



# Requirements and Requirement Folders User Guide

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## Competency Module



## Introduction

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Skillset Requirements are a cornerstone of the Competency module. A Skillset requirement is an obligation that must be satisfied by staff employees in order to achieve a successful competency assessment for a test system.

Every skillset you create is made up of different requirements and every requirement has different documents attached to it. Every skillset created can be made up by a unique, not fixed, number of requirements. Unlike other means of tracking skillset requirements, StaffReady is highly flexible and customizable.

Mastering the creation and management of requirements and requirement folders allows organizations to dramatically improve efficiency by further defining skillsets and assigning those easily to employees.

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## Add And Remove Requirements

To begin adding or removing a **Requirement**, first navigate to the **Setup** tab of the Competency module and select the **Skillsets** perspective. (Yellow box, Figure 1)

It should be noted that you can add new **Requirements** or make changes to existing **Requirements** from the **Requirements Perspective** in addition to the **Skillsets Perspective**.

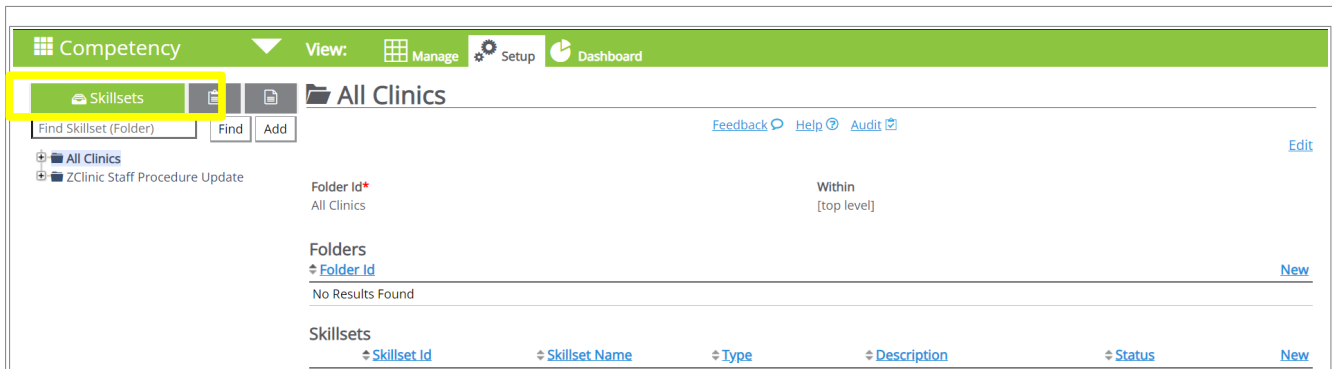


Figure 1

Next, select the **Skillset** you wish to add a **Requirement** to and select the **Add Requirement** button. (Yellow box, Figure 2) (Continued on page 4)

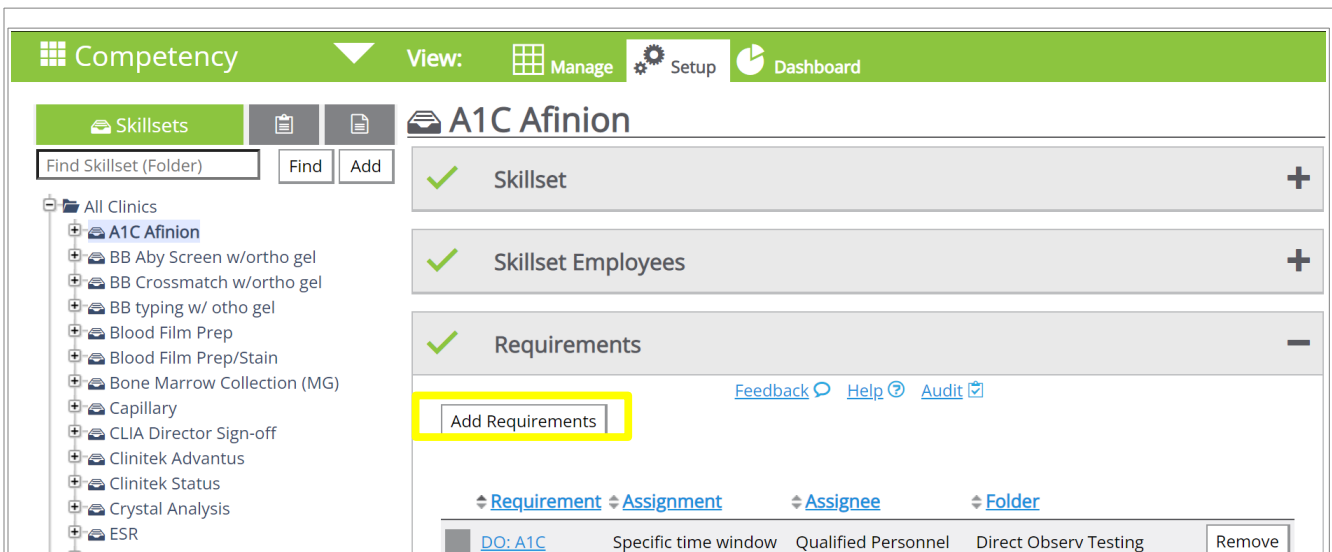


Figure 2

## Add And Remove Requirements (Continued)

Next, select the parent folder the **Requirement** should reside by clicking the relevant **Select** button. (Figure 1) **Note:** if the **Requirement** you are looking for is not compatible with the **Skillset Type**, you will not see the **Requirement** counted in this window. **CLIA Skillsets** need **CLIA** type **Requirements** and **Working Task** or **One Time Skillsets** need **Working Task Requirements**.

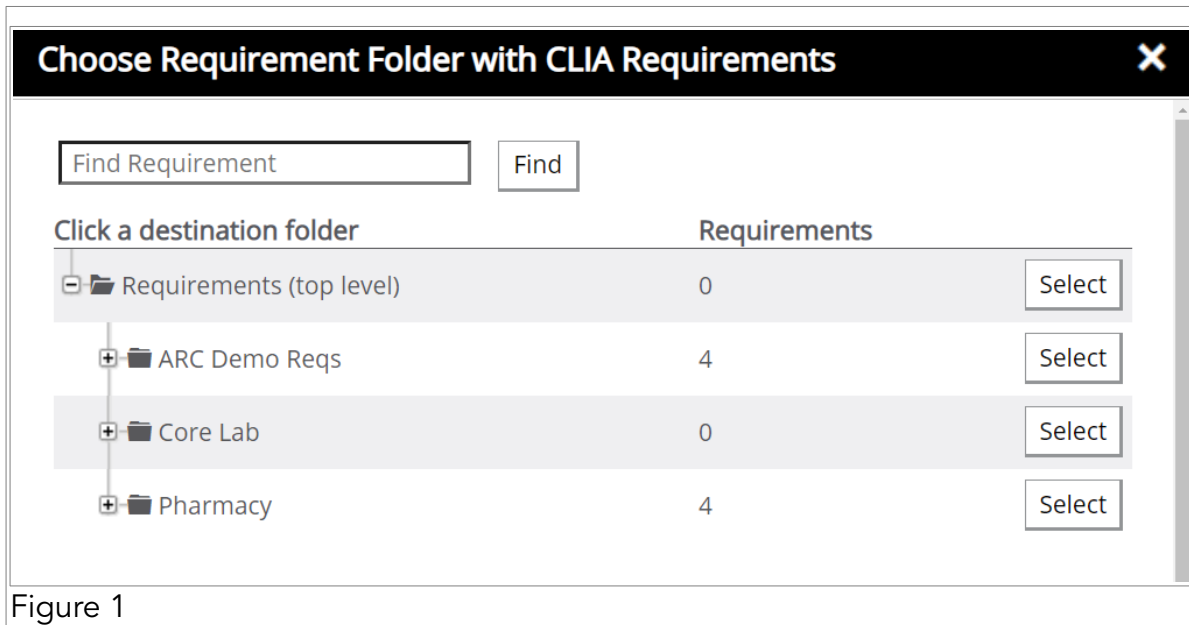


Figure 1

Locate the **Requirement** you want to add in the list and select the **Add** button. (Yellow box, Figure 2)

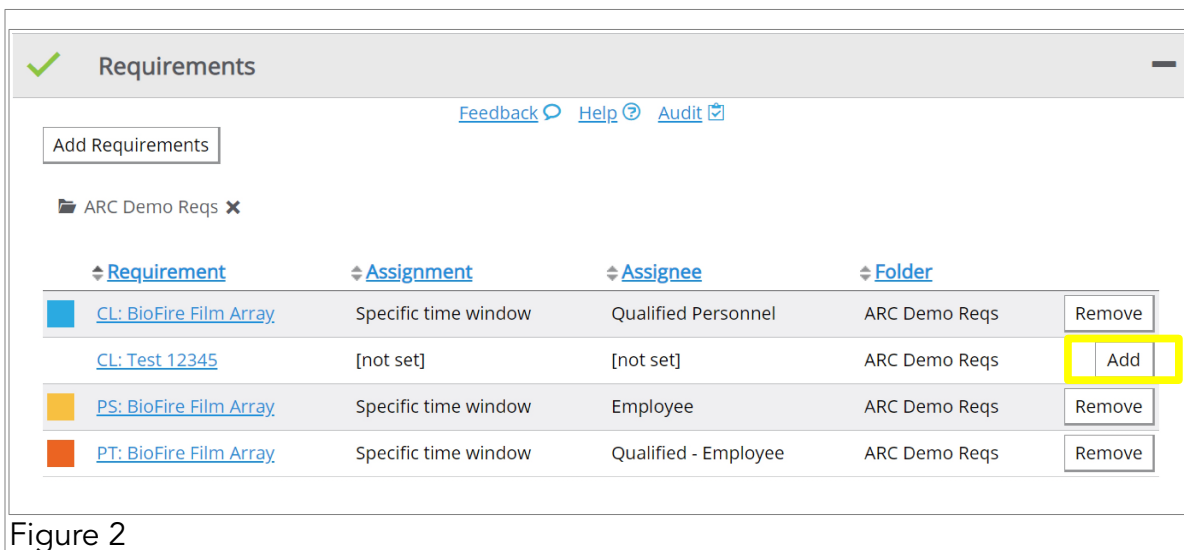


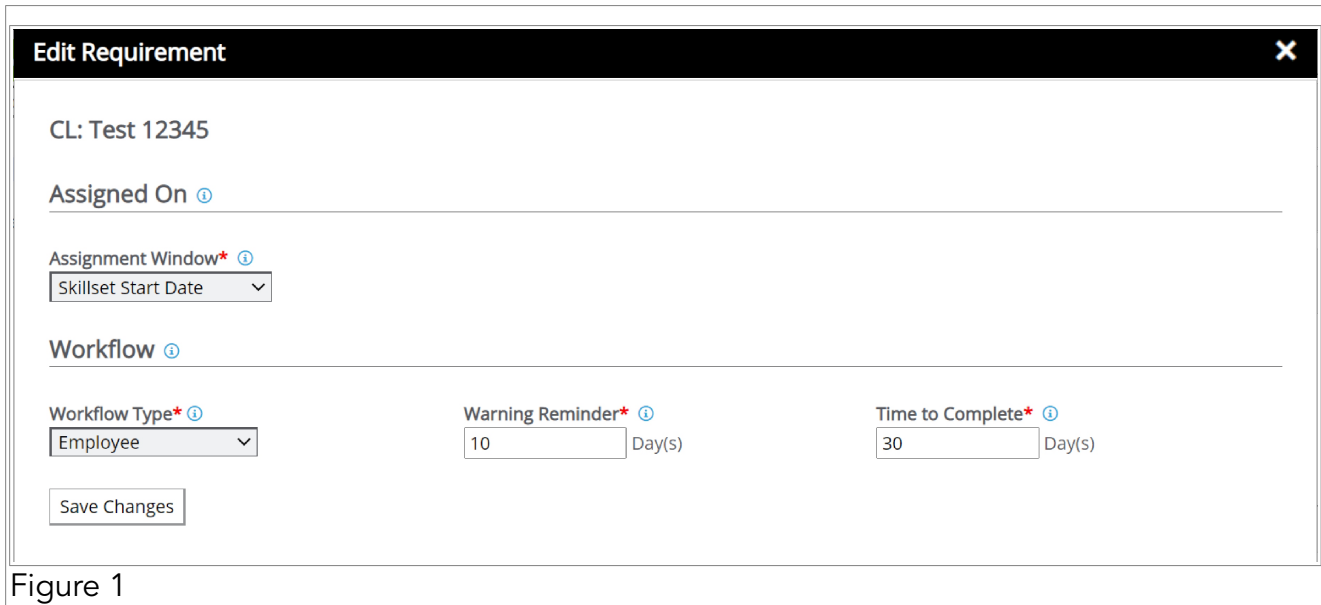
Figure 2

If you wish to remove a **Requirement** from the **Skillset**, select the **Remove** button. If the **Skillset** is published, removing a **Requirement** will revoke any assessments that haven't been started that are associated with it.

## Edit Requirement Window

This will open the **Edit Requirement** pop-up window. (Figure 1)

From here, you can adjust the **Assignment Window** to either the **Skillset Start Date** or a **Specific Window** of time for all employees on the **Skillset**.



The screenshot shows a pop-up window titled "Edit Requirement" with a close button (X) in the top right corner. The window contains the following fields and controls:

- CL: Test 12345
- Assigned On ⓘ
- Assignment Window\* ⓘ
  - Dropdown menu: Skillset Start Date
- Workflow ⓘ
- Workflow Type\* ⓘ
  - Dropdown menu: Employee
- Warning Reminder\* ⓘ
  - Input field: 10
  - Label: Day(s)
- Time to Complete\* ⓘ
  - Input field: 30
  - Label: Day(s)
- Save Changes button

Figure 1

**Skillset Start Date:** Assessments will roll out to each employee based on their individual **Skillset Start Date** (The date the employee began being assessed on the process). Employees can have different start dates for different skillsets.

**Specific Window:** Selecting **Specific Window** means that the **Requirements** will be rolled out to everyone assigned to the **Skillset** on a specific date. If this option is selected, a new field will appear that you will need to enter the date in.

## Workflow Type, Warning Reminder, Time to Complete

You can also adjust the **Workflow Type**. **Workflow Type** determines who is assigned a particular task for the **Requirement**. For example, you would use a **Qualified Personnel Workflow Type** if the **Requirement** entails observing a specific **Skillset Employee**.

**Employee:** This workflow type means that the requirement will go directly to the employee listed on the **Skillset**. Primarily used for problem solving exams.

**Employee-Qualified:** Goes to the employee listed on the skillset, and then to the **QP(s)** listed on the requirement. Primarily used for **Graded Exams**.

**Qualified-Employee:** Goes first to the **QP(s)** listed on the skillset, and then to the employee listed on the **Requirement**. Primarily used for **Blind Testing**.

**Qualified Personnel (QP):** Goes only to **QP(s)** listed on the requirement and is typically used for **Direct Observation**.

**Warning Reminder:** Setting this field allows you to set the number of days before a reminder that a task is nearing its due date is sent to employees. Notification messages must be turned on for these to be sent.

**Time to Complete:** Setting this field allows you to set a time that a team member has to complete a task before it becomes overdue.

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

Workflow Type\* ⓘ

- Employee
- Choose One
- Employee
- Employee - Qualified
- Qualified - Employee
- Qualified Personnel

**Note: Qualified Personnel**  
Choosing any **Workflow Type** other than **Employee** will require you to input at least one **QP (Qualified Personnel)**. Two **QPs** may be required if the first **QP** is also listed under the **Skillset Employees** color bar.

Warning Reminder\* ⓘ  Day(s)

Time to Complete\* ⓘ  Day(s)

Qualified Personnel ⓘ

Qualified Personnel ⓘ

## Edit or Delete Requirement

To edit an existing **Requirement**, navigate to the **Setup** tab and then locate the **Requirement Folder** and individual **Requirement** you wish to **Edit**. (Yellow box, Figure 1)

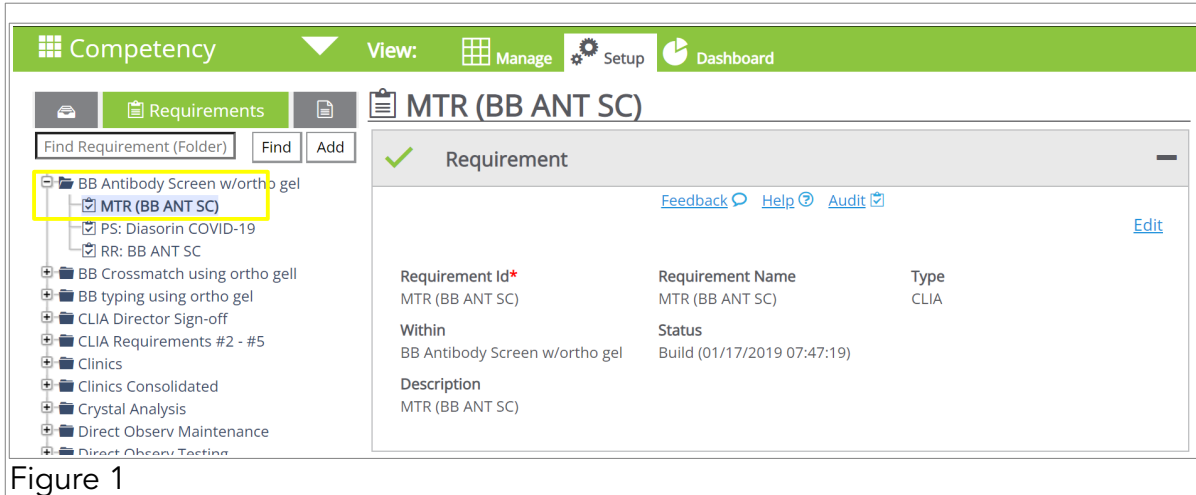


Figure 1

Selecting the **Edit** button will allow you to change different elements within the color bar such as the **Requirement ID**, **Description**, **Parent Folder**, and **Requirement Name**. (Figure 2)

If the **Requirement** is attached to a published **Skillset**, you will need to restart the **Requirement** for the edits to take effect.

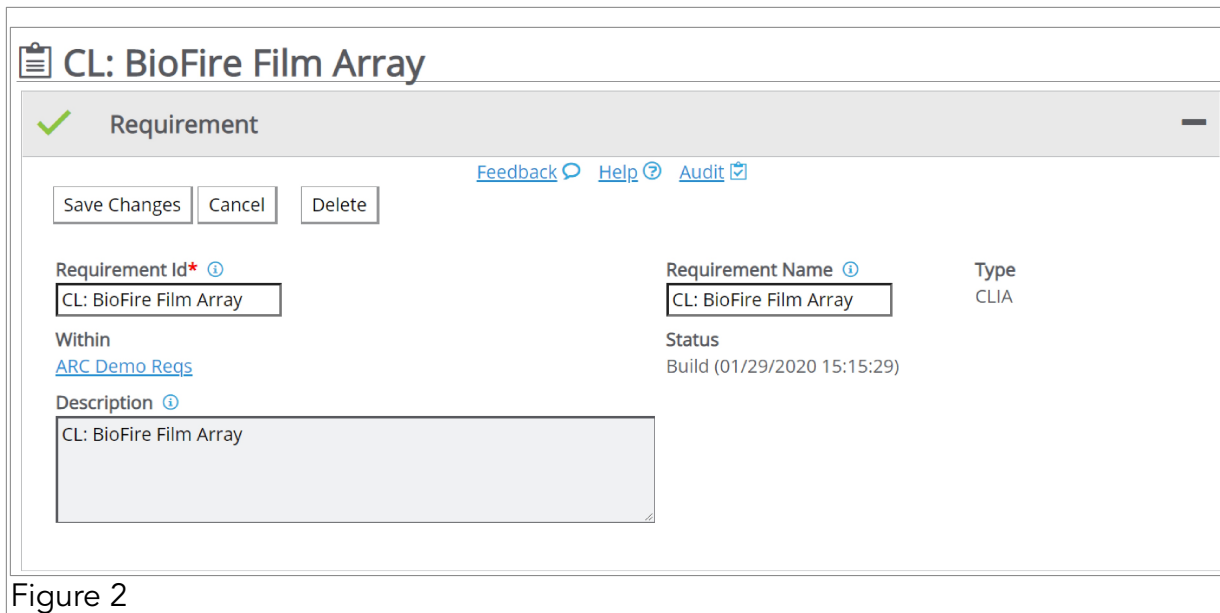


Figure 2

**Note:** You must have **Skillset Documents** assigned to a **Requirement** for the **Requirement** to be attached to a **Skillset**. You can attach a **Requirement** to a **Skillset** without documents but nothing will happen. To read more about creating different types of **Skillset Documents**, please check out this [user guide](#) on how to create Competency Documents.

## Clone Requirement

To clone a **Requirement**, navigate to the **Setup** tab of the **Competency** module, select the **Requirements Perspective** (Orange box, Figure 1), select the **Requirement** you wish to clone, and then select the **Add** button. (Yellow box, Figure 1)

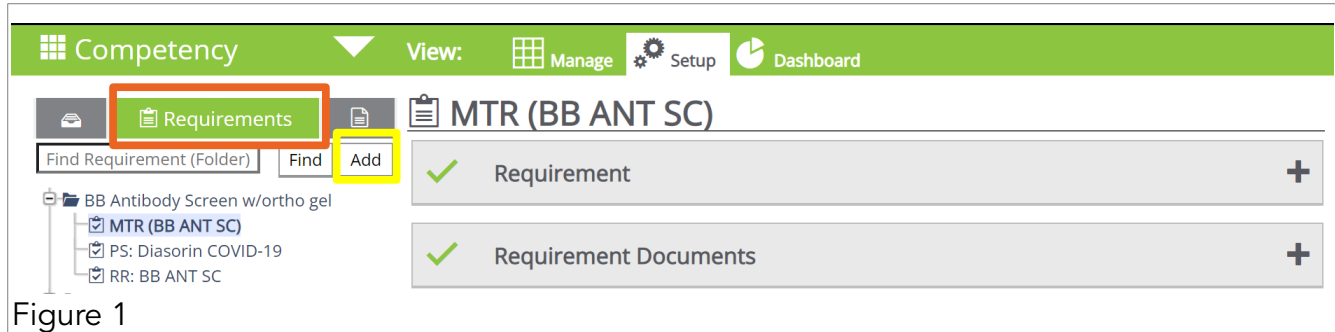


Figure 1

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

Select the **Clone Requirement** side tab (Yellow box, Figure 2) and then enter the **Requirement ID**, **Requirement Name**, and **Description**. Your cloned **Requirement** will be under the same parent **Folder** as the original **Requirement** and will share the documents attached to the original. Duplicate documents are not created.

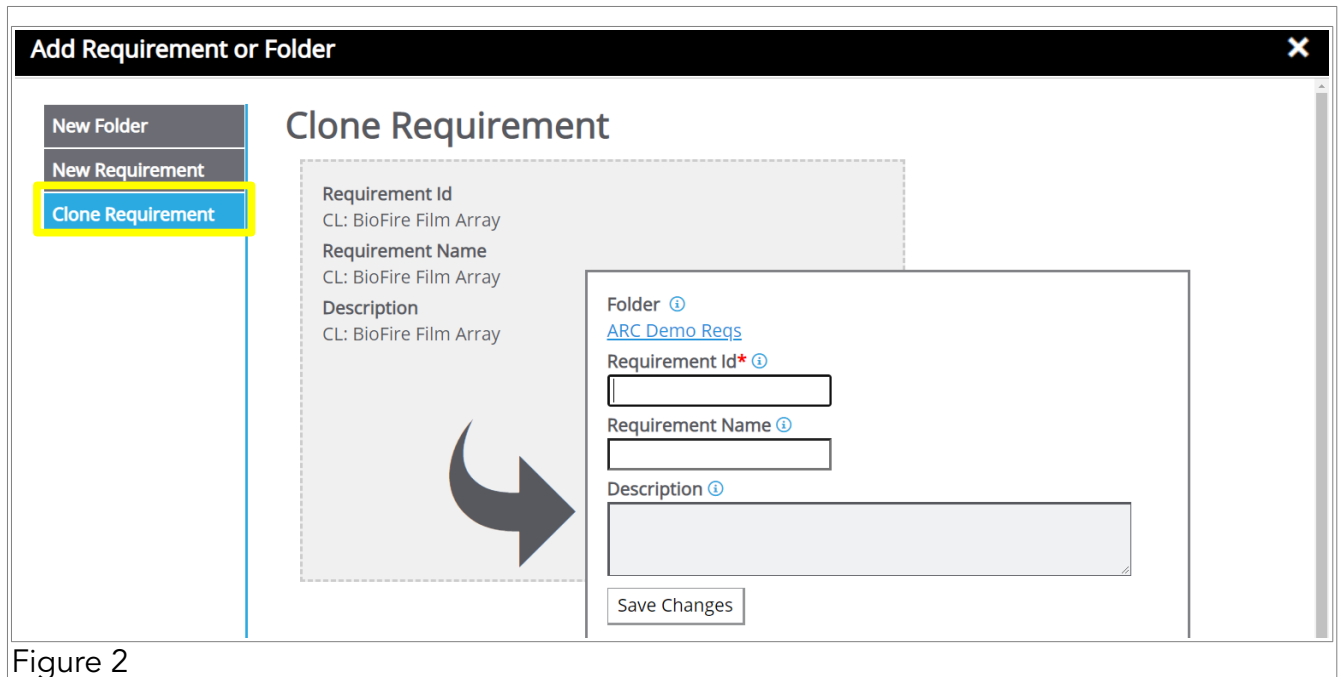


Figure 2

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

## Setting Up Requirement Folders

To begin setting up **Requirement Folders**, navigate to the **Setup** tab, select the **Requirements Perspective** (Orange box, Figure 1) locate the parent **Requirement** folder you wish to add the folder to, and then select the **Add** button. (Yellow box, Figure 1)

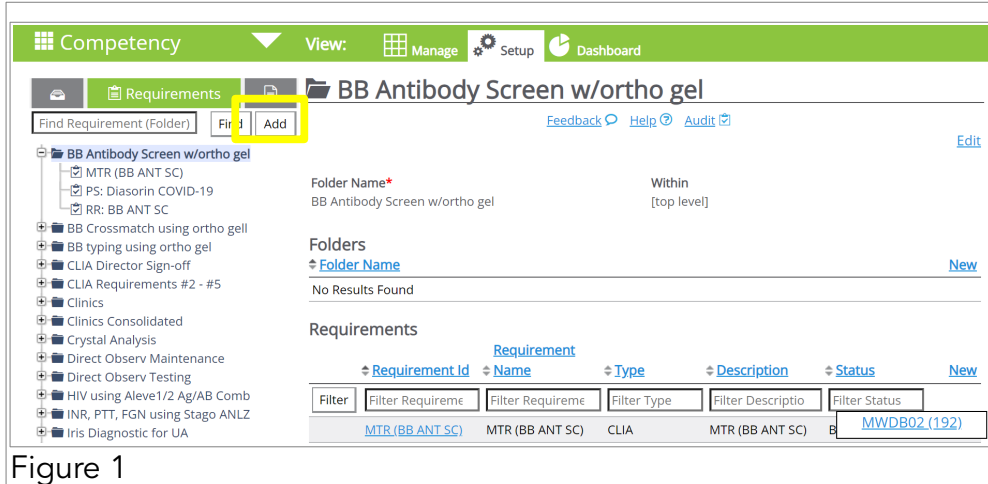


Figure 1

Select the **Add** button. (Yellow box, Figure 1) This will open the **Add Requirement or Folder** pop-up window. (Figure 2) Enter the name of the **Folder** in the **Folder** field. If you need to change the parent **Folder**, select the **Folder** link. (Yellow box, Figure 2)

This will open the **Choose Requirement Folder** pop-up window. Click the **Select** button next to the destination folder you wish to place the new **Requirement** Folder in. (Figure 3)

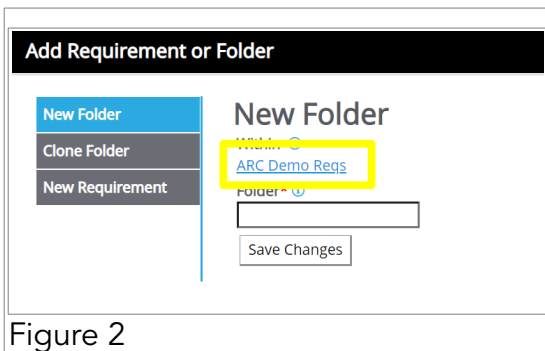


Figure 2

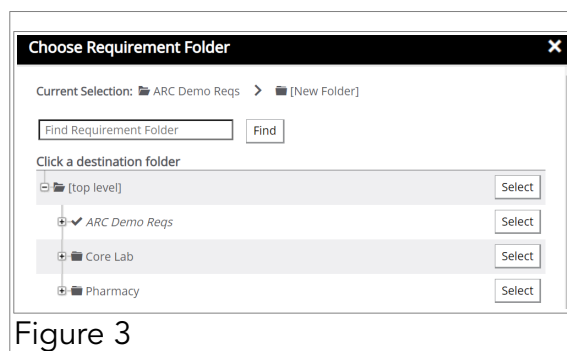


Figure 3

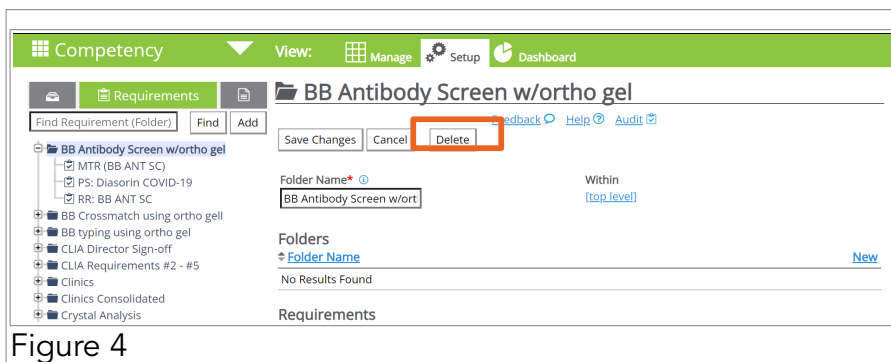


Figure 4

**Note:** If you attempt to delete a folder with child folders or requirements in it, you will receive an error message. (Orange box, Figure 4)

## Cloning Folders

To clone a **Requirement Folder**, navigate to the **Requirements Perspective** in the **Setup** tab of the **Competency Module**. Select the **Requirement Folder** you wish to clone and then select the **Add** button. (Yellow box, Figure 1)

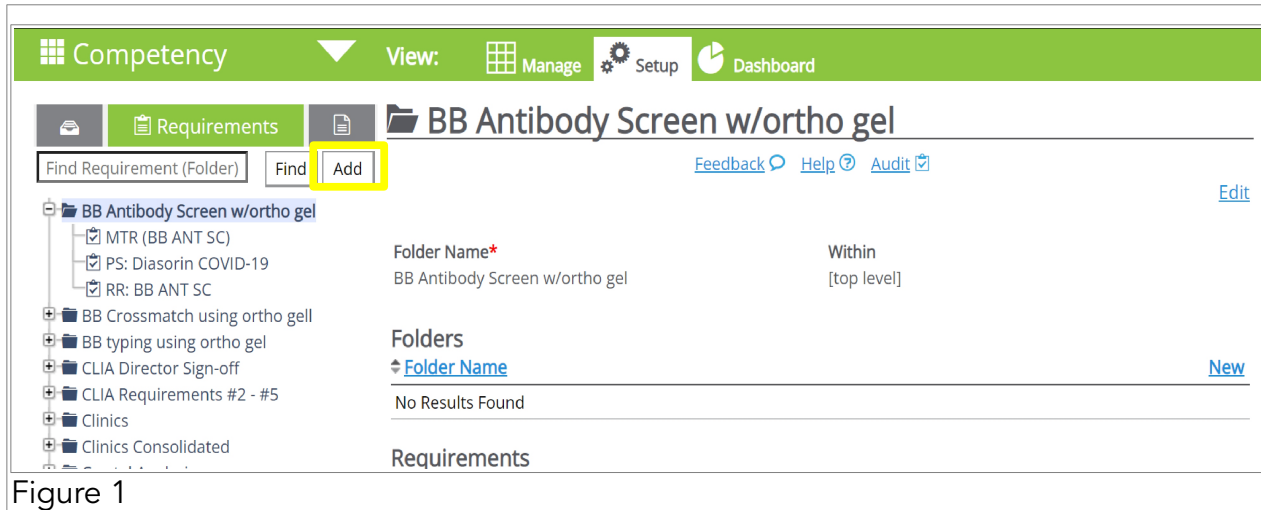


Figure 1

This will open the **Add Requirement or Folder** pop-up window. (Figure 2) Select the **Clone Folder** side tab, enter a **Folder ID**, **Folder Name**, and **Description**. If you need to adjust the parent **Folder**, select the folder link. (Yellow box, Figure 2) Select the **Save Changes** button when you are finished.

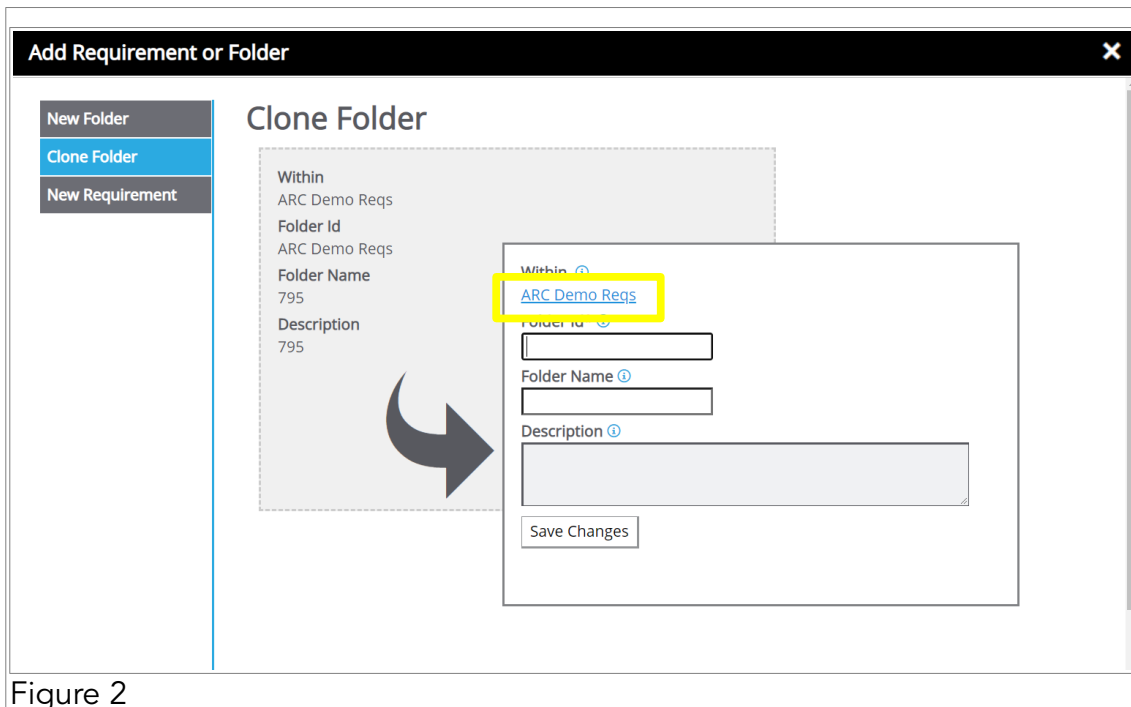


Figure 2

## Resources

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This concludes the User Guide for **Requirements** and **Requirement Folders**. 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.

<a href="#">Skillsets and Employees</a>	<a href="#">PDF Document</a>
<a href="#">Create Competency Documents</a>	<a href="#">PDF Document</a>
<a href="#">Skillset Levels</a>	<a href="#">PDF Document</a>
<a href="#">Competency Overview</a>	<a href="#">PDF Document</a>