

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](mailto:kl_help@lists.upenn.edu).

## 1. To Add or Remove requirements, please navigate to the User Needs Mgmt Tool.

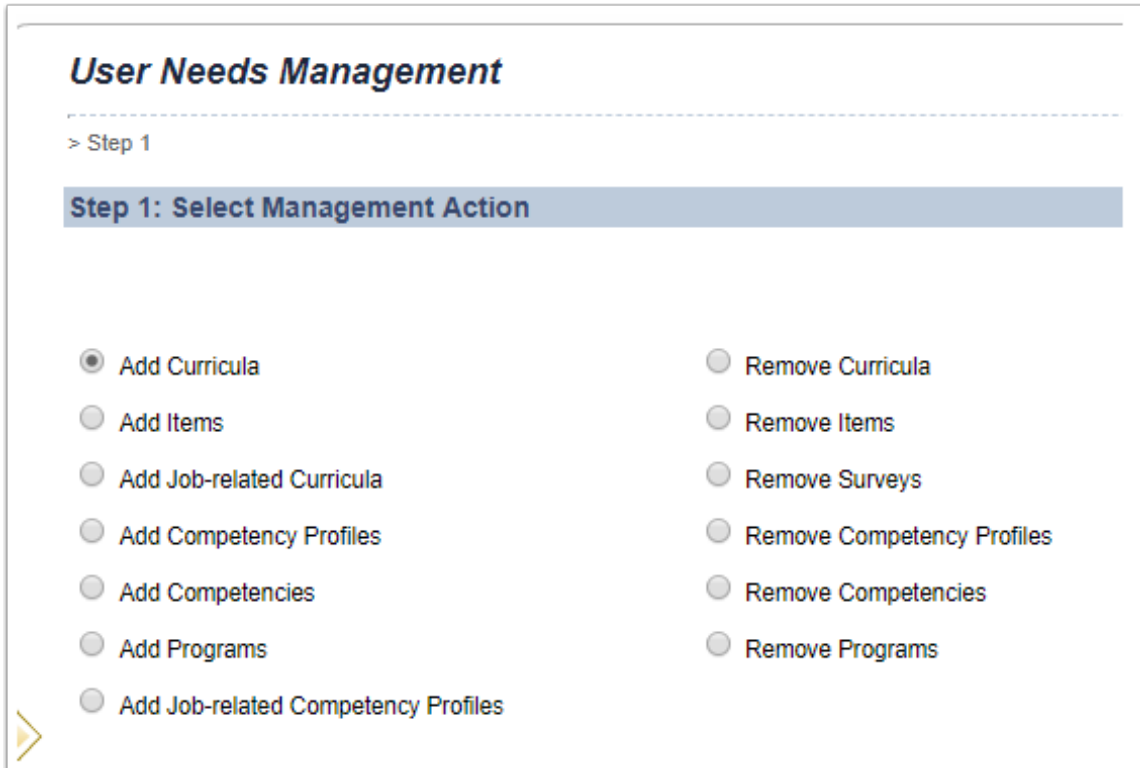
1. Click the Admin Tab
2. Click Users
3. Select Tools
4. Click User Needs Mgmt

The screenshot displays the KnowledgeLink Admin interface. At the top, the 'Admin' tab is selected, indicated by a circled '1'. Below the navigation bar, the 'Users' icon is highlighted with a circled '2'. In the left sidebar, the 'Tools' menu is expanded, with 'User Needs Mgmt' selected, indicated by a circled '3' and '4'. The main content area shows the 'User Needs Management' page, which includes a search bar, a 'Go' button, and a list of management actions under 'Step 1: Select Management Action'. The actions are organized into two columns: 'Add' and 'Remove'.

Add	Remove
<input type="radio"/> Add Curricula	<input type="radio"/> Remove Curricula
<input type="radio"/> Add Items	<input type="radio"/> Remove Items
<input type="radio"/> Add Job-related Curricula	<input type="radio"/> Remove Surveys
<input type="radio"/> Add Competency Profiles	<input type="radio"/> Remove Competency Profiles
<input type="radio"/> Add Competencies	<input type="radio"/> Remove Competencies
<input type="radio"/> Add Programs	<input type="radio"/> Remove Programs
<input type="radio"/> Add Job-related Competency Profiles	

## 2. Select the action you want to perform and click Next.

In this example, we are adding a Curriculum.



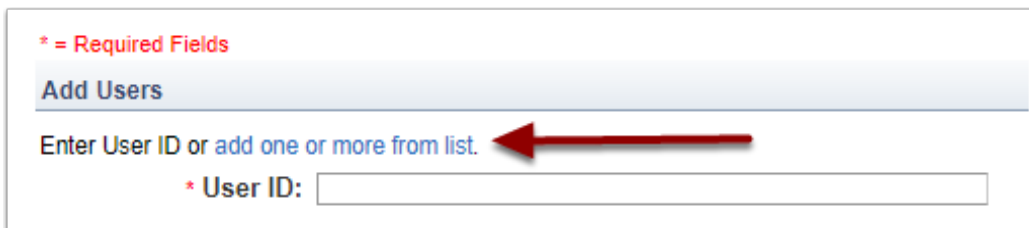
**User Needs Management**

> Step 1

**Step 1: Select Management Action**

- Add Curricula
- Add Items
- Add Job-related Curricula
- Add Competency Profiles
- Add Competencies
- Add Programs
- Add Job-related Competency Profiles
- Remove Curricula
- Remove Items
- Remove Surveys
- Remove Competency Profiles
- Remove Competencies
- Remove Programs

## 3. You can now select users by User IDs. Click add one or more from list.



\* = Required Fields

**Add Users**

Enter User ID or [add one or more from list.](#)

\* User ID:

## 4. You can search for users here by User IDs (Penn IDs) or PennKeys.

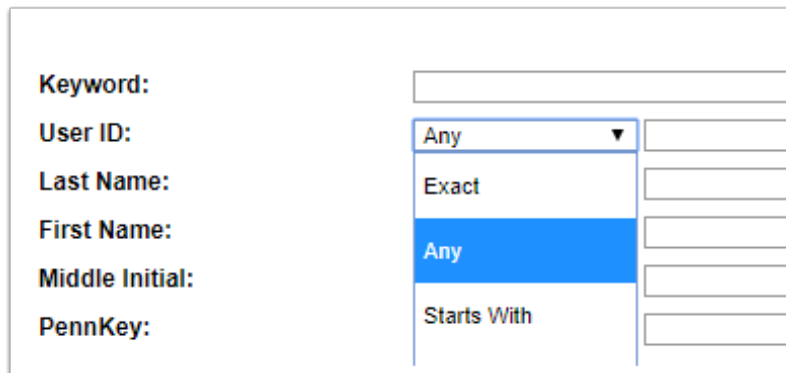
If you don't see User IDs or Pennkeys as options, click Add/Remove Criteria to select how you'd like to search.



A screenshot of a search criteria form. It contains the following fields and options:

- Keyword:** A text input field.
- User ID:** A dropdown menu with "Starts With" selected and an empty text input field.
- Last Name:** A dropdown menu with "Starts With" selected and an empty text input field.
- First Name:** A dropdown menu with "Starts With" selected and an empty text input field.
- Middle Initial:** A dropdown menu with "Starts With" selected and an empty text input field.
- PennKey:** A dropdown menu with "Starts With" selected and an empty text input field.
- Add/Remove Criteria** with a blue circular arrow icon.

## 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:



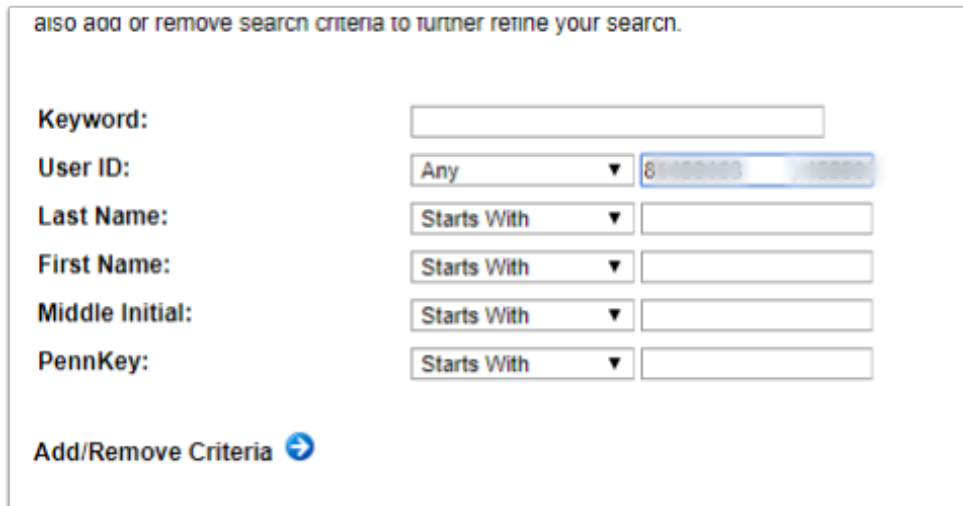
A screenshot of the same search criteria form as in the previous image, but with the "User ID" dropdown menu open. The dropdown menu shows the following options:

- Any (highlighted in blue)
- Exact
- Any
- Starts With

The other fields (Keyword, Last Name, First Name, Middle Initial, PennKey) and their respective "Starts With" dropdowns are visible but not selected.

## 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.



also add or remove search criteria to further refine your search.

Keyword:


User ID:

Last Name:

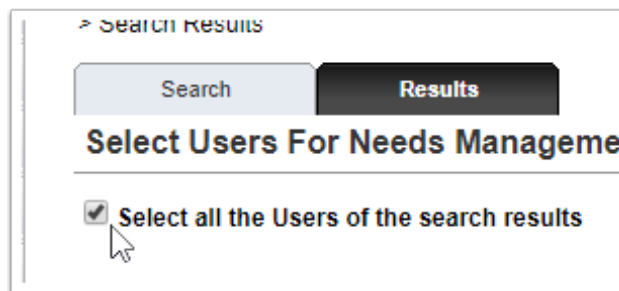
First Name:

Middle Initial:

PennKey:

[Add/Remove Criteria](#) 

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



> Search Results

**Select Users For Needs Managemen**

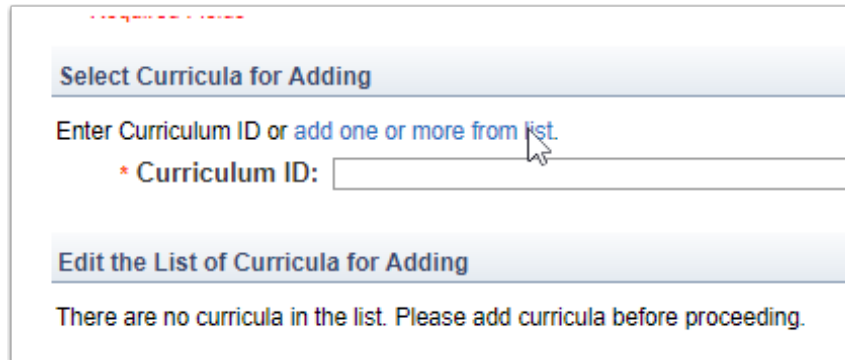
Select all the Users of the search results

## 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

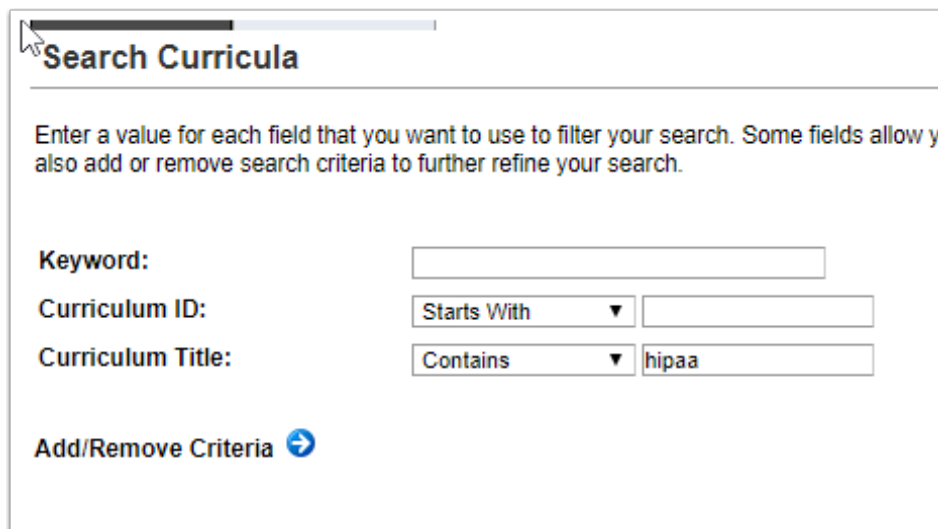


9. Now use the add one or more from list link to search and select your curriculum.

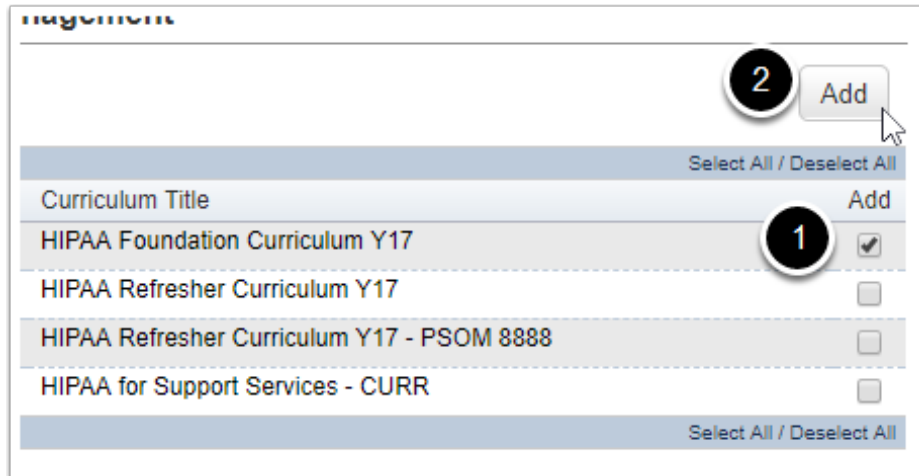


10. In this example I'm looking for a HIPAA curriculum, but I'm not sure which one. So I'm searching for all titles that contain HIPAA.

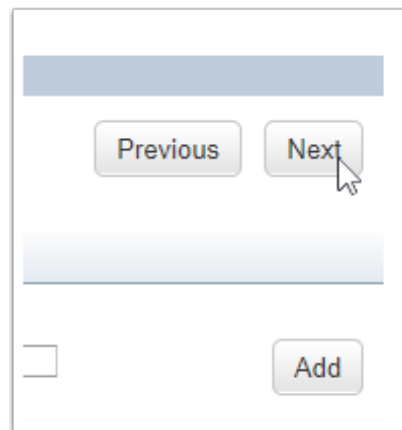
If you don't have the search options you want, please select Add/Remove Criteria to discover more search options and add them to the page.



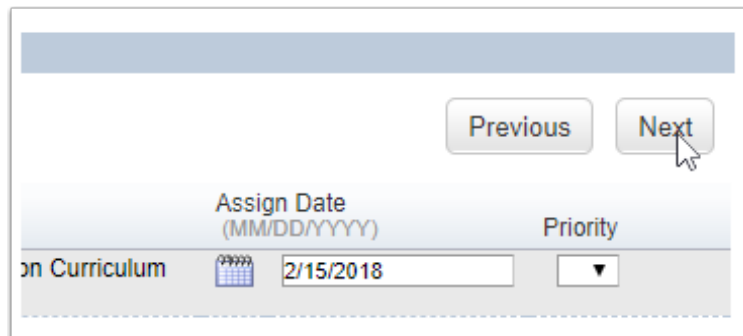
11. Check Add by the Curriculum you're assigning and click the Add button.



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.**

