This handout will show you how to use the User Needs Mgmt Tool in the Users Tools area.

It is crucial to know whether the assignment is an item or curriculum. If you remove the item but leave a curriculum, for example, the curriculum requirement will remain on the user’s Learning Plan. Similarly, if you add assign an item when you mean to assign a curriculum, you will not get the retraining requirements you need and will not be able to run a Curriculum Status report. If you are unsure, please contact us at kl_help@lists.upenn.edu.

1. To Add or Remove requirements, please navigate to the User Needs Mgmt Tool.
   1. Click the Admin Tab
   2. Click Users
   3. Select Tools
   4. Click User Needs Mgmt
2. Select the action you want to perform and click Next.

In this example, we are adding a Curriculum.

3. You can now select users by User IDs. Click add one or more from list.
4. You can search for users here by User IDs (Penn IDs) or PennKeys.

If you don't see User IDs or Pennkeys as options, click Add/Remove Criteria to select how you'd like to search.

![Search Criteria](image)

5. We have an excel sheet of Penn IDs. To search for all people at once, select Any from the User ID drop down list:

![Search Criteria](image)
6. Now paste the Penn IDs into the field separated by commas and click Search.

See the [How to Create a Comma Separated List from an Excel Column](#) for help in creating this list.

7. Click either the Select all the Users box or page through to select specific users from the list.

8. Click Add. Under Edit Users, there should be a message: All users returned in your previous search will be affected. If this is correct, proceed.

Click Next
9. Now use the add one or more from list link to search and select your curriculum.

10. In this example I'm looking for a HIPAA curriculum, but I'm not sure which one. So I'm searching for all titles that contain HIPAA.

If you don't have the search options you want, please select Add/Remove Criteria to discover more search options and add them to the page.
11. Check Add by the Curriculum you're assigning and click the Add button.

12. Click Next

13. Click Next if the assignment date is ok. (Today's date is the default).
14. To assign your curriculum click Run Job Now. If you need to assign it at an appointed time, (9:00am, next Monday, etc). click Schedule Job.