Collaboris

DocRead for SharePoint 2013, 2016 & 2019

End User Guide

Version 4.0

Contents

1 Intended Audience

This document is intended to be read and understood by users who wish to:

- View reading assignments issued by DocRead.
- Confirm they have read and understood the information sent via DocRead.
- View and save Positive and Negative reading receipts.

2 Prerequisites

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

- ✓ DocRead must have been installed and configured by your SharePoint Administrators ready for use in your SharePoint site.
- ✓ A DocRead Publisher must have assigned at least one document for you to read via DocRead.
- ✓ You are logging onto SharePoint as a user who has 'Read' access to the documents that you are required to read.

3 Introduction

DocRead is a compliance solution for SharePoint that distributes important documents, such as policies, to groups of users and allows them to explicitly acknowledge that they have **read** and **understood** them.

DocRead works by automatically creating time limited Reading Tasks to users based on their membership in pre-configured groups or audiences.

Individuals are notified via email when new assignments have been created and when they are completed or overdue.

4 The User Interface

We recommend that DocRead web parts are placed on the home pages of your organisation's Intranet site or your personal MySite so essential Reading Tasks are brought to your attention as soon as you log onto your system. However, if neither of these locations are suitable the web parts can be placed on any web part page.

DocRead Web parts are configurable by your organisation so whilst the instructions for using the web parts contained within this guide will remain the same, your system may look slightly different to the pictures contained within this guide, reflecting your organisations centralised choices.

5 Reading Task Status Icons

DocRead uses the following icons to reflect the current status of the DocRead Tasks:

Required Reading: You are required to read the document.

Reading Completed: You have already indicated that you have read the document.

Reading Overdue: The time allocated to complete the task has elapsed.

Reading not Required: You are not required to read this document.

Reading Recommended: Although not essential, it has been recommended that you read this document.

6 Email notifications

We recommend that DocRead is configured within your organisation to automatically send emails when Reading Tasks have been issued, completed or fall overdue.

The email notifications contain instructions detailing how to complete a Reading Task and a link which will take you directly to the relevant document.

Simply click on the 'View Task' links contained within the email notification to view the Reading Task window.

Action Required   **Collaboris Ltd.**

Reading Task Assigned

Task Created on: 12/30/2012

Task Deadline: 1/6/2013

A new reading task has been created and assigned to you. You are required to read the document "DocRead_Small_Icon.ico" before the deadline date of 1/6/2013.

Comments from the publisher (if used):

No comments provided.

To complete the reading task please follow the instructions below.

- **Step 1:** Select the following link to view and confirm your task : View Task.
- **Step 2:** Ensure that you read and fully understand the contents of the document and that you agree with the Terms and Conditions statement.
- **Step 3:** Check the "I Agree" box and click the "Confirm" button.

Note: The screenshot shows the default text for the "Action Required" email. Your DocRead administrator may have configured DocRead to display different text.

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7 Example of DocRead Webs part on an Intranet Home Page

The picture below gives an example of how DocRead may look on your organisation's home page. As previously mentioned, your organisation can configure these web parts, so they may look different.
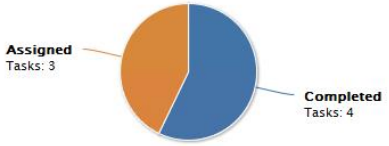

Your organisation may choose to include some or all of the available columns as detailed in the list below:

Audience, Creation Date, Document Name, Due Date, Location, Overdue, Readership Type, Site, Status, Task Image, Username.

8 Reviewing Documents

There are four ways to view and confirm documents that have been assigned to you.

1. Following a link from an email notification (as shown in section 6).
2. Clicking on a Reading Task in a DocRead web part (as shown in section 7).
3. Viewing DocRead Tasks from the Library tools menu within a specific document library (as shown in section 8.1).
4. Viewing DocRead Tasks against a single document in a document library (as shown in section 8.2).

8.1 View Reading Tasks from the Document Library

If a SharePoint document library has DocRead enabled, you may wish to view whether you have any assigned, completed or overdue documents associated with it.

1. Navigate to the document library via your preferred approach. For example, you can access a list of document libraries by selecting 'Settings', then 'Site Content'.
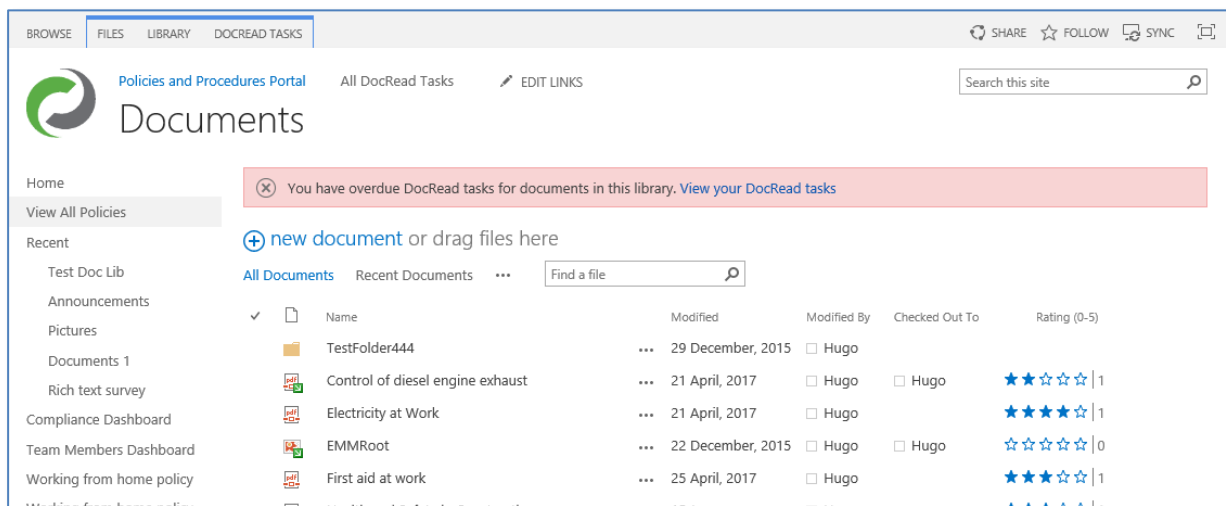
2. Once you have arrived at the document library (as above), a coloured toolbar (aka Ribbon) will appear above the list of documents. (Please Note, if the ribbon doesn't appear automatically you can usually cause it to show by clicking in the space to the right of 'Add document').

> **Note:** If you cannot see the 'DocRead Tasks' section (within the ribbon), then DocRead hasn't been enabled on the document library by a DocRead Administrator.

3. In addition to the ribbon you may also see a 'status bar' which will be amber if you have required reading assignments, or red if you have overdue items.
4. To view the documents which have been assigned to you select 'DocRead Tasks' within the ribbon, to display the three key reading status icons (see below).
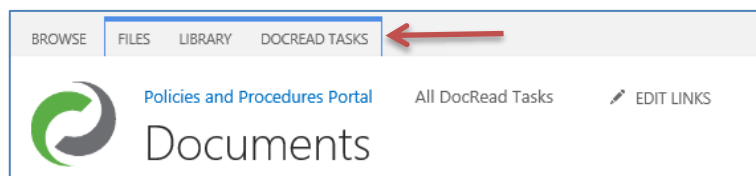
Select one of the Reading Requirement status icons to view a list of documents assigned to you with that current status.

Note: The screenshot shows the default text for the "Reading Required" task. Your DocRead administrator may have configured DocRead to display different text.

8.2 View Reading Tasks from a single document

Within a DocRead enabled document library, you can also check to see if you are required or recommended to read a particular document by selecting the 'drop down' menu for a specific document then selecting 'Reading Requirements' (see below).

This will take you to the 'Reading Task Details' window as described in the next section.

9 Completing a Reading Task

It doesn't matter which method you use (from those mentioned in section 8) to view further details about an individual Reading Task. Each method will direct you to the Reading Task window shown below.

The Reading Task Details window will appear initially containing three tabs.

1. **Task:** this shows the current status of the Reading Task and summarises key details for the document.
2. **Document:** this gives additional information about the document and also contains any specific comments that the document publisher included when issuing the task.
3. **Confirmation:** this tab should be used to confirm that you have completed the assignment.
4. **Receipts:** This will become enabled when you complete the reading task.

> **Note:** In some cases it's possible that you will have been assigned a document to read that you don't have access to. In such cases you will need to contact the DocRead Publisher or Administrator and ask them to grant you 'read' permission in SharePoint.

5. Once you have read the document and understood it, you must read the 'Terms and Conditions' statement, then check the 'I agree' box and click 'Confirm' to complete the Reading Task.

> **Note:** If your organization is using the 'force view document' feature you will not be able to confirm that you have read a document and agree with the statement until you have clicked on a link to the document and opened the file. If this is the case the message "you must click 'View Document' before being able to 'Confirm' this task" will be initially displayed instead of the 'I agree' check box. (as shown in the second picture below)

6. If your organisation also uses DocSurvey at this point you may be required to answer a survey or quiz about the information you have just read. If a survey or quiz is being used, the questions will appear in a new pop up window. Follow the instructions given.

7. After you have successfully confirmed a task you will be redirected to the first 'Task' tab where the message will have changed and the Version and Date Completed fields will be populated.

8. The third 'Confirmation' tab will contain a link to the document you confirmed reading and also a link to your reading receipt held in the DocRead database that acts as proof that you have 'accepted' the document.

9. The fourth tab 'Receipts' will now become enabled. This shows a history of reading for this task.

Note: The screenshots shown above display the default text for the different status of a task. Your DocRead administrator may have configured DocRead to display different text.

10 Reading Receipts

Once you confirm you have completed a Reading Task, DocRead issues a 'completed' email notification which contains a link to a 'positive' reading receipt, confirming the completion of the task. It is advised that you download or print this receipt for your personal records.

Should you not complete a reading request before it is deleted by an administrator, a 'negative' reading receipt is generated by the system. This allows your organisation to keep complete records for each Reading Task.

There are several reasons why negative reading certificates can be generated:

- The document is no longer valid.
- The document has been moved.
- You have changed role (therefore you have moved out of the group required to read the document).

The reading receipts are stored in a secure database within SharePoint.

11 DocRead Reporting

DocRead Administrators have access to the DocRead reporting suite which will allow them to view the progress of Reading Tasks. The Reports show the number of completed and outstanding Reading Tasks and allow drill through to find more details about the current status of Reading Tasks.

It is also possible for your line manager to access DocRead reports that show them the reading status of all tasks assigned to members of their team.