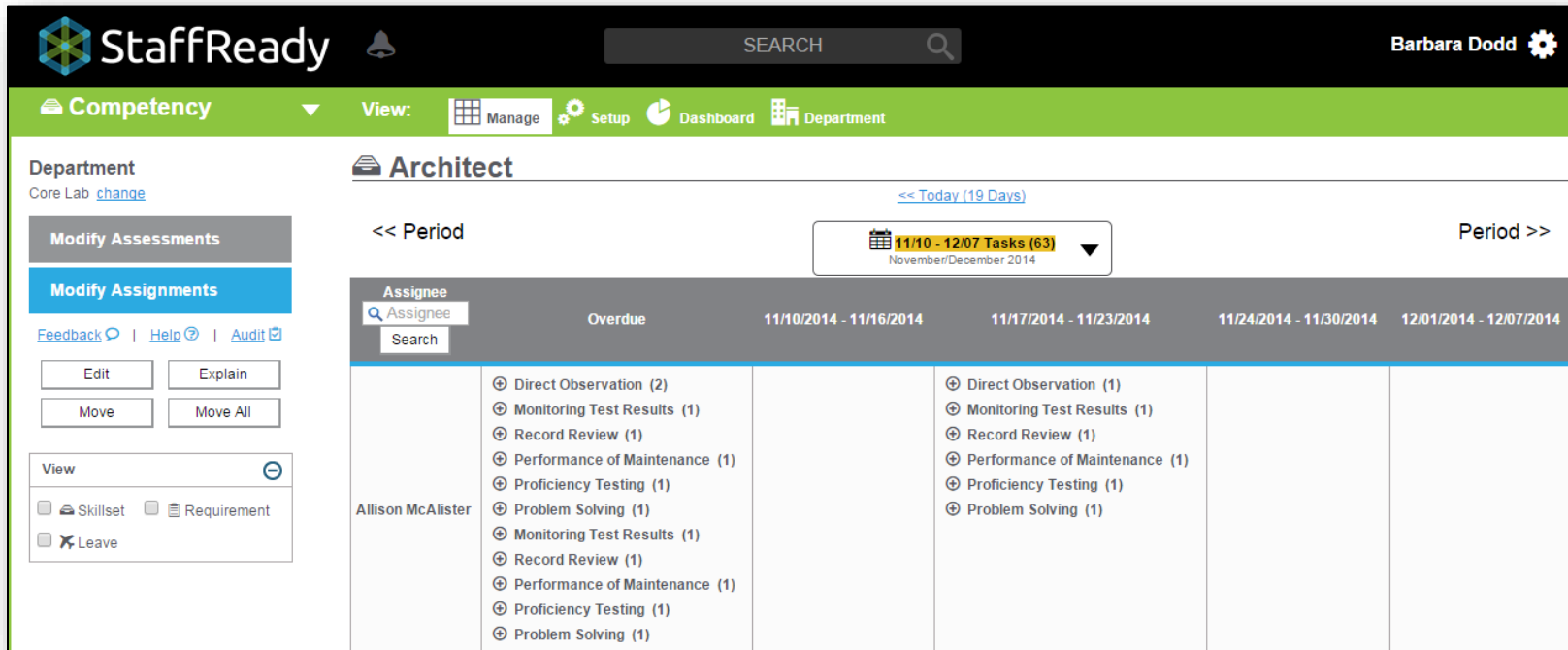


## Manage View – Competency Grid Modify Assignments Menu

This reference guide provides an overview of the **Manage** view's **Modify Assignments** menu within StaffReady. The following process steps and instructional information are provided within this document:

- **Modify Assignments Grid Navigation**
- **Edit**
- **Move**
- **Move All**
- **Explain**



The screenshot displays the StaffReady interface in the Manage view. The top navigation bar includes the StaffReady logo, a search bar, and the user name Barbara Dodd. The main navigation bar shows the current view as 'Manage' and the department as 'Architect'. The left sidebar contains the 'Modify Assignments' menu with options for 'Edit', 'Explain', 'Move', and 'Move All'. The main content area shows a competency grid for the 'Architect' department, with a search bar for assignees and a table of tasks assigned to Allison McAlister.

Assignee	Overdue	11/10/2014 - 11/16/2014	11/17/2014 - 11/23/2014	11/24/2014 - 11/30/2014	12/01/2014 - 12/07/2014
Allison McAlister	<ul style="list-style-type: none"> <li>⊕ Direct Observation (2)</li> <li>⊕ Monitoring Test Results (1)</li> <li>⊕ Record Review (1)</li> <li>⊕ Performance of Maintenance (1)</li> <li>⊕ Proficiency Testing (1)</li> <li>⊕ Problem Solving (1)</li> <li>⊕ Monitoring Test Results (1)</li> <li>⊕ Record Review (1)</li> <li>⊕ Performance of Maintenance (1)</li> <li>⊕ Proficiency Testing (1)</li> <li>⊕ Problem Solving (1)</li> </ul>		<ul style="list-style-type: none"> <li>⊕ Direct Observation (1)</li> <li>⊕ Monitoring Test Results (1)</li> <li>⊕ Record Review (1)</li> <li>⊕ Performance of Maintenance (1)</li> <li>⊕ Proficiency Testing (1)</li> <li>⊕ Problem Solving (1)</li> </ul>		

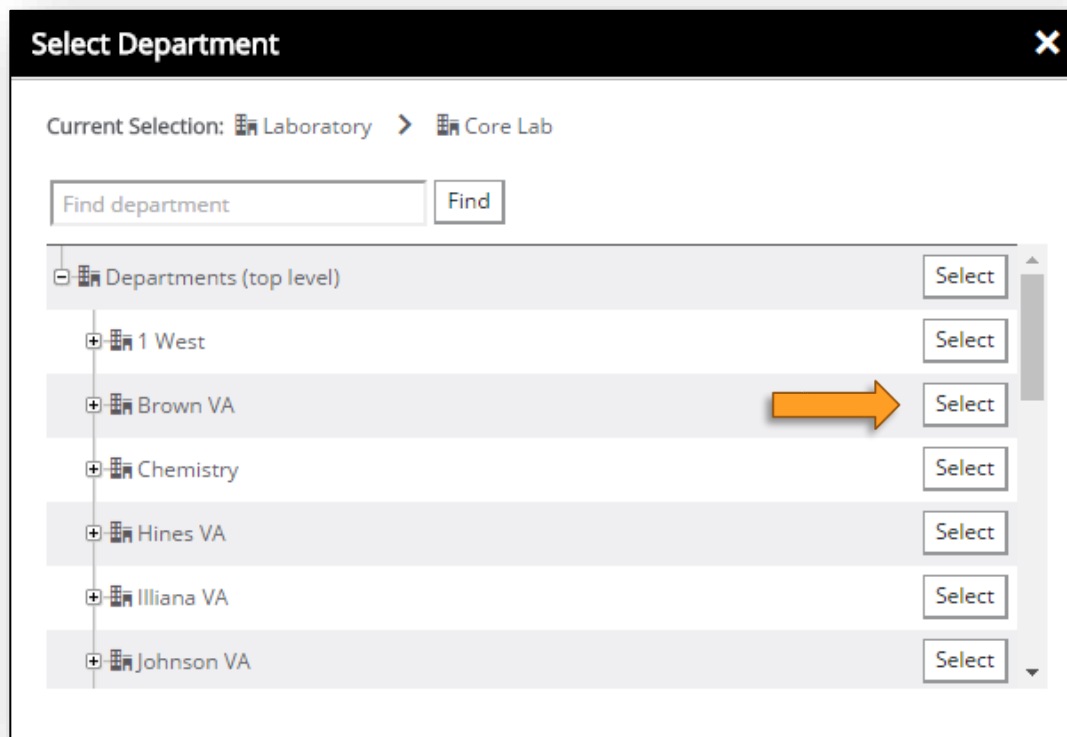
## 1 | Modify Assignments Grid Navigation

### Modify Assignments Grid Navigation

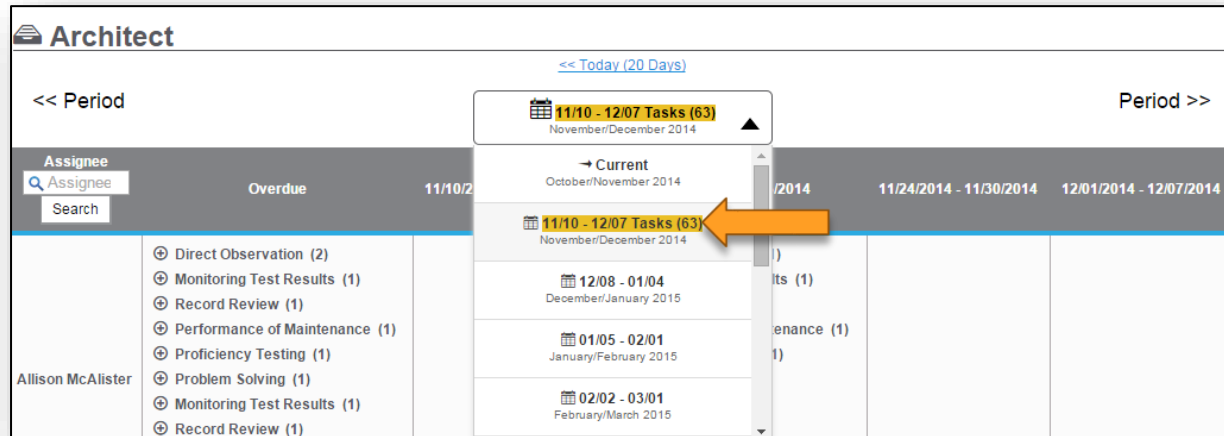
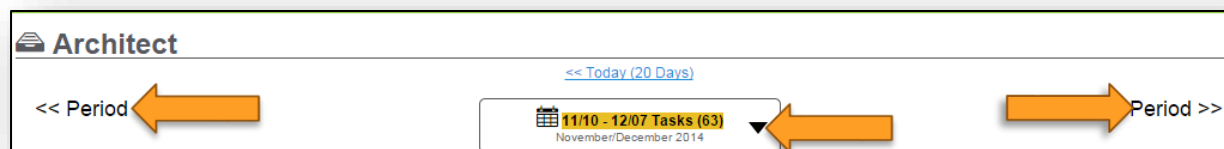
1. Click [department](#) to adjust the department employees displaying assessments within the **Competency Grid**.



2. Click [Select Department](#).



3. Click << **Period** to view a previous annual assessment period.
4. Click **Period** >> to view a future annual assessment period.
5. Click << **Today** menu to change the displayed assignment period to the four week assignment period containing today's date.
6. Click **Skillset Assessment** menu to change displayed annual assessment period.



7. Search **Subject** to limit **Assignment Grid** task information to a single department employee.

8. Click **Skillset** to display tasks associated **Skillset**.

9. Click **Requirement** to display tasks associated **Requirement**.


The screenshot displays the 'All Skillsets' page in the StaffReady system. The top navigation bar includes 'Competency', 'View: Manage', 'Setup', 'Dashboard', and 'Department'. The left sidebar contains options for 'Modify Assessments', 'Modify Assignments', and a 'View' dropdown menu. An orange arrow points to the 'Requirement' option in the 'View' menu. The main content area shows a calendar for the period 11/10/2014 - 11/23/2014, with a search bar for assignees. The tasks for Allison McAlister are listed in a table format:

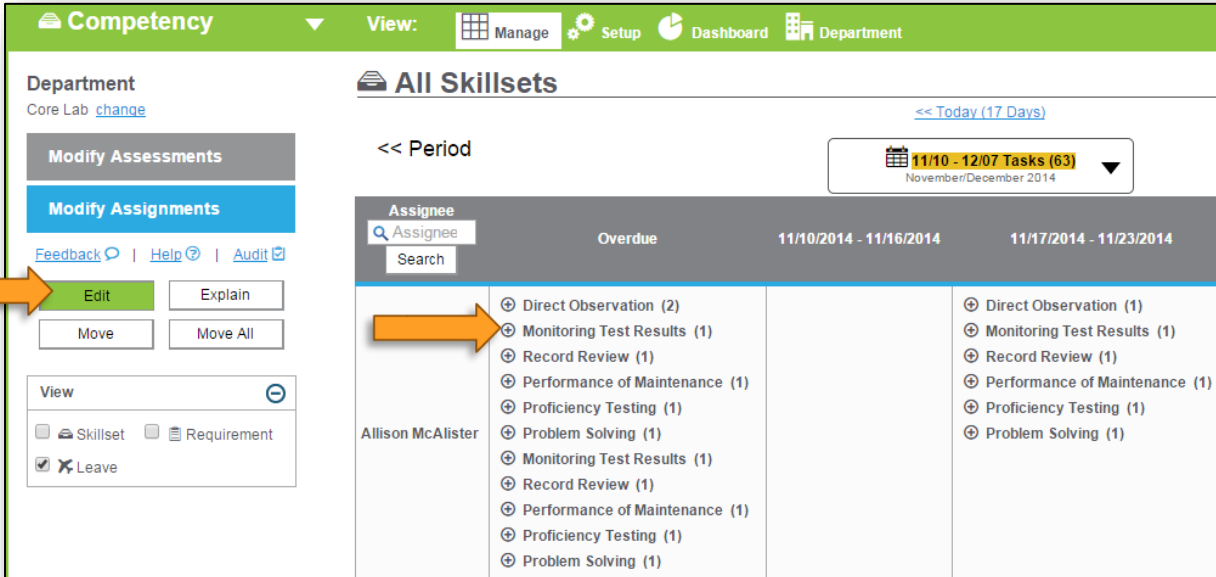
Assignee	Overdue	11/10/2014 - 11/16/2014	11/17/2014 - 11/23/2014
Allison McAlister	<ul style="list-style-type: none"> <li>Direct Observation (2)</li> <li>Monitoring Test Results (1)</li> <li>Record Review (1)</li> <li>Performance of Maintenance (1)</li> <li>Proficiency Testing (1)</li> <li>Problem Solving (1)</li> <li>Monitoring Test Results (1)</li> <li>Record Review (1)</li> <li>Performance of Maintenance (1)</li> <li>Proficiency Testing (1)</li> <li>Problem Solving (1)</li> </ul>		<ul style="list-style-type: none"> <li>Direct Observation (1)</li> <li>Monitoring Test Results (1)</li> <li>Record Review (1)</li> <li>Performance of Maintenance (1)</li> <li>Proficiency Testing (1)</li> <li>Problem Solving (1)</li> </ul>

## 2 | Edit

### Using the Edit Mode

1. Click **Edit**.

2. Click the  icon.



The screenshot shows the 'Competency' management interface. On the left sidebar, the 'Edit' button is highlighted with an orange arrow. The main content area displays 'All Skillsets' for the 'Core Lab' department. A table lists tasks for the assignee 'Allison McAlister' across two periods: 11/10/2014 - 11/16/2014 and 11/17/2014 - 11/23/2014. An orange arrow points to the first task in the first period.

Assignee	Overdue	11/10/2014 - 11/16/2014	11/17/2014 - 11/23/2014
Allison McAlister		<ul style="list-style-type: none"> <li>⊕ Direct Observation (2)</li> <li>⊕ Monitoring Test Results (1)</li> <li>⊕ Record Review (1)</li> <li>⊕ Performance of Maintenance (1)</li> <li>⊕ Proficiency Testing (1)</li> <li>⊕ Problem Solving (1)</li> </ul>	<ul style="list-style-type: none"> <li>⊕ Direct Observation (1)</li> <li>⊕ Monitoring Test Results (1)</li> <li>⊕ Record Review (1)</li> <li>⊕ Performance of Maintenance (1)</li> <li>⊕ Proficiency Testing (1)</li> <li>⊕ Problem Solving (1)</li> </ul>

3. Click **Assignee Task Card**

Allison McAlister

4. Enter **Employee** name to reassign task.

5. Edit **Deadline Date** to change task due date.

6. Click **Save Changes**.

### 3 | Move

#### Using the Move Mode

1. Click **Move**.

2. Click **Requirement Task Card**.

**⊕ Record Review (1)**

The screenshot shows the 'Competency' management interface. On the left, under 'Department: Core Lab', there are buttons for 'Modify Assessments', 'Modify Assignments', 'Edit', 'Explain', 'Move', and 'Move All'. An orange arrow points to the 'Move' button. Below these are 'View' options for Skillset, Requirement, and Leave. On the right, the 'All Skillsets' view is shown for the period '11/10 - 12/07 Tasks (63)'. A table lists tasks for 'Allison McAlister' with columns for 'Overdue', '11/10/2014 - 11/16/2014', and '11/17/2014 - 11/23/2014'. An orange arrow points to the 'Record Review (1)' task card in the middle column.

Assignee	Overdue	11/10/2014 - 11/16/2014	11/17/2014 - 11/23/2014
Allison McAlister	<ul style="list-style-type: none"> <li>⊕ Direct Observation (2)</li> <li>⊕ Monitoring Test Results (1)</li> <li>⊕ Record Review (1)</li> <li>⊕ Performance of Maintenance (1)</li> <li>⊕ Proficiency Testing (1)</li> <li>⊕ Problem Solving (1)</li> <li>⊕ Monitoring Test Results (1)</li> <li>⊕ Record Review (1)</li> <li>⊕ Performance of Maintenance (1)</li> <li>⊕ Proficiency Testing (1)</li> <li>⊕ Problem Solving (1)</li> </ul>		<ul style="list-style-type: none"> <li>⊕ Direct Observation (1)</li> <li>⊕ Monitoring Test Results (1)</li> <li>⊕ Record Review (1)</li> <li>⊕ Performance of Maintenance (1)</li> <li>⊕ Proficiency Testing (1)</li> <li>⊕ Problem Solving (1)</li> </ul>

3. Hover over the destination employee **Assignment Task Grid Cell**.

Assignee		Overdue	11/10/2014 - 11/16/2014	11/17/2014 - 11/23/2014
<input type="text" value="Assignee"/> <input type="text" value="Search"/>				
Allison McAlister	<ul style="list-style-type: none"> <li>⊕ Direct Observation (2)</li> <li>⊕ <b>Record Review (1)</b></li> <li>⊕ Performance of Maintenance (1)</li> <li>⊕ Proficiency Testing (1)</li> <li>⊕ Problem Solving (1)</li> <li>⊕ Monitoring Test Results (1)</li> <li>⊕ Record Review (1)</li> <li>⊕ Performance of Maintenance (1)</li> <li>⊕ Proficiency Testing (1)</li> <li>⊕ Problem Solving (1)</li> <li>⊕ Monitoring Test Results (1)</li> </ul>		<ul style="list-style-type: none"> <li>⊕ Direct Observation (1)</li> <li>⊕ Monitoring Test Results (1)</li> <li>⊕ Record Review (1)</li> <li>⊕ Performance of Maintenance (1)</li> <li>⊕ Proficiency Testing (1)</li> <li>⊕ Problem Solving (1)</li> </ul>	
Donovan Dorsey				<ul style="list-style-type: none"> <li>⊕ Direct Observation (2)</li> <li>⊕ Monitoring Test Results (1)</li> <li>⊕ Record Review (1)</li> <li>⊕ Performance of Maintenance (1)</li> <li>⊕ Proficiency Testing (1)</li> <li>⊕ Monitoring Test Results (1)</li> <li>⊕ Record Review (1)</li> <li>⊕ Performance of Maintenance (1)</li> <li>⊕ Proficiency Testing (1)</li> <li>⊕ Problem Solving (1)</li> </ul>



4. Click the destination employee **Assignment Grid Task Cell**.

Assignee			
Assignee	Overdue	11/10/2014 - 11/16/2014	11/17/2014 - 11/23/2014
Search			
Allison McAlister	<ul style="list-style-type: none"> <li>⊕ Direct Observation (2)</li> <li>⊕ Performance of Maintenance (1)</li> <li>⊕ Proficiency Testing (1)</li> <li>⊕ Problem Solving (1)</li> <li>⊕ Monitoring Test Results (1)</li> <li>⊕ Record Review (1)</li> <li>⊕ Performance of Maintenance (1)</li> <li>⊕ Proficiency Testing (1)</li> <li>⊕ Problem Solving (1)</li> <li>⊕ Monitoring Test Results (1)</li> </ul>		<ul style="list-style-type: none"> <li>⊕ Direct Observation (1)</li> <li>⊕ Monitoring Test Results (1)</li> <li>⊕ Record Review (1)</li> <li>⊕ Performance of Maintenance (1)</li> <li>⊕ Proficiency Testing (1)</li> <li>⊕ Problem Solving (1)</li> </ul>
Donovan Dorsey	<ul style="list-style-type: none"> <li>⊕ Record Review (1)</li> </ul>		<ul style="list-style-type: none"> <li>⊕ Direct Observation (2)</li> <li>⊕ Monitoring Test Results (1)</li> <li>⊕ Record Review (1)</li> <li>⊕ Performance of Maintenance (1)</li> <li>⊕ Proficiency Testing (1)</li> <li>⊕ Monitoring Test Results (1)</li> <li>⊕ Record Review (1)</li> <li>⊕ Performance of Maintenance (1)</li> <li>⊕ Proficiency Testing (1)</li> <li>⊕ Problem Solving (1)</li> </ul>



## 4 | Move All

### Using the Move All Mode

1. Click **Move All**.
2. Hover over and Click the currently assigned employee **Assignment Task Grid Cell**.

The screenshot displays the 'Competency' management interface. On the left, the 'Department' is set to 'Core Lab'. Below this, there are buttons for 'Modify Assessments', 'Modify Assignments', 'Feedback', 'Help', and 'Audit'. A 'View' section includes checkboxes for 'Skillset', 'Requirement', and 'Leave'. The 'Move All' button is highlighted with an orange arrow. The main area shows 'All Skillsets' for the employee 'Allison McAlister'. A table lists tasks with columns for 'Assignee', 'Overdue', and two date periods: '11/10/2014 - 11/16/2014' and '11/17/2014 - 11/23/2014'. An orange arrow points to the first task in the first column.


Assignee	Overdue	11/10/2014 - 11/16/2014	11/17/2014 - 11/23/2014
Allison McAlister	<ul style="list-style-type: none"> <li>⊕ Direct Observation (2)</li> <li>⊕ Performance of Maintenance (1)</li> <li>⊕ Proficiency Testing (1)</li> <li>⊕ Problem Solving (1)</li> <li>⊕ Monitoring Test Results (1)</li> <li>⊕ Record Review (1)</li> <li>⊕ Performance of Maintenance (1)</li> <li>⊕ Proficiency Testing (1)</li> <li>⊕ Problem Solving (1)</li> <li>⊕ Monitoring Test Results (1)</li> </ul>		<ul style="list-style-type: none"> <li>⊕ Direct Observation (1)</li> <li>⊕ Monitoring Test Results (1)</li> <li>⊕ Record Review (1)</li> <li>⊕ Performance of Maintenance (1)</li> <li>⊕ Proficiency Testing (1)</li> <li>⊕ Problem Solving (1)</li> </ul>

3. Hover over and Click the destination employee Assignment Task Grid Cell.

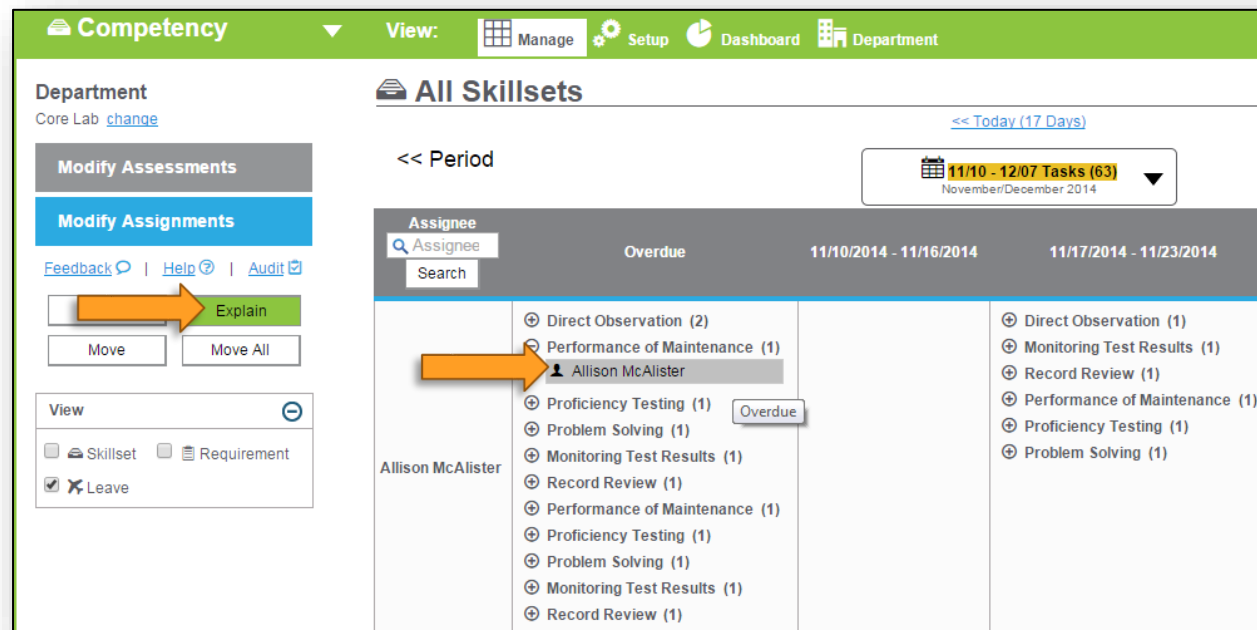
Assignee			
Assignee	Overdue	11/10/2014 - 11/16/2014	11/17/2014 - 11/23/2014
Search			
Allison McAlister			<ul style="list-style-type: none"> <li>⊕ Direct Observation (1)</li> <li>⊕ Monitoring Test Results (1)</li> <li>⊕ Record Review (1)</li> <li>⊕ Performance of Maintenance (1)</li> <li>⊕ Proficiency Testing (1)</li> <li>⊕ Problem Solving (1)</li> </ul>
Donovan Dorsey	<ul style="list-style-type: none"> <li>⊕ Direct Observation (2)</li> <li>⊕ Performance of Maintenance (1)</li> <li>⊕ Proficiency Testing (1)</li> <li>⊕ Problem Solving (1)</li> <li>⊕ Monitoring Test Results (1)</li> <li>⊕ Record Review (1)</li> <li>⊕ Performance of Maintenance (1)</li> <li>⊕ Proficiency Testing (1)</li> <li>⊕ Problem Solving (1)</li> <li>⊕ Monitoring Test Results (1)</li> <li>⊕ Record Review (1)</li> </ul>		<ul style="list-style-type: none"> <li>⊕ Direct Observation (2)</li> <li>⊕ Monitoring Test Results (1)</li> <li>⊕ Record Review (1)</li> <li>⊕ Performance of Maintenance (1)</li> <li>⊕ Proficiency Testing (1)</li> <li>⊕ Monitoring Test Results (1)</li> <li>⊕ Record Review (1)</li> <li>⊕ Performance of Maintenance (1)</li> <li>⊕ Proficiency Testing (1)</li> <li>⊕ Problem Solving (1)</li> </ul>

## 5 | Explain

### Using the Copy Mode

1. Click **Edit**.
2. Click the  icon.
3. Click **Assignee Task Card**

 Allison McAlister



**Competency** View: Manage Setup Dashboard Department

Department: Core Lab [change](#)

Modify Assessments

Modify Assignments

Feedback | Help | Audit

Explain

Move Move All

View

Skillset Requirement

Leave

**All Skillsets** << Today (17 Days)

11/10 - 12/07 Tasks (63) November/December 2014

Assignee	Overdue	11/10/2014 - 11/16/2014	11/17/2014 - 11/23/2014
<input type="text" value="Assignee"/> <input type="button" value="Search"/>			
Allison McAlister	<ul style="list-style-type: none"> <li>⊕ Direct Observation (2)</li> <li>⊖ Performance of Maintenance (1)</li> <li>⊕ Allison McAlister</li> <li>⊕ Proficiency Testing (1) <span>Overdue</span></li> <li>⊕ Problem Solving (1)</li> <li>⊕ Monitoring Test Results (1)</li> <li>⊕ Record Review (1)</li> <li>⊕ Performance of Maintenance (1)</li> <li>⊕ Proficiency Testing (1)</li> <li>⊕ Problem Solving (1)</li> <li>⊕ Monitoring Test Results (1)</li> <li>⊕ Record Review (1)</li> </ul>		<ul style="list-style-type: none"> <li>⊕ Direct Observation (1)</li> <li>⊕ Monitoring Test Results (1)</li> <li>⊕ Record Review (1)</li> <li>⊕ Performance of Maintenance (1)</li> <li>⊕ Proficiency Testing (1)</li> <li>⊕ Problem Solving (1)</li> </ul>