StaffReady

Creating Competency Documents User Guide

Competency Module

Introduction

StaffReady Competency centralizes any number of documents needing to be created and stored in one central, web-based location. For the first time, admins can locate information quickly, make decisions and maintain records without the need for paper, binders and spreadsheets.

Learning how to create and manage competency documents is the focus of the Creating Competencies User Guide. This guide provides a comprehensive overview on how to create documents, add questions, what the different document types there are as well as what question types there are. Additionally, you will learn how to create folders, clone them, and add documents to Requirements.

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Create Competency Documents

To begin creating **Competency Documents**, navigate to the **Setup** tab. **(Figure 1)**

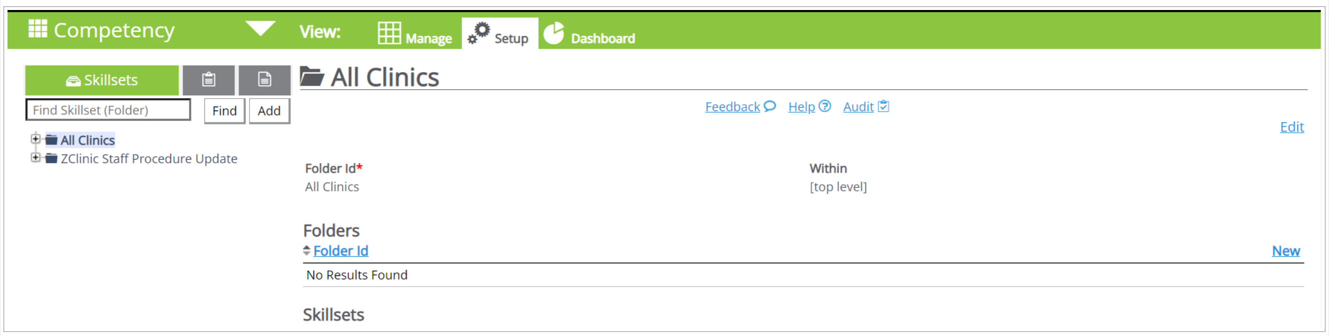


Figure 1

Select the **Documents** perspective **(Yellow box, Figure 2)** and then select the **Add** button.

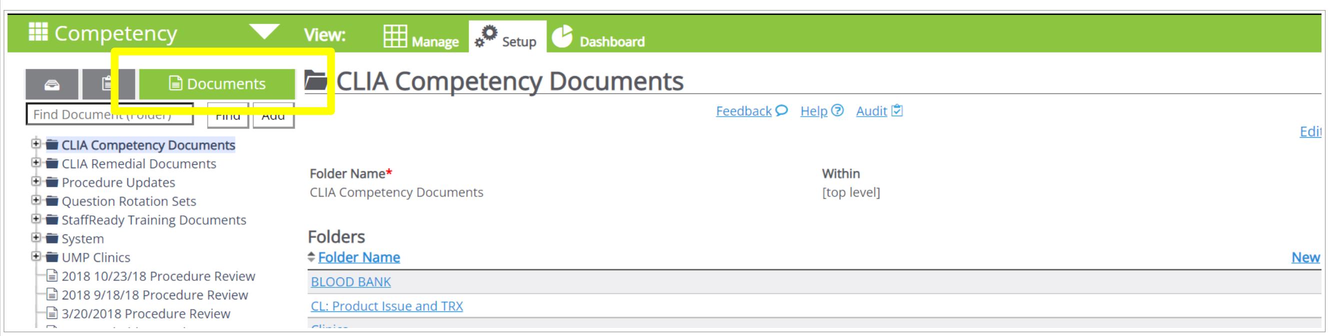


Figure 1

This will open the **Add New Folder or Document** pop-up window. **(Figure 3)**

Select the **New Document** side tab. (Continues on page 4)

Figure 3

Add New Folder or Document Window

Enter in a **Document ID**, **Document Name**, **Document Type**, and **Description** if needed and then select the **Save Changes** button. **(Figure 1)** It is highly recommended that the **Name** and **ID** fields have the same content.

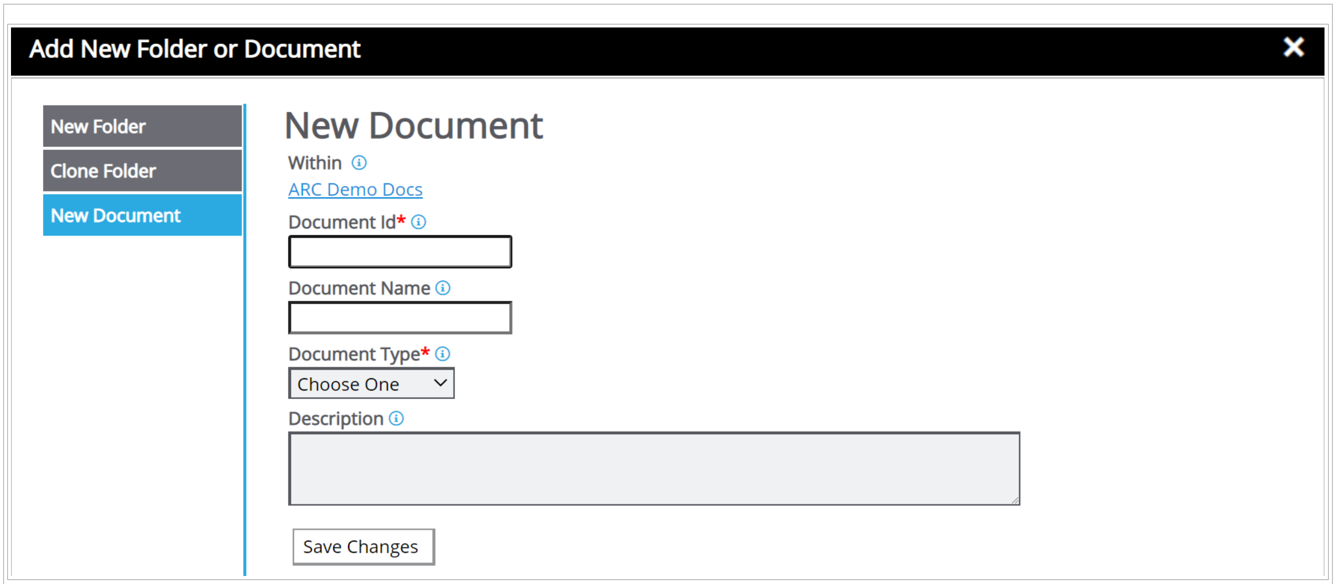
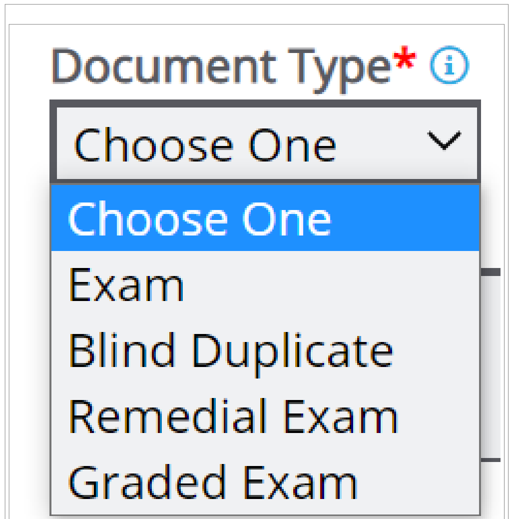


Figure 1

Document Types



Exam – Standard multipurpose competency document format, graded by the software. (**Note**: If you select this option there will be an additional checkbox option available titled **Retake Options**. This allows the employee to retake the exam if failed, without the input of a supervisor.)

Blind Duplicate – Specially designed exam for blind duplicate and survey kit proficiency testing with additional question types and functionality.

Remedial Exam – Specially designed exam for remediation. This document can ONLY be assigned to the **Remedial Documents** section of a requirement.

Graded Exam – Specially designed exam for questions designed to be graded by a qualified person and not the software. This type of exam has to be approved by a person in order to pass.

Edit Document Contents

Now that you've created the document, it's time to add content to it. Locate the **Document** color bar and then select the **Edit Document Contents** link. **(Yellow box, Figure 1)**

In this example, the type of document we created is the **Exam** type.

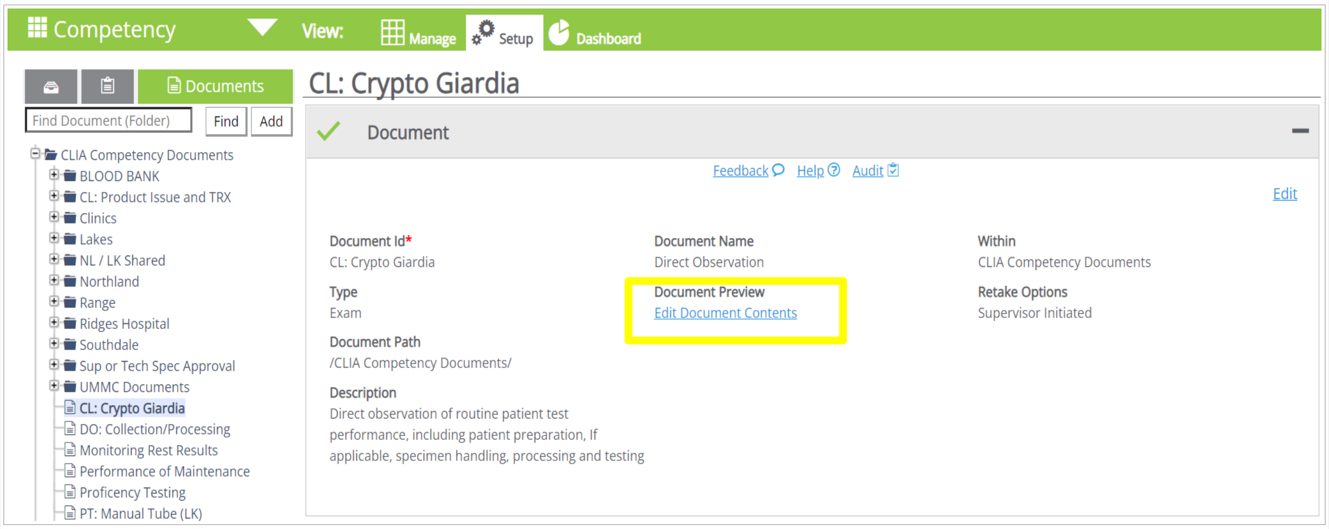


Figure 1

This will open the **Document Editor**. **(Figure 2)** By default, a section is created with the same ID as that of the document. You can choose to edit this section or create a new section.

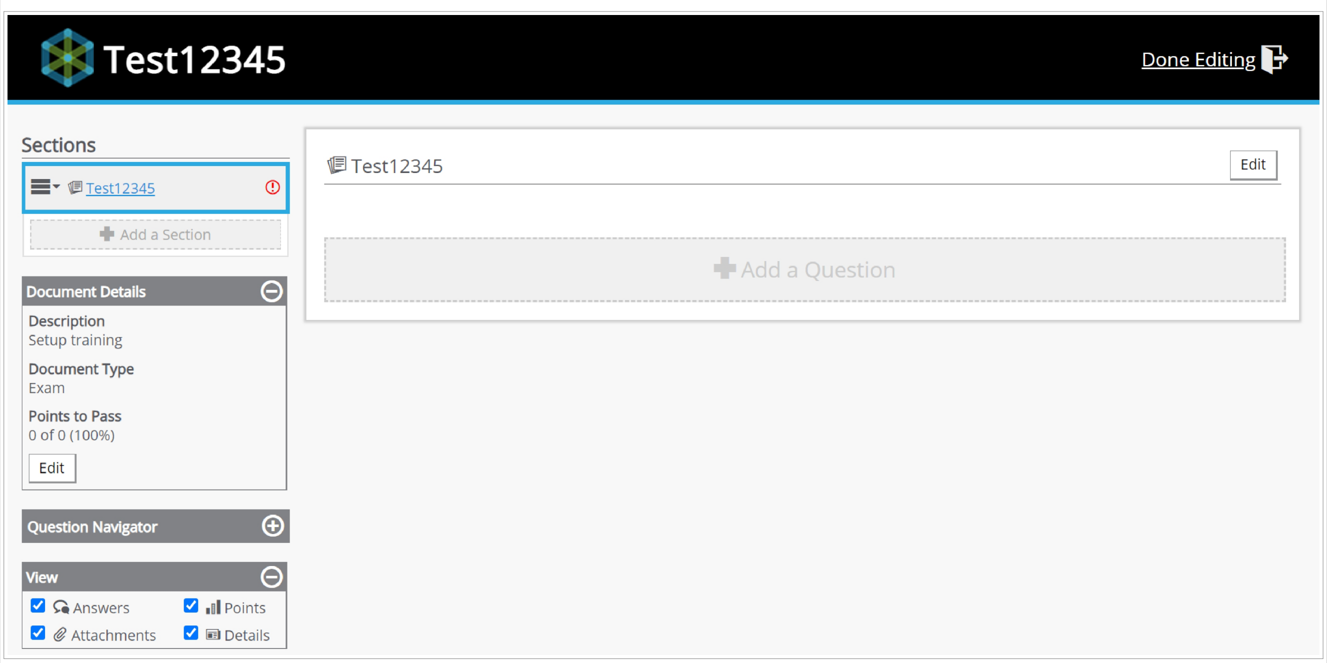


Figure 2

Adding Questions and Question Type

Selecting **Add Question**, will open the **New Question** pop-up window. **(Figure 1)**

Select the **Question Type** from the dropdown menu **(Figure 2)**, select whether or not the question needs additional detail, select whether or not the question requires an answer, attach a file or website if necessary, and attach an image if needed. Figure 2 is a complete list of all possible question types.

Not all question types are available for each document type and not every data field is available for each question type.

Select the **Save Changes** button when you have finished editing the question.

Repeat these steps for however many questions you need to create.

Select the **Done Editing** link **(Yellow box, Figure 3)** when you have finished editing all questions.

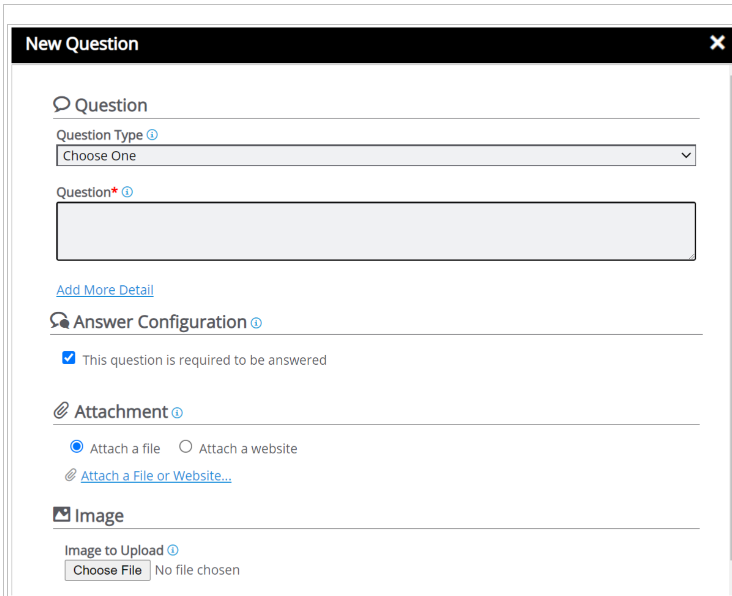


Figure 1

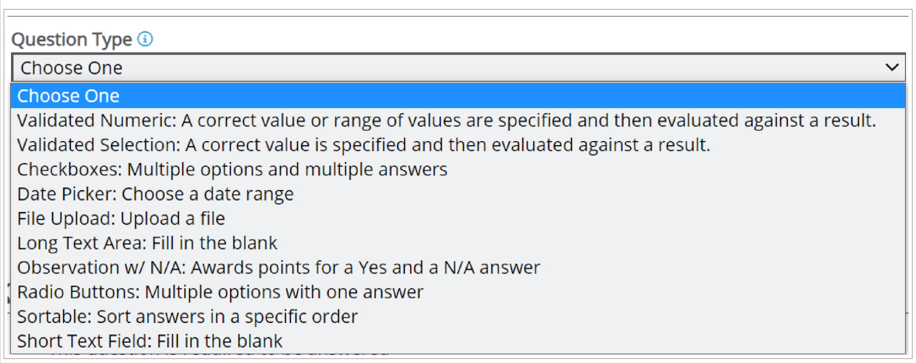
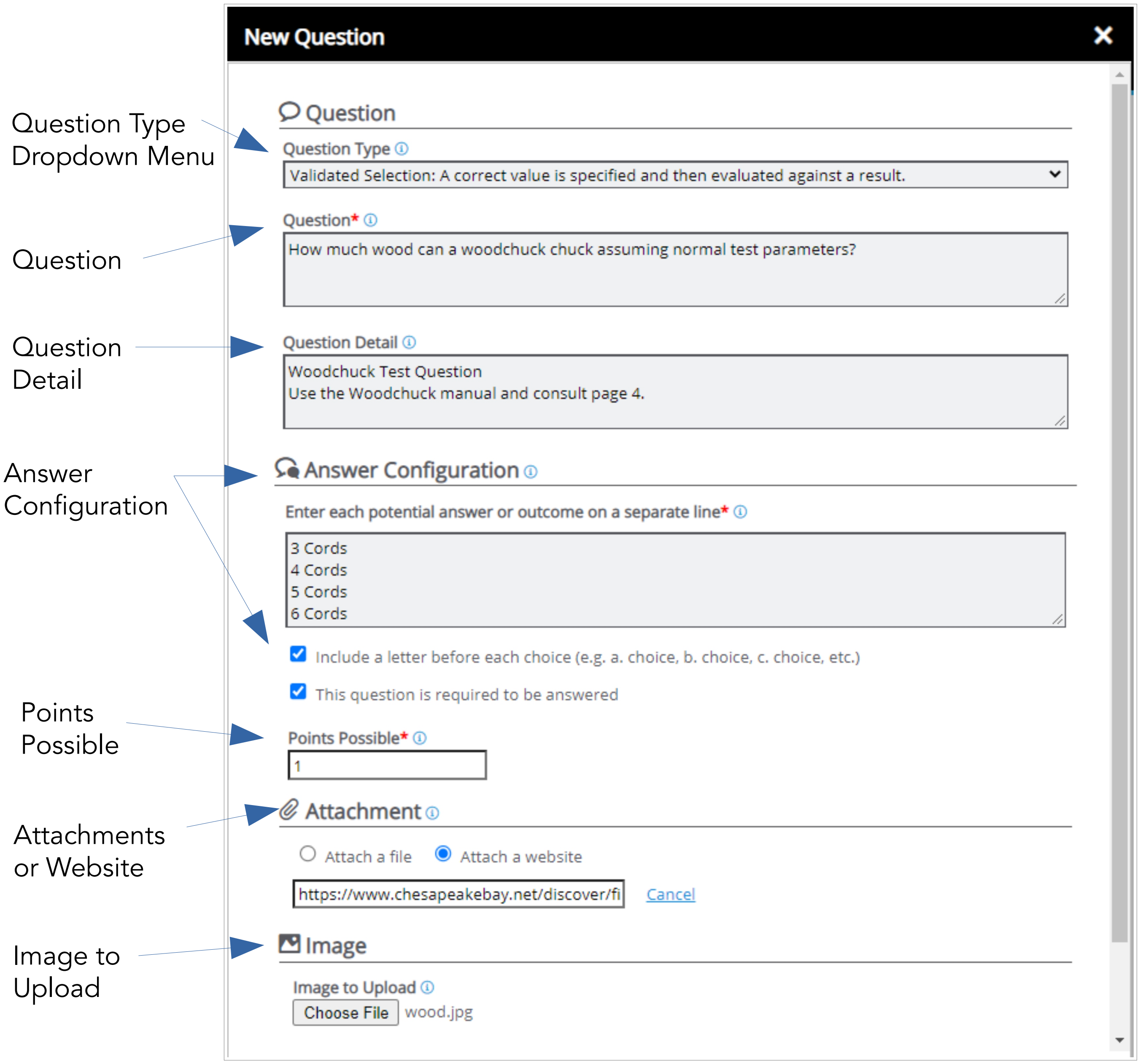


Figure 2

Figure 3

Fully Completed Question Example

Please see below an example of a fully completed question with each data field filled out. Each data field has been labeled for clarity.



Note: To reemphasize, <u>not all question types are available for each document type and not every data field is available for each question type</u>. Your New Question pop-up window may not contain all the data fields displayed in the above screenshot.

Edit Existing Questions

By selecting from the function list **(Orange box, Figure 1)** you can perform several different actions for each question such as **Move**, **Edit**, **Copy**, or **Delete**. Selecting **Move** will allow you to move the question to a different **Question Set**. If you would like to move the question to a different part of the same section, select and drag the hamburger icon to the place you want it. **(Yellow box, Figure 1)** Selecting **Copy** will create an identical version of that question.

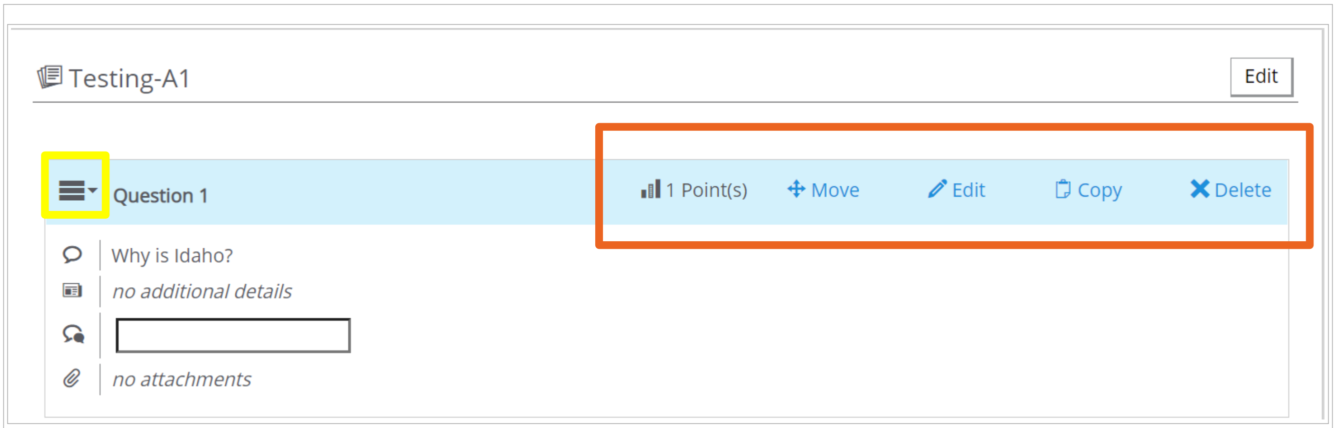


Figure 1

Selecting the **Edit** button will open the **Edit Question** pop-up window. **(Figure 2)**

From here, you can make any changes are needed for the question.

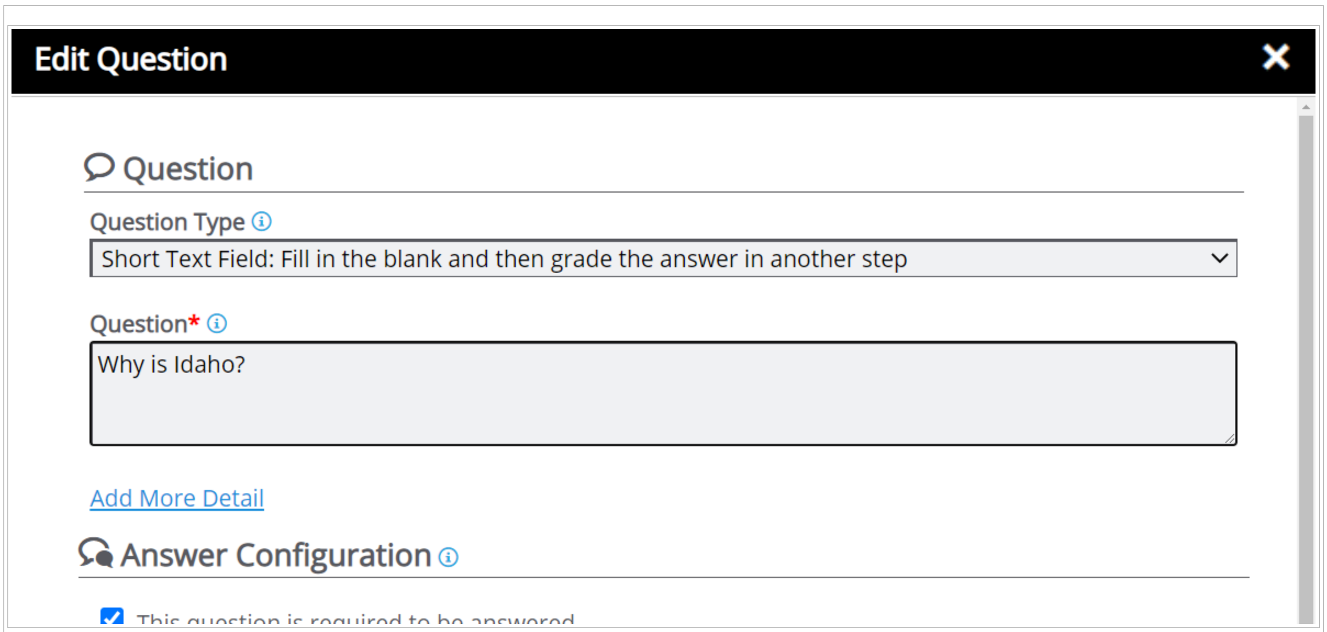


Figure 2

Document Editor and Editing Sections

To edit the section, select the **Edit** button at the top of the section **(Yellow box, Figure 1)** to open the **Edit Section** pop-up window. **(Figure 2)**

From here you can edit the **Section ID**, **Section Description**, or delete the section entirely. The section can only be deleted if all questions in it have been deleted or moved.

Select the **Save Changes** button when finished.

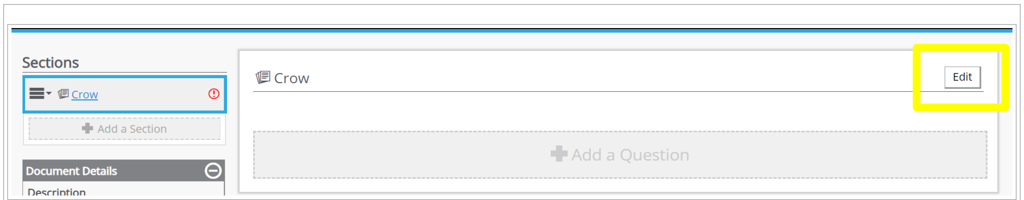


Figure 1

Figure 2

Select the **Edit** link **(Yellow box, Figure 3)** to open the **Edit Document** pop-up window. **(Figure 4)** You can edit the Document ID, parent folder, Document Name, Points to Pass, Retake options, and Document Description from here. Select the **Save Changes** button when you are finished.

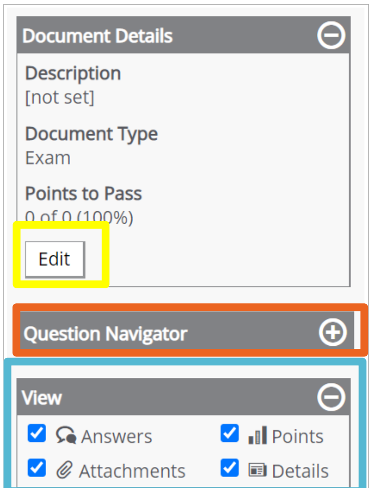


Figure 3

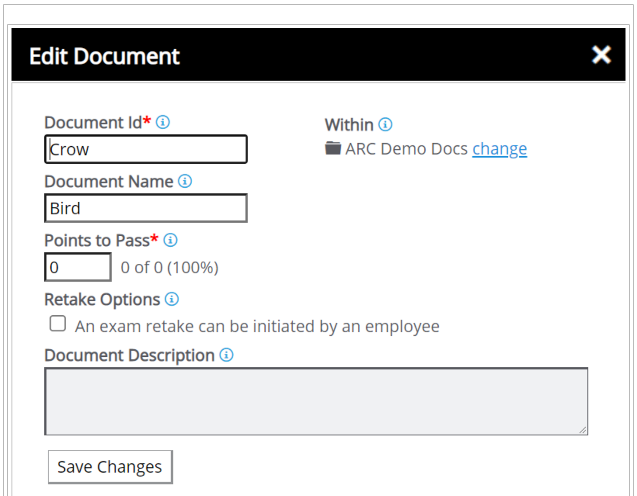


Figure 4

You can easily view all created questions by expanding the question navigator **(Orange box, Figure 3)** and scrolling to the question you want. You can also filter the visible questions fields by selecting the check boxes beneath the **View** menu. **(Teal box, Figure 3)**

Creating Competency Document Folders

To create a new competency document folder, navigate to the **Setup** tab, and select the **Documents** perspective. **(Yellow box, Figure 1)** If you want to search for an existing folder, begin typing in the name in the Find Document Folder field. **(Teal box, Figure 1)** Otherwise, select the **Add** button.

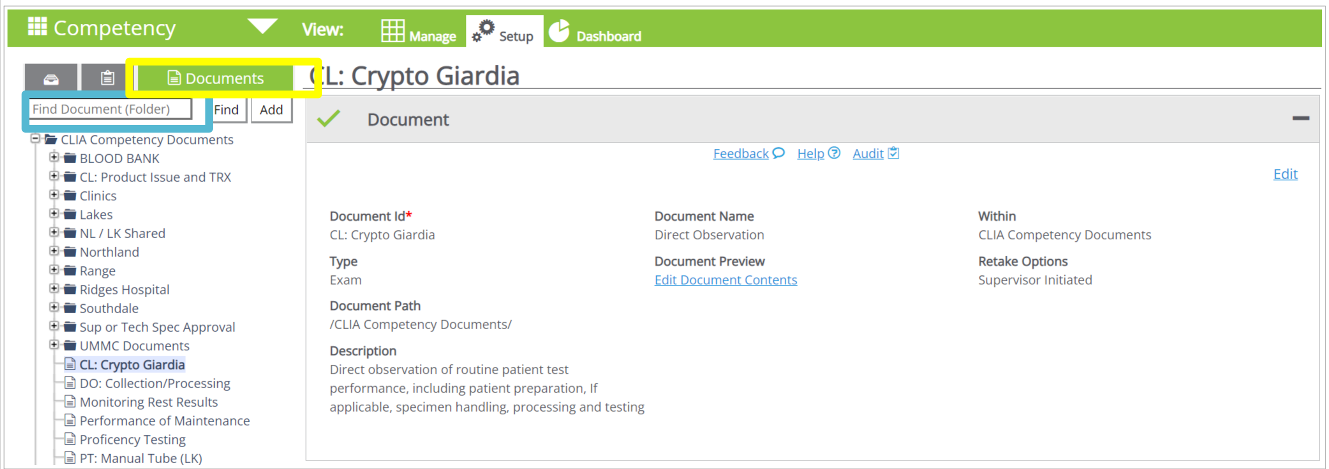


Figure 1

This will open the **Add New Folder or Document** pop-up window. **(Figure 2)**

Select the **New Folder** side tab and then enter in the name of the folder. Selecting the link below the **Within** header **(Yellow box, Figure 2)** will allow you to change where your new folder will reside.

Select the **Save Changes** button when you are finished.

Figure 2

Clone Folders

To clone a new competency document folder, navigate to the **Setup** tab, select the **Documents** perspective **(Yellow box, Figure 1)** and select the **Add** button.

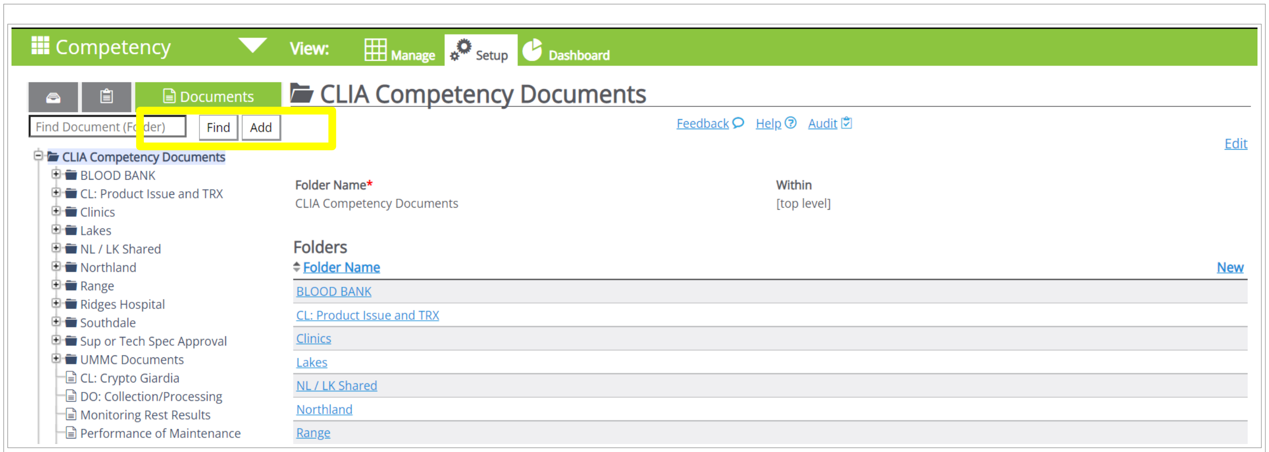


Figure 2

This will open the **Add New Folder or Document** pop-up window. **(Figure 2)** Select the **Clone Folder** side tab and enter in the **Folder ID**, **Folder Name**, and **Folder Description**. For ease of use, we recommend keeping the Name and ID the same. Any fields that you don't fill out will be populated with the original folder data. Cloning a folder containing child folders will replicate the child folders and documents within the cloned folder.

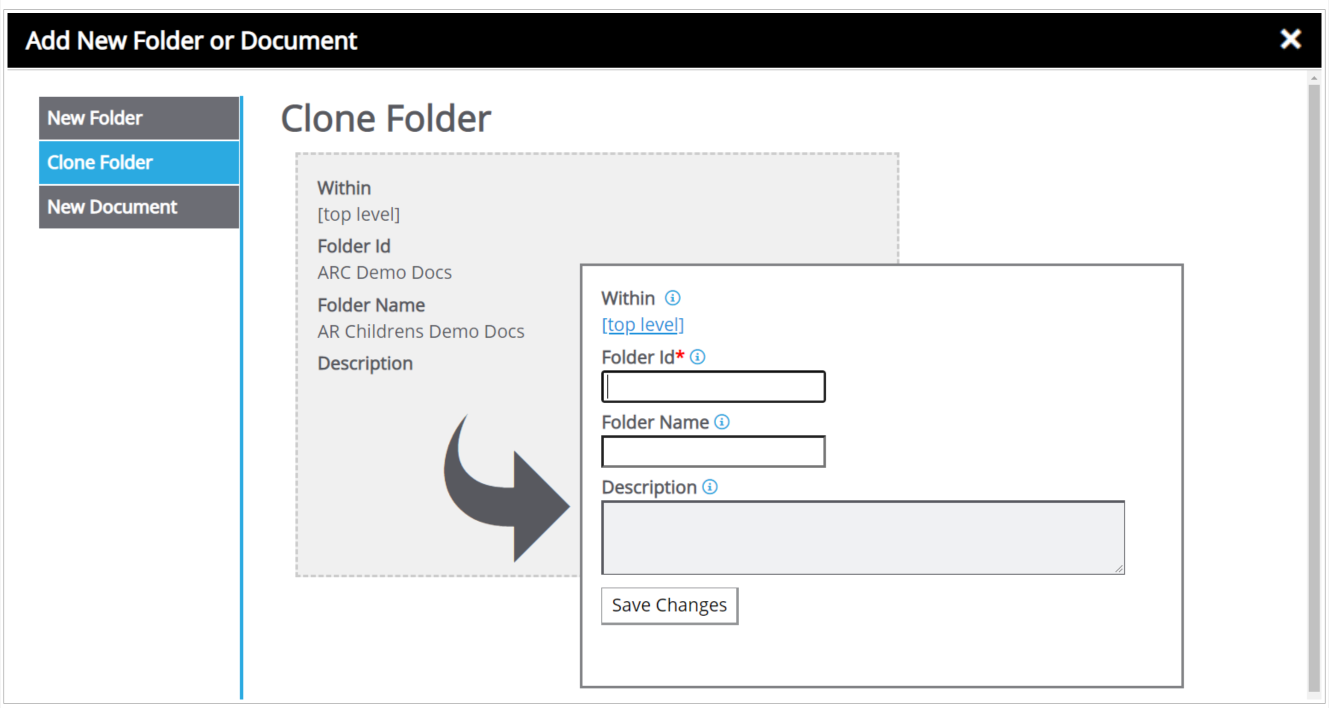


Figure 2

Select the **Save Changes** button to conclude the process.

Add Documents to Requirement

To add a competency document to a requirement, navigate to the **Setup** tab, select the **Requirements** perspective, and then select the individual requirement that you want to add documents to. **(Figure 1)**

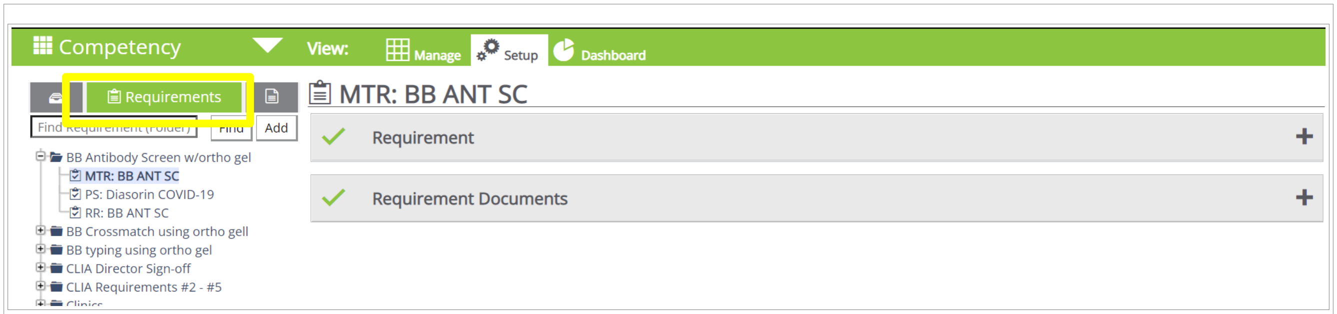


Figure 1

Select the **Requirement Documents** color bar to expand it. **(Figure 2)** Select the **Add Documents** button. **(Yellow box, Figure 2)** It should be noted that you can also create new documents by selecting the **New Document** button and following the same steps as before.

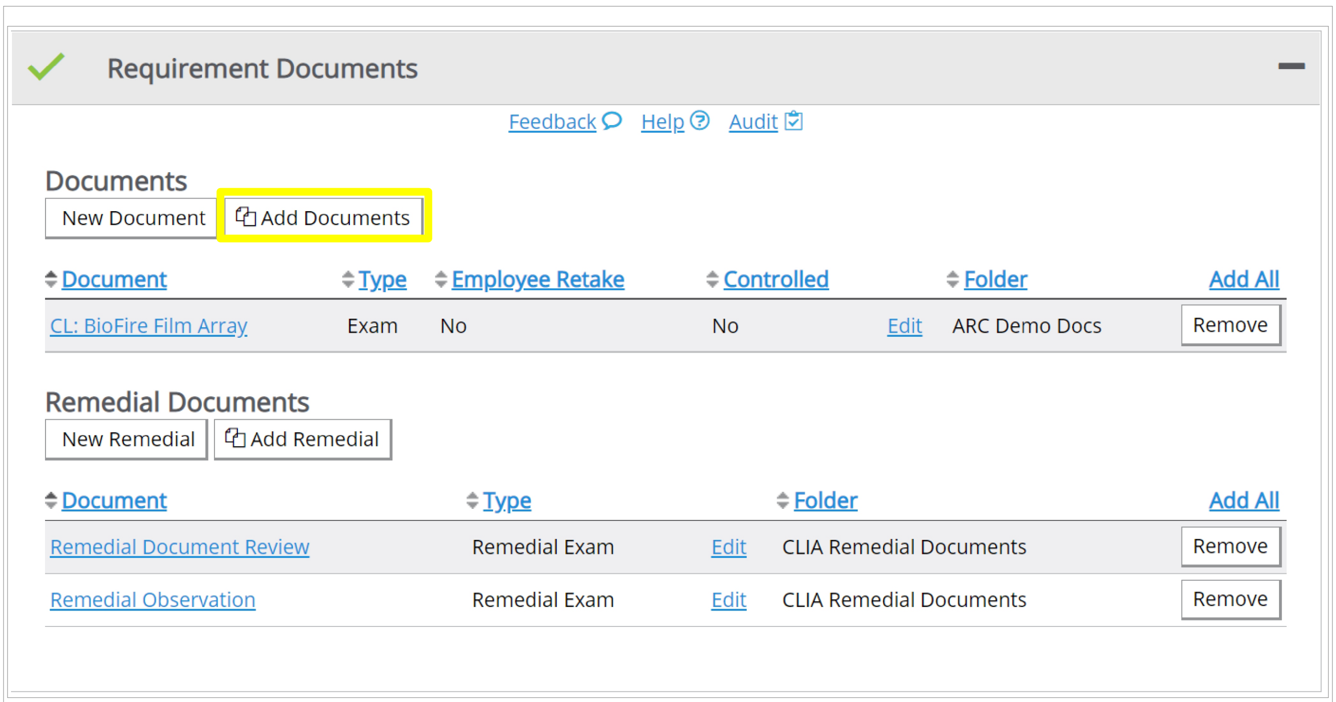


Figure 2

This will open the **Add Documents** pop-up window. (Continued on page 13)

Add Documents to Requirement (Continued)

Select a document folder or an individual document to add by clicking the **Select** button next to it. **(Yellow box, Figure 1)** In this example, we selected the **Documents** (top level) option. Once you've made a selection the **Add Documents** pop-up will automatically close.

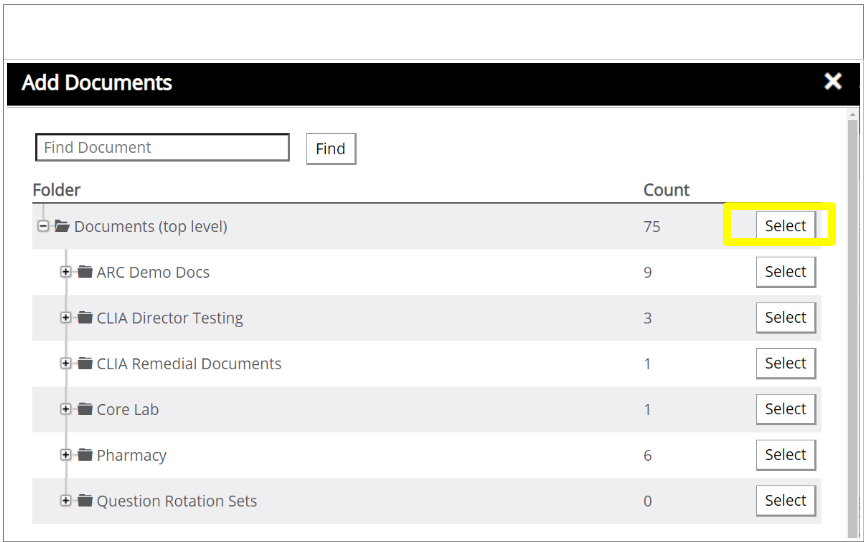


Figure 1

You will now see a green tag **(Yellow box, Figure 2)** representing all documents of a given category. Select the **Add** or **Remove** buttons if you wish to remove any document from this section. If you want to edit the **Document Details** for any document, please consult page 14.

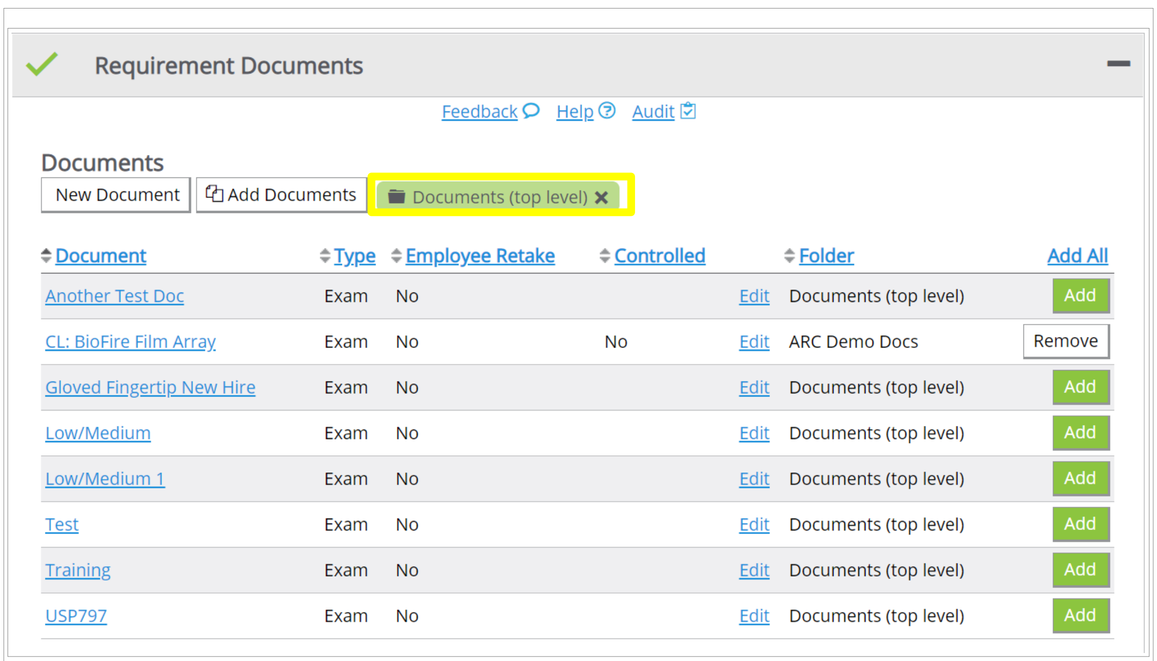


Figure 2

Edit Document Details

To edit **Document Details**, select the **Edit** link adjacent to the document within the **Requirement Documents** color bar. **(Yellow box, Figure 1)**

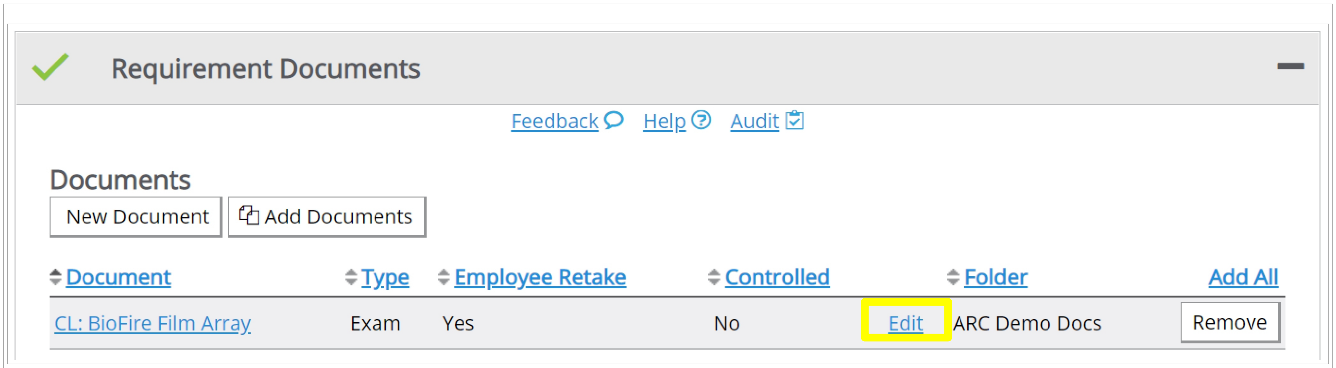


Figure 1

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

You can edit the Document ID, Name, points to pass, where the document resides hierarchically (parent folder), document description, or change the the contents of the document. When finished select the **Save Changes** button.

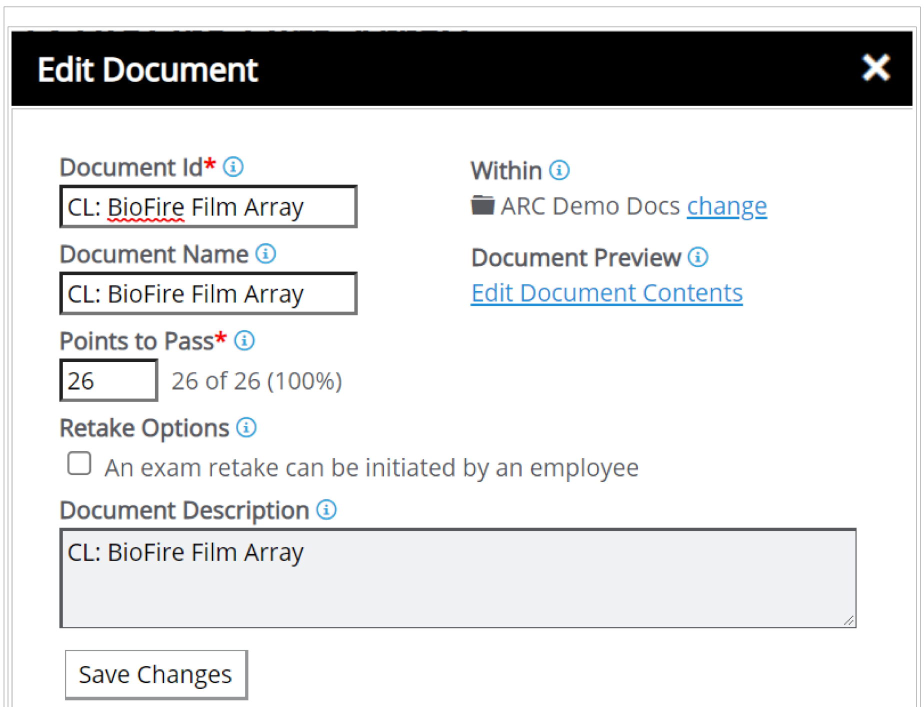


Figure 2

Note: If the document is controlled by **Document Control** you will see a 'Yes' in the controlled column. If this is the case, you will not be able to edit document details here.

Creating Remedial Documents

Remedial Documents can be utilized as remedial pathways for observation of supervisors or colleagues retaking a test or for employees to read a procedure or policy.

To begin creating a **Remedial Document**, navigate to the **Setup** tab select the **Requirements** perspective, locate a given Requirement, select the **Requirement** color bar and then select either the **New Remedial** or **Add Remedial** buttons if you want to add a previously created document. **(Yellow box, Figure 1**)

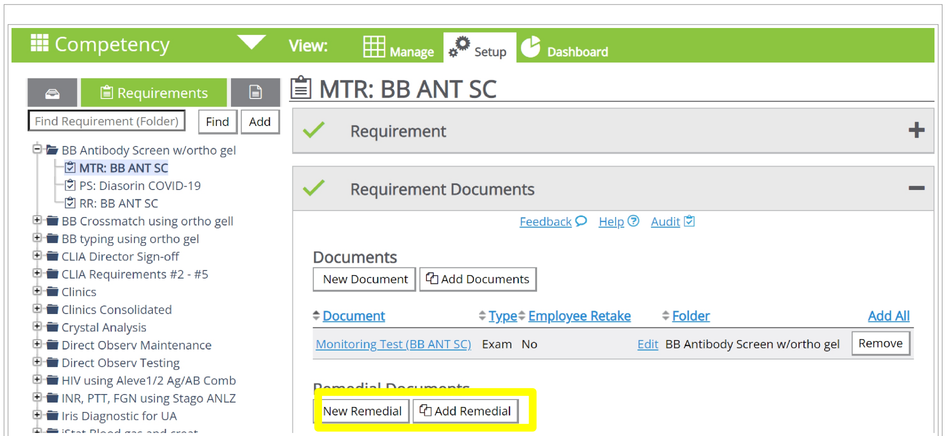


Figure 1

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

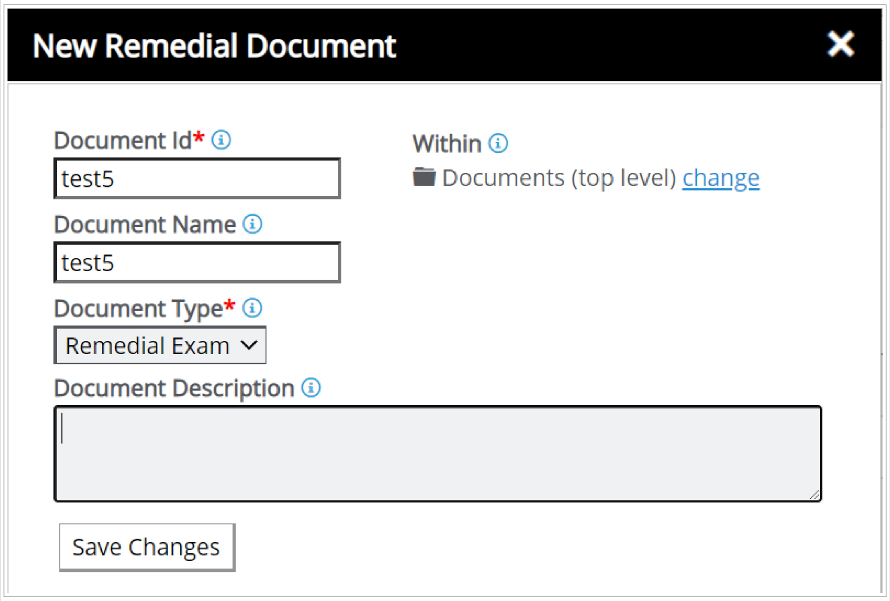


Figure 2

Enter in the Document ID, Document Name, Remedial Exam, and Document Description if necessary. Select the **Save Changes** button when finished.

Your newly created document will now appear below the **Remedial Documents** section. **(Figure 3)**

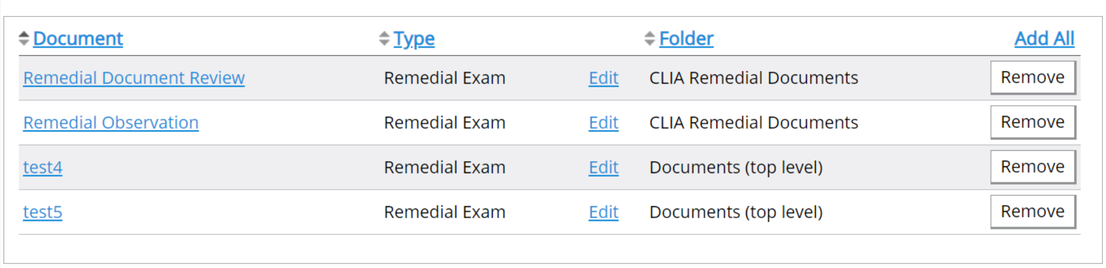


Figure 3

Creating Remedial Documents: Editing Contents

Next, select the document link **(Yellow box, Figure 1)** to open the **Document Editor** directly or select the **Edit** link **(Orange box, Figure 1)** and then the **Edit Document Contents** link.

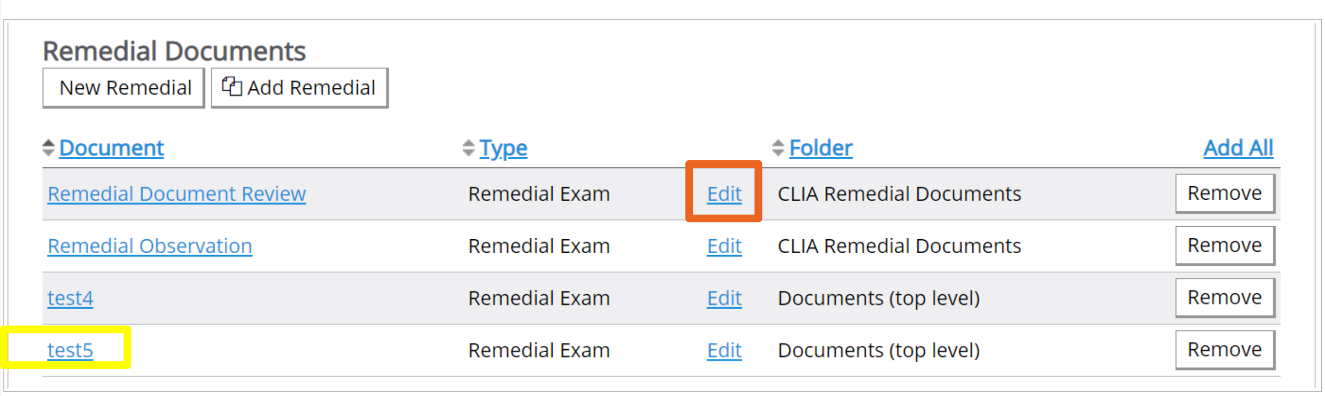


Figure 1

From within the **Document Editor (Figure 2)** select **Add a Question**. **(Orange box, Figure 2)**

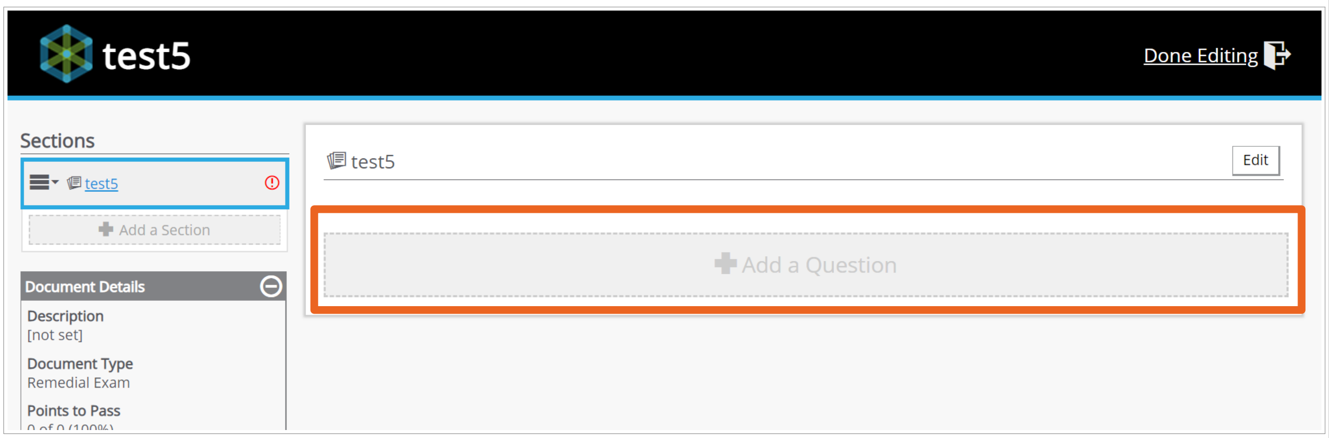


Figure 2

Select either of the **Remedial** options **(Figure 3)** and then select the **Save Changes** button.

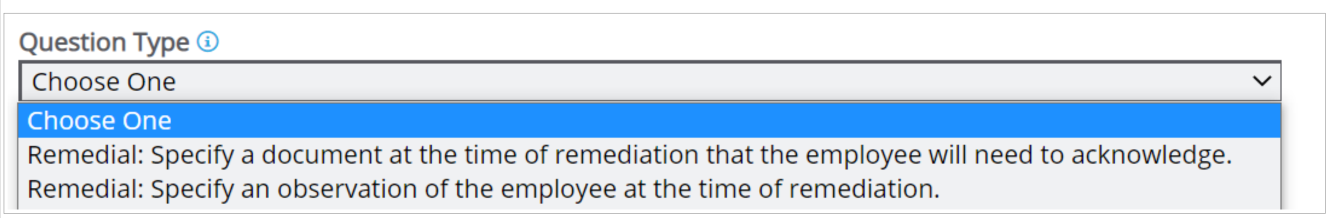


Figure 3

Resources

This concludes the User Guide for **Creating Competency Documents**. We hope that you have a better understanding of this feature and how it functions within the entire framework of the Competency 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.

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Question Rotation	PDF Document
Skillset Levels	PDF Document