list of their Penn IDs and paste it into the User ID field after you click "add one or more from list" as in the previous example.

1. Select "Any" as a delimiter for the **User ID** field and create a comma-separated list of the Penn IDs. (see [How to Create a Comma Separated List from an Excel Column](#)) to cut and paste into the field.
2. Click **Search**.

Users

Search

Search Results

Search Users

Enter a value for each field that you want to use to filter your search. Some fields allow you to select from a list of values. You can also add or remove search criteria to further refine your search.

Keyword:

User ID:

Last Name:

12345678,23456789,34567890,13456789

Search Reset

With multiple user IDs, separate them with commas.

1

2

How to Batch Add/Remove Required Item & Curriculum Assignments With the User Needs Mgmt Tool

User | Help |

> Search Results

Search **Results**

Select Users For Needs Management

Select all the Users of the search results

Add

User ID	User Name	Select All / Deselect All	Add
10000000	XXXXXXXXXXXXXXXX	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
10000000	XXXXXXXXXXXXXXXX	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Select All / Deselect All

User Needs Management | Help |

> Step 1 > Step 2

Step 2: Select Users

Previous **Next**

* = Required Fields

Add Users

Enter User ID or add one or more from list.

* User ID: Add

Edit Users

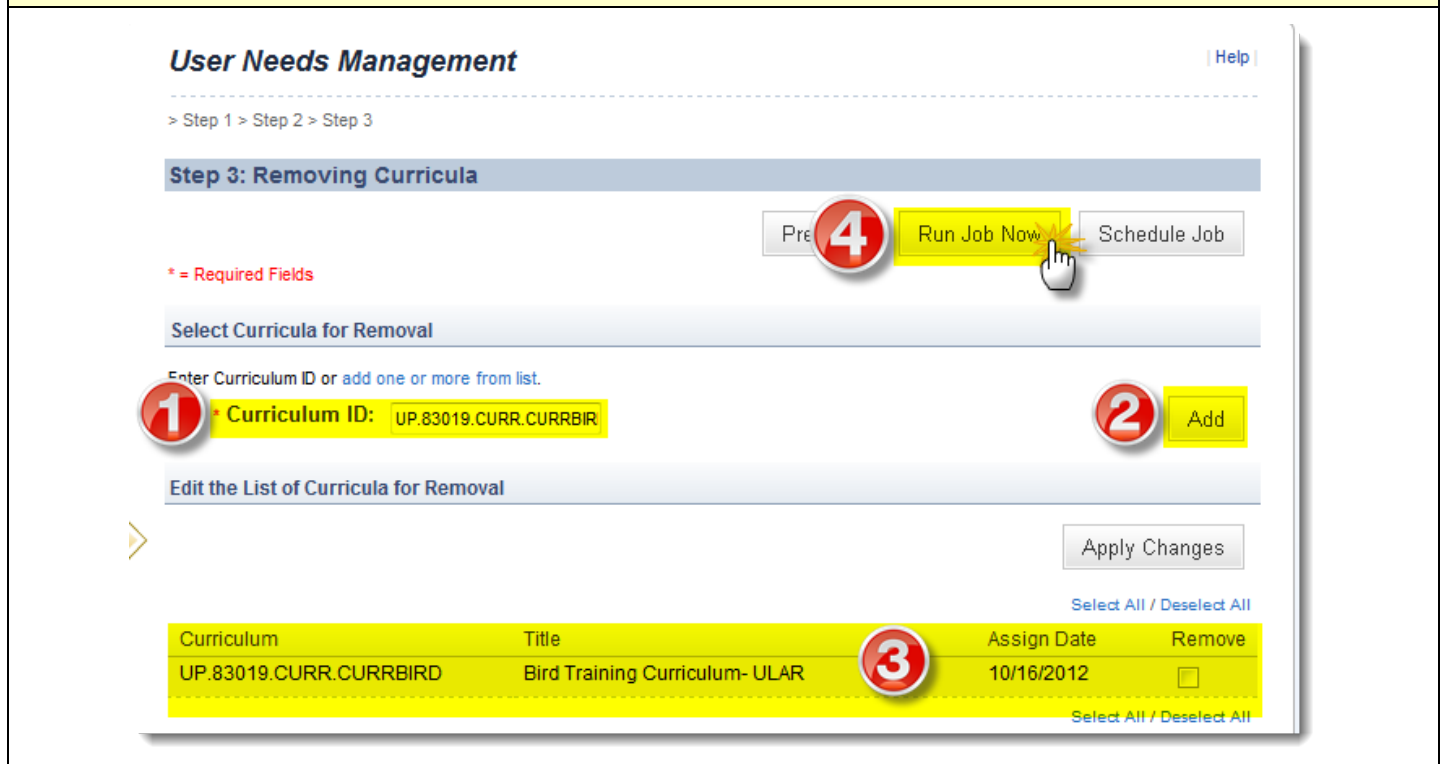
Apply Changes

User ID	Name	Remove
10000000	XXXXXXXXXXXXXXXX	<input type="checkbox"/>
10000000	XXXXXXXXXXXXXXXX	<input type="checkbox"/>

Select All / Deselect All

How to Batch Add/Remove Required Item & Curriculum Assignments With the User Needs Mgmt Tool

1. Enter the **Curriculum ID** in the field - **UP.83019.CURR.CURRBIRD**.
2. Click the **Add** button to select it.
3. Note that the curriculum appears at the bottom of the tool.
4. Click **Run Job Now** to remove the curriculum from the multiple people identified.



User Needs Management [Help](#)

> Step 1 > Step 2 > Step 3

Step 3: Removing Curricula

* = Required Fields

Pre **4** Run Job Now Schedule Job

Select Curricula for Removal

Enter Curriculum ID or add one or more from list.

1 * Curriculum ID: UP.83019.CURR.CURRBIR **2** Add

Edit the List of Curricula for Removal

> Apply Changes

Select All / Deselect All

Curriculum	Title	Assign Date	Remove
UP.83019.CURR.CURRBIRD	Bird Training Curriculum- ULAR	10/16/2012	<input type="checkbox"/>

Select All / Deselect All

3

ATTENTION: If Items on a user's Learning Plan were assigned **FROM A CURRICULUM**, the assignment must be removed by unassigning the entire CURRICULUM. You are not able to unassign individual items that were assigned from a curriculum. Make sure you know if the training you're working with was assigned as part of curriculum or as a "free floating" item. All assignments made from Penn Profiler are made as curriculum assignments.

How to Batch Add/Remove Required Item & Curriculum Assignments With the User Needs Mgmt Tool

B. Remove a Required Item

PENN EXAMPLE: You've been asked to remove the required item, New Staff Orientation, from Penn ID 10051662. (with additional instructions for batches)

1. Click on the **Users** button
2. Expand the **Tools** menu
3. Select **User Needs Mgmt**
4. Select the **Remove Items** radio button
5. Click on the **Next** button

The screenshot displays the Knowledge Link web application interface. At the top, there is a navigation bar with 'Home' and 'Admin' tabs. Below this is a menu with icons for Home, Users, Performance, Learning, Content, Commerce, System Admin, References, and Reports. A search bar is located below the menu. The main content area is titled 'User Needs Management' and shows 'Step 1: Select Management Action'. The left sidebar contains a list of navigation items: Users, Assignment Profiles, Job Codes, Job Families, Positions, Organizations, Organization Groups, Regions, Tools, Record Learning - Financial, Record Learning - Multiple, Learning Event Editor, Merge Users, Send Notifications, Supervisor Assistant, and User Needs Mgmt. The 'Tools' menu is expanded, and 'User Needs Mgmt' is selected. The main content area contains a list of radio buttons for selecting management actions: Add Curricula, Remove Curricula, Add Items, Remove Items, Add Competency Profiles, Remove Competency Profiles, Add Competencies, Remove Competencies, Add Job-related Curricula, and Remove Surveys. The 'Remove Items' radio button is selected. A 'Next' button is visible in the top right corner. Red numbered callouts (1-5) indicate the steps: 1. Home button, 2. Tools menu, 3. User Needs Mgmt, 4. Remove Items radio button, 5. Next button.

How to Batch Add/Remove Required Item & Curriculum Assignments With the User Needs Mgmt Tool

Since our example has only one person, enter the Penn ID in the User ID field. Click the **Add** button, then click the **Next** button

TIP: If you need to remove the required assignment from multiple users, click on the "add one or more from list" link.

1. In the User ID area, set the delimiter to "Any" and enter a list of the Penn IDs separated by commas. See [How to Create a Comma Separated List from an Excel Column](#).
2. Click **Search**, then the **Select All** link and the **Add** button and then the **Next** button.

How to Batch Add/Remove Required Item & Curriculum Assignments With the User Needs Mgmt Tool

Select **COURSE** from the drop down menu for **Type** and if you know the item ID, fill it in. Since these are sometimes hard to remember, you can click on the "add one from list" link and do a search.

User Needs Management Help

> Step 1 > Step 2 > Step 3

Step 3: Removing Items

*** = Required Fields**

Select Items for Removal

Enter 'Item ID' and 'Item Type' or [add one or more from list](#).

* Type: * ID:

Edit the List of Items for Removal

There are no items in the list. Please add items before proceeding.

Do not use the Keyword search! Instead use **Item Title** and set the delimiter to "Contains". (If you do not see this criterion, click on **Add/Remove Criteria** and add it.)

Items Help

Search

Search Items

Enter a value for each field that you want to use to filter your search. Some fields allow you to search for multiple values. You can also add or remove search criteria to further refine your search.

Keyword:

Item Title:

[Add/Remove Criteria](#)

How to Batch Add/Remove Required Item & Curriculum Assignments With the User Needs Mgmt Tool

Your search returned 3 items. Click on the checkbox for the appropriate item and then on the **Add** button.

Items | Help

> Search Results

Search Results

Select Items For Needs Management

Item	Title	Assign. Type	Add
COURSE HS.30001.ITEM.HOC100 (Rev '1' - 10/1/2012 12:00 AM America/New York)	Introduction to Housestaff Orientation - UPHS	OPT	<input type="checkbox"/>
COURSE UP.40010.ITEM.TRN100 (Rev '1' - 10/1/2012 12:00 AM America/New York)	New Staff Orientation SOM	OPT	<input type="checkbox"/>
COURSE UP.92029.ITEM.TD00010 (Rev '1' - 10/1/2012 12:00 AM America/New York)	New Staff Orientation	REQ	<input checked="" type="checkbox"/>

Select All / Deselect All

Confirm that the item is correct and click **Run Job Now**. You will see a confirmation screen.

User Needs Management | Help

> Step 1 > Step 2 > Step 3

Step 3: Removing Items

Previous Run Job Now Schedule Job

* = Required Fields

Select Items for Removal

Enter 'Item ID' and 'Item Type' or add one or more from list.

* Type: * ID:

Add

Edit the List of Items for Removal

Apply Changes

Item	Title	Assign. Type	Assign Date	Remove
COURSE UP.92029.ITEM.TD00010 (Rev '1' - 10/1/2012 12:00 AM America/New York)	New Staff Orientation	REQ	10/16/2012	<input type="checkbox"/>

Select All / Deselect All

How to Batch Add/Remove Required Item & Curriculum Assignments With the User Needs Mgmt Tool

For other methods to add/remove items and curricula, see the following two guides:

- [How to Assign an Item or Curriculum, Remove an Assignment or Modify One - Single User](#)
- [How to Assign an Item or Curriculum – Group](#)