



# Adding New Documents and Document Review Cycle User Guide

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## Document Control Module



## Introduction

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Adding and maintaining documents is the centerpiece of any document control system. StaffReady's Document Control module makes this process seamless and easy from beginning to end. It also is compatible with StaffReady Competency and Scheduling and offers additional functionality when integrated together.

This Add New Documents and Document Review Cycle user guide outlines the fundamentals of utilizing StaffReady Document Control. The goal of this user guide is to outline the steps for creating a new document, adding content to it, using the Document Status color bar, publishing your document, and maintaining it through a review cycle.

Mastering these core features will allow you to feel comfortable as you transition your previous document management system into a robust solution located in the cloud with cutting-edge, user-friendly features.

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## Adding New Documents

To begin adding a new document, navigate to the **Setup** tab of the Document Control module and select the **Add** button. (Yellow box, Figure 1)

This will open the **Add Subject Or Document** pop-up window. (Figure 2)

Enter in the **Document Name**, **Document Type**, **Location(s)** if your license includes the Scheduling Module, **Document Classification**, **Document Subject**, and the **Time Between Reviews**. You may also enter a **Description** of the document if applicable.

You can choose to upload your own **File** or **URL** or choose an existing Competency Document.

Once finished, select the **Save Changes** button.

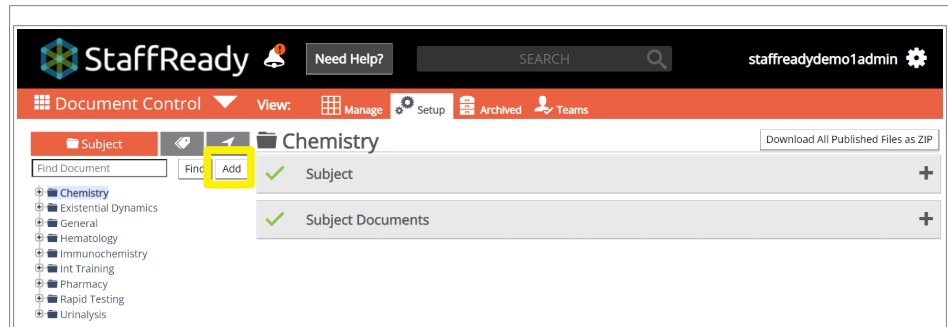


Figure 1

Figure 2

**Note:** You will need to create Subjects and Classifications before they can be used in document creation.

## Attaching a File or URL

Now that you've created the document or if you're looking to add a file to an existing document, navigate to a **Subject** folder and select a document. In the **Document Status** color bar, select the **Attach Content For Review** or **Attach Pre-Approved Content** buttons depending on whether or not you want to bypass the review process. (Yellow box, Figure 1) This will open the **Attach Content** pop-up window. (Figure 2) If you selected **Attach Content For Review**, please follow the steps below. If you wish to choose an existing Competency Document, please jump to page 5.

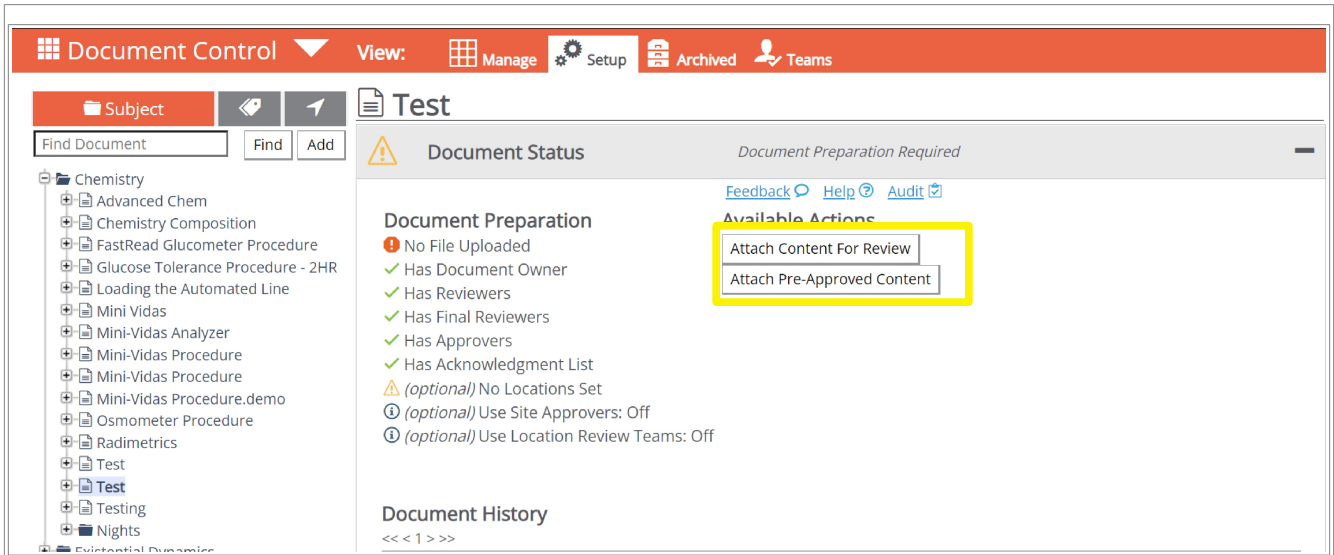


Figure 1

Select either the **Attach File** radio button (Yellow box, Figure 2) or the **Attach Link** radio button depending on whether or not you want to bypass the review process. (Figure 3) When you have finished selecting your file or link, select the **Upload File** or **Save URL** button. The heading beneath **Document Preparation** will update to reflect that a file has been uploaded. (Figure 4) Skip to page 8 upon completion of this step.

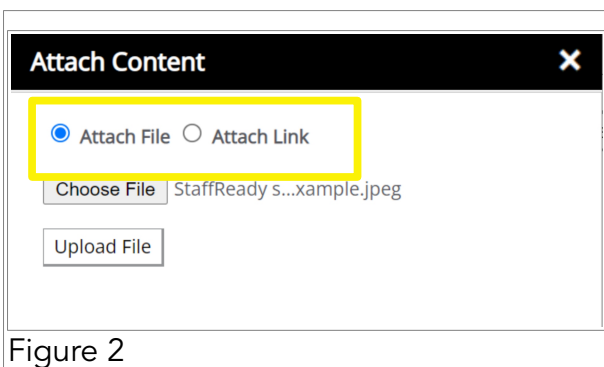


Figure 2



Figure 3

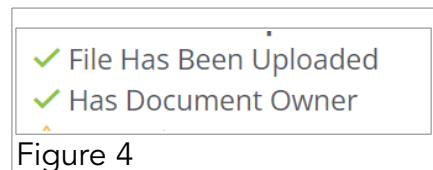


Figure 4

## Attaching an Existing Competency Document

To add a previously created exam, select the **Link Pre-Approved Exam** button. (Yellow box, Figure 1)

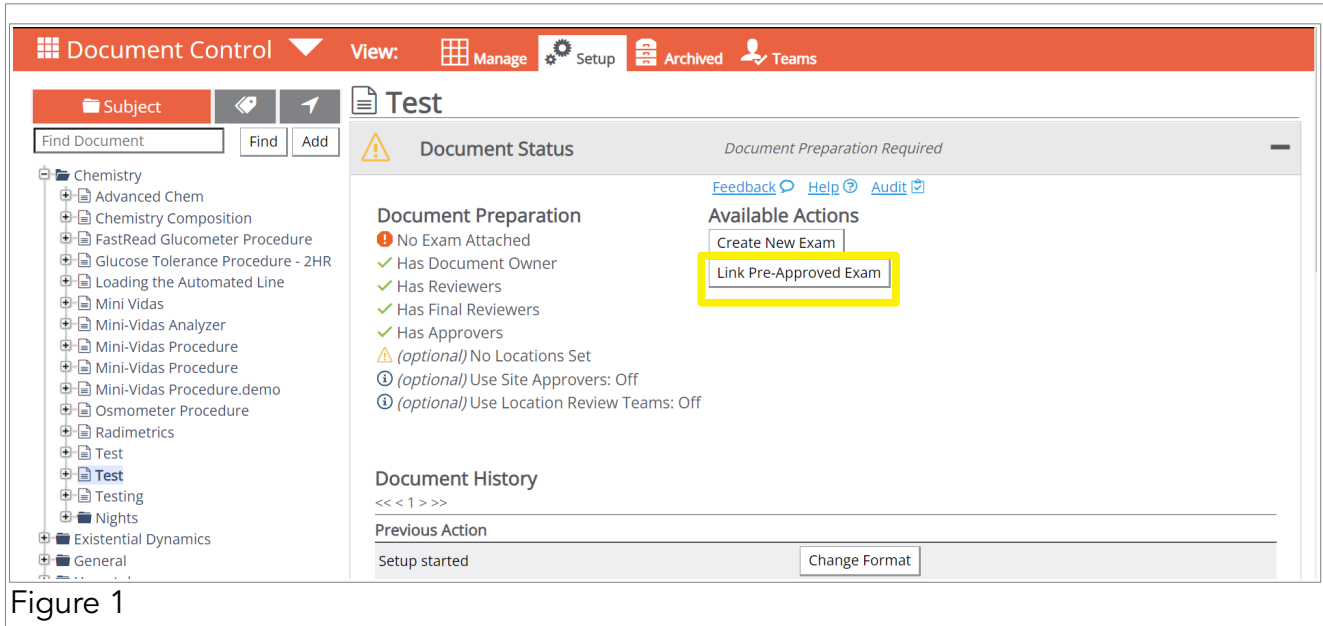


Figure 1

This will open the **Attach Content** pop-up window. (Figure 2) Select the exam you wish to attach from the tree picker (Yellow box, Figure 2) and then click the **Select** button next to that exam.

As in the example image (Figure 4, pg. 4), the Document Status color bar will update to reflect that an exam document has been attached.

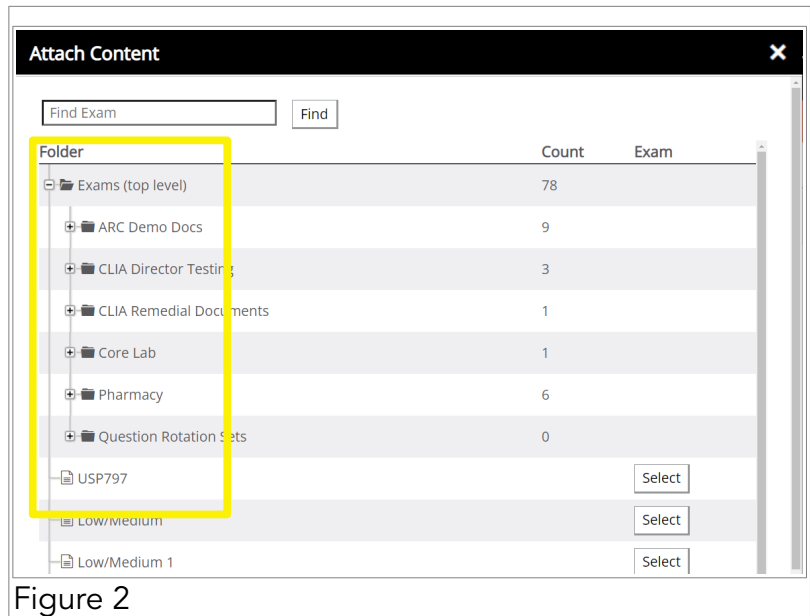


Figure 2

## Creating a New Controlled Exam

If you wish to create a new document, select the **Create New Exam** button. (Yellow box, Figure 1)

This will open the **Create Document** pop-up window. (Figure 2)

Enter a **Document Id**, **Document Name** and choose a **Document Type** from the dropdown menu. (Figure 3)

To see a breakdown of the available exam types please consult our [Create Competency Documents user guide](#).

If applicable, enter a description for the document.

When you are finished, select the **Save Changes** button.

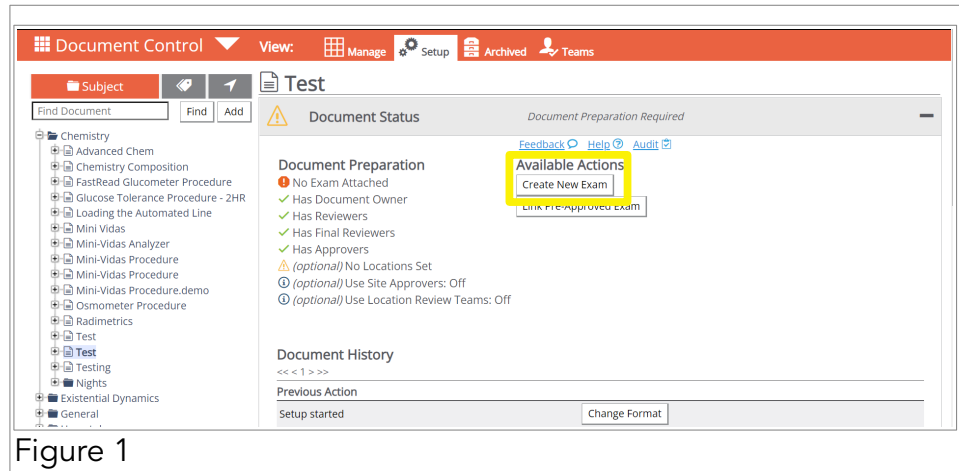


Figure 1

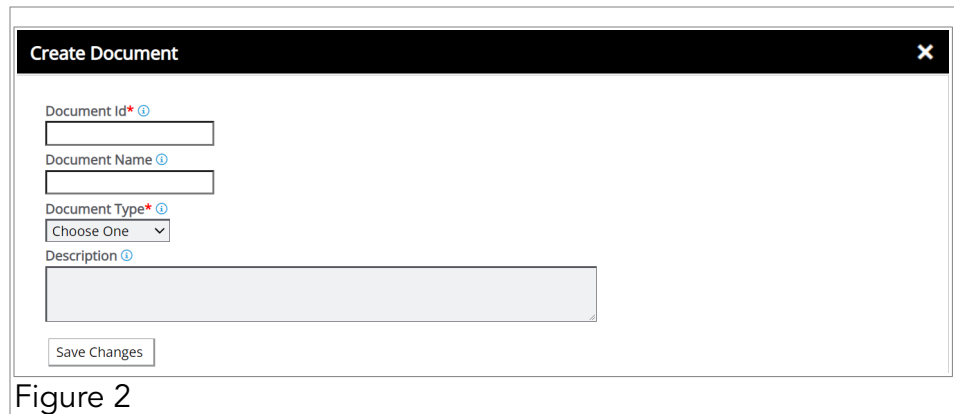


Figure 2

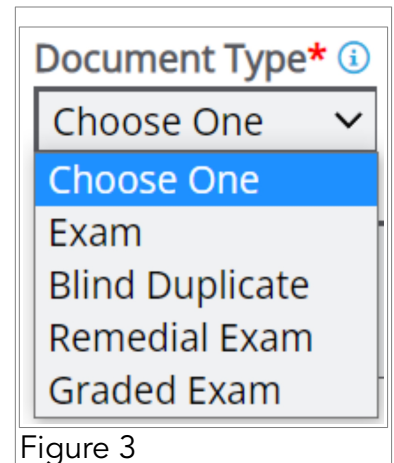


Figure 3

## Adding Content to Exam

Now that you've created the exam, you need to add content to it. Select the **Add Content To Exam** button. (Yellow box, Figure 1)

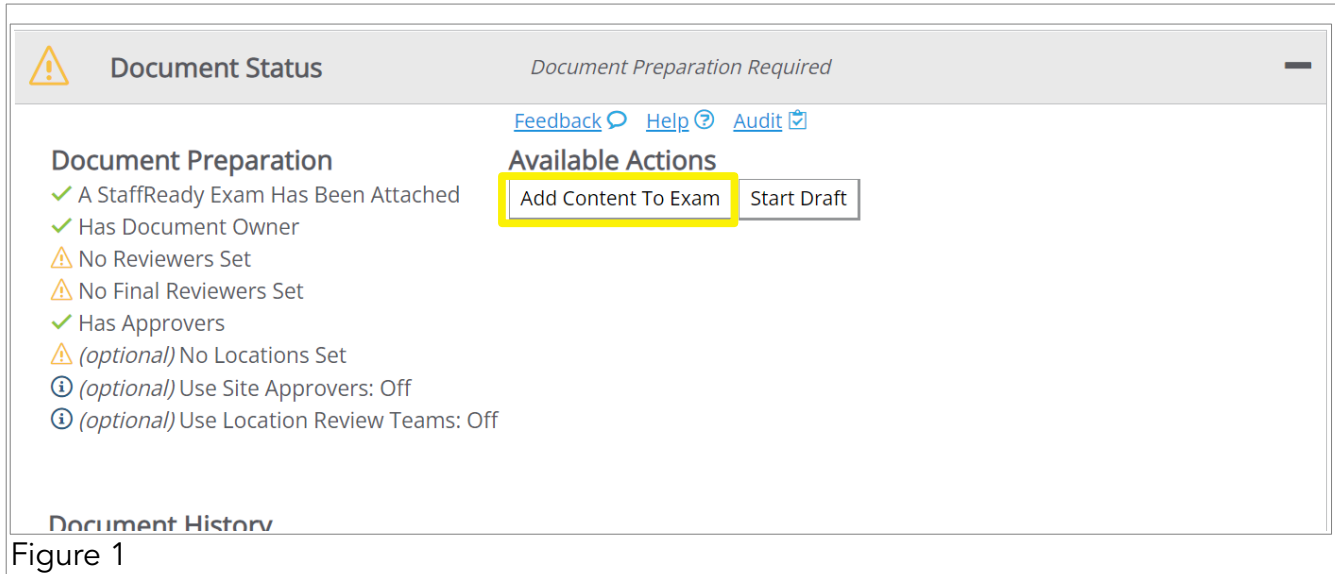


Figure 1

This will open the **Document Editor** screen. (Figure 2) Select the **Add a Question** field (Yellow box, Figure 2) to begin adding questions to the exam. For more detailed information on creating exams, please check out the full user guide for **Creating Competency Documents** [here](#).

When you are finished adding questions, select the **Done Editing** link. (Teal box, Figure 2)

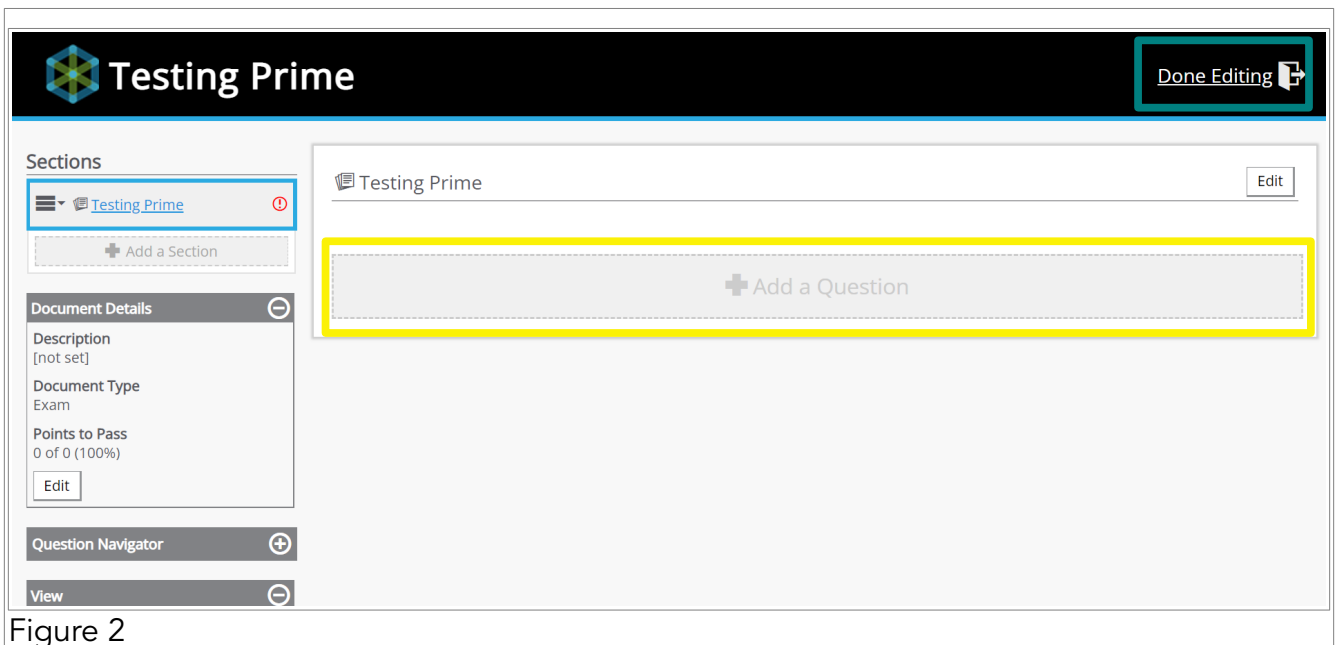


Figure 2

## Document Status Color Bar

The **Document Status** color bar allows you to track where a document's status is in its review cycle.

The color bar will update and display different symbols as you complete each step of document preparation.

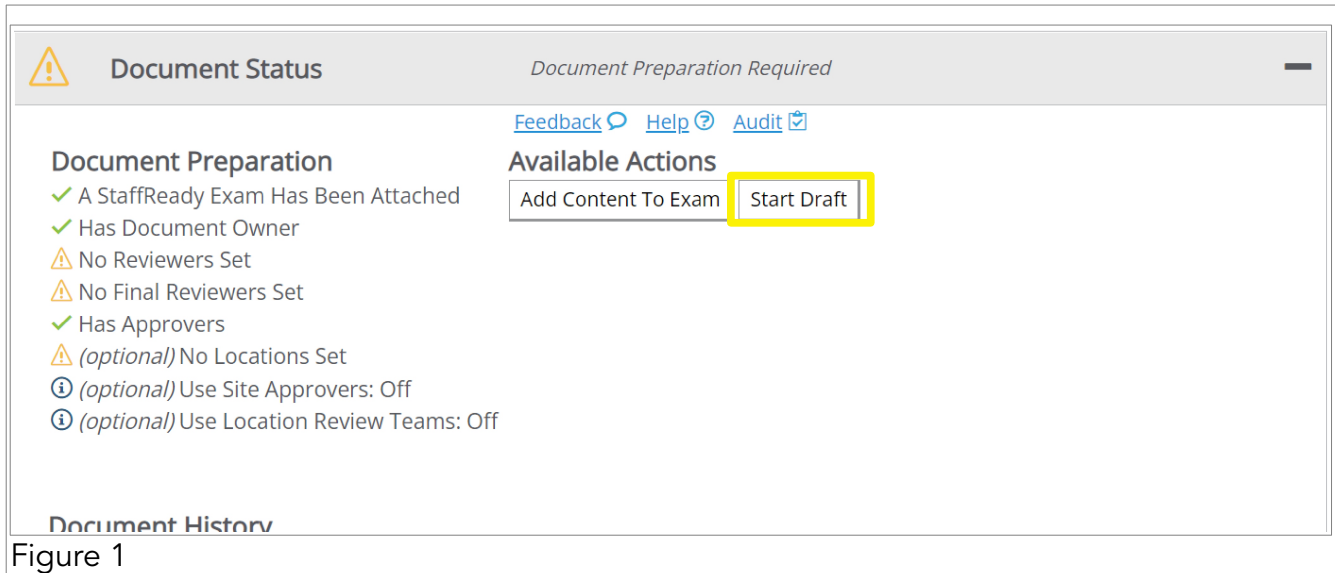


Figure 1

Once you've added an exam and set up an approver or multiple approvers, you will have the option to start the document draft. Select the **Start Draft** button (Yellow box, Figure 1) to do this. You will then see a spinning document image and a message that StaffReady is preparing the Draft. (Figure 2)

Once the draft has begun, the **Document Status** color bar will change and new selectable options will appear.

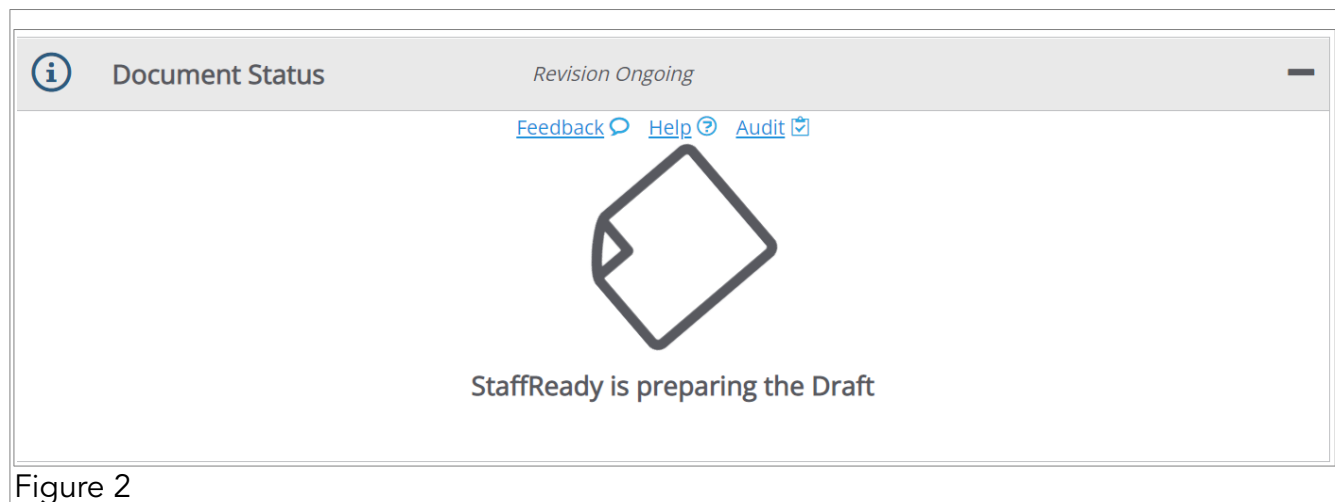


Figure 2

## Edit Instructions/Content

Select the **Edit Instructions/Content** button (Yellow box, Figure 1) to open the **Add Review Instructions** pop-up window. (Figure 2)

You can add instructions in the **Add Instructions** field (Teal box, Figure 2) and set target publish and review dates. (Yellow box, Figure 2)

Select the **Complete Options** tab. (Orange box, Figure 2) This allows you to determine what the next step of the document preparation process is. (Send to Reviewers, Send to Final Reviewers, or Request Approval)

When you are finished, select the **Send to Next Step** button. (Teal box, Figure 3)

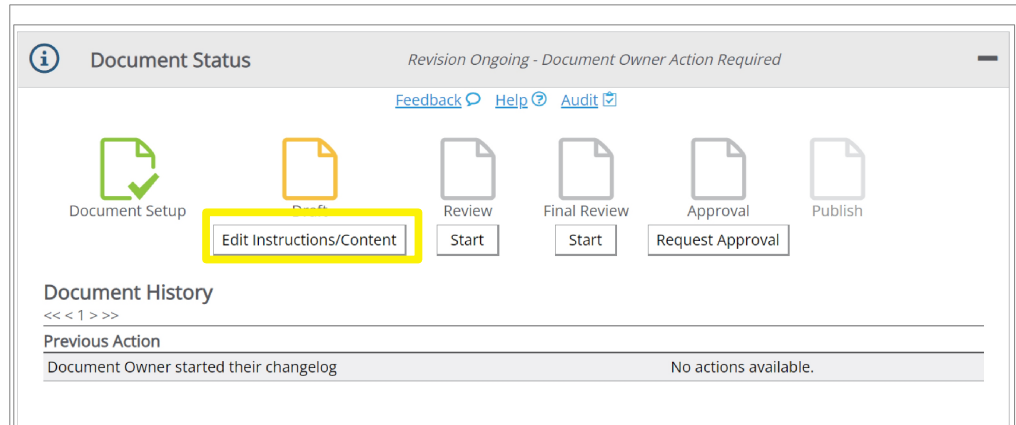


Figure 1

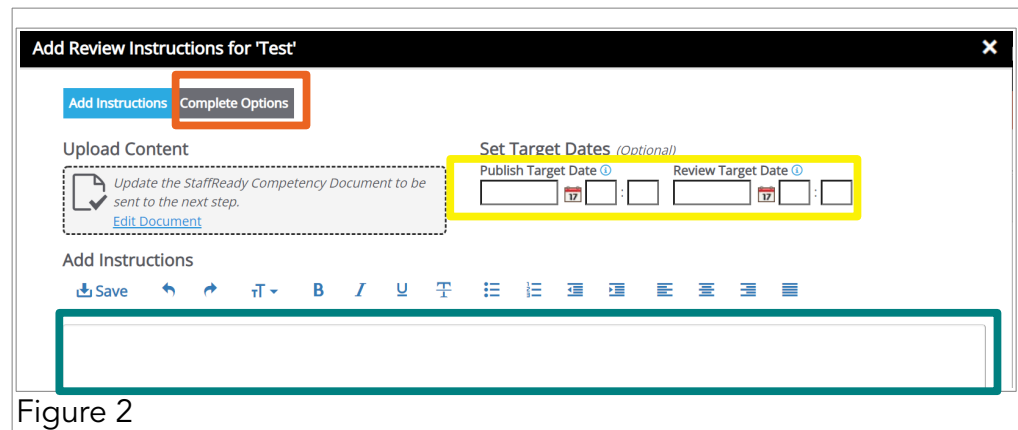


Figure 2

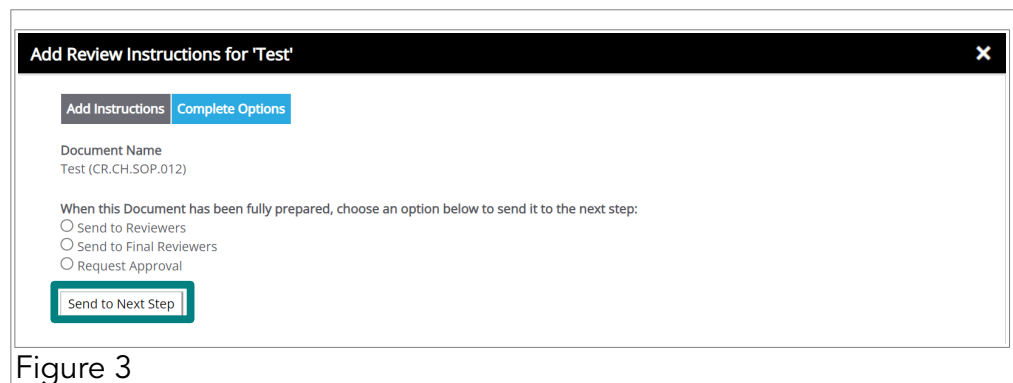


Figure 3

## Publish Options

Once a document draft has been reviewed and approved, the **Publish Options** button will become visible. (Yellow box, Figure 1) To read the full user guide on **Reviewers** and **Final Reviewers**, please read that user guide [here](#). To read the full user guide on **Approvers**, please read that user guide [here](#).

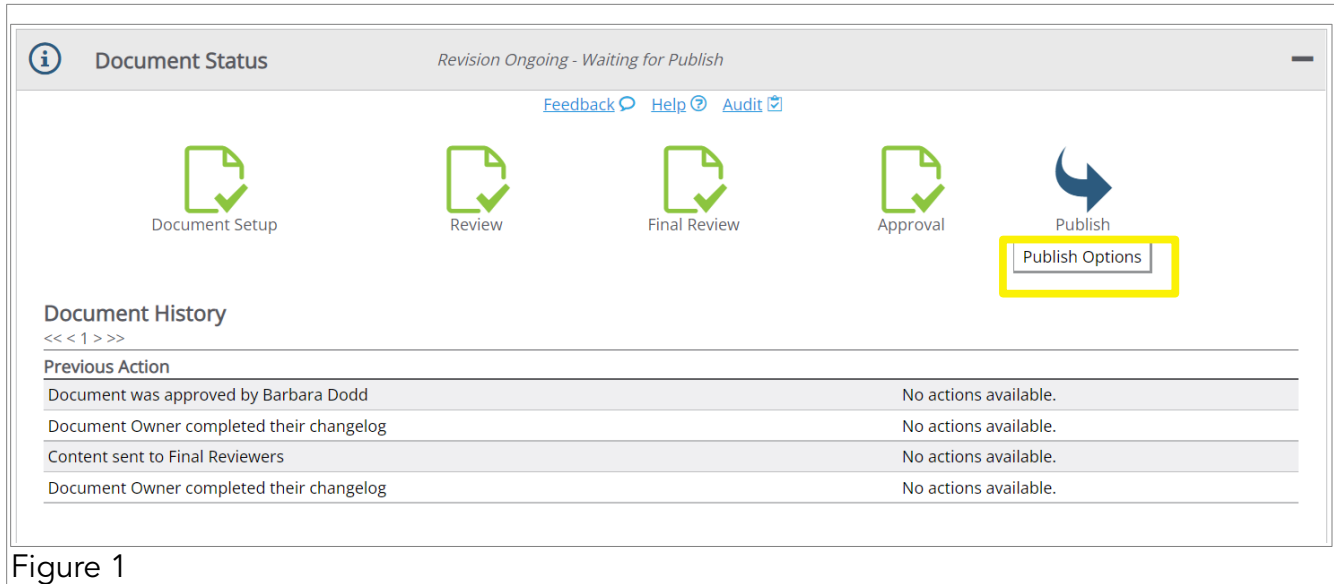


Figure 1

Select the **Publish Options** button to open the **Publish Document** pop-up window. (Figure 2)

Select whether or not the document will require a signed acknowledgment, enter in the number of days remaining until an acknowledgment reminder is sent, how many days in total employees will have to acknowledge the document, and set keywords for easily finding the document later.

Only File/URL type documents can have signed acknowledgment. Additionally, the Acknowledgment List color bar must contain employees for this function to work as intended.

Once you've done this, select the **Publish** button.

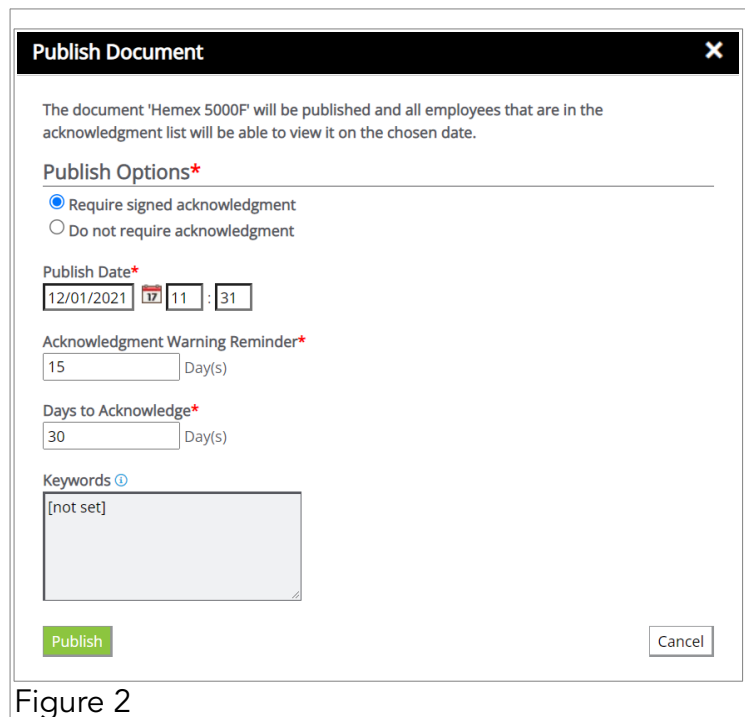


Figure 2

## Post Publishing Document Review

Now that the document is published, the **Document Status** color bar will again update its appearance and more selectable buttons will be available. (Figure 1)

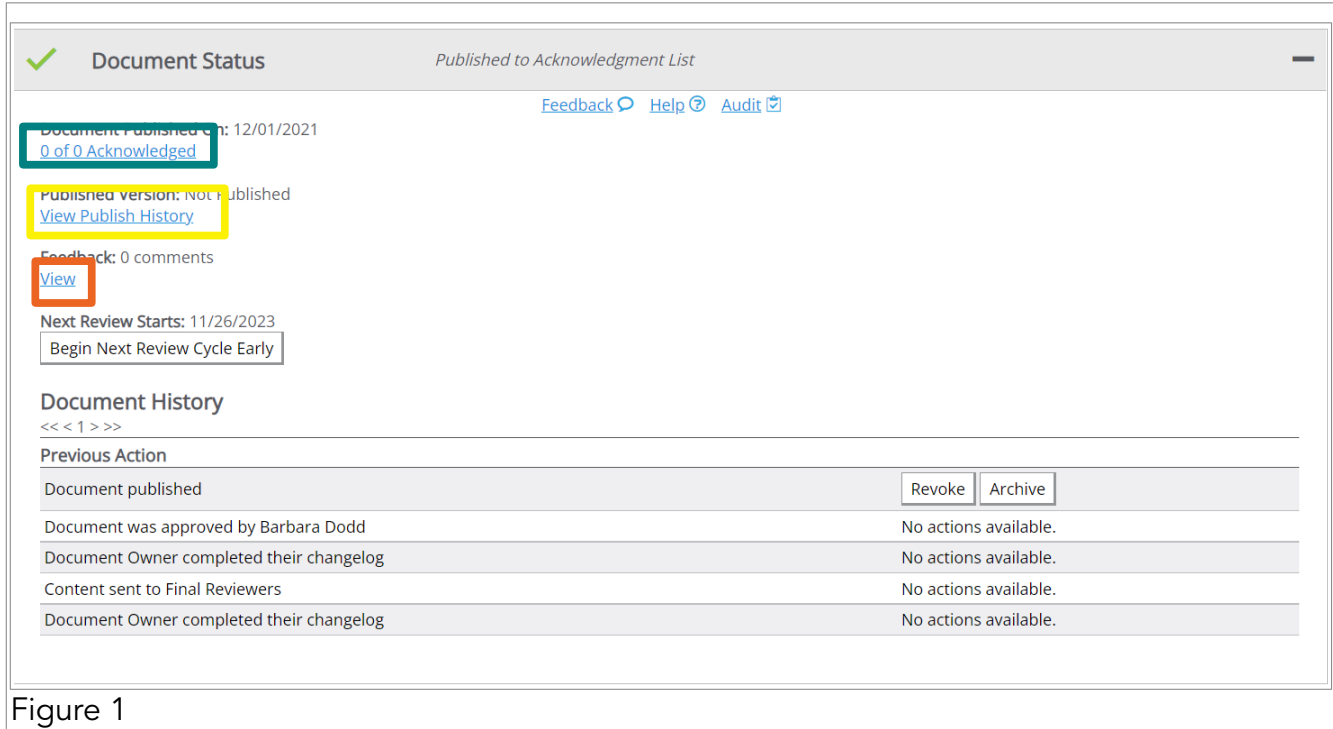


Figure 1

Selecting the **Begin Next Review Cycle Early** button will restart the entire review process.

Selecting the **Acknowledged** link (Teal box, Figure 1) will allow you to view who has or hasn't acknowledged receipt of the document.

Selecting the **View Publish History** link (Yellow box, Figure 1) will allow you to view the version number that was published, the date it was published, and the number of acknowledgment tasks completed that were associated with that version. (Figure 2) Selecting the **View** link (Orange box, Figure 1) will allow you to view any feedback that's been submitted thus far.

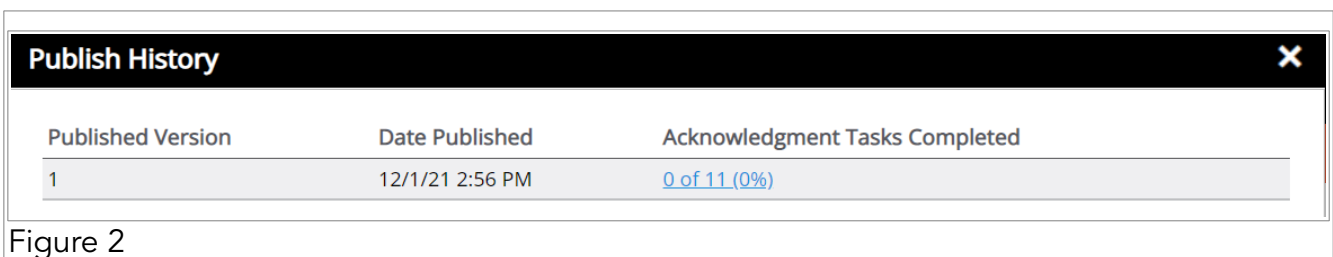


Figure 2

## Resources

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This concludes the User Guide for **Add New Documents** and **Document Review Cycle**. We hope that you have a better understanding of this feature and how it functions within the entire framework of the Document Control module.

For more focused Guides on the functions and features discussed in this document, please check out the linked Guides on this page for supplemental reading.

For further assistance, please contact our Support Team directly.

Our service hours are Monday through Friday, 6am to 5pm PST.

Phone: 1-877-229-5230

[Online Support Form](#)

## Related Topics

Please select any link to skip to that topic.

<a href="#">Reviewers and Final Reviewers</a>	<a href="#">PDF Document</a>
<a href="#">Approvers</a>	<a href="#">PDF Document</a>
<a href="#">Acknowledgment List Color Bar</a>	<a href="#">PDF Document</a>
<a href="#">Overview</a>	<a href="#">PDF Document</a>
<a href="#">Archived Tab</a>	<a href="#">PDF Document</a>
<a href="#">Manage Tab</a>	<a href="#">PDF Document</a>