StaffReady

Teams User Guide

Staff Module

Introduction

The StaffReady Teams function allows for the grouping of staff into separate departments or units. Your organization can utilize this feature to assign teams for document review, teams of qualified personnel, and teams to acknowledgment lists.

Mastering this feature allows you to move away from individual assignments and instead are able to group employees by teams and send assignments out enmasse.

StaffReady Teams saves significant time in overall staff management, creates significant efficiencies, and makes these tasks much easier for admins and managers.

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Teams Tab Overview

<u>**Note:**</u> The Teams tab primarily functions with StaffReady Competency and StaffReady Document Control. If your license does not include these modules and you would like to add them to your license, please contact your StaffReady Customer Success Manager.

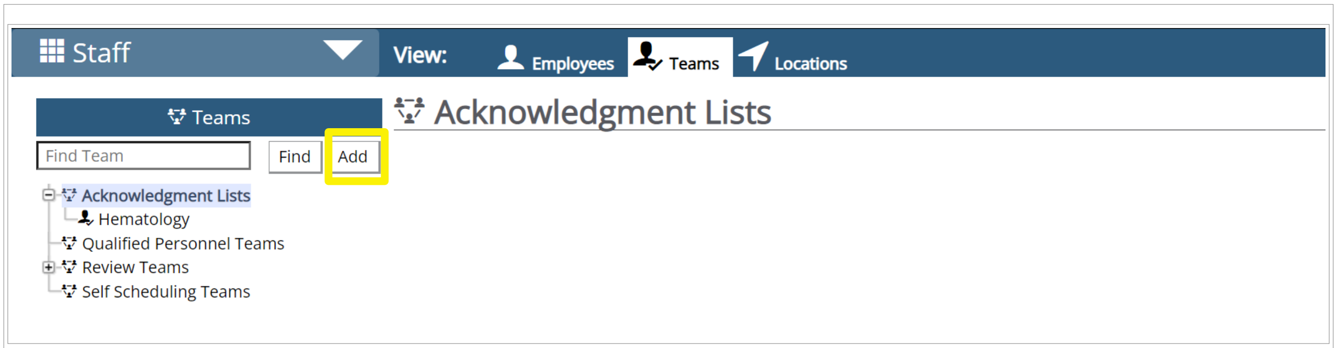

Figure 1

To set up a new Team or Team folder, select the **Teams** tab and then select the **Add** button. **(Yellow box, Figure 1)**

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

Enter in a Folder or Team name and then enter a description in the appropriate fields.

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

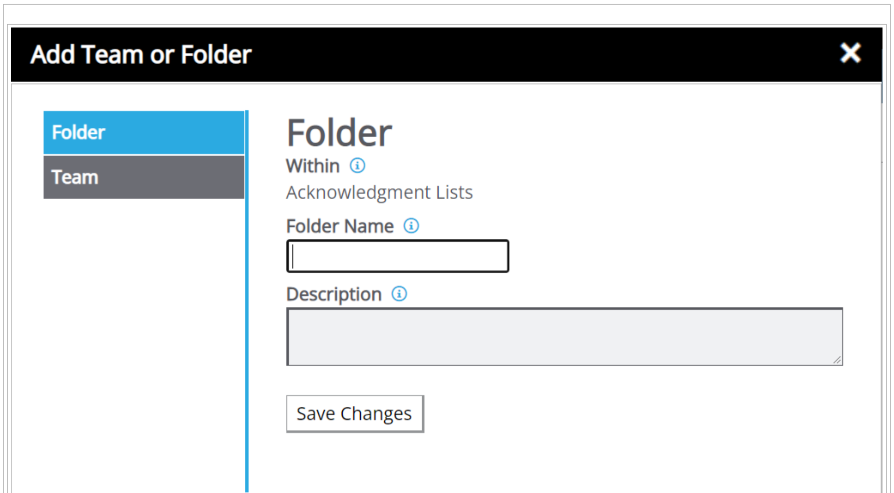

Figure 2

Team Color Bar

To make changes to an existing team, select a team from the tree picker **(Yellow box, Figure 1)** and then select the **Team** color bar to expand it. **(Orange box, Figure 1)**

Once expanded, select the **Edit** button **(Yellow box, Figure 2)** if you want to update the **Team Name**, **Team Description**, or hierarchy. (Which folder the Team is located in)

This will alter the appearance of the color bar **(Figure 3)** such that you can edit the fields.

If necessary, you can also delete the team by selecting the **Delete** button.

Once you are finished making edits, select the **Save Changes** button.

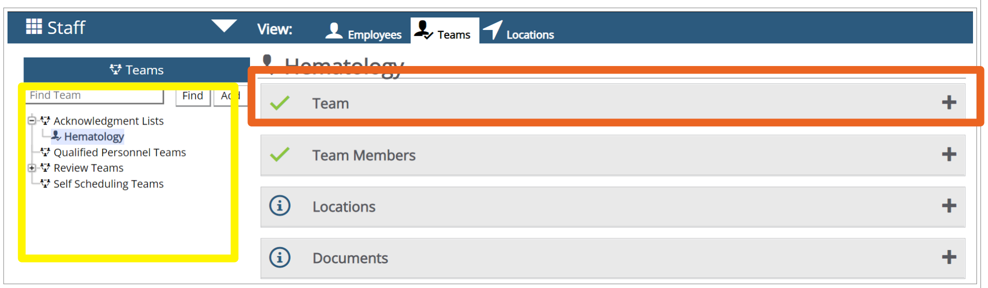

Figure 1

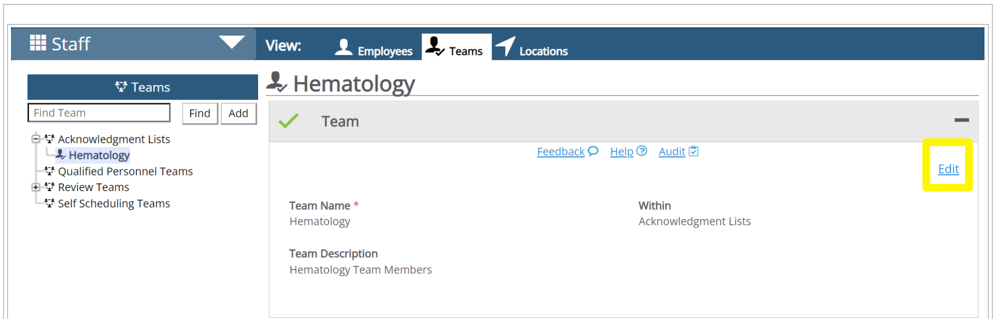

Figure 2

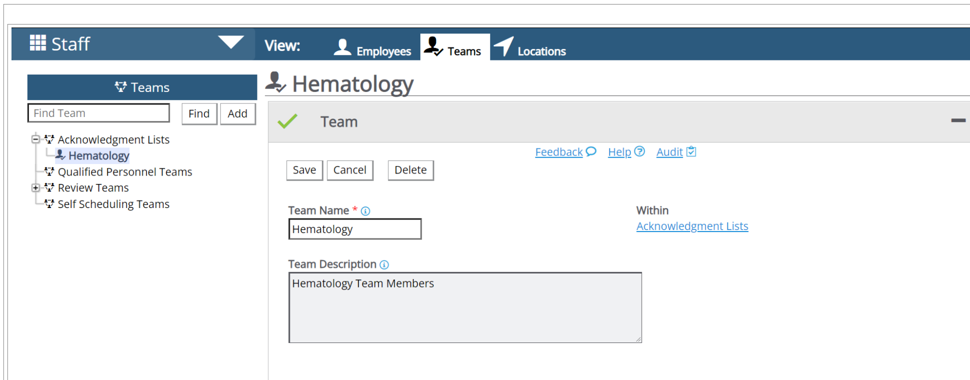

Figure 3

Team Members Color Bar

The **Team Members** color bar is where you will add or remove employees from a given team. Select the color bar to expand it. **(Figure 1)**

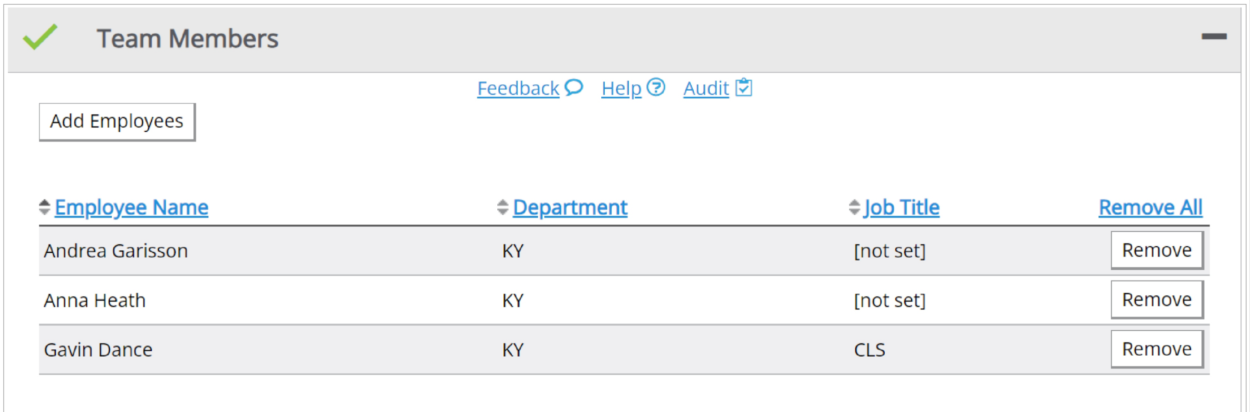

Figure 1

Selecting the **Add Employees** button will open the **Add Employees** pop-up window. **(Figure 2)**

You can use the filters to locate a specific employee **(Yellow box, Figure 2)** or simply type their name into the **Full Name** field.

Once you've selected your employee, select the **'Add to…'** button. **(Yellow box, Figure 3)**

The employee will now appear in the Team member list.

To remove an employee, select the **Remove Employee** button adjacent to their name.

Figure 2

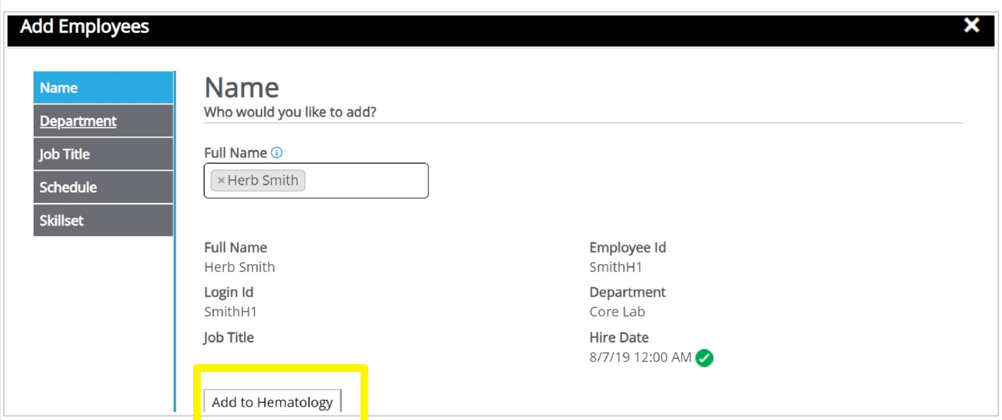

Figure 3

Locations and Documents Color Bars

The **Locations** color bar allows you to view any locations associated with a given team. The color bar is not editable and will list the **Location**, **Site**, and **Site Approver**. **(Figure 1)**

Locations

Feedback Help

Location	Site	Site Approver
1st Floor	Hawthorne Clinic	Tom Williamson

Figure 1

The **Documents** color bar allows you to view any documents associated with a given team. These documents may be required reading to work at a site i.e. a procedure or policy. **(Figure 2)**

The **Documents** color bar is not editable and will list the document name, classification, document owner, and a short description of the document.

Documents

Feedback Help

	Name	Classification	Owner	Description
Filter	Filter Name	Filter Classification	Filter Owner	Filter Description
	Auto-Sed ESR Procedure	HE.SOP.001	Barbara Dodd	Auto-Sed ESR Procedure
	Loading the Automated Line	CH.SOP.002	Barbara Dodd	Automated Line - Loading procedure

Figure 2

Resources

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

Staff Overview	PDF Document
Document Control Teams	PDF Document
Departments	PDF Document