

DocRead for SharePoint 2010

# Administrator Guide

Version 3.2

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## 1 Intended Audience

This document is intended for users who have been granted DocRead Administrator permissions and wish to:

- Add DocRead Web Parts to web pages
- View and Search DocRead tasks
- Delete Tasks
- Synchronise site documents
- Manually process DocRead tasks
- View or download Reports

## 2 Prerequisites

Before using this guide, please ensure the following conditions have been met:

- ✓ DocRead must have been installed and configured in your SharePoint Farm.
- ✓ A Site Owner (user with 'Full Control') needs to have activated DocRead against the relevant sites and Document Libraries that you wish to configure.
- ✓ You are logging onto SharePoint as a user who has 'Contribute' permissions over the site where you want to configure DocRead.
- ✓ You are logging onto SharePoint as a user who is in the 'DocRead Site Administrators' group.

## 3 Introduction

This guide is intended to help you administer DocRead within your sites and site collections on your organisations SharePoint intranet, internet or collaboration sites.

Please refer to the System Administrator's Guide if these have not already been completed.

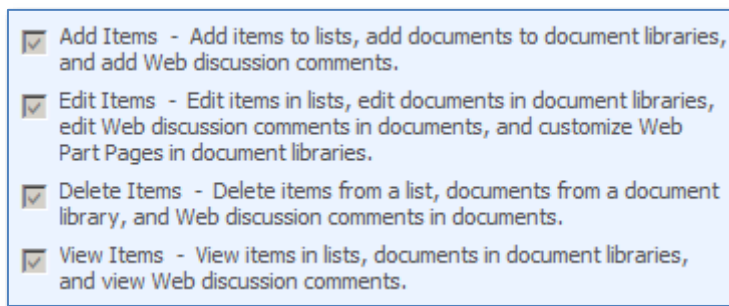
## 4 DocRead Web Parts

There are three DocRead Reading Task web parts and four DocRead Charting Web Parts that can be easily added to a web part page. Although they can be placed onto any web part page, we recommend that they are placed either on your Intranet home page and/or a user's MySite so that Reading Tasks are immediately brought to their attention.

### 4.1 Permission required to add a Web Part

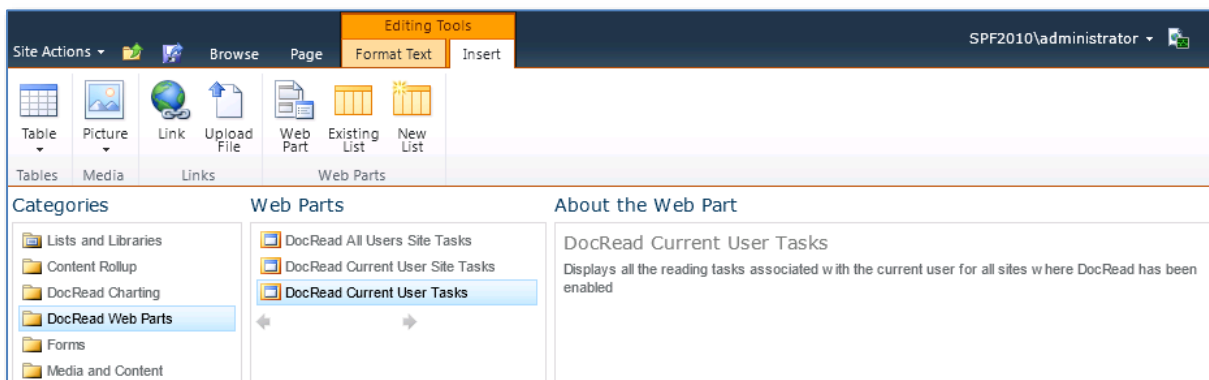
This section explains how to add and configure a DocRead web part onto a web part page. To follow these steps you need ensure you have been granted 'Contribute' permissions on the site.

Contribute permission allows you to do actions such as 'Add Items', 'Edit Items', 'Delete Items' and 'View Items', as shown in the next picture.



### 4.2 Add a DocRead Reading Task Web Part

1. Browse to a page containing a web part zone on which you wish to add a web part.
2. From the 'Settings' menu select 'Edit Page'.
3. In the space where you would like to display the DocRead web part, click 'Add Web Part'.
4. In the 'Categories' section on the left hand side you will see a list of available Web parts.
5. Select 'DocRead Web Parts'.



6. You are then presented with the three web part options, with descriptions about each one appearing in the 'About the Web Part' section.
  - a. **DocRead All Users Site Tasks.** This displays the reading assignments associated with all users on the current site. This is only available to Administrators.
  - b. **DocRead Current User Site Tasks.** This displays the reading assignments issued on the current site to the logged on user.

- c. **DocRead Current User Tasks.** This displays all reading assignments for the current logged on user from across all sites on the SharePoint Farm.

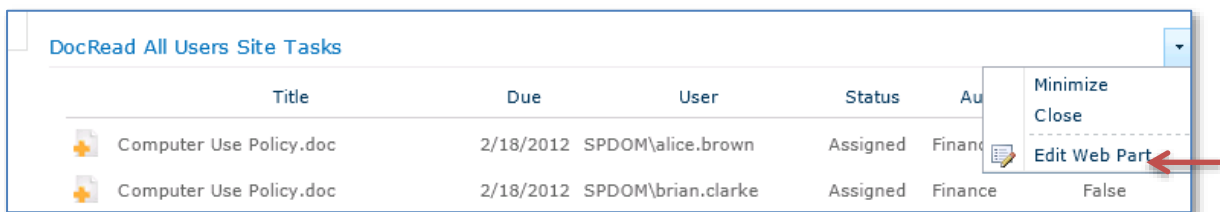
**Note:** The 'All Users Site Tasks' web part is only available to Administrators. 'Current User Site Tasks' will only show a user tasks that have been assigned from the current site. To ensure the user can see ALL tasks that have been assigned to them you must select the 'Current User Tasks' web part.

7. Select the most appropriate web part and click 'Add'.
8. You can select as many web parts as you like on any particular web page, however the first option, 'DocRead All User Site Tasks' is only available to an Administrator and will not appear on a normal user's page.

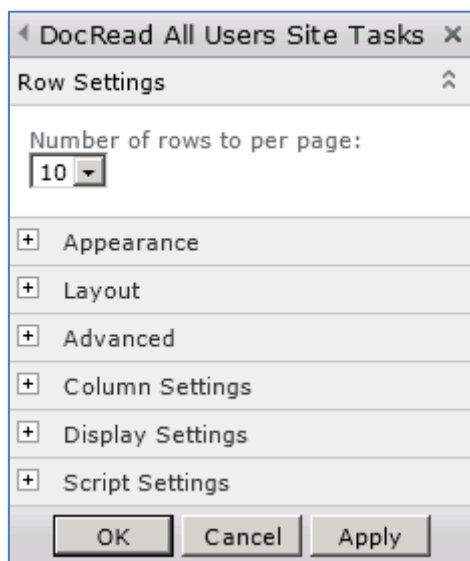
### 4.3 Customising the DocRead Web Part

All web parts are customisable to allow your organisation to select the columns that are displayed to the user. Ensure you are still able to 'Edit' your web page and then:

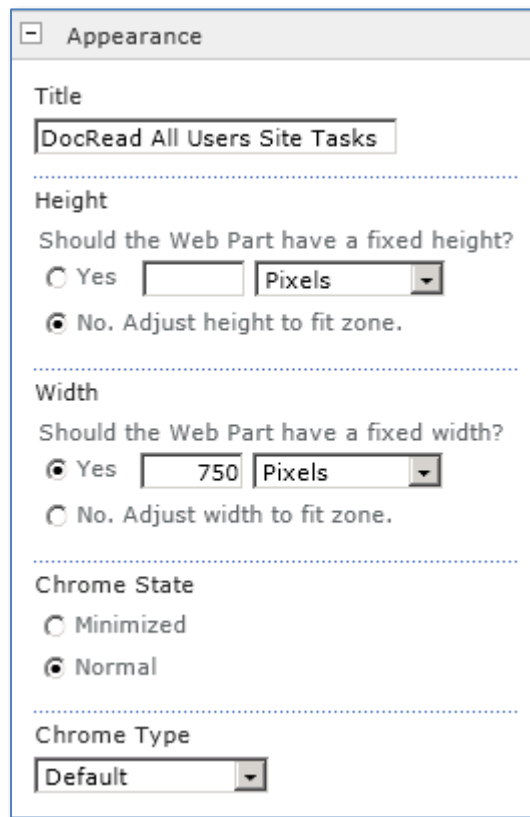
1. Select the down arrow associated with the DocRead web part (in the top right hand corner of the web part).
2. Select 'Edit Web part'.



3. You are then presented with several options within a separate pop up window. Use the '+' button to expand each area to view the specific options.
  - a. **Row Settings:** This allows you to select the number of rows displayed on each page of the web part.



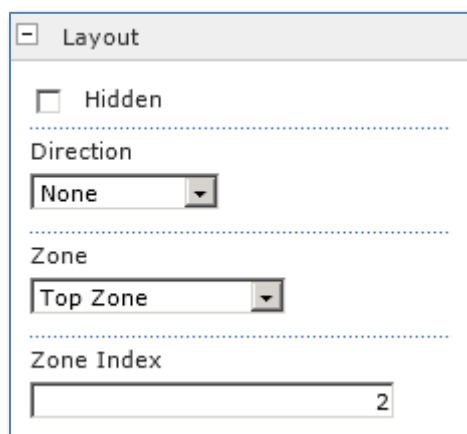
- b. **Appearance:** This allows you amend the height and width of the web part, provide a suitable title / label that will be displayed and also amend the chrome state and type.



The screenshot shows the 'Appearance' configuration dialog box for a web part. It contains the following settings:

- Title:** A text box containing 'DocRead All Users Site Tasks'.
- Height:** A section titled 'Should the Web Part have a fixed height?' with two radio buttons: 'Yes' (unselected) and 'No. Adjust height to fit zone.' (selected). A text box next to 'Yes' is empty, and a dropdown menu is set to 'Pixels'.
- Width:** A section titled 'Should the Web Part have a fixed width?' with two radio buttons: 'Yes' (selected) and 'No. Adjust width to fit zone.' (unselected). A text box next to 'Yes' contains '750', and a dropdown menu is set to 'Pixels'.
- Chrome State:** Two radio buttons: 'Minimized' (unselected) and 'Normal' (selected).
- Chrome Type:** A dropdown menu set to 'Default'.

- c. **Layout:** This allows you to specify the zone that the web part will be located within. Alternatively all web parts can be dragged in between web part zones using a mouse.



The screenshot shows the 'Layout' configuration dialog box for a web part. It contains the following settings:

- Hidden:** A checkbox that is unchecked.
- Direction:** A dropdown menu set to 'None'.
- Zone:** A dropdown menu set to 'Top Zone'.
- Zone Index:** A text box containing the number '2'.

- d. **Advanced:** This allows you to configure more advanced settings for the web part.

Advanced

Allow Minimize

Allow Close

Allow Hide

Allow Zone Change

Allow Connections

Allow Editing in Personal View

Export Mode

Do not allow

Title URL

Description

Displays all the reading tasks a

Help URL

Help Mode

Navigate


Catalog Icon Image URL

Title Icon Image URL

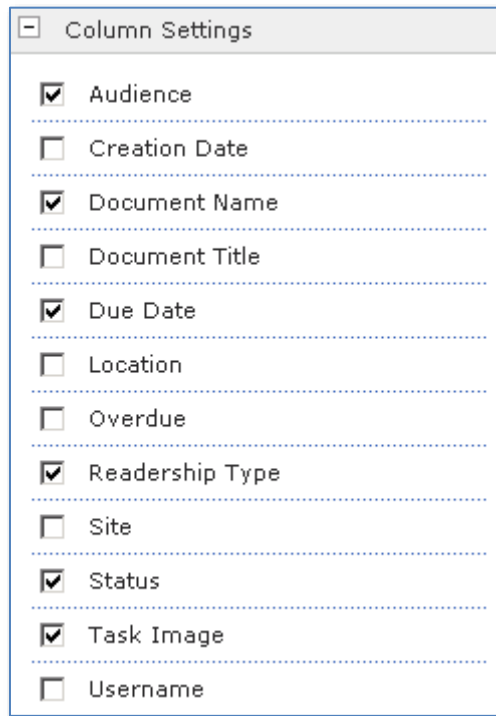
Import Error Message

Cannot import DocRead All Use

Target Audiences



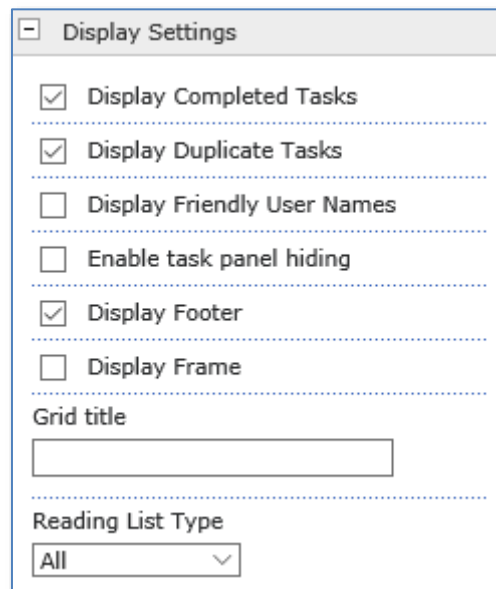
- e. **Column settings:** This allows you to choose which columns will be displayed in the DocRead list.



Column Settings

- Audience
- Creation Date
- Document Name
- Document Title
- Due Date
- Location
- Overdue
- Readership Type
- Site
- Status
- Task Image
- Username

- f. **Display Settings:** Under 'Reading List Type' you can choose whether to include recommended, required or all reading assignments in the DocRead list.



Display Settings

- Display Completed Tasks
- Display Duplicate Tasks
- Display Friendly User Names
- Enable task panel hiding
- Display Footer
- Display Frame

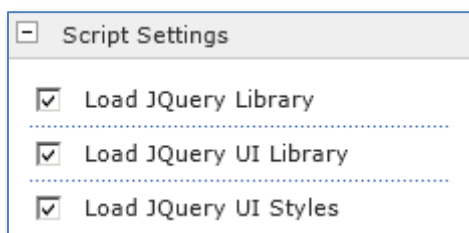
Grid title

Reading List Type

All

- g. **Script Settings:** This allows you to optionally include the JQuery libraries. If your page already includes JQuery then unselect these options.



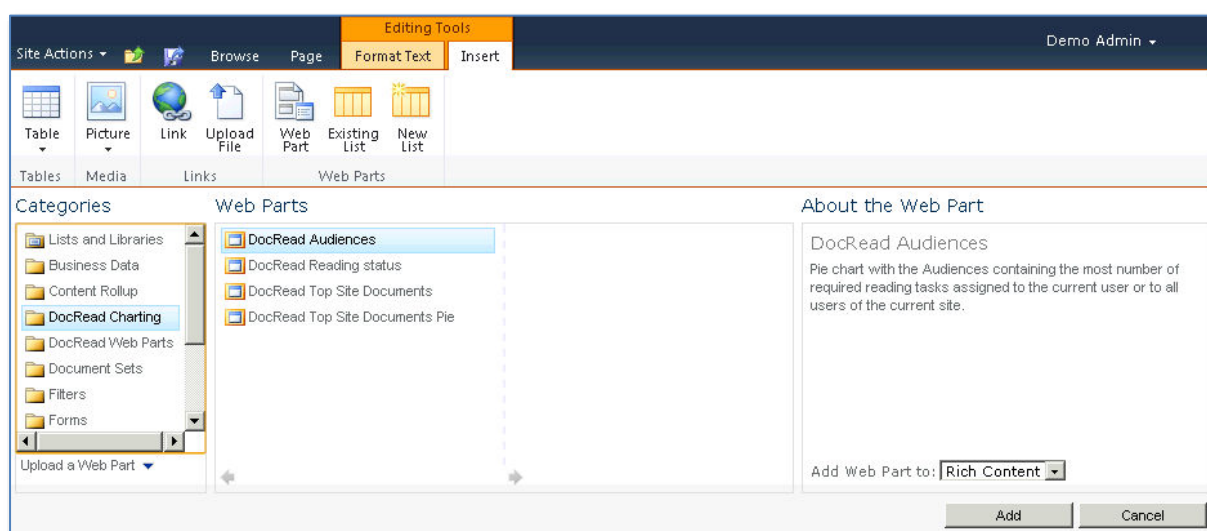


4. After you have made the required changes, click 'Apply' and then 'OK' to close the window.
5. You must remember to save your changes to the web page and also publish the page as per your normal business routines.

#### 4.4 Adding a DocRead Charting Web Part

The DocRead charting web parts allow you to show users their reading status pictorially.

1. Browse to a page containing a web part zone on which you wish to add a web part.
2. From the 'Site Actions' menu select 'Edit Page'.
3. From the 'Editing Tools' menu select the 'Insert' option and click on 'Add Web Part'.
4. In the 'Categories' section on the left hand side you will see a list of available Web parts.
5. Select 'DocRead Charting'.

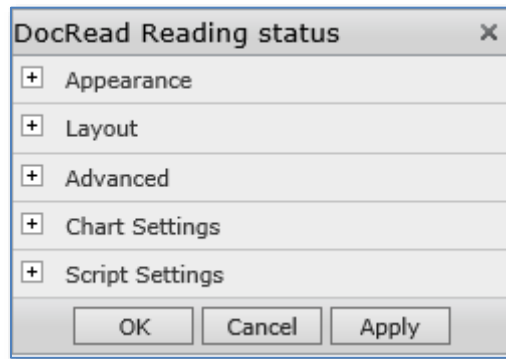


6. You are then presented with the three web part options, with descriptions about each one appearing in the 'About the Web Part' section.
  - a. DocRead Audiences
  - b. DocRead Reading Status
  - c. DocRead Top Documents
  - d. DocRead Top Documents Pie
7. Select the most appropriate web part and click 'Add'.

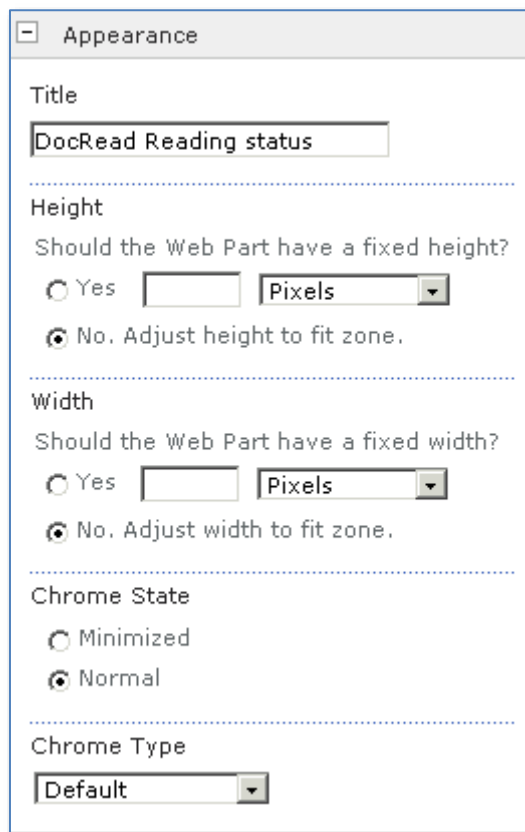
#### 4.5 Customising the Charting Web Parts

As with the Reading Task Web Parts the Charting Web Parts are customisable. To amend the Web Part, select the down arrow associated with the web part (in the top right hand corner of the web part) and select 'Edit Web Part'.

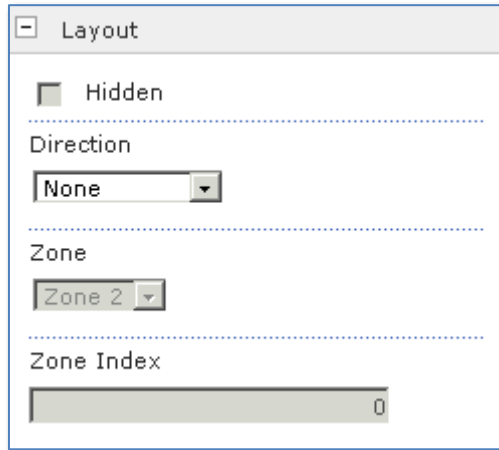
1. You are then presented with several options within a separate pop up window. Use the '+' button to expand each area to view the specific options.



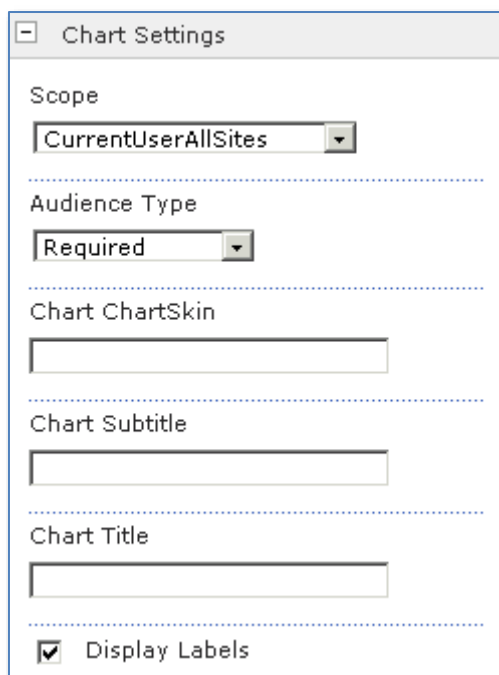
- a. **Appearance:** This allows you amend the height and width of the web part and also amend the chrome state and type.



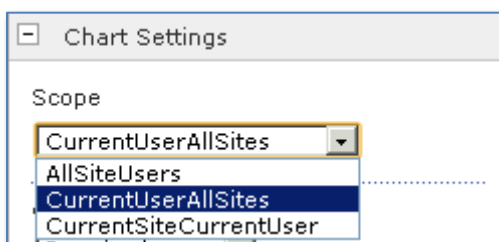
- b. **Layout:** This allows you to specify the zone that the web part will be located within. Alternatively all web parts can be dragged in between web part zones using a mouse.



- c. **Chart Settings:** The charts can be amended to show all site user information (for administrators only), all information for the current user from across all sites within the Farm or restricted to the task information for the current user from the current site.

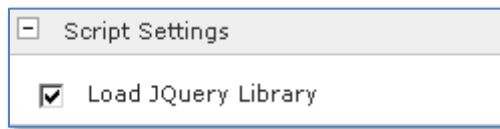


The most important chart setting is the scope of the chart. This allows you determine what data the chart will show.



**Note:** The most useful option is 'CurrentUserAllSites' because this shows the user a 'helicopter view' of all of their tasks, regardless of their site of origin. The 'AllSiteUsers' view can only be used by Administrators.

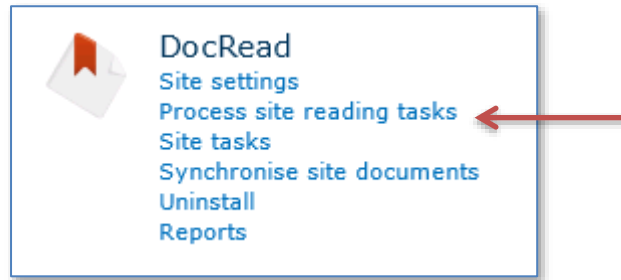
- d. **Script Settings:** This allows you to optionally include the JQuery libraries. If your page already includes JQuery then unselect these options.



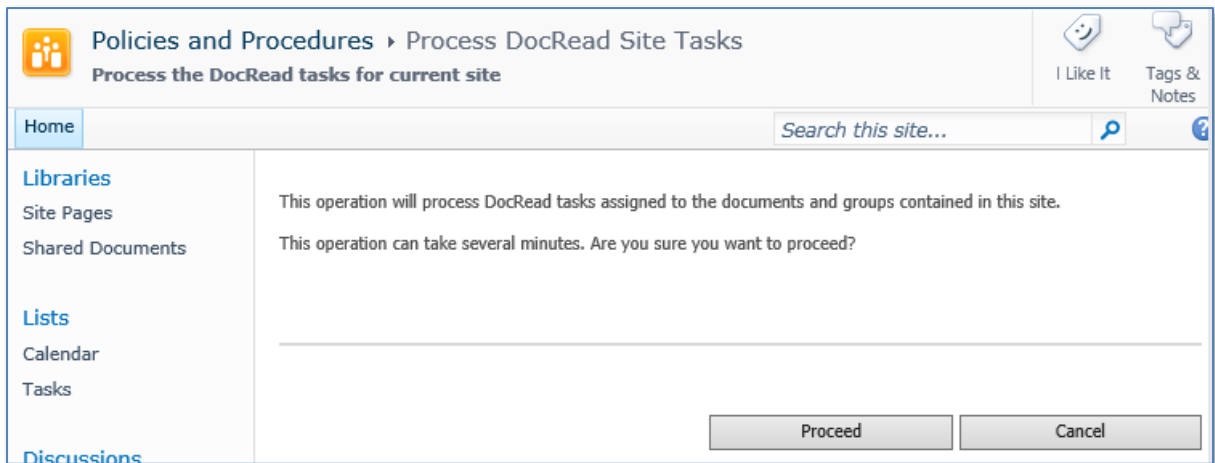
## 5 Process Site Reading Tasks

If you do not want to wait for the scheduled DocRead timer job to assign reading tasks to the identified users you can select the 'Process Site Readership Tasks' option to force DocRead to generate those tasks immediately by following these steps:

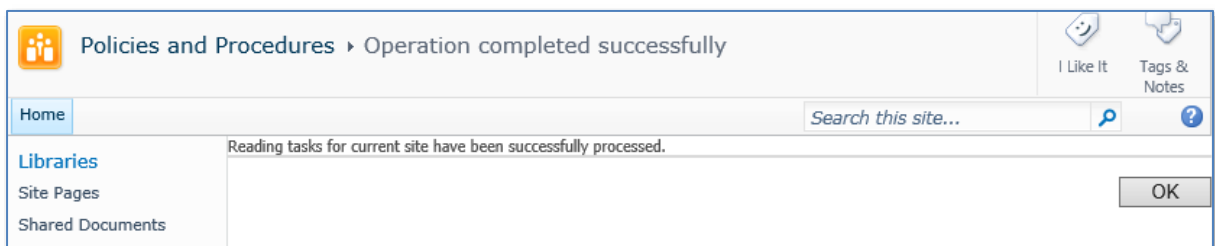
1. Go to 'Site Actions', and choose 'Site Settings'.
2. Within the DocRead section, select 'Process site reading tasks'.



3. Click 'Proceed' to confirm.



4. Once successfully processed you should receive a confirmation message.



**Note:** This process will assign reading tasks on the current Site for SharePoint Groups only. Reading tasks assigned to SharePoint Audiences will be processed during the next scheduled timer job run, as set by the SharePoint Administrator during the DocRead Installation and Initial Setup procedure. This is a volume processing safeguard to ensure that large quantities of tasks are not processed at inconvenient times for your organisation. Please contact your SharePoint Administrator for more information.

## 6 View and Search Site Tasks

Only DocRead Administrators can view all successfully processed site tasks. A User will only be able view details of tasks assigned to them.

The report will default to show each DocRead distributed document alphabetically and each user it has been assigned to. Along with the due date for completion, the request type (required or recommended reading) and the current status for each user (assigned, completed, overdue).

1. Within the relevant Site (each Site will generate its own Site Readership reports) select 'Site Actions' then 'Site Settings'.
2. Select 'Site Tasks' from the DocRead section.

Title	Created	Due	Type	User	Status	Audience	Overdue
Computer Use Policy.doc	2/13/2012	2/18/2012	Required	SPDOMalice.brown	Assigned	Finance	False
Computer Use Policy.doc	2/13/2012	2/18/2012	Required	SPDOMbrian.clarke	Assigned	Finance	False
Computer Use Policy.doc	2/13/2012	2/18/2012	Required	SPDOMcharles.davies	Assigned	Finance	False
Alcohol and drug abuse policy.docx	2/13/2012	2/20/2012	Required	SPDOMadministrator	Assigned	DocRead Test Site Members	False
Annual Holiday Entitlement Policy.docx	2/13/2012	2/20/2012	Required	SPDOMlewis.forrester	Assigned	Operations	False
Annual Holiday Entitlement Policy.docx	2/13/2012	2/20/2012	Required	SPDOMfrank.grove	Assigned	Operations	False
Annual Holiday Entitlement Policy.docx	2/13/2012	2/20/2012	Required	SPDOMgilian.hill	Assigned	Operations	False
Computer Use Policy.doc	2/13/2012	2/18/2012	Required	SPDOMadministrator	Complete	Finance	False
Annual Holiday Entitlement Policy.docx	2/13/2012	2/20/2012	Required	SPDOMadministrator	Complete	Operations	False

3. The report may be sorted by Document Name, Date Created, Due date, Type, User, and Status.
4. Search facilities exist within the report should you have a specific query. Click on the 'magnifying glass' icon at the bottom, left hand side of the screen.

**Tasks Filter** [X]

Document Name

User Name

Due Date  [Calendar Icon]

Status  [Dropdown Arrow]

Audience  [Dropdown Arrow]

Readership Type  [Dropdown Arrow]

Overdue  [Dropdown Arrow]

[Search] [Reset]

5. Enter or Select the criteria you wish to search by and click 'Search'.
6. To start a new search click 'Reset' and enter your new criteria as described above.
7. If you are unsure of exactly what you are searching for, you can use % as a wild card in the search. For example the three options below are all acceptable wild card search terms: '%policy' or 'policy%' or '%policy%'

## 7 Delete Tasks

1. To delete DocRead tasks use the task search functionality, explained in the previous section, to find the tasks that you want to delete.
2. From the list of results highlight the task (or tasks) that you want to delete.
3. Click on the 'dustbin' icon at the bottom of the list and select which level of delete you wish to perform (the selected task, all tasks to all users for the item or all tasks for the user for the item).
4. Click 'Ok' to confirm the delete.

**Note:** Negative reading receipts will be generated for all users who had not completed the task before it was deleted.

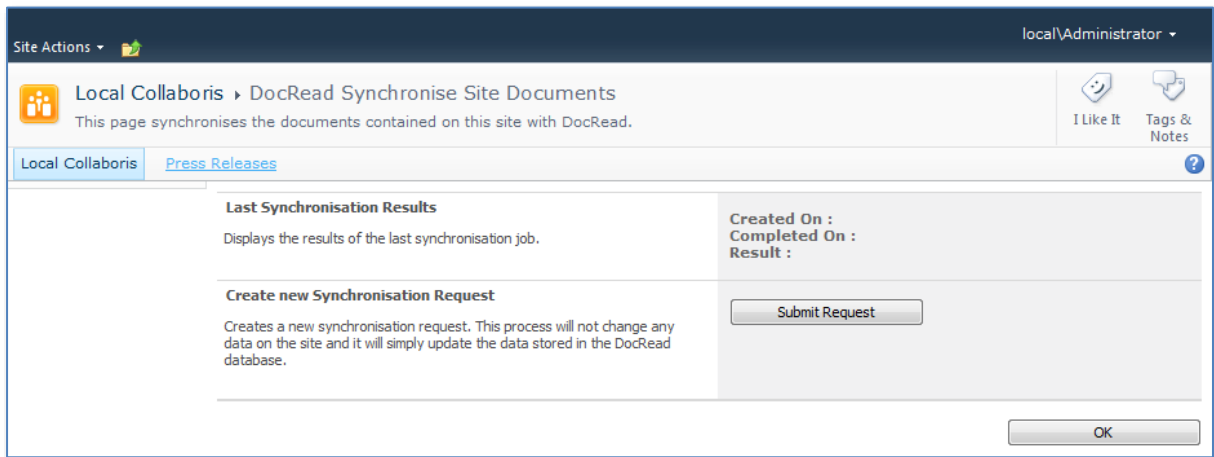
## 8 Synchronise Site Documents

The 'Synchronise Site Documents' option will ensure that all documents held in SharePoint and that have assigned required and recommended audiences are being tracked by DocRead.

You will need to run this option if you undelete (or restore from backup):

- a. a document library that was attached to DocRead or
- b. a site containing document libraries that were attached to DocRead.

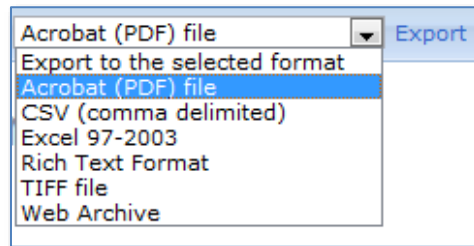
You can run this option by clicking on the 'Submit Request' button. This will schedule a job that, by default, runs every 15 minutes and that will be responsible for updating DocRead.



## 9 DocRead Reporting for Administrators

DocRead Reporting gives enhanced reporting functions and also allows you to download reports to various formats (Excel, PDF, CSV files etc.) To access reports, go to 'Site Settings' and select 'Reports' from the DocRead menu.

All DocRead reports can be exported to various file formats. Select your chosen format from the drop down menu and then click 'Export'.



Each report offers a different set of available parameters that can be used to filter or search to ensure the report reflects the required information.

### 9.1 'Site Collection Dashboard'

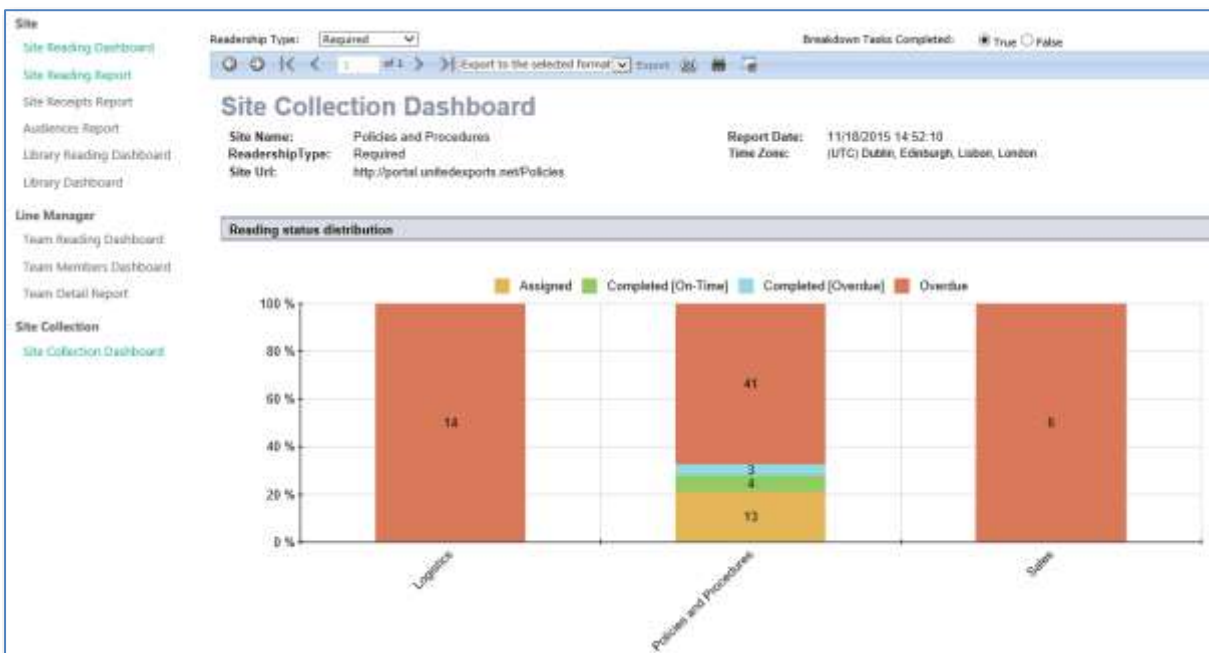
This report can only be accessed by members of the group selected to be Site Collection Administrators on the DocRead Site Settings page.

DocRead Site Collection Administrators

Please select the group of users that will have permissions to see DocRead Reports scoped at the site collection level.

Site group:

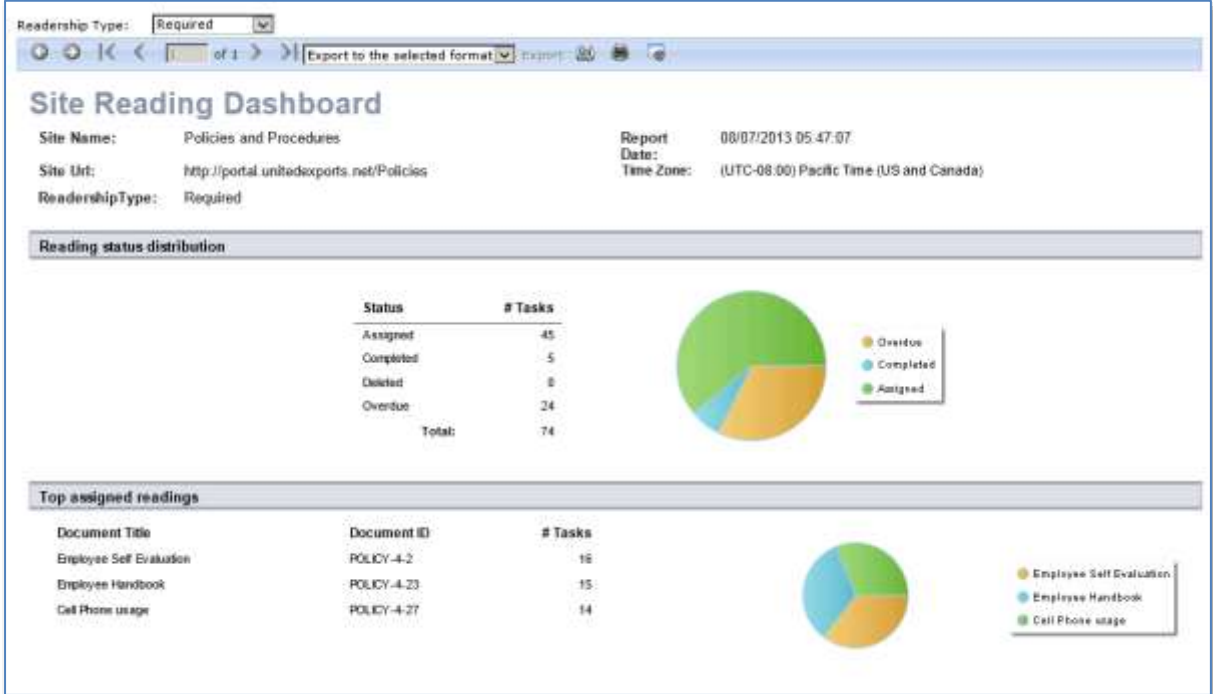
This report summarises the number of tasks by reading status for each site within the site collection. Clicking on one of the sites listed in the data table below the graph will drill down to show results for the libraries within the site chosen.



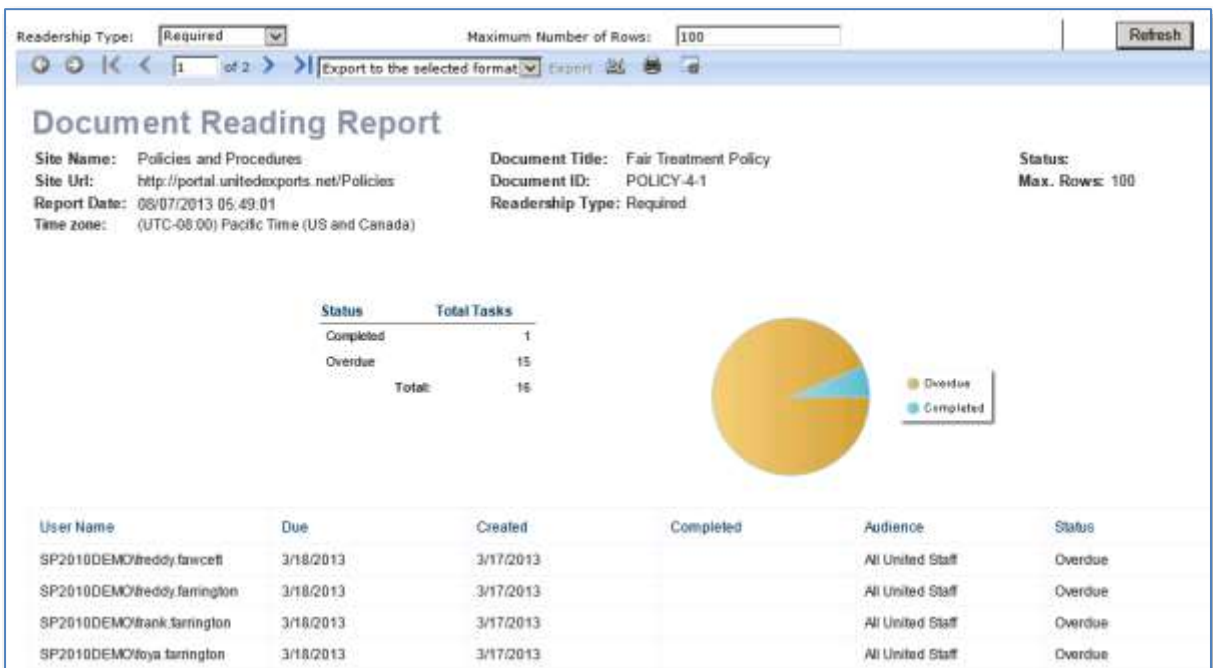


## 9.2 'Site Reading Dashboard'

This report will appear with default settings limiting the initial report to the top 10 records within each reading status and for required readership only. Use the parameter input boxes at the top and click 'Refresh' to change your view if wished.



Drill down to an individual 'Document Reading Dashboard' is available from the 'Top Assigned Readings', 'Top Completed Readings' and 'Top Overdue Readings' sections. Simply click on the item you are interested in and the drill through report will be generated.



### 9.3 'Site Reading Report'

The 'Site Reading Report' shows the same report as when viewing 'Site Tasks' (described in the previous section). The 'search' and 'sort' functions are replaced by the parameter entry boxes above the report. Input your specific report requirements and click 'Refresh' to view items that match these parameters.

### 9.4 'Site Receipts Report'

The 'Site Receipts Report' shows all positive and negative confirmation receipts generated to date. Click on a row in the report to view the reading receipt.

## 9.5 'Audiences Report'

This report gives you an overview of all of the items that have been assigned by DocRead on the particular site. It can be really useful when trying to control the number of documents issued by DocRead.

Document Title:

Reading Status:

Sort Column:

Document ID:

Audience Name:

Readership Type:

Sort Direction:

Export to the selected format

### Document By Audience Report

**Site Name:** Policies and Procedures      **Report Date:** 08/07/2013 06:05:14  
**Site Url:** http://portal.unitedexports.net/Policies      **Time zone:** (UTC-08:00) Pacific Time (US and Canada)

Title	Audience Name	Document Name	# Tasks	Type	Location
Business Dress Code	All United Staff	Business Dress Code.docx	16	SPGroup	http://portal.unitedexports.net/Policies/Documents/Business Dress Code.docx
Cell Phone usage	All United Staff	Cell Phone usage.docx	16	SPGroup	http://portal.unitedexports.net/Policies/Documents/Cell Phone usage.docx
Employee Handbook	All United Staff	Employee Handbook.docx	16	SPGroup	http://portal.unitedexports.net/Policies/Documents/Employee Handbook.docx
Employee Self Evaluation	All United Staff	Employee Self Evaluation.docx	16	SPGroup	http://sp2010dmo/Policies/Documents/Employee Self Evaluation.docx
Fair Treatment Policy	All United Staff	Fair Treatment Policy.docx	16	SPGroup	http://sp2010dmo/Policies/Documents/Fair Treatment Policy.docx
Fair Treatment Policy	Finance Group	Fair Treatment Policy.docx	4	SPGroup	http://sp2010dmo/Policies/Documents/Fair Treatment Policy.docx
Health Safety And Wellbeing	Health and Safety Group	Health Safety And Wellbeing.docx	2	SPGroup	http://portal.unitedexports.net/Policies/Documents/Health Safety And Wellbeing.docx
Jury Duty	Marketing Group	Jury Duty.docx	4	SPGroup	http://portal.unitedexports.net/Policies/Documents/Jury Duty.docx
Recruitment Policy	Finance Group	Recruitment Policy.docx	4	SPGroup	http://portal.unitedexports.net/Policies/Documents/Recruitment Policy.docx

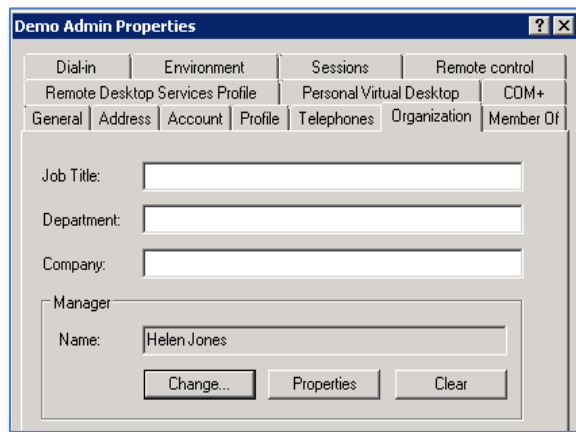
Document by Audience Report
Page 1 of 1
DocRead Reporting

## 10 Team Manager Reports

The following reports are only available to Line Managers and will display information about the reading status of all tasks assigned to members within their team.

For these reports to be populated the following field must be completed within Active Directory. In addition to this, the User Profile Synchronisation service must be set to import the 'Manager' property into the SharePoint User Profile.

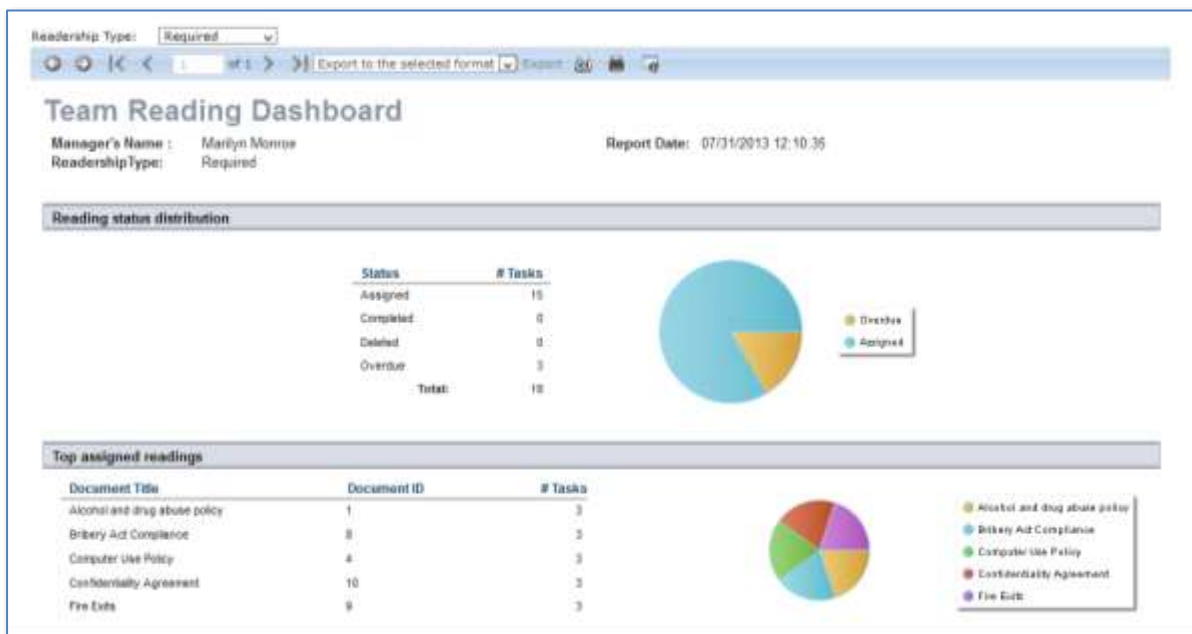
**As SharePoint Foundation doesn't support User Profiles, Team Manager Reports will always be blank, unless a custom import process has been developed by Collaboris to update the Line Manager in the DocRead database.**



The reports will appear blank if someone who is not a direct line manager accesses them.

### 10.1 'Team Reading Dashboard'

This report provides an overview of Assigned, Completed and Overdue Tasks for all members of the managers' team. The information is grouped by assignment or task.



Drill through to find more information in the Team Detail report is available by clicking on the particular document / assigned task that you are interested in.

## 10.2 'Team Detail Report'

If you arrive at this report by drilling through from the dashboard, the report will be filtered on the selected task only. Selecting this report from the reports menu will generate a report that includes all tasks for all team members.

Staff Name	User	Title	Status	Created	Due	Completed	Audience
Mark Masters	sp2013/mark.masters	Alcohol and drug abuse policy	Assigned	7/31/2013	12/7/2014		All Users Group
Mike Masters	sp2013/mike.masters	Alcohol and drug abuse policy	Assigned	7/31/2013	12/7/2014		All Users Group
Mike Masters	sp2013/mike.masters.1	Alcohol and drug abuse policy	Assigned	7/31/2013	12/7/2014		All Users Group

## 10.3 'Team Members Dashboard'

This report is similar to the 'Team Reading Dashboard' however the information is grouped by team member rather than by the task.

Status	# Tasks
Assigned	15
Completed	0
Deleted	0
Overdue	3
<b>Total</b>	<b>18</b>

User Name	Preferred Name	# Tasks
sp2013/mark.masters	Mark Masters	5
sp2013/mike.masters	Mike Masters	5
sp2013/mike.masters.1	Mike Masters	5

Drill through from this report will result in a 'Team Detail Report' filtered by the person

Document Title:  Document ID:

Reading Status: All  Readship Type: Required

Maximum Number of Rows: 100  Sort Column: Document Title

Sort Direction: Ascending

Export to the selected format  Export

**Team Detail Report**

Manager's Name: Marky Monroe Report Date: 07/12/2013 12:29:24

Reading Type: Required Status: All

Staff Name	User	Title	Status	Created	Due	Completed	Audience
Mark Masters	sp2013/mark.masters	Accident reporting policy	Overdue	7/29/2013	7/30/2013		All Users Group
Mark Masters	sp2013/mark.masters	Alcohol and drug abuse policy	Assigned	7/31/2013	1/27/2014		All Users Group
Mark Masters	sp2013/mark.masters	Bribery Act Compliance	Assigned	7/31/2013	1/27/2014		All Users Group
Mark Masters	sp2013/mark.masters	Computer Use Policy	Assigned	7/31/2013	8/1/2013		All Users Group
Mark Masters	sp2013/mark.masters	Confidentiality Agreement	Assigned	7/31/2013	1/27/2014		All Users Group
Mark Masters	sp2013/mark.masters	Fire Exits	Assigned	7/31/2013	1/27/2014		All Users Group

Team Detail Report Page 1 of 1 DocRead Reporting

## 11 Reading Receipts

Positive receipts are generated when a user self certifies that they have read and understood a document and agree with the Terms and Conditions statement associated with the task.

### Reading Receipt

Receipt Nbr: 4  
Created On: 7/31/2013 11:15 AM  
Assigned To: sp2013\demo.admin  
Issue Reason: Reading completed



---

Helen This document certifies that the user "sp2013\demo.admin" has confirmed reading the document "Computer Use Policy" on the date: 7/31/2013 11:15:07 AM.

**Reading Task Details:**  
Created : 7/31/2013      Due: 8/1/2013      Completed: 7/31/2013

**Document Details:**  
ID: 4      Version: 1      Audience: All Users Group  
Title: Computer Use Policy  
Name: Computer Use Policy.doc  
Uri : <http://portal.unitedexports.net/Documents/Computer Use Policy.doc>

**Agreed Terms and Conditions:**  
Helen You are required to read this document. After reading the document tick the box below and click Confirm. I hereby confirm that I have read the document that is linked from this page.

Negative receipts are created if a user has not completed a task before it is deleted from their reading list. Tasks can be deleted manually by an administrator or automatically by DocRead should the task no longer be relevant to the user (the user could have been promoted, moved departments or left the company for example).

### Reading Receipt

Receipt Nbr: 16  
Created On: 7/31/2013 1:40 PM  
Assigned To: sp2013\sally.shields  
Issue Reason: User left audience



---

Helen This document confirms that the user "sp2013\sally.shields" has failed to complete the task to read the document "Accident reporting policy".

**Reading Task Details:**  
Created : 7/31/2013      Due: 8/7/2013      Completed:

**Document Details:**  
ID: 2      Version: 1      Audience: All Users Group  
Title: Accident reporting policy  
Name: Accident reporting policy.docx  
Uri : <http://portal.unitedexports.net/Documents/Accident reporting policy.docx>

## 12 Support

We hope you have found this guide easy to follow and have successfully assigned documents to groups of users and are monitoring their acceptance!

Please refer to the knowledgebase articles within our online support site here: <http://support.collaboris.com/forums/20325473-Knowledge-Base> in the first instance and if you still can't solve your problem, contact us at [support@collaboris.co.uk](mailto:support@collaboris.co.uk) with your licence key and support package details and we will be happy to assist you.