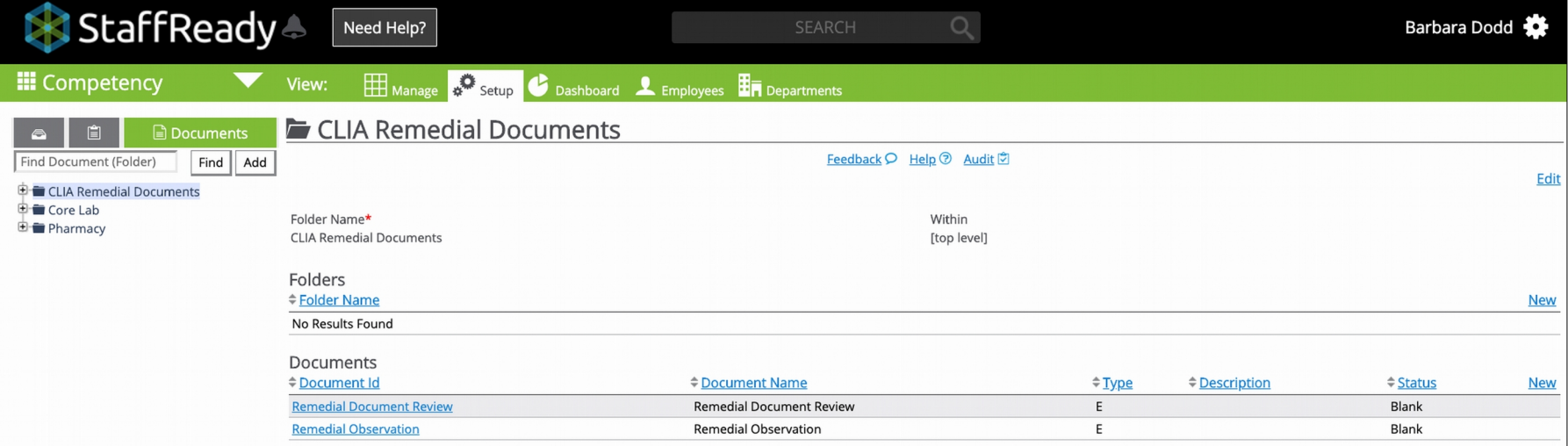


Competency- Documents

Competency Document Folder Setup

This reference guide provides a comprehensive overview of the process for setting up Document Folders within the StaffReady Competency module. The following process steps and instructional information are provided within this document:

- [Competency Document Folder Creation](#)
- [Cloning Document Folders](#)



The screenshot shows the StaffReady interface for managing documents. The top navigation bar includes the StaffReady logo, a search bar, and the user name 'Barbara Dodd'. The main navigation menu has options for 'Competency', 'Manage', 'Setup', 'Dashboard', 'Employees', and 'Departments'. The current view is 'Documents' for the 'CLIA Remedial Documents' folder.

On the left, there is a sidebar with a search box 'Find Document (Folder)' and 'Find' and 'Add' buttons. Below it, a tree view shows the folder structure: 'CLIA Remedial Documents', 'Core Lab', and 'Pharmacy'.

The main content area shows the 'Folder Name*' field set to 'CLIA Remedial Documents' and the 'Within' field set to '[top level]'. There are links for 'Feedback', 'Help', and 'Audit'. An 'Edit' link is visible on the right.

Below the folder information, there is a 'Folders' section with a 'Folder Name' link and a 'New' link. It states 'No Results Found'.

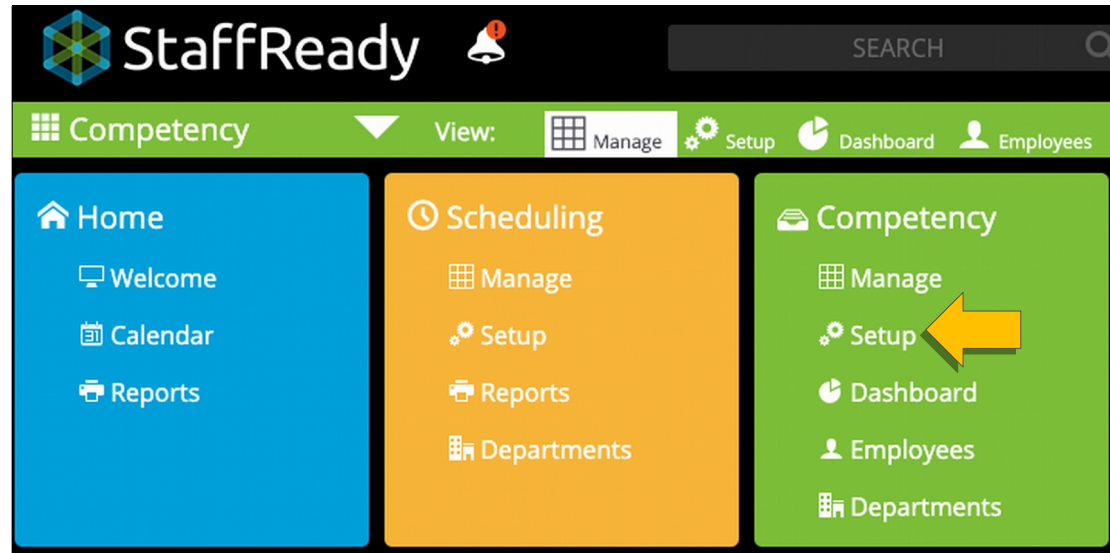
At the bottom, there is a 'Documents' section with a table listing documents. The table has columns for 'Document Id', 'Document Name', 'Type', 'Description', and 'Status'. There are also 'New' and 'Edit' links for each document.

Document Id	Document Name	Type	Description	Status
Remedial Document Review	Remedial Document Review	E		Blank
Remedial Observation	Remedial Observation	E		Blank

1 | Competency Document Folder Creation

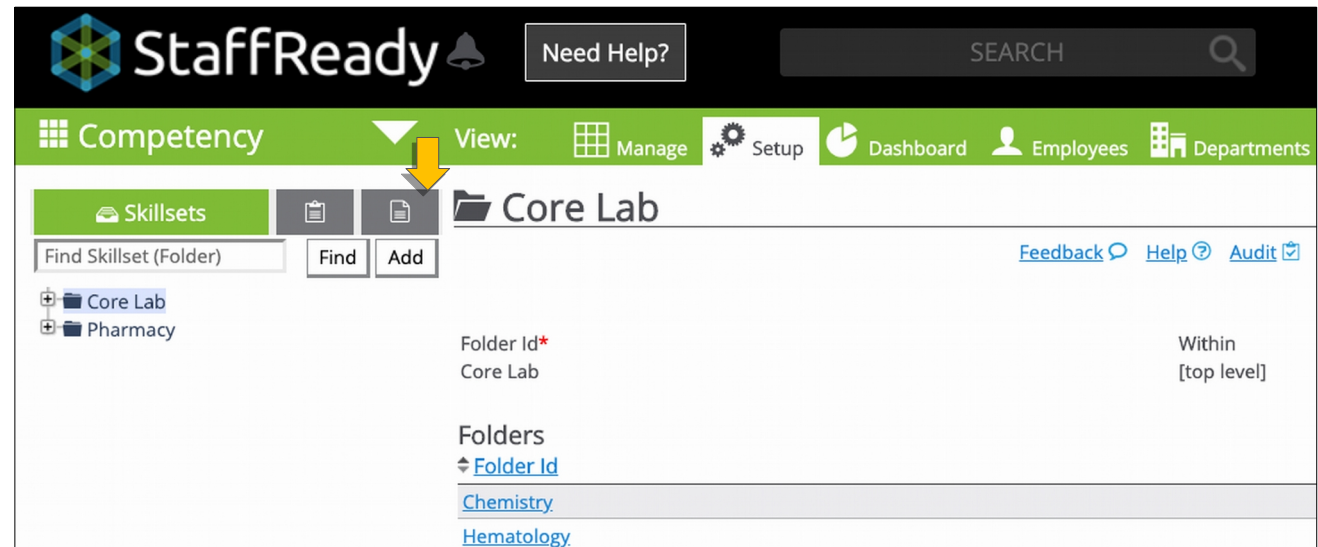
Steps to Locate or Create a New Document Folder

1. Click on the Main Menu and select **Setup** under the **Competency** module.



2. There are three Competency perspectives: Skillsets, Requirements and **Documents**.

3. Click on the **Documents** perspective.

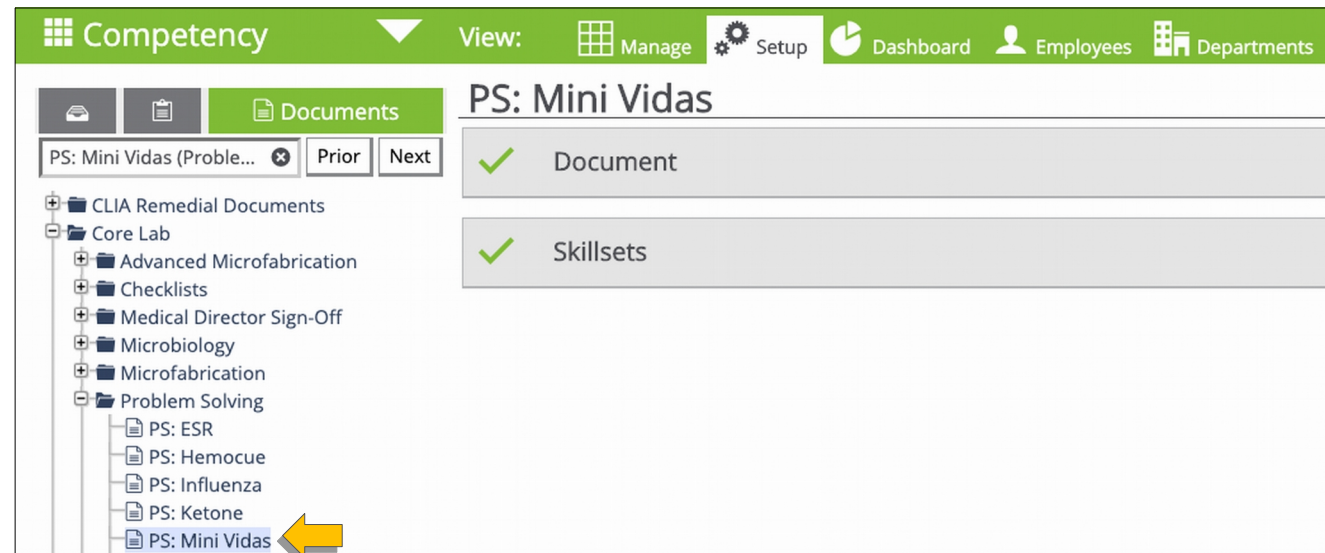
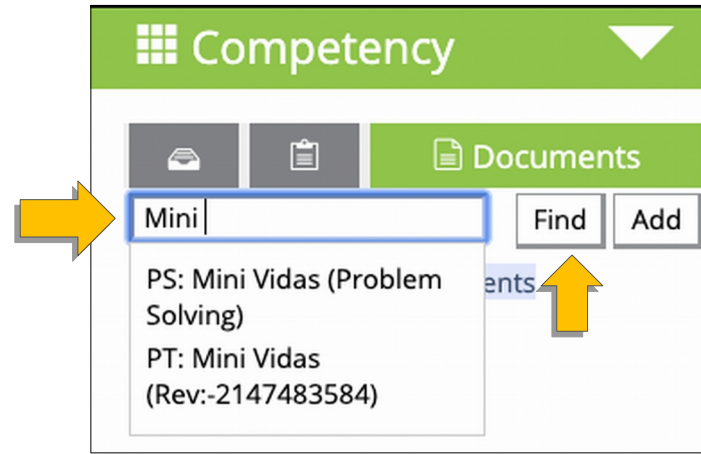


Steps to Locate or Create a New Document Folder

4. To search for an existing **Document Folder**, use the **Find Document (Folder)** text field.

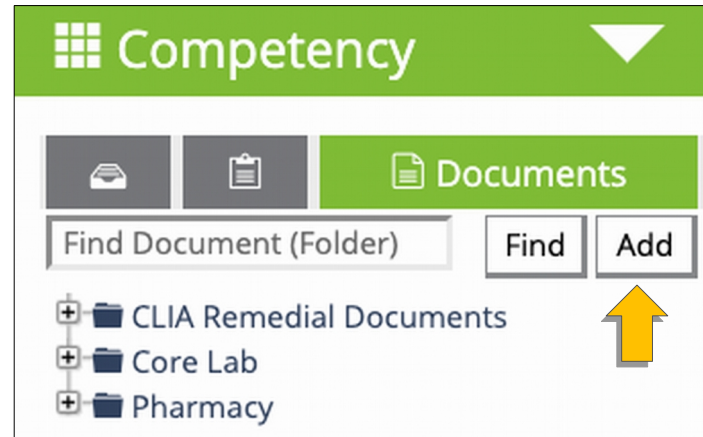
5. Click the **Find** button or choose from an auto-populated search list.

→ Note that if there are several possible matches containing your search criteria, all possibilities may not show. Increase your search criteria to see the document you are searching for.



Steps to Locate or Create a New Document Folder

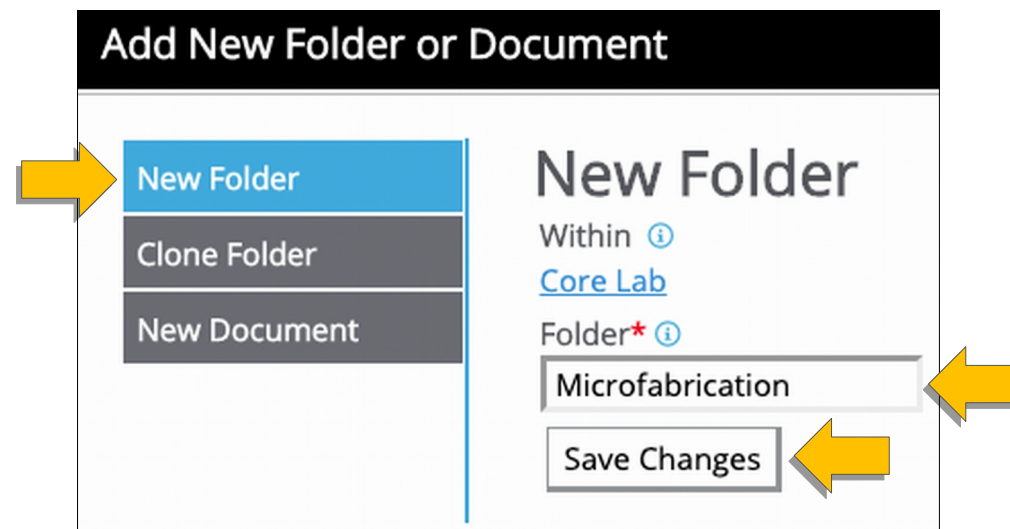
6. To create a new **Document Folder**, highlight the folder you would like to create the new **Document Folder** under and click the **Add** button.



7. Select **New Folder** from the menu options on the left side.

8. Type the name of the new **Document Folder** into the Folder text field.

19. Click the **Save Changes** button.



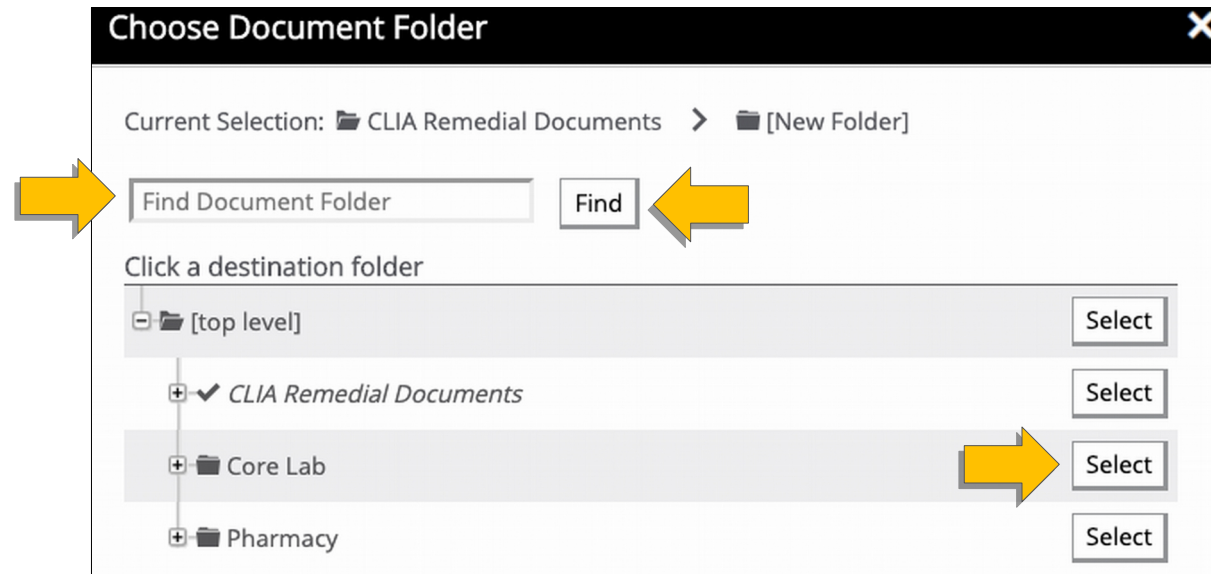
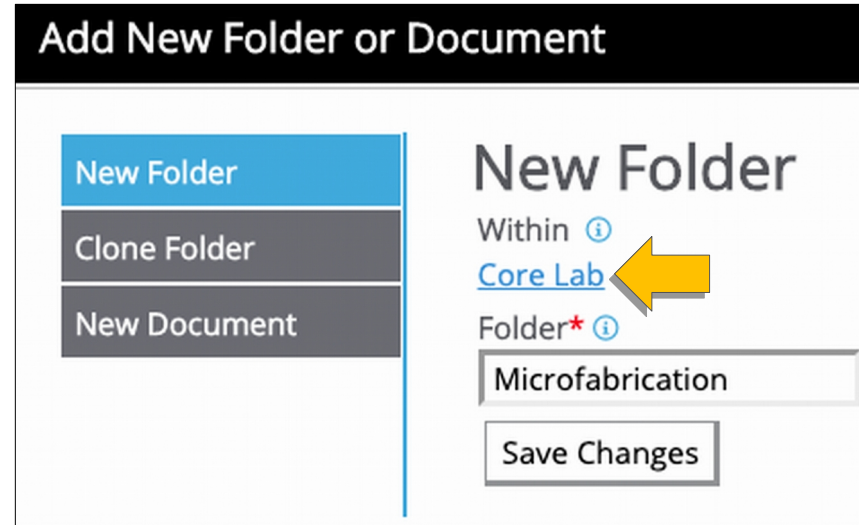
Steps to Locate or Create a New Document Folder

10. Another option for creating **Document Folders** is to place it under a specific folder location. Click on the link located under Within. In this screenshot, the folder name is [Core Lab](#).

11. Use the **Find Document Folder** text field to locate your Document Folder. Click the **Find** button or choose from an auto-populated search list.

12. Click the **Select** button next to the desired destination folder.

→ Note that when creating a new **Document Folder**, you have the option to create within the Top Level, or within an existing 'parent' **Document Folder**. For this training guide, the new **Document Folder** will be created under **Core Lab**.



Steps to Locate or Create a New Document Folder

13. Click the **Save Changes** button.

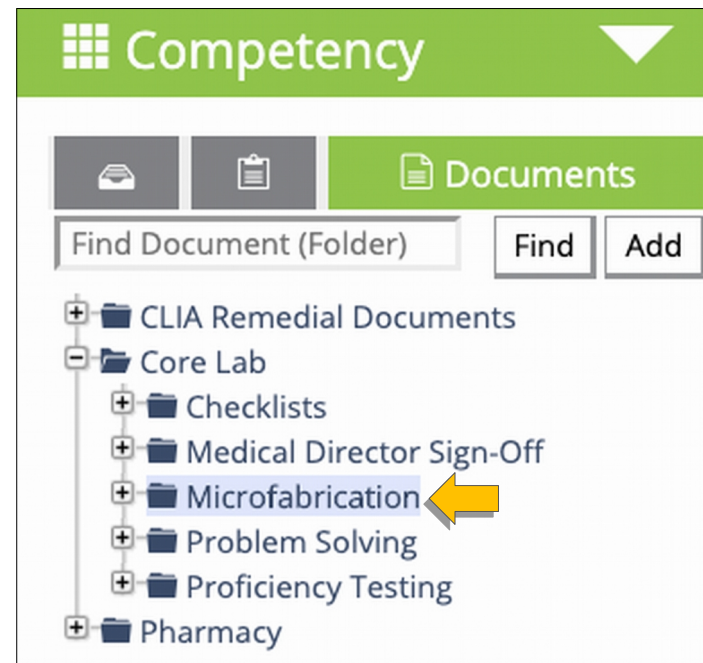
→ Note that once a **Document Folder** is created, new Competency Documents can be created, edited, moved or deleted, as needed. For further information about creating Competency Documents, please review the following training guide-

[Create Competency Documents](#)

Add New Folder or Document

New Folder
Clone Folder
New Document

New Folder
Within ⓘ
[Core Lab](#)
Folder* ⓘ
Microfabrication
Save Changes



2| Cloning Document Folders

Steps to Clone a Document Folder

1. To **Clone** a **Document Folder**, click on the folder you would like to **Clone**, then click the **Add** button.

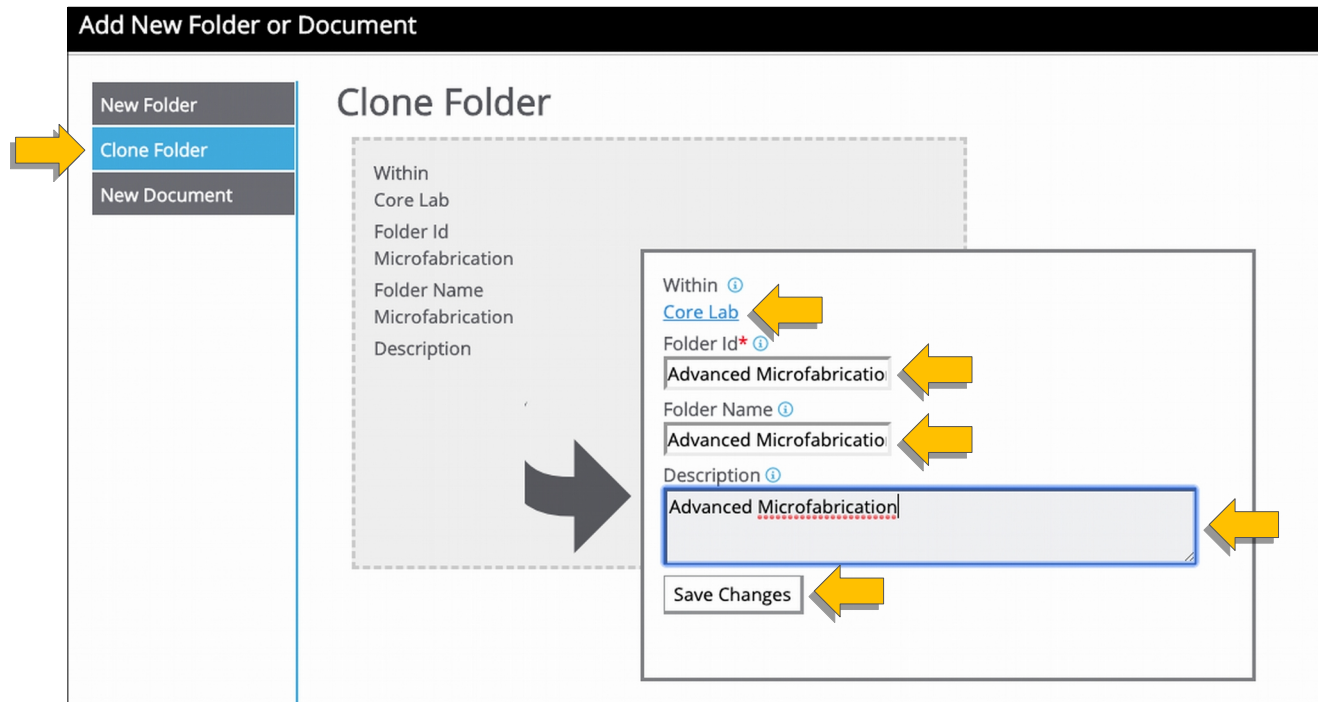
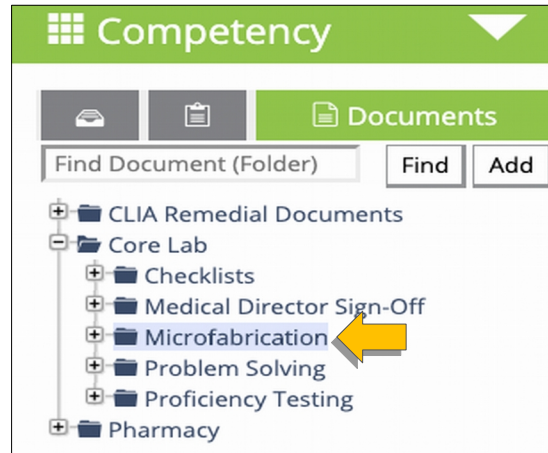
2. Select **Clone Folder** from the left side menu options.

3. Type the name of the new **Document Folder** being cloned into the **Folder Id**, **Folder Name** and **Description** text fields.

4. Click the **Save Changes** button.

→ Note that when cloning a **Document Folder**, you have the option to clone within the **Top Level**, or within an existing 'parent' **Document Folder**. Additionally, the **Document Folder** being cloned must have a unique name that differs from the parent **Id** or folder name.

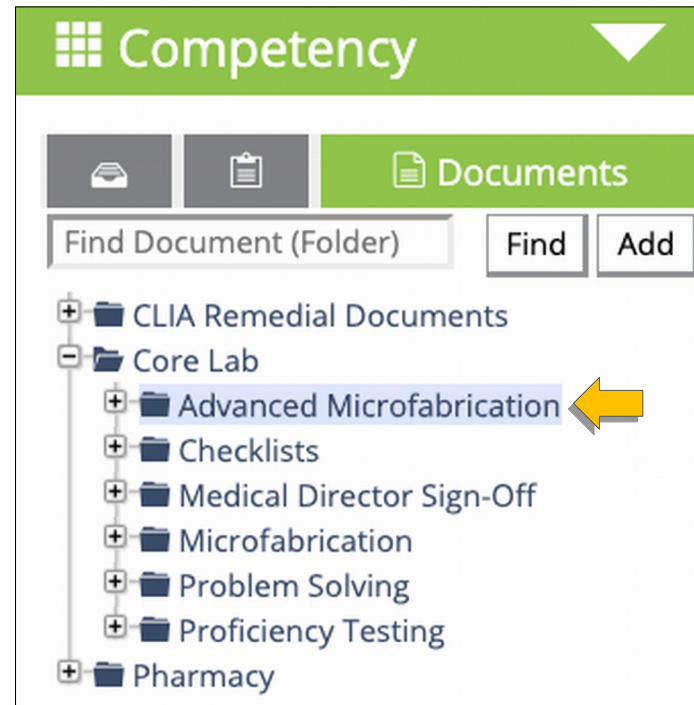
For this training guide, the new **Document Folder** will be cloned within [Core Lab](#).



Steps to Clone a Document Folder

5. A cloned **Document Folder** is created.

→ Note that when a **Document Folder** is cloned, **all** Competency Documents within that folder will also be cloned.



Visit Our Training Center

To learn more about the **Staff Ready Competency** module, please review the following documents in the **Training Media Center**.

For assistance with the **StaffReady Competency** features, please contact our Customer Support team:

6am-5pm PST
Monday thru Friday
Phone: 1.877.229.5230
[Online Support Form](#)

→ Click the **Need Help?** box in StaffReady to access our new online Chat feature!



Skillset Folder Setup	PDF Document
Skillset Setup	PDF Document
Skillset Requirements Setup	PDF Document
Managing Skillset Employees	PDF Document
Publishing Skillsets	PDF Document
Updating Skillset Employee Profiles	PDF Document
View First Year Assessments	PDF Document
Skillset Levels	PDF Document
Skillset Managers Color Bar	PDF Document
Skillset Messages Color Bar	PDF Document