

## DocumentReady – Perspectives Setup

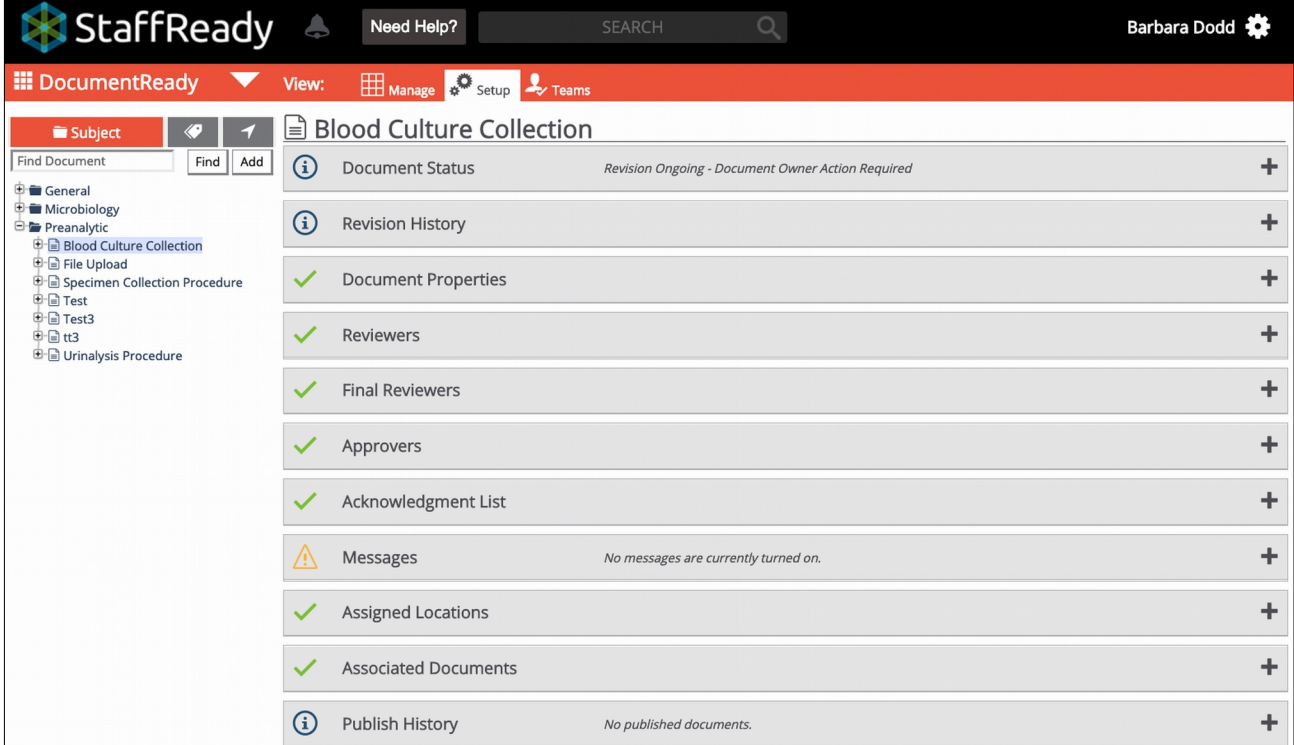
### Subject, Classification and Location

This reference guide provides a comprehensive overview of configuring Perspectives (Subjects, Classifications, and Locations) within the DocumentReady module. The following process steps and instructional information are provided in this document:

- [Subject Perspective](#)
- [Classification Perspective](#)
- [Location Perspective](#)

The DocumentReady module provides multiple **Perspectives**, so you won't have to dig through complex folder structures or counter-intuitive filing systems to find the document you need.

Each **Perspective** offers a different approach to grouping documents together, and each document can be organized with unique settings for easy access to related documents.



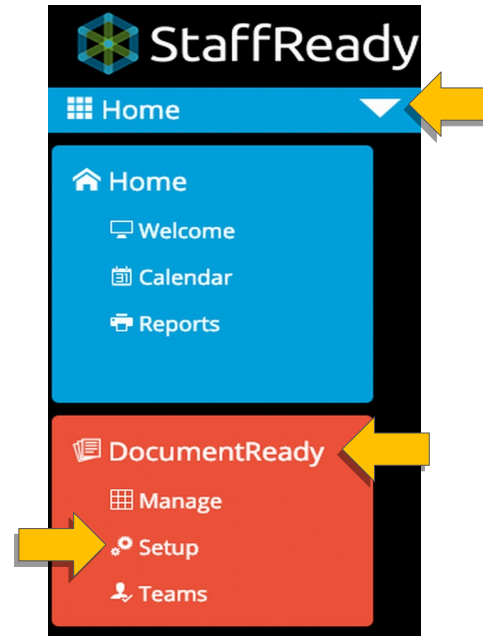
The screenshot displays the StaffReady DocumentReady interface. The top navigation bar includes the StaffReady logo, a 'Need Help?' button, a search bar, and the user name 'Barbara Dodd' with a settings gear icon. Below the navigation bar, the 'DocumentReady' header shows 'View:' options for 'Manage', 'Setup', and 'Teams'. The main content area is titled 'Blood Culture Collection' and features a sidebar on the left with a folder tree under 'Preanalytic'. The main panel lists various document management options, each with a status indicator and a plus sign for expansion:

Item	Status	Action
Document Status	Revision Ongoing - Document Owner Action Required	+
Revision History		+
Document Properties	✓	+
Reviewers	✓	+
Final Reviewers	✓	+
Approvers	✓	+
Acknowledgment List	✓	+
Messages	No messages are currently turned on.	+
Assigned Locations	✓	+
Associated Documents	✓	+
Publish History	No published documents.	+

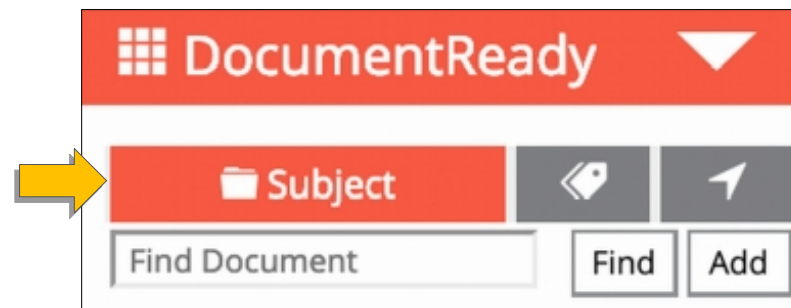
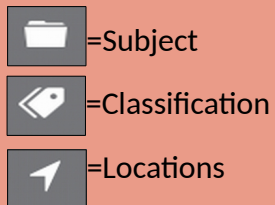
## | DocumentReady Setup View – Perspectives: Subject, Classification, Location

### DocumentReady Perspectives Navigation

1. Click **Home** to Navigate to the **DocumentReady > Setup** module.



2. Select the desired **Subject, Classification or Location** perspectives option:



## 1 | Subject Perspective

The **Subject** perspective allows you to group documents according to the type of work they relate to. A **Subject** provides an alternative to Classifications by organizing documents of different types or from different departments or sites.

### Adding a New Subject in DocumentReady

1. Select the **Subject** perspective option, then click the **Add** button.

2. Click the **Subject** option on the left side action menu.

3. Type the name of the new Subject into the text field.

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

5. A new **Subject** folder will be created.

The screenshot illustrates the process of adding a new Subject in the StaffReady DocumentReady interface. The interface features a top navigation bar with the StaffReady logo, a DocumentReady dropdown menu, and a left sidebar with a 'Subject' folder. A modal window titled 'Add Subject Or Document' is open, showing a list of options (Document, Subject) and a form for entering a 'Subject Name' (Microbiology) and a 'Save Changes' button. A bottom banner reads 'Click "Add" to add a Document or Subject'.

## | Subject Perspective, Cont. – Adding a Document

### Steps to Add a New Subject Document

To create a new document under **Subject** folders:

1. Select the **Subject** you'd like to create the new Document under.
2. Click the **Add** button to include a new document into your new **Subject** folder.
3. Click the **Document** link on the left side action menu.
4. Assign a **Document Name**.
5. Assign a **Document Type**.
6. Assign a **Classification**.
7. Assign a **Time Between Reviews**.
8. Optional fields include **Locations**, **Subject** and **Description**. The **Subject** is pre-filled based on the folder selection you made and can be switched to another **Subject**, as needed.
9. Click **Save Changes**.

The screenshot shows the DocumentReady interface. At the top, there's a red header with the DocumentReady logo and a dropdown arrow. Below that, a 'Subject' folder is selected, with a 'Find Document' input field, 'Find' and 'Add' buttons, and a list of folders: General, Microbiology (highlighted), and Preanalytic. A yellow arrow points to the 'Add' button.

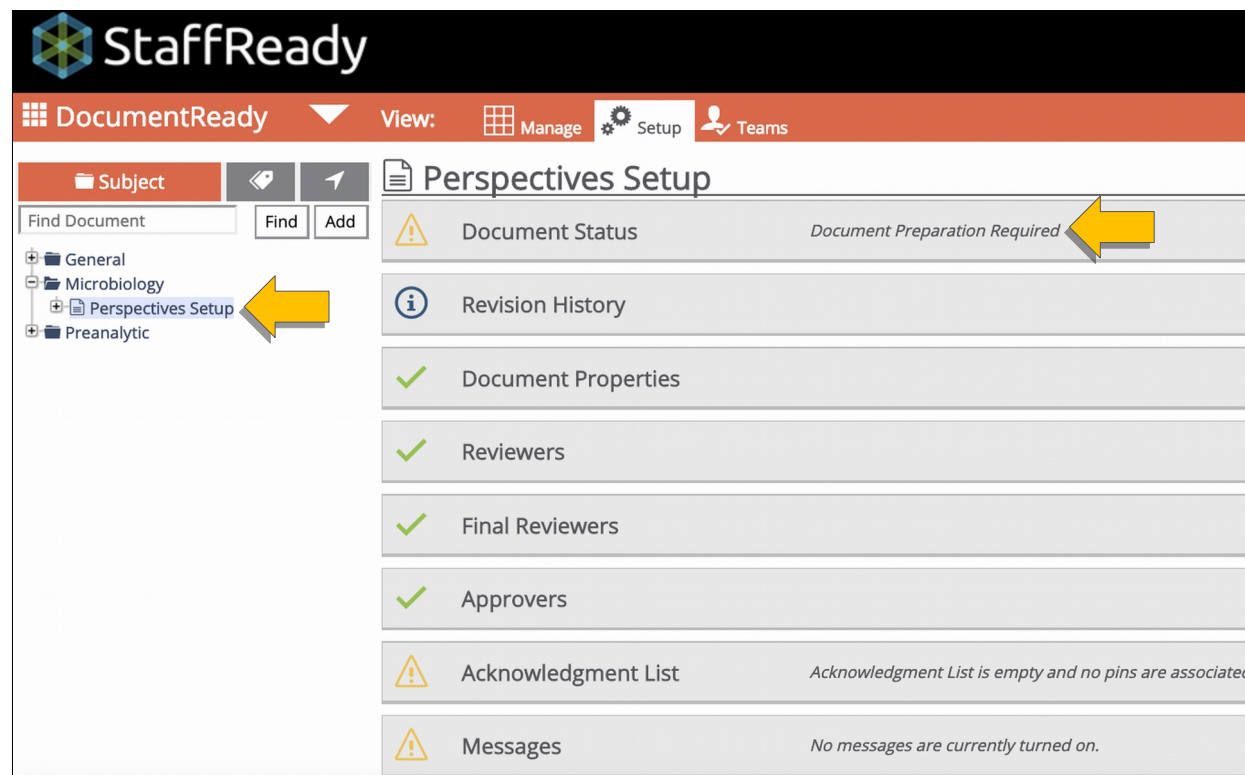
The 'Add Subject Or Document' form is shown below. It has a left sidebar with 'Document', 'Subject', and 'Edit Subject' options. The main form fields are:
 

- Document Name\***: Perspectives Setup (highlighted with a yellow arrow)
- Document Type\***: File or URL (dropdown menu, highlighted with a yellow arrow)
- Locations**: (empty text field)
- Classification\***: Specimen Processing (highlighted with a yellow arrow)
- Subject**: Microbiology (highlighted with a yellow arrow)
- Time Between Reviews\***: 2 Year Interval (dropdown menu, highlighted with a yellow arrow)
- Description**: (empty text area)
- Save Changes**: (button, highlighted with a yellow arrow)

## | Subject Perspective, Cont. – Finding a Document

### Steps to Add a New Subject Document

12. Your document is now ready for the Document Review preparation stage.



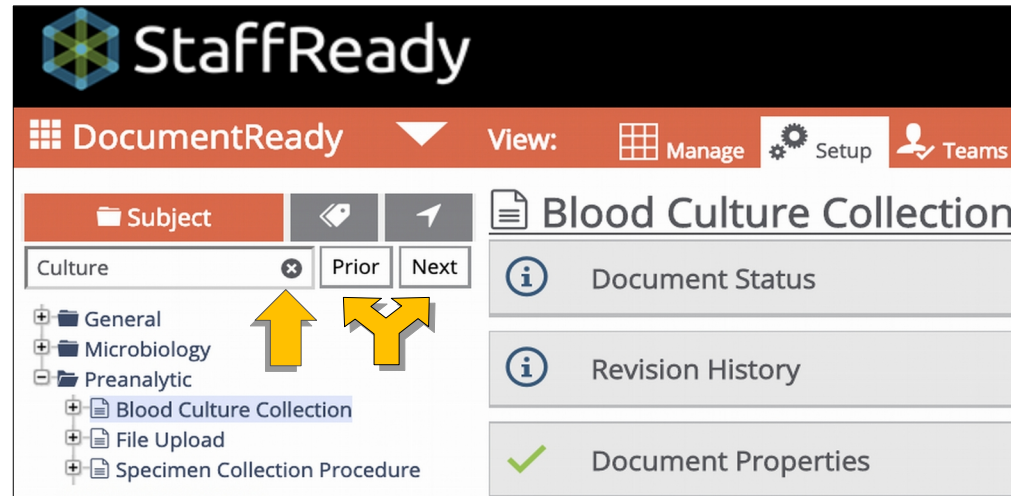
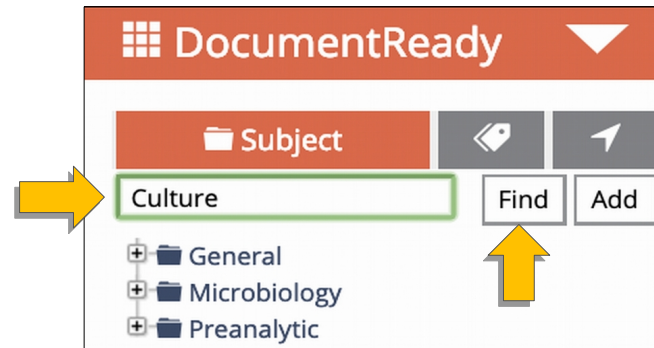
To learn more about next steps for document preparation in the **DocumentReady** module, please review the following documents in the **StaffReady Training Media Center**.

DocumentReady Overview & Key Concepts	<a href="#">PDF Document</a>
Adding New Documents	<a href="#">PDF Document</a>
Document Status Color Bar	<a href="#">PDF Document</a>
Revision Tasks Color Bar	<a href="#">PDF Document</a>
Acknowledgment List Color Bar	<a href="#">PDF Document</a>
Acknowledgment Tasks Color Bar	<a href="#">PDF Document</a>

## | Subject Perspective, Cont. – Finding a Document

### Steps to Finding a Subject Document

1. To locate a document in your **Subject** list, enter the name or partial name of the document you are searching for into the **Find Document** text field.
2. Click the **Find** button.
3. Continue clicking the **Next** or **Prior** buttons until the desired document is located.
4. To clear your search criteria, click the 'X' in the search text field.



## 2| Classification Perspective

The **Classification** perspective is based on the Library of Congress filing system, and is used to display critical information at a glance. **Classification** tags are abbreviations that describe aspects of the related business process or area to quickly locate documents.

### Adding a Classification in DocumentReady

1. Select the **Classification** perspective option, then click the **Add** button.
2. Assign a **Short Id** by typing the name of the new Classification into the text field. Up to five alpha-numeric characters are supported in this field.
3. Optional fields include Classification **Name** and **Description**.
4. Click the **Save Changes** button.
5. Once the new **Classification** is created, you can review or edit the **Classification** by clicking on the Classification colorbar.

The screenshot illustrates the StaffReady DocumentReady interface. The top navigation bar shows the StaffReady logo and the DocumentReady perspective. Below this, a 'Classification' colorbar is active, with a 'Find Document' search bar and 'Find' and 'Add' buttons. A yellow arrow points to the 'Add' button. To the right, a 'Add Classification' form is displayed, featuring a 'Short Id\*' field with 'POL' entered, a 'Name' field with 'Policies', and a 'Description' field with 'Policies Library'. A 'Save Changes' button is located at the bottom of the form, with a yellow arrow pointing to it. Below the main interface, a 'Policies' list is shown, with a yellow arrow pointing to the 'Classification' entry.

## | Classification Perspective, Cont.

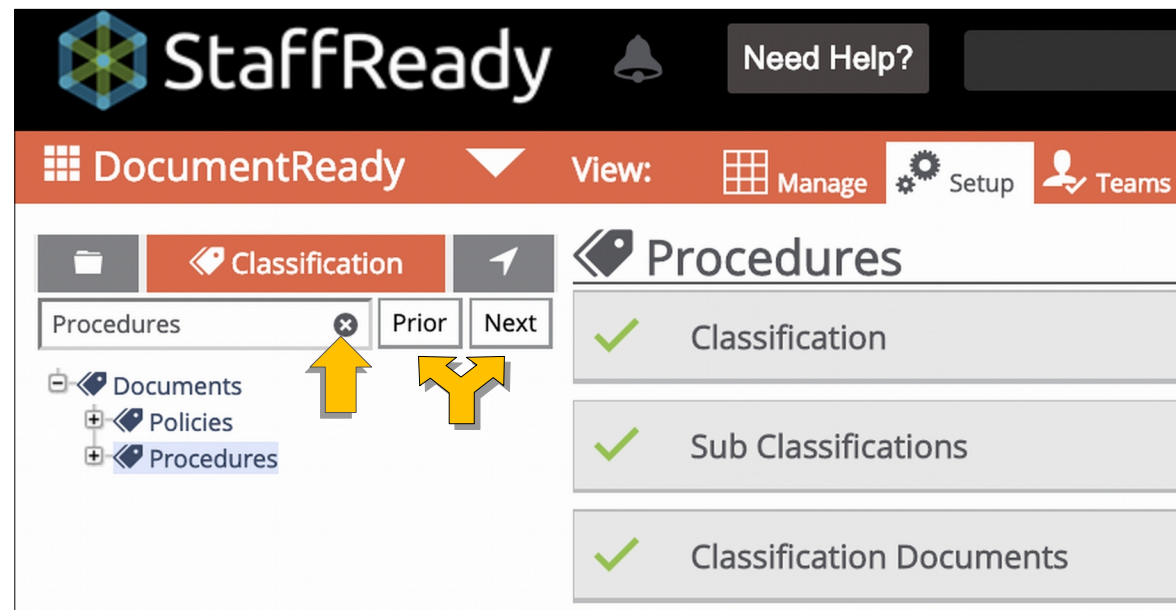
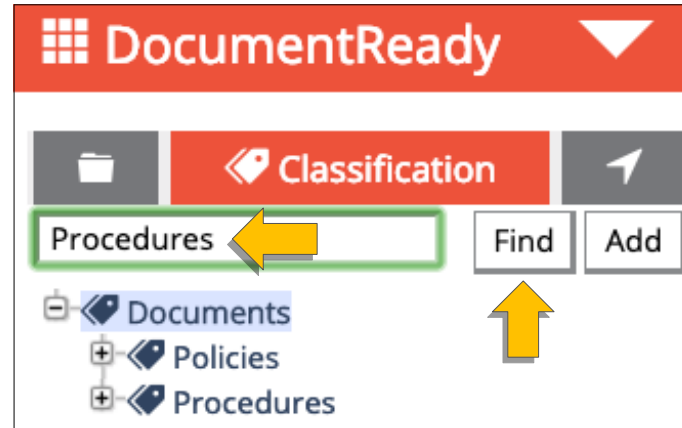
### Locate a Document under the Classification Perspective

1. To locate a document in your **Classification** list, enter the name or partial name of the document you are searching for into the **Find Document** text field.

2. Click the **Find** button.

3. Continue clicking the **Next** or **Prior** buttons until the desired document is located.

4. To clear your search criteria, click the **'X'** in the search text field.



### 3| Location Perspective

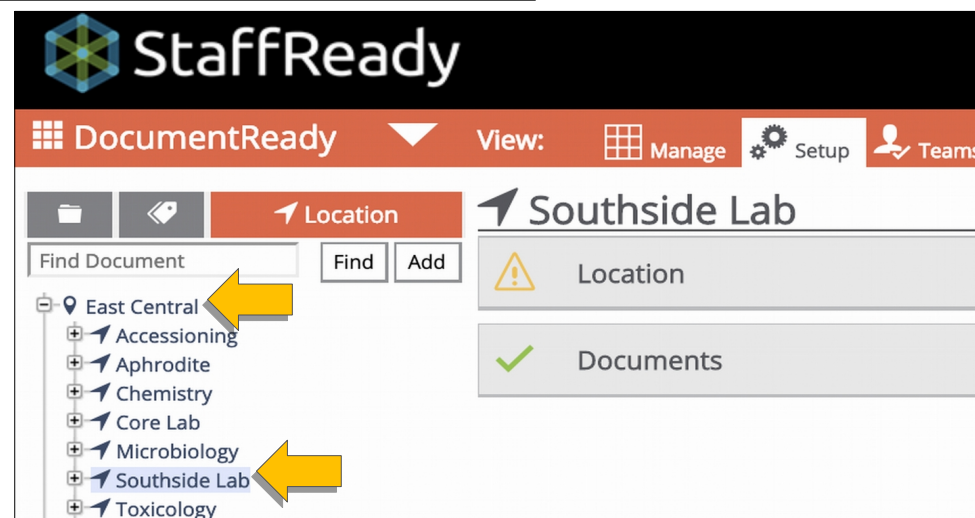
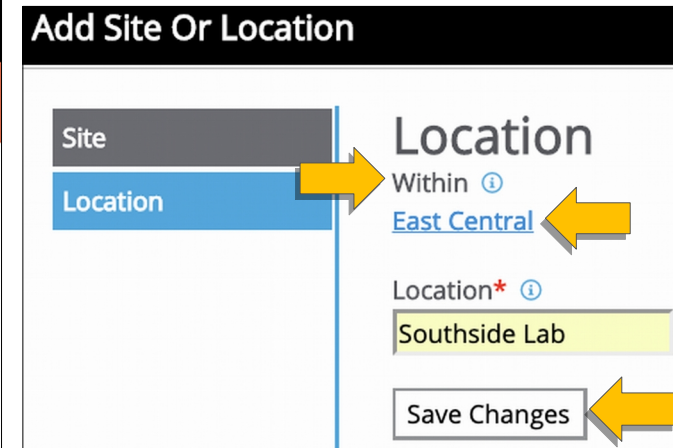
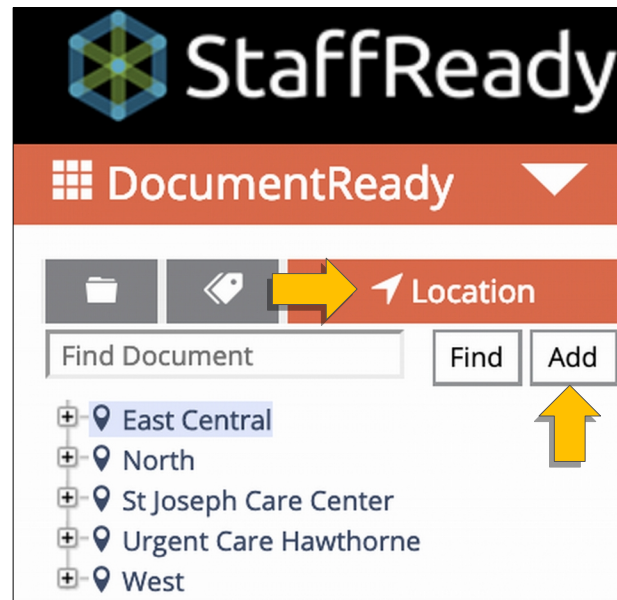
The **Location** perspective corresponds to physical areas where the equipment, business process, or testing procedure described in a document are located.

#### Adding a Location in DocumentReady

1. Select the **Location** perspective option, then click the **Add** button.
2. Select **Location** option on the left side action menu.
3. Type a **Location** name into the text field.
4. Click **Save Changes** to add the new **Location**.

*\*Note that the Location will be added to the Site or Parent Location that is listed in the "Within" field, located in the Add Site or Location screens.*

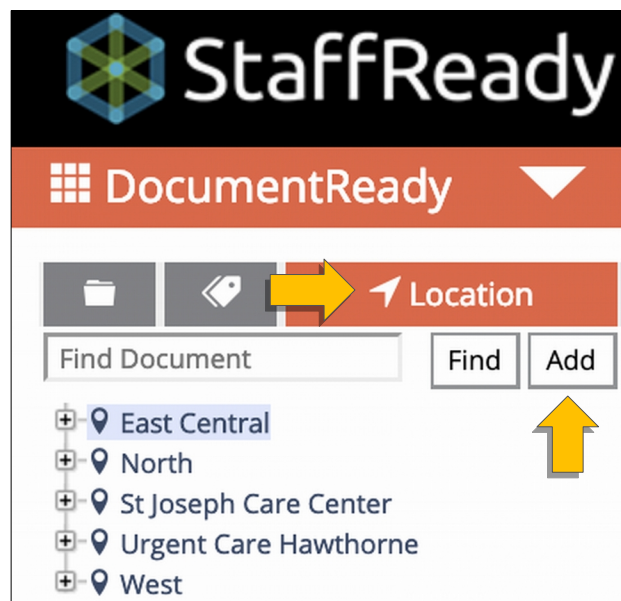
In the third screenshot, the Southside Lab was created as a new **Location** under the Top Level site East Central.



## | Location Perspective, Cont.

## Adding a Location in DocumentReady

5. To add a new **Site Location**, click the **Add** button.



6. Click the **Site** option under the left side action menu.

7. Enter in the required **Site** location specifics:

- Site name
- Address
- City, State, Postal Code

Optionally enter:

- Suite Number
- Hours of Operation
- Extended Zip Code

8. Click **Save Changes**.

 A screenshot of the 'Add Site Or Location' form. The form has a left sidebar with two tabs: 'Site' and 'Location'. The 'Site' tab is selected and highlighted in blue. A yellow arrow points to the 'Site' tab. The main form area is titled 'Site' and contains several input fields:
 

- Site\***: Southside Lab
- Address\***: 123 Main Street
- Suite/Attn**: (empty)
- City\***: Spokane
- State/Province\***: WA
- Postal Code\***: 99000
- Hours**: 08:00 - 17:00
- Zip+**: (empty)

 At the bottom of the form, there is a 'Save Changes' button. A yellow arrow points to the 'Save Changes' button.

## | Location Perspective, Cont.

## Adding a Location in DocumentReady

9. A new **Site** will be created.

*\*Note that a Site are at the top-level of the Location perspective. Within a Site you can create an additional Location and sub-Locations.*

The screenshot displays the StaffReady DocumentReady interface. At the top, the StaffReady logo is visible. Below it, the DocumentReady header includes a navigation menu with 'DocumentReady', 'View:', 'Manage', 'Setup', and 'Teams'. The main content area is titled 'Location' and shows a list of locations: East Central, North, Southside Lab (highlighted with a yellow arrow), St Joseph Care Center, Urgent Care Hawthorne, and West. A search bar labeled 'Find Document' with 'Find' and 'Add' buttons is present. On the right, the 'Southside Lab' site is selected, showing a 'Site' tab with a warning icon and a 'Documents' tab with an information icon.

## | Location Perspective, Cont.

## Find a Location

1. To find a **Location**, enter the name or partial name of the **Location** into the search field.

2. Click the **Find** button.

3. Continue clicking the **Next** or **Prior** buttons until the desired **Location** is located.

4. To clear your search criteria, click the 'X' in the search text field.

For assistance with **Perspectives Setup** or other **StaffReady DocumentReady** features, please contact our Customer Support team:

7am-5pm PST

Monday thru Friday

Phone: 1.877.229.5230

[Online Support Form](#)

