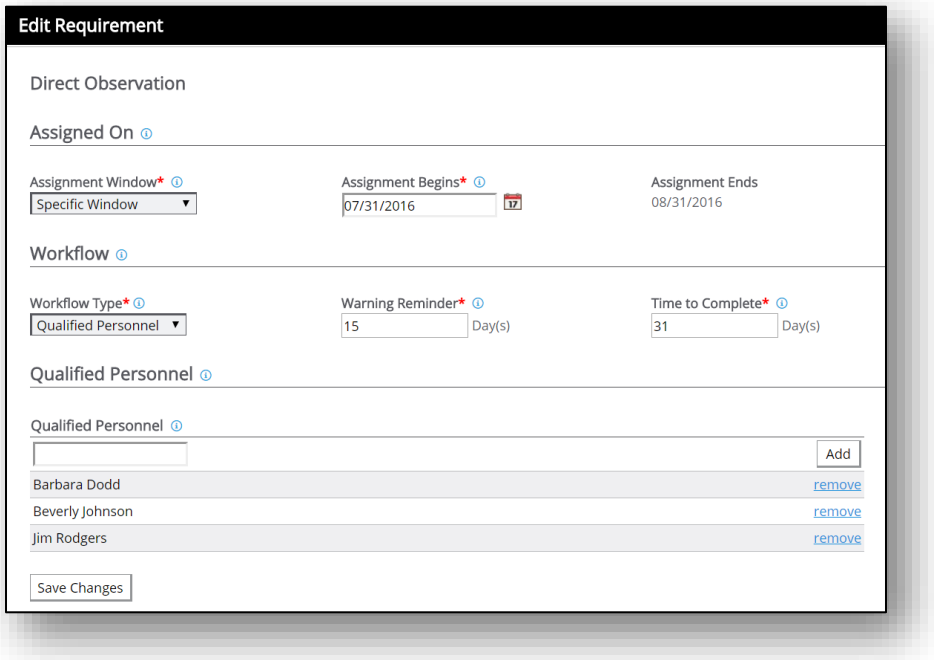
Setup View – Browse Skillsets Perspective
Requirement Assignment Period Settings

This reference guide provides an overview of the setup process for Requirement Assessment Period Settings within StaffReady. The behavior of a published skillset is dependent on four primary assignment properties: **assignment window, assignment begin date, time to complete and assignee.** The following process steps and instructional information are provided within this document:

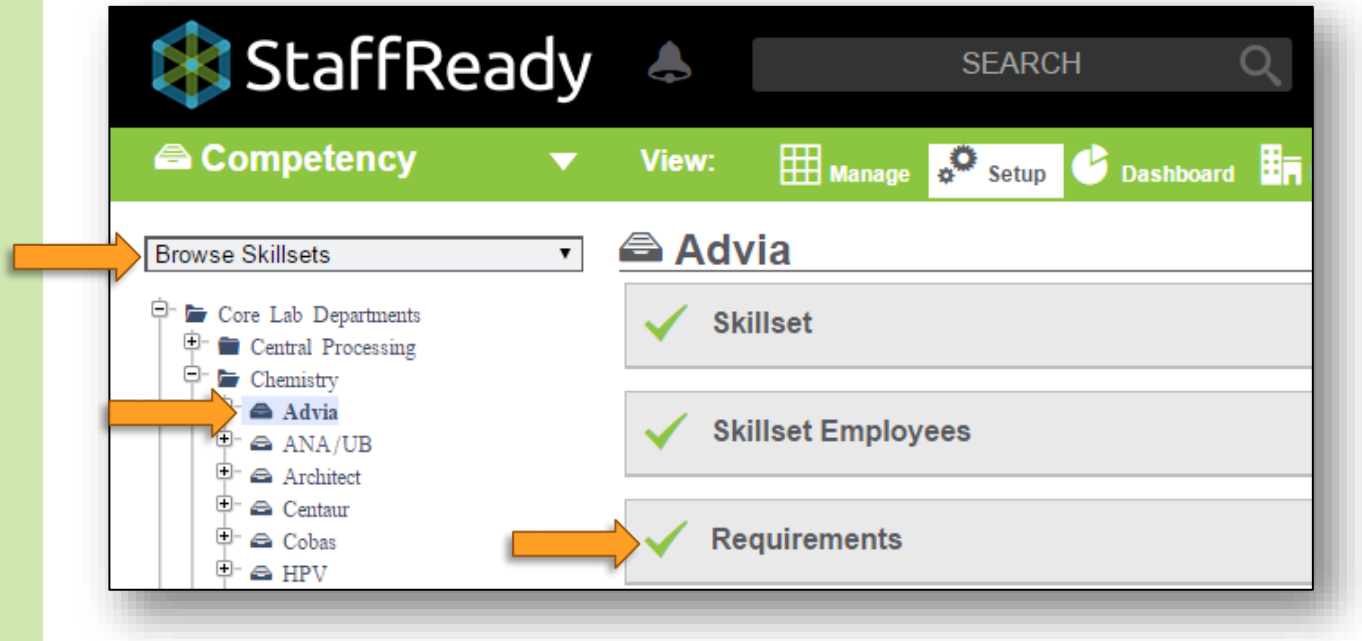
- **Quick Setup**
- **Assignment Window Options**
- **Workflow Assignee Option: The Employee Completes**
- **Workflow Assignee Option: A Team of Individuals**
- **Multi-step Workflow**



1 | Quick Setup

Quick Setup

1. Select **Browse Skillsets** perspective.
2. Select a **Skillset**.
3. Open **Requirements** colorbar.



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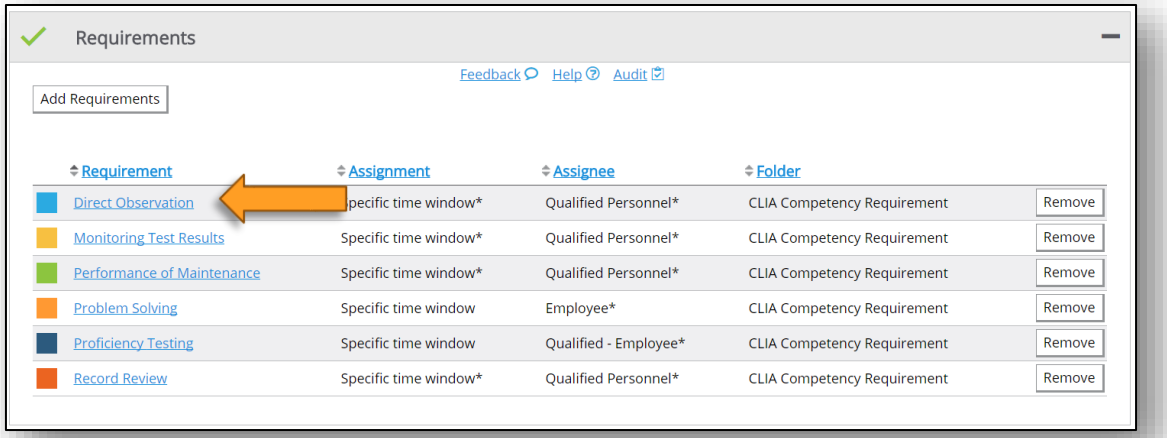
4. Click Requirement.



5. Select **Assignment Window**:

   - Skillset Start Date
   - Specific Window

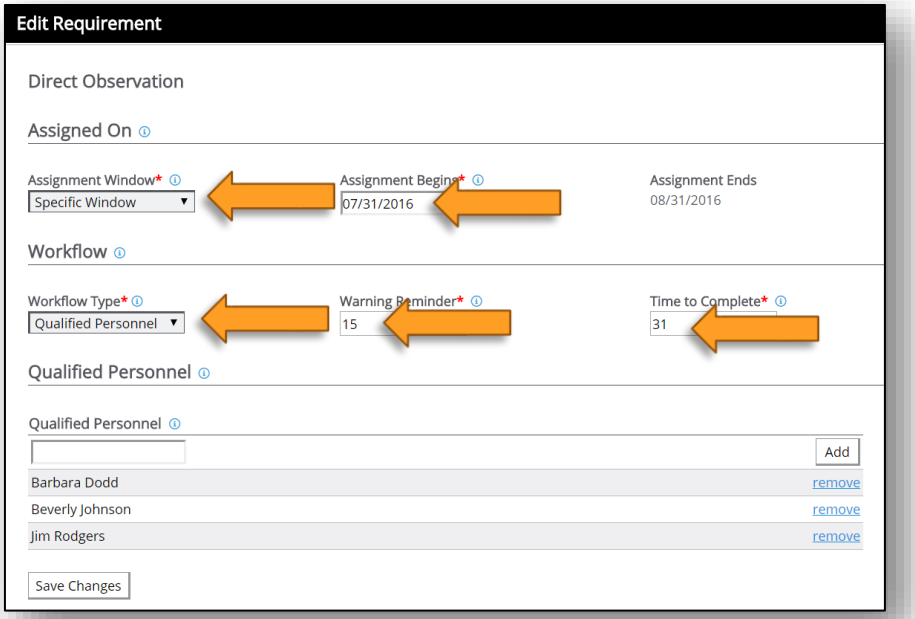
6. Enter **Warning Reminder.**

7. Enter **Time to Complete.**

8. Select **Workflow Type** option.

9. Add **Assignee's.**

9. Click **Save Changes.**



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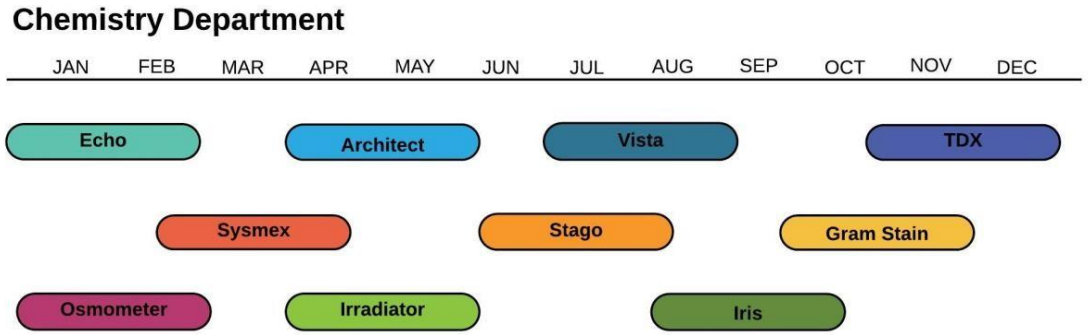
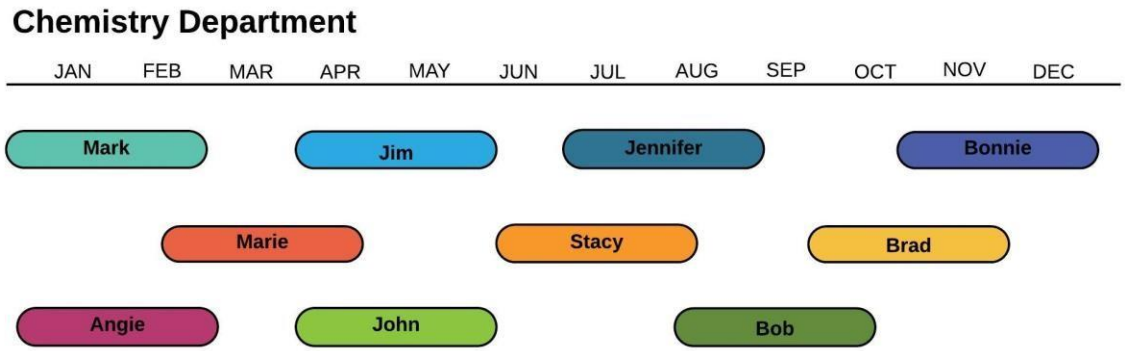
2 | Assignment Windows

The **Specific Window Assignment** option assigns all skillset employee assessments at the same time, based on the assignment begin date. This results in assessments being assigned in clusters with all assessments for a given test system coming due at the same time.



Skillset start date assigns skillset employee assessments based on the date that a skillset employee first started working on a test system. This results in assessments being assigned sporadically throughout the year.



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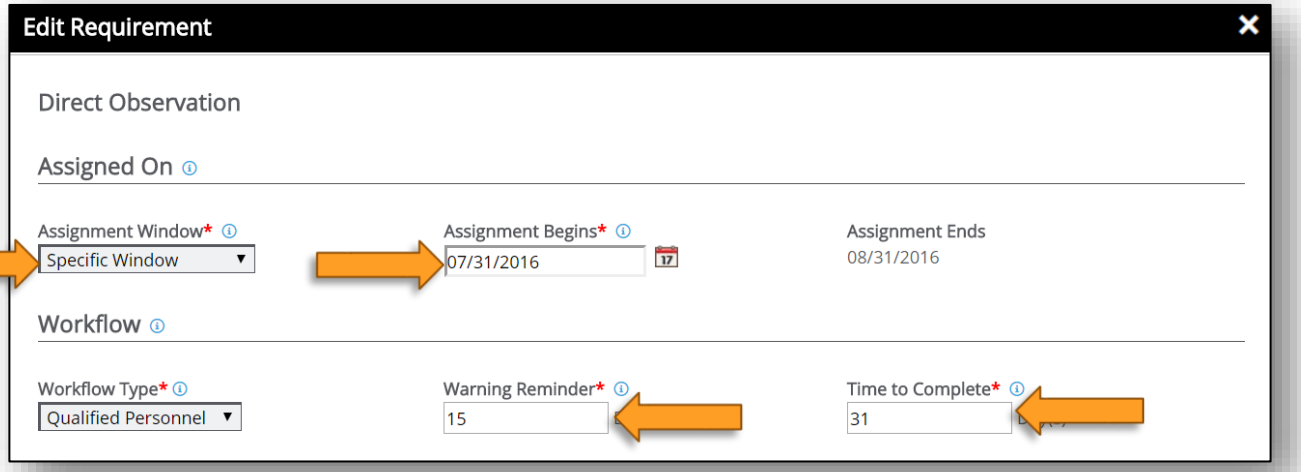
Assignment Window

1. Select **Specifc Window** or **Skillset Start Date** option from **Assignment Window** menu.

2. **Assignment begin date** determines the annual start date for a competency assessment. If the **assignment window** is set to **specific window**, then the **assignment begin date** is a custom field that will be the same for every employee being assessed for the test system. However, if the **assignment window** is set to **skillset start date** then the **assignment begin date** is determined by each individual employee's **skillset start date**.

3. Enter **Warning Reminder**, which is the number of days before the due date. For example, a **Warning Reminder** of '5' days will result in a system generated **Warning Reminder** five days before the assessment due date.

4. **Time to complete** is the number of days after the **assignment begin date** that **assignees** must complete assessment tasks. If assessment tasks are not completed before the due date, then the assessment is considered overdue.



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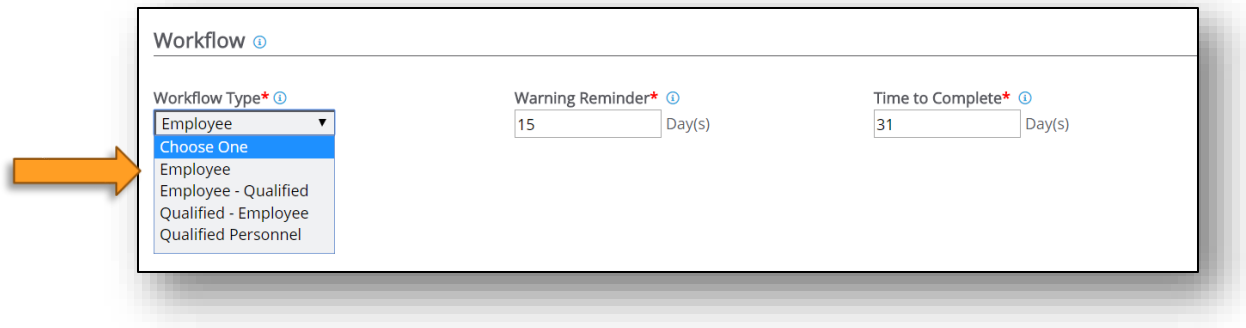
4 | Workflow Assignee Option: The Employee Completes the Assessment Themselves

The "**Employee**" **Workflow Type** option is for assessments (such as **problem solving** exams) that employees complete without assistance from their supervisor.

Assignee Option: The Employee Completes

1. Select **Employee** Workflow Type.
2. Click **Save Changes**.



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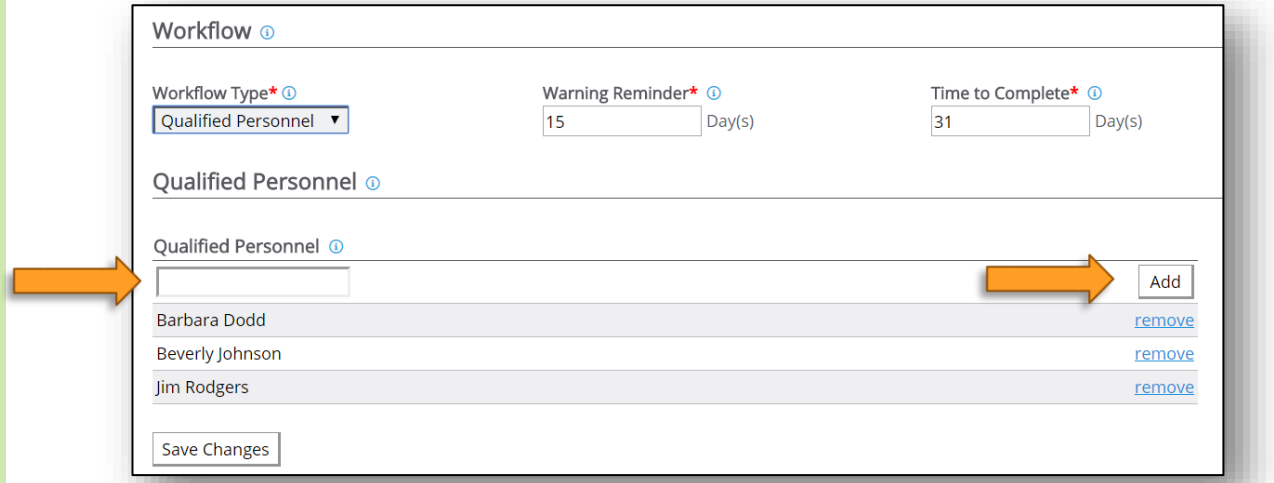
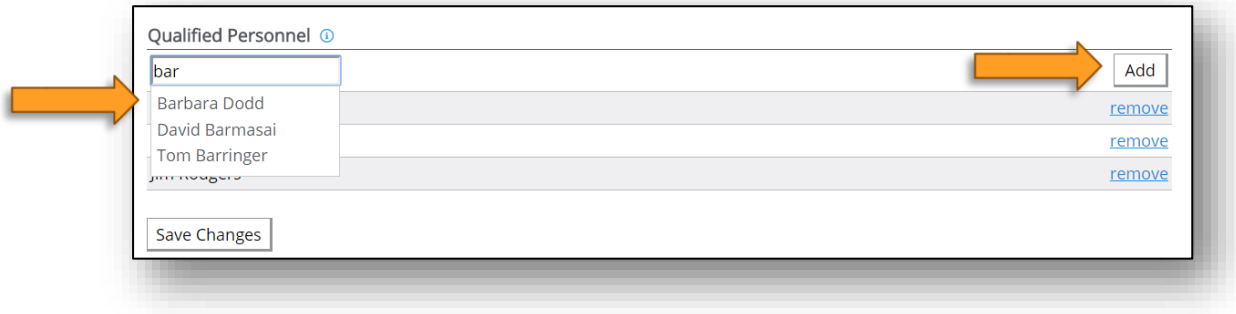
5 | Workflow Assignee Option: Qualified Personnel

The "**Qualified Personnel**" **Workflow Type** is for skillsets with multiple supervisors that can complete employee assessments for a given test system.

Assignee Option: A Team of Individuals

1. Select the **Qualified Personnel** option.
2. Begin typing a supervisor name within the **Full Name** search field. (The Qualifed Personnel must already be added to StaffReady)
3. Select the supervisor name from the auto-complete menu below the **Full Name** search field.
4. Click the **Add** button.





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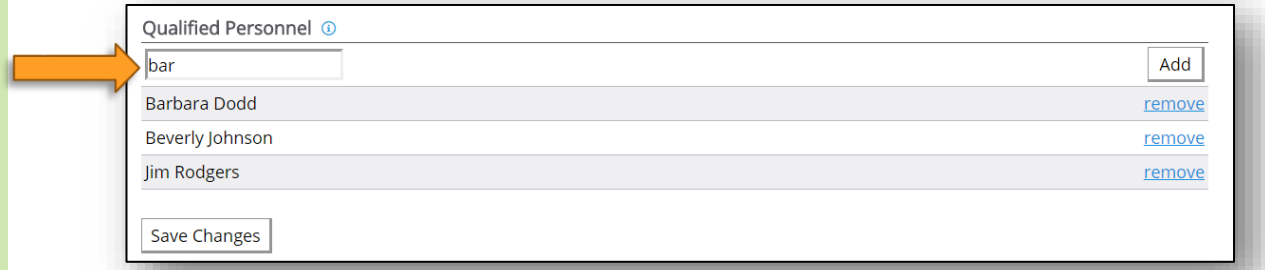
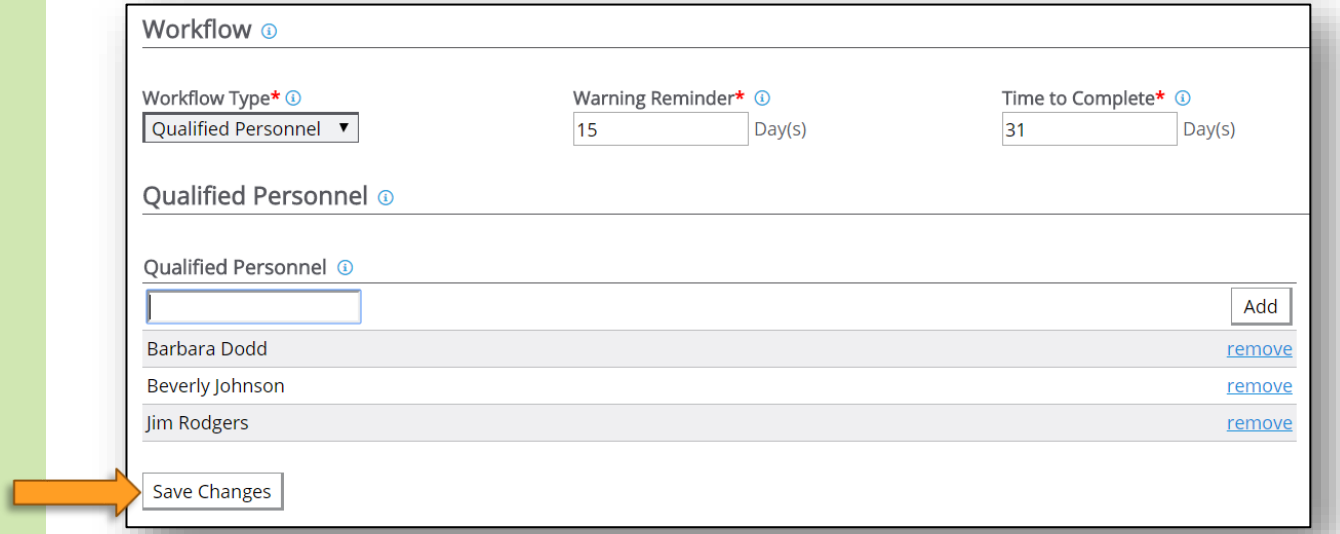
Note: Repeat steps 2-5 for every qualified personnel.



5. Click **Save Changes.**



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6 | Multi-step Workflows

Some assessments (such as blind duplicate proficiency tests) require multiple employees to complete tasks before the assessment can be completed.

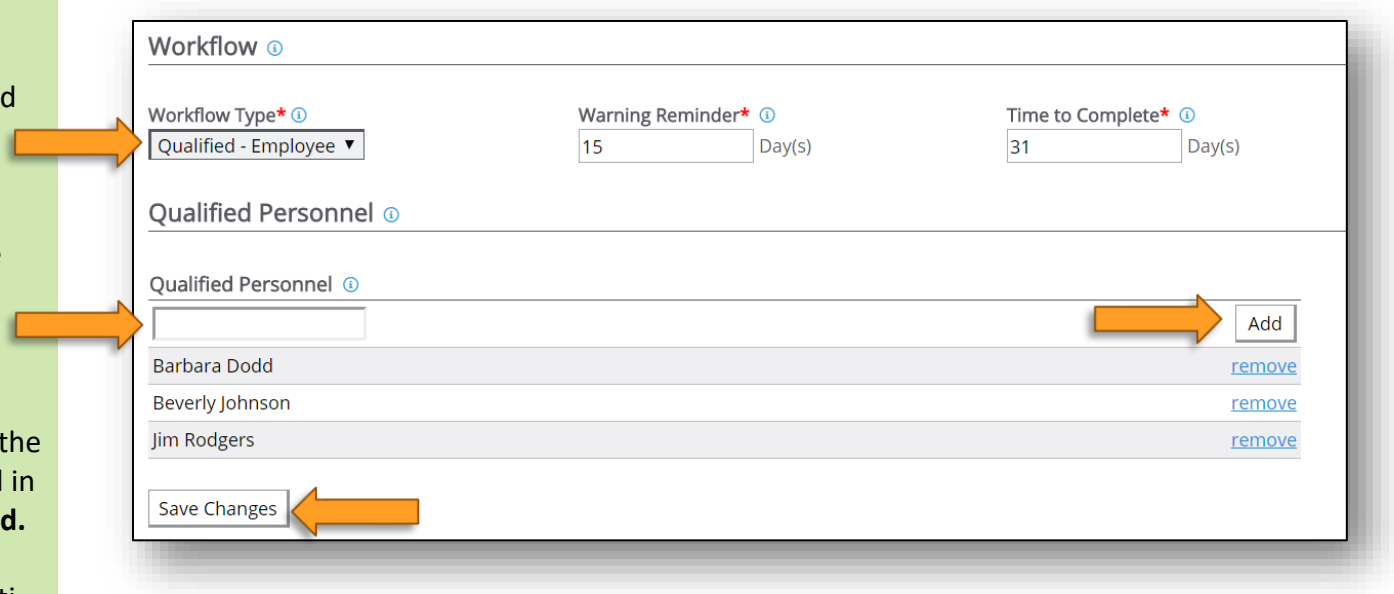
Multi-step Workflows

1. Select **Employee – Qualified or Qualified - Employee** Workflow Type.

   Employee – Qualified = Employee Completes exam then Qualified Personnel Completes their portion (Used for manually graded problem solving exams)
   Qualified - Employee = Qualified Personnel completes inputs known result and then the Employee inputs their repeat value. (Used for Blind Duplicate Method in Proficiency Testing)

2. Within the **Qualified Personnel** field, begin typing the name of the supervisor who will be assigned in the workflow and then Click **Add.** (NOTE: Multiple Qualified Personnel can be added to Multi-Step Workflows)

3. Click **Save Changes**.



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