



Getting Started: Core User Guide

Document Control Module



Introduction

StaffReady Document Control was specifically designed to make life easier for all employees, from core users to managers, system administrators and everything in between. This Getting Started: Core User Guide is designed to highlight all the features specific to Core users regarding managing personal settings, document revision and acknowledgement tasks.

With StaffReady Document Control, staff can now view and manage document revision and notes from home. Employees can quickly see the status of acknowledgment tasks needing attention, knowing all activities are date and time stamped. Staff can also communicate directly with supervisors regarding questions through an internal messaging portal.

As a result of these features, managing your document revision tasks, notes and activities is a much more flexible and easy process. Acknowledgment tasks are easy to view and respond to, data is centrally organized online, and ease-of-access to all personal profile information dramatically increases. Once you've mastered the main areas of functionality, you'll be able to access tasks, activities and personal settings easily from any device with internet connectivity.

As you get started, we've created a Glossary at the end that highlights terms unique to the software.

Table of Contents

(Please select any topic to skip to that section)

Updating Personal Settings pg. 3
Updating Time Format, Password, and Signature pg. 4
Revision Tasks pg. 5
Revision Tasks: Instruction and Review pg. 6
Revision Notes: Review Notes and Completion pg. 7
Acknowledgment Tasks pg. 8
Acknowledgment Tasks: Signoff pg. 9
Document Library pg. 9
Glossary pg. 10
Resources pg. 11

Updating Personal Settings

Before jumping into how to use our modules, we want to configure our basic settings. Select the gear symbol next to your user name and then select **Settings**. (Figure 1)

This will open the **My Settings** pop-up window.

In the **Contact Information** side tab, you can manage your email address(es) and phone numbers. Email settings can be further adjusted by selecting the **Adjust Email Settings** link adjacent to your email address. (Figure 2)

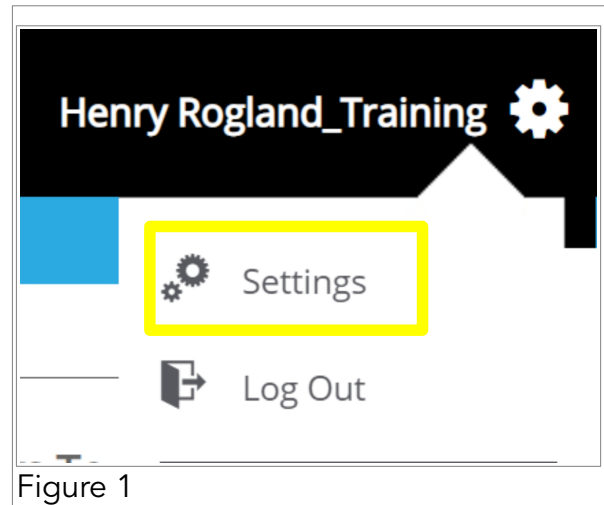


Figure 1

This will open the **Days to Receive Mail** pop-up window. (Figure 3)

You can opt into or out of receiving alert messages or informational notifications by selecting the appropriate check boxes. (Yellow box, Figure 3)

If you opt to receive informational messages, you can also choose which days you receive them on. Once you have made your choices, select the **Save Changes** button.

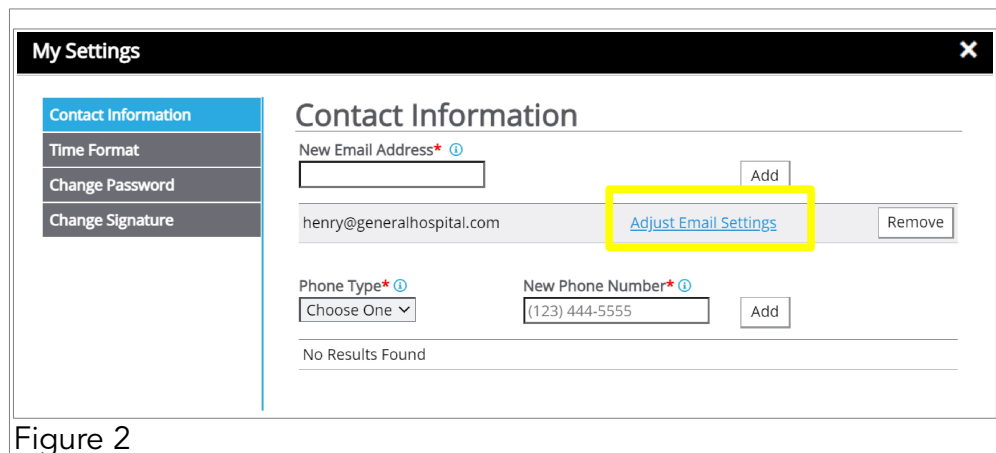


Figure 2

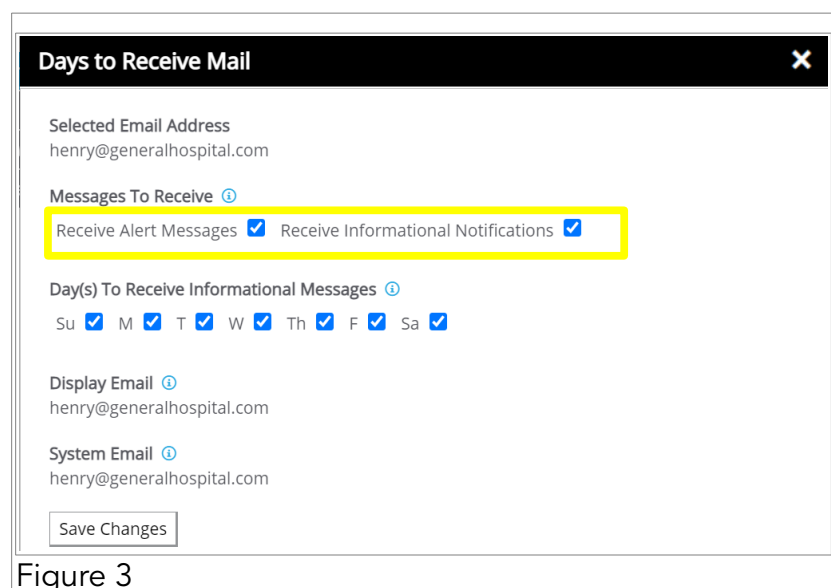


Figure 3

Updating Time Format, Password, and Signature

Selecting **Time Format** will allow you to adjust the **Time Style** display to either 12 or 24 hour time. You can also adjust the Date Format to MM/DD/YYYY (i.e. 12/25/2021) or DD/MMM/YYYY (i.e. 12-Dec-2021). (Figure 1)

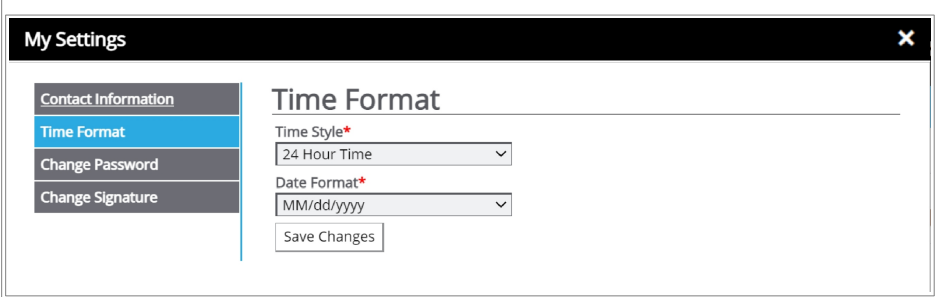


Figure 1

You will need to log out and back in for this change to take effect.

Selecting the **Change Password** side tab will allow you to enter and save a new password. (Figure 2)

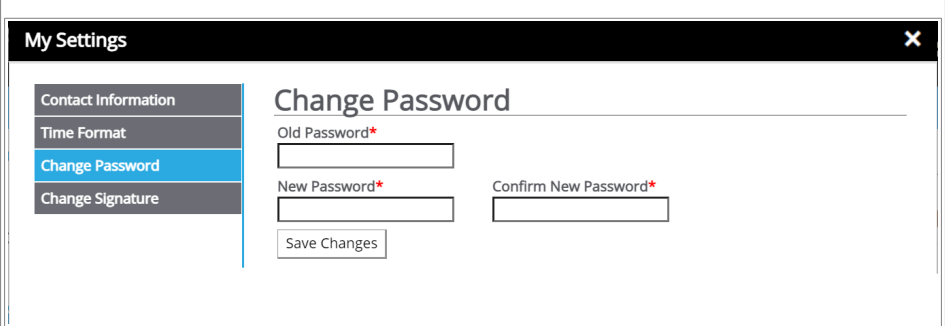


Figure 2

Selecting the **Change Signature** side tab will allow you to enter a new PIN as well as enter the name for your signature and customize its style. Both the PIN and the signature will be used to sign documents.

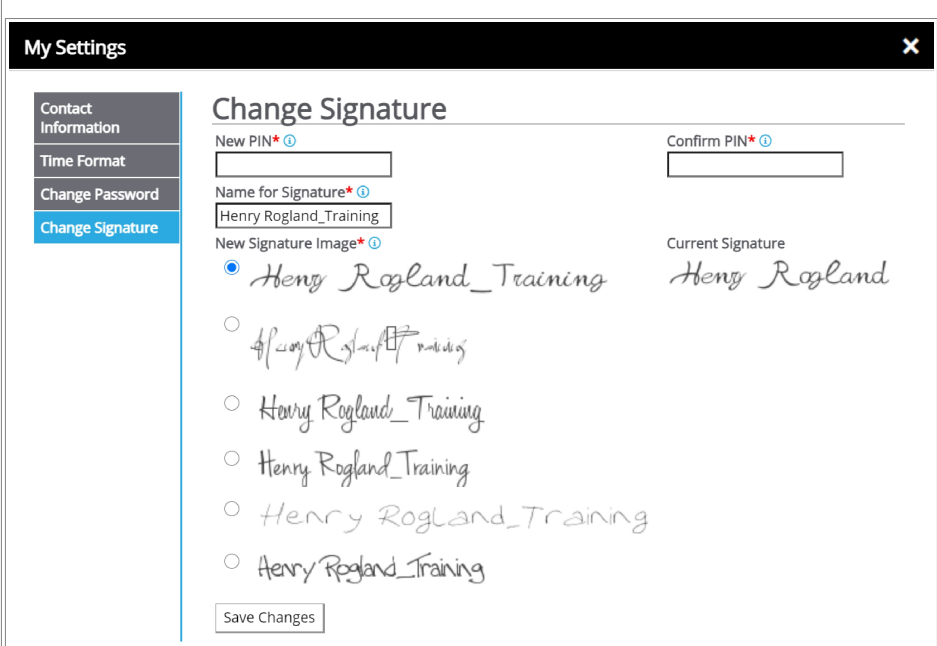


Figure 3

Revision Tasks

From the Welcome tab, select **My Documents**. You will be able to view **Acknowledgment Tasks** and the **Document Library**. Depending on the permissions granted you by your system administrator, you may also have **Revision Tasks** visible. (Figure 1)

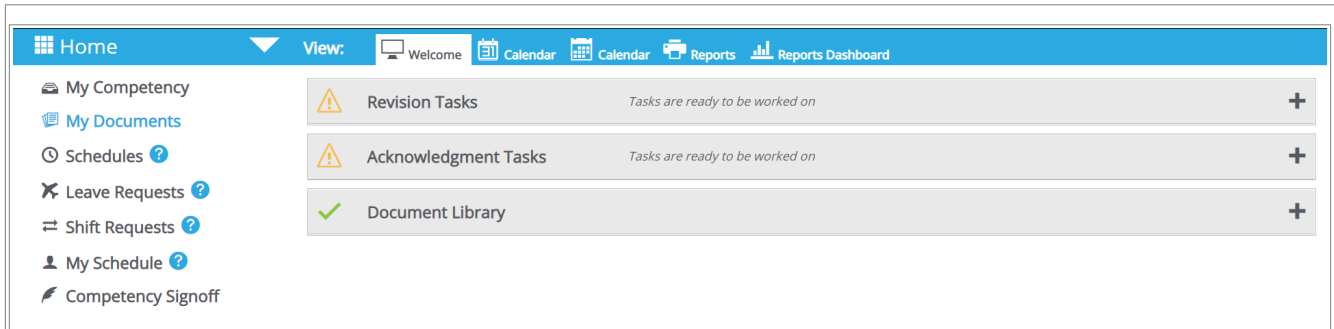


Figure 1

Selecting the **Revisions Tasks** color bar will open it. (Figure 2) Select the download link next to each task to read and update the document being reviewed. Selecting **Start Task** will begin the revision process for one of the documents. Selecting **Continue Task** will resume a previously started **Revision Task**.

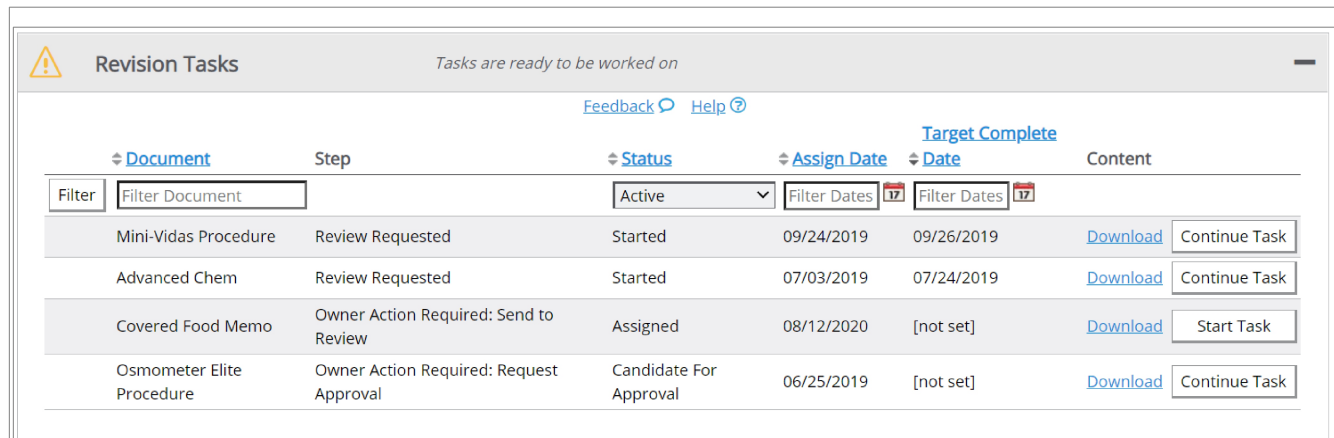


Figure 2

Revision Tasks: Instructions & Review Overview

Selecting either link will open the **Review for Document** pop-up menu. (Figure 1) Selecting the Instructions tab will display the **Document Name** with the **Classification** in parentheses, the **Target Publish Date**, and **Revision Instructions**. You can also download the document by selecting the document link. (Yellow box, Figure 1)

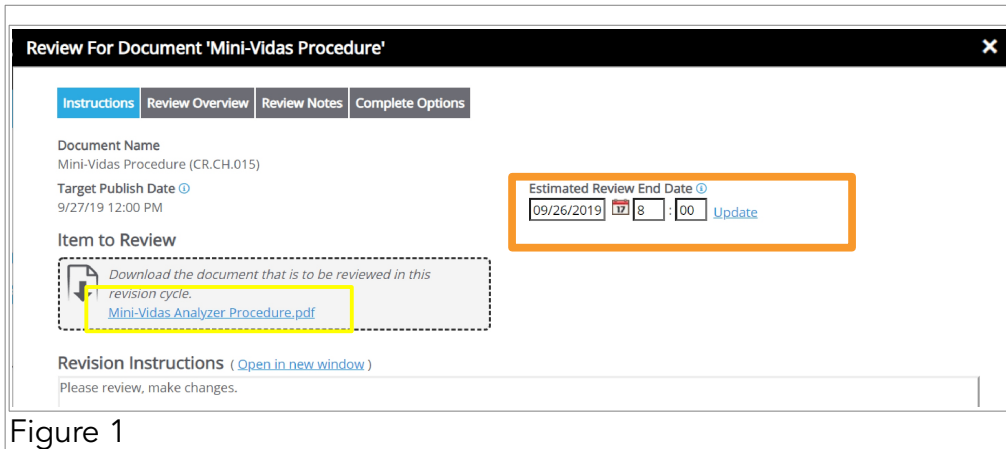


Figure 1

You can also adjust the estimated review **End Date** or choose a date by clicking on the calendar icon. (Orange box, Figure 1) Select the **Update** link to lock in the **Estimated Review End Date**. The **Estimated Review End Date** is an optional date for when you think the review might be completed. A reviewer can update this if their projected completion date is different than the one set by the **Document Owner**.

Select the **Review Overview** tab (Figure 2) to view the **Document** name as well as different information about the document, such as who it was assigned to, the assignee's role, the status of completion, and any comments or attachments that were added in **Review Notes**. (Covered on page 7)

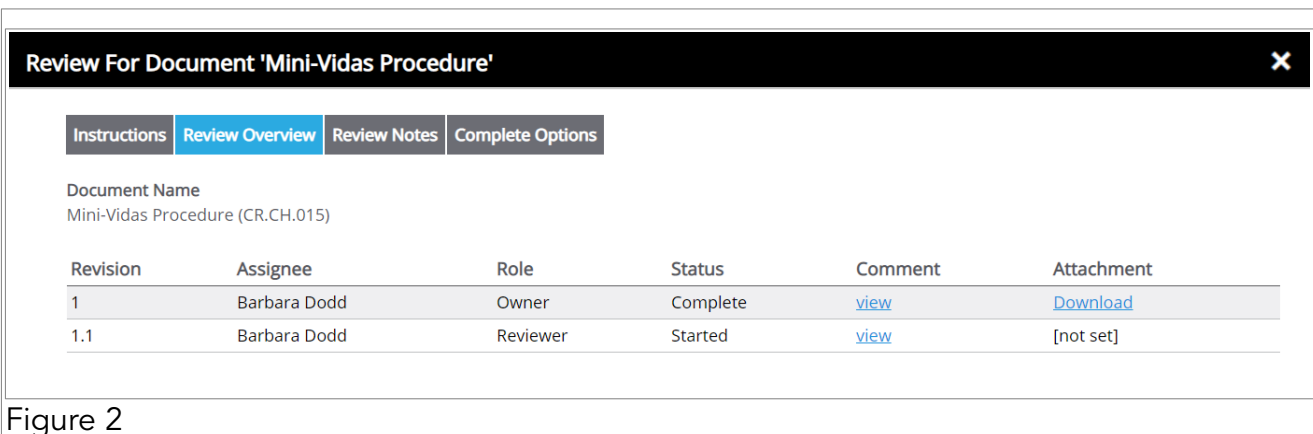


Figure 2

If a comment was added, a **View** link will be visible. Selecting it will allow you to read the comments. If the assignee added an edited version of the document, a **Download** link will be visible. Selecting the link will download the document and you can view the revised attachment.

Revision Tasks: Review Notes & Complete

Selecting the **Review Notes** tab (Figure 1) will display the document(s) being reviewed and provides another download link. Use the **Add Review Notes** text field to record any recommendations or required document revisions for the **Document Owner** to consider. To upload an edited version of the document or other supporting documents, select the attach link in the **Add Attachment** section. Once you are finished, select **Save**.

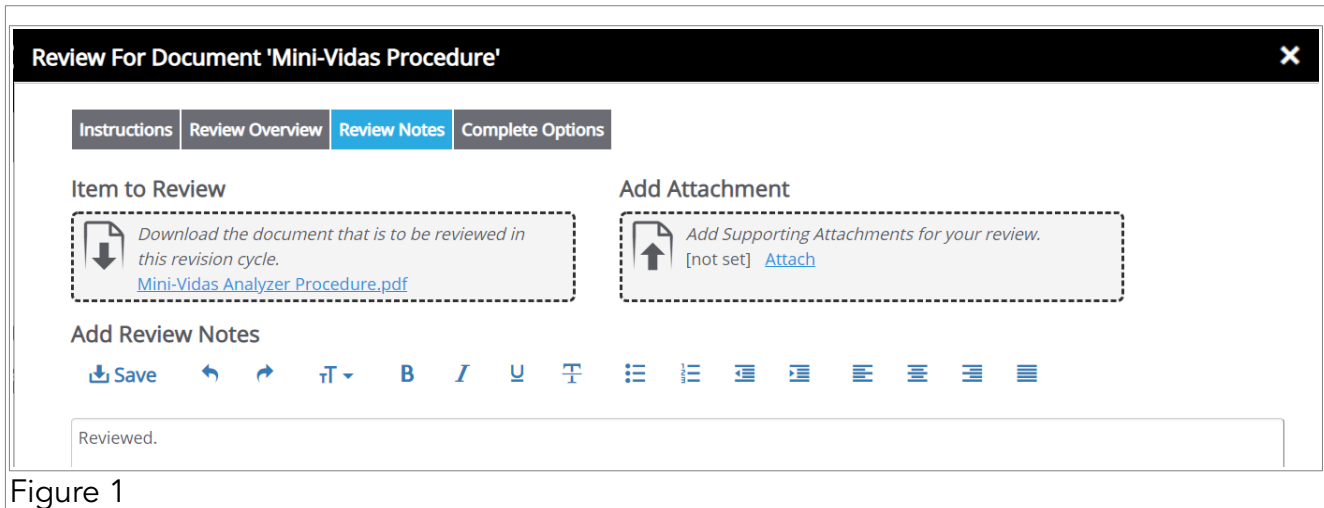


Figure 1

Note: We highly recommend saving your comments periodically. It is important to save your work often because if your session times out, any unsaved comments will be lost.

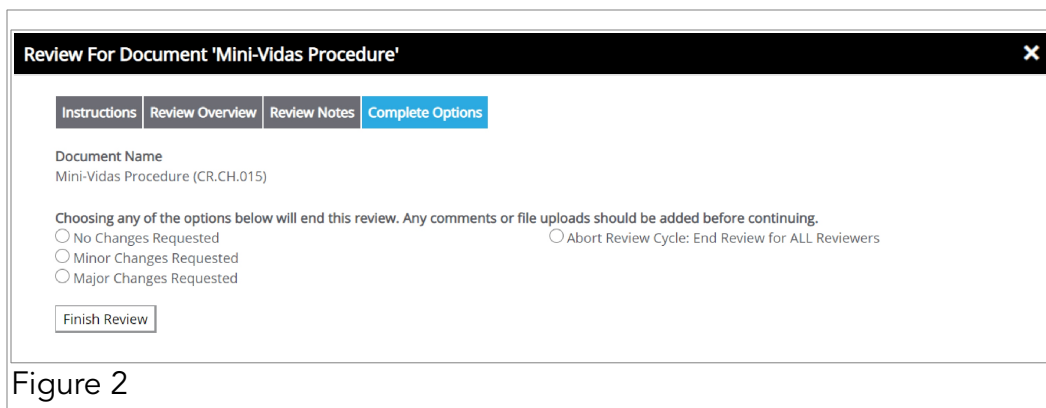


Figure 2

Select the **Complete Options** tab. (Figure 2) Select one of the following review options: **No Changes Requested**, **Minor Changes Requested** (requires minimal updates before being published), **Major Changes Requested** (requires significant content updates before being published), and **Abort Review Cycle (End for Review for ALL Reviewers)**. Selecting **Abort Review Cycle** will immediately end the review cycle for all Reviewers and send it back to the Document owner.

Once you've selected one of these options, select the **Finish Review** button. The information will then be sent back to the owner for review.

Acknowledgment Tasks

The **Acknowledgment Tasks** color bar (**Figure 1**) allows you to manage and acknowledge receipt of published documents within your organization. You can choose to filter your acknowledgment tasks by selecting the **Document**, **Status**, **Assigned**, or **Due** links to change the sort order of each column. You can also choose to type a **Document Title** into the **Filter Document** field and selecting the filter button to refine the number of results. Selecting the Status dropdown menu allows you to filter results by **Show All Results**, **Incomplete**, **Complete**, **Overdue**, **Due Soon**, **Assigned**, and **Upcoming**. You can select a specific calendar date to filter the tasks by **Assigned** date or **Due** date.

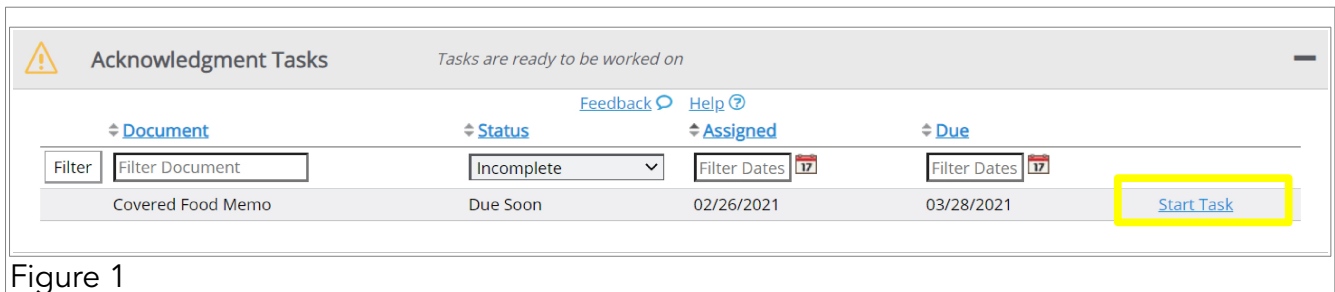


Figure 1

To begin an **Acknowledgment Task**, first navigate to the **Acknowledgment Tasks** color bar and then select the **Start Task** link next to the task you wish to start. (Yellow box, Figure 1)

This will open the **Document Acknowledgment** screen. (Figure 2)

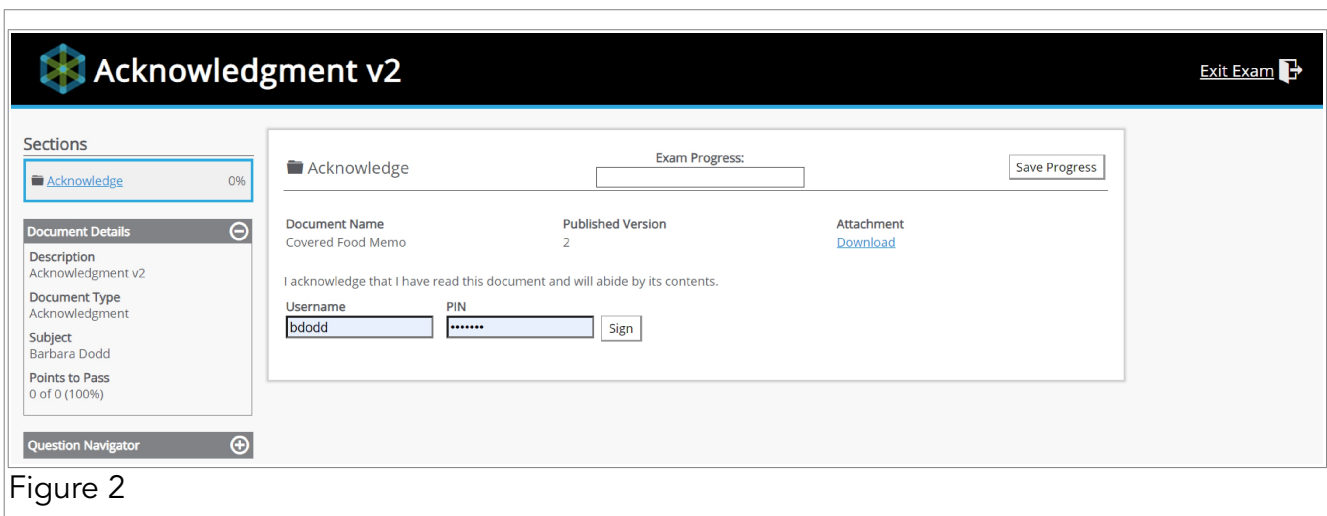


Figure 2

To review the document requiring acknowledgment, select the **Download** link.

Once you have reviewed the document, enter your username and PIN and then select the **Sign** button to confirm that you have reviewed the document. If you do not finish to acknowledge your review of the document but wish to exit, select the **Save Progress** button.

Acknowledgment Tasks: Signoff

If you selected **Sign**, you will then be able to review your signature before submitting the **Signoff**. (Figure 1) If you signed in error, you can select the **Reset Signature** link to revert to the previous screen.

Select the **Exit Exam** link to close the **Acknowledgment** screen and return to the **Welcome** tab.

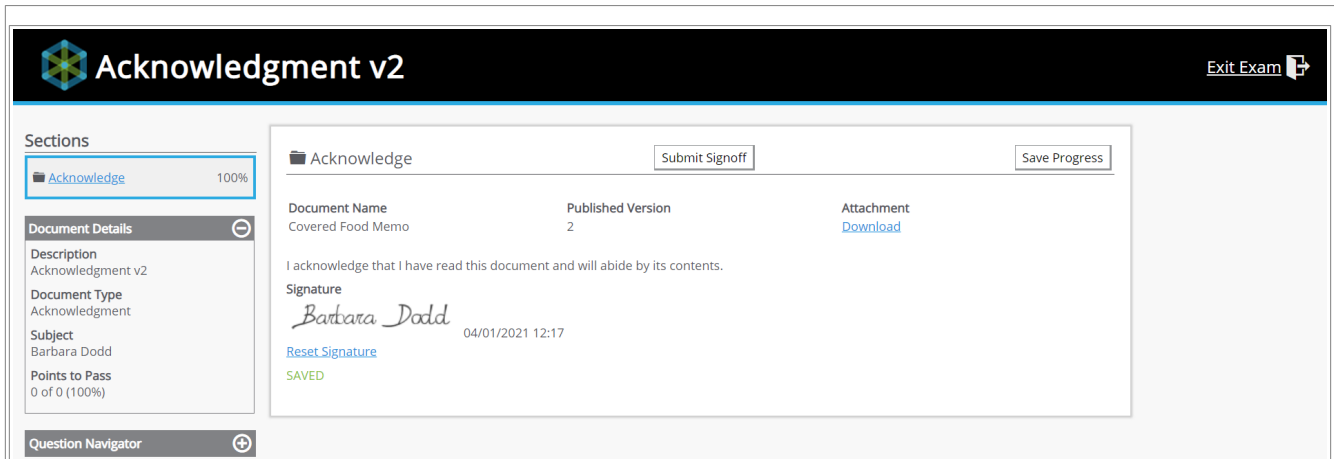


Figure 1

Document Library

Selecting the **Document Library** color bar (Figure 2) allows you to view all publicly available documents published within your organization. You can search by keyword, document name, identifier, description and location. You can also choose to download or add comments to these documents.

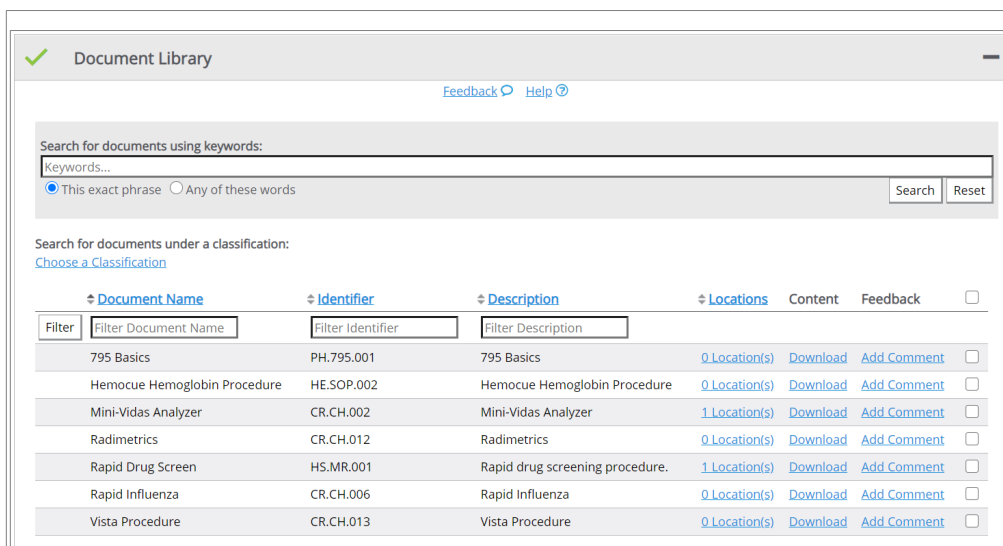


Figure 2

Glossary

Acknowledgment: A published document that employees receive that they are required to read and acknowledge that they have received and understand it.

Approver: the final authority on whether a document revision will be approved or denied. An **Approver** will read and validate the revised document. A document can have more than one **Approver**.

Classification: Classification is based on the library of congress filing system and is used to display critical information in an abbreviated format.

Document Owner: The creator of and person primarily responsible for maintaining a document within an organization. The document owner can publish a document for distribution to employees. Each document can only have one document owner.

Note: A **Document Admin** has access to all Documents and has the same permissions as a **Document Owner**.

Identifier: Another term for the **Classification Short ID**.

Reviewer: A person that analyzes a document to check the accuracy of the content and the consistency of its formatting. A document can have multiple reviewers but a minimum of one is required.

A document can also have a **Final Reviewer** who will confirm the accuracy of the document after the standard review process. There can be more than one **Final Reviewer**.

Resources

This concludes the Core User Guide for the **Document Control** module. 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.

Getting Started: Scheduling	PDF Document
Getting Started: Competency	PDF Document