

DocRead for SharePoint 2013, 2016 & 2019
Modern View

End User Guide

Version 5

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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 on your SharePoint site.
- ✓ A DocRead Publisher must have assigned at least one document for you to read via DocRead.
- ✓ You are logging onto SharePoint with 'Read' access to the documents 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 for 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 organization'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 organization, 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 organization's 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 organization 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 that will take you directly to the relevant document.

Click on the 'View Task' link in 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.

7 Example of DocRead Webs part on an Intranet Home Page

The picture below shows how DocRead may look on your organization's home page. As previously mentioned, your organization can configure these web parts, so they may look different.

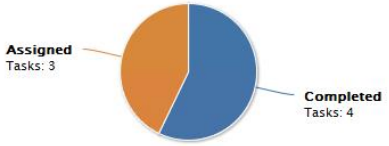
Home



DocRead Current User Tasks

Name	Due	Type	Status	Overdue
Health Safety And Wellbeing.docx	8/7/2013	Required	Assigned	False
Fire Exits.docx	1/27/2014	Required	Assigned	False
Confidentiality Agreement.doc	1/27/2014	Required	Assigned	False
Annual Holiday Entitlement Policy.docx	1/27/2014	Recommend	Assigned	False
Accident reporting policy.docx	7/30/2013	Required	Completed	False
Computer Use Policy.doc	8/1/2013	Required	Completed	False
Alcohol and drug abuse policy.docx	1/27/2014	Required	Completed	False
Bribery Act Compliance.doc	1/27/2014	Required	Completed	False

DocRead Reading status



Assigned
Tasks: 3

Completed
Tasks: 4

Your organization 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

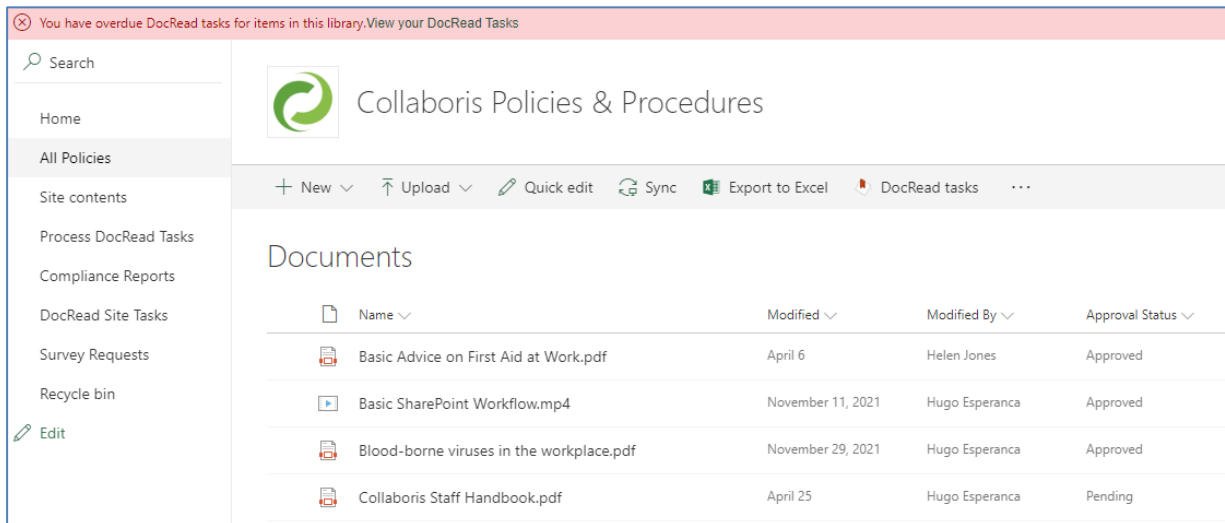
There are four ways to view and confirm documents assigned to you.

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'.



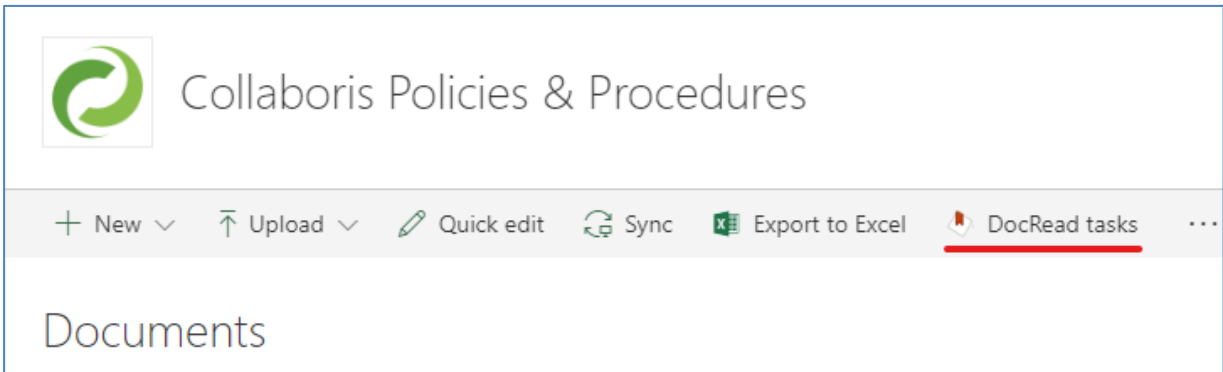
The screenshot shows a SharePoint document library titled "Collaboris Policies & Procedures". A red notification bar at the top states: "You have overdue DocRead tasks for items in this library. View your DocRead Tasks". The left sidebar contains navigation options like Home, All Policies, Site contents, Process DocRead Tasks, Compliance Reports, DocRead Site Tasks, Survey Requests, Recycle bin, and Edit. The main area displays a toolbar with options: + New, Upload, Quick edit, Sync, Export to Excel, and DocRead tasks. Below the toolbar is a table of documents:

Name	Modified	Modified By	Approval Status
Basic Advice on First Aid at Work.pdf	April 6	Helen Jones	Approved
Basic SharePoint Workflow.mp4	November 11, 2021	Hugo Esperanca	Approved
Blood-borne viruses in the workplace.pdf	November 29, 2021	Hugo Esperanca	Approved
Collaboris Staff Handbook.pdf	April 25	Hugo Esperanca	Pending

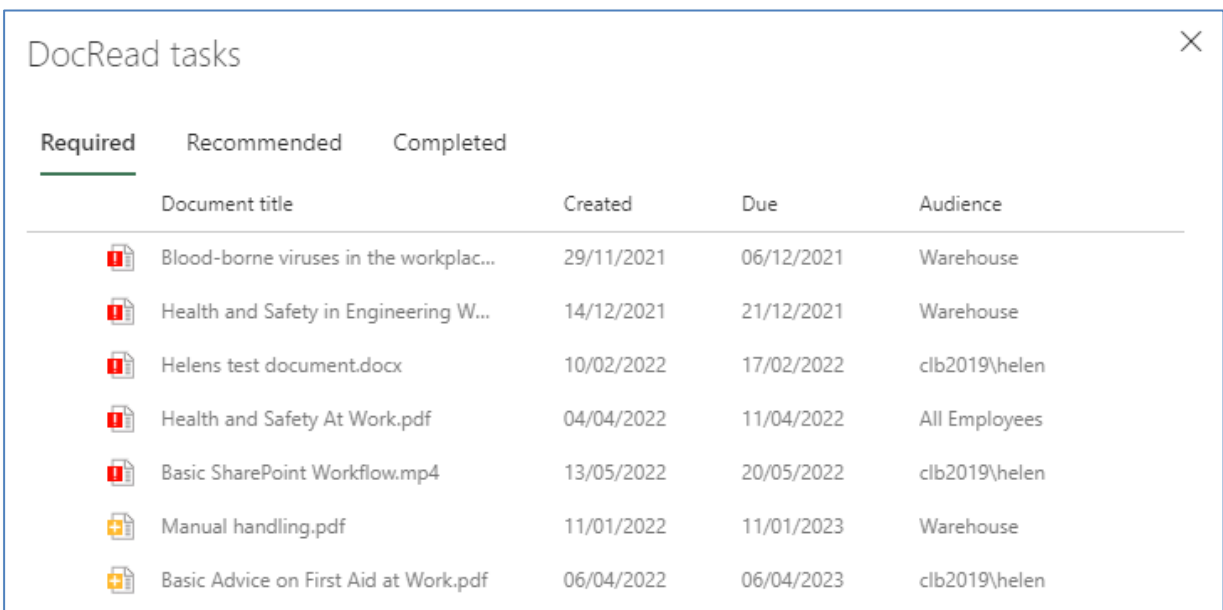
2. Once you have arrived at the document library (as above), a coloured notification bar will appear above the list of documents. (Please Note, if the notification bar doesn't appear automatically you can usually cause it to show by clicking in the space to the right of 'Add document').

Note: If you cannot see the 'DocRead Tasks' command within the toolbar, then DocRead hasn't been enabled on the document library by a DocRead Administrator.

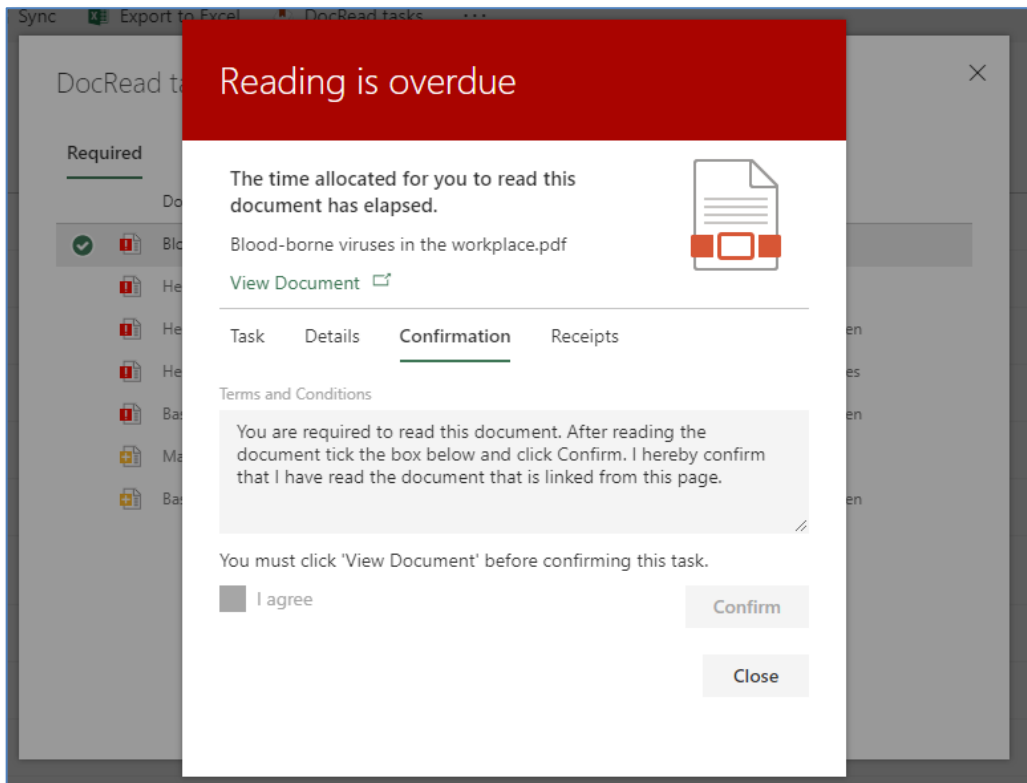
3. In addition to the DocRead command in the toolbar you may also see a 'notification bar' which will be amber if you have required reading assignments, or red if you have overdue items.
4. To view the documents which have been assigned to you select 'DocRead Tasks' command within the toolbar, to display the three key reading status icons (see below).



5. Select 'Required', 'Recommended', or 'Completed' tabs to view a list of documents assigned to you with that current status.



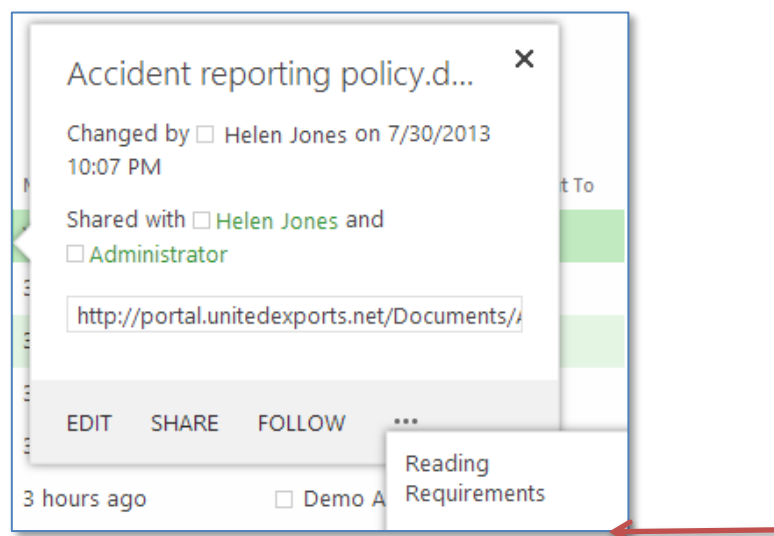
6. Double click one of the items in the list to see further details about the task.



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 'dropdown' menu for a specific document and 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 initially appear containing three tabs.

1. **Task:** this shows the current status of the Reading Task and summarises key details for the document.
2. **Details:** 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.

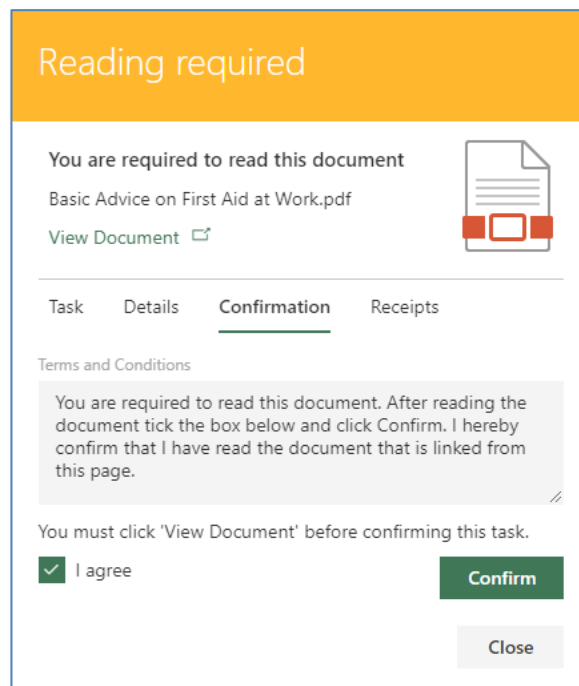
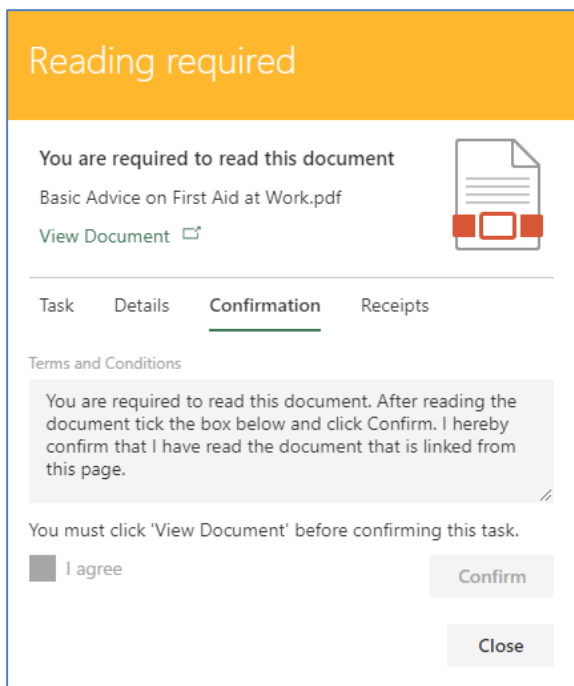
The image shows two screenshots of the 'Reading required' window. The left screenshot displays the 'Task' tab, which includes a 'View Document' link and a table of task details. The right screenshot displays the 'Details' tab, which provides more information about the document, including its title, ID, and required period.

Task	Details	Confirmation	Receipts
Audience		clb2019\helen	
Task Type		User	
Date assigned		06/04/2022	
Due		06/04/2023	
Status		Assigned	
Version			
Date completed			

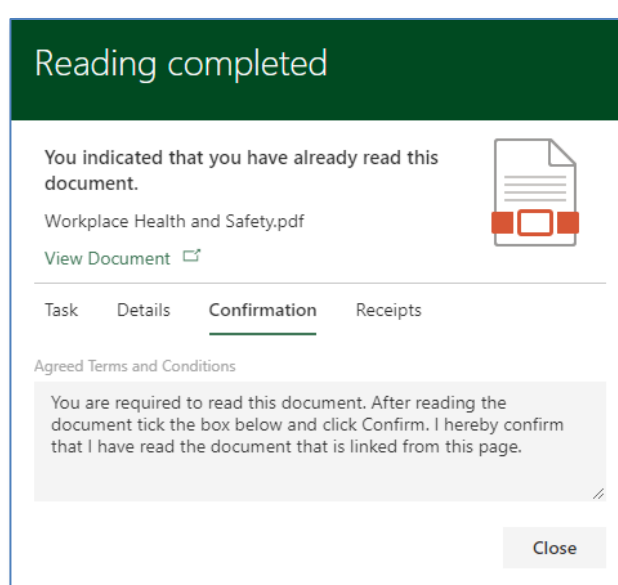
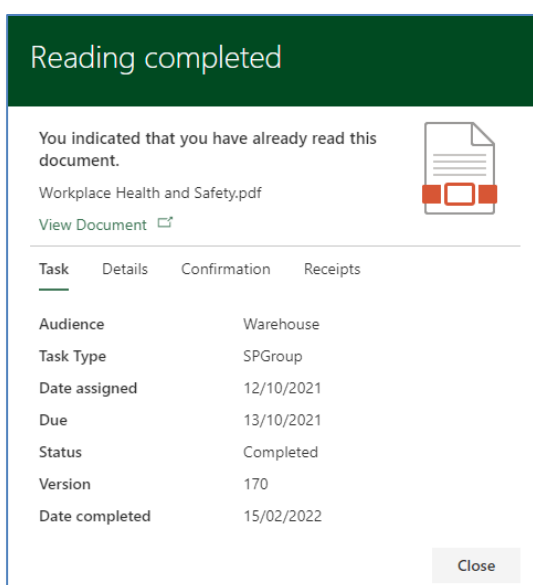
Updated	06/04/2022
Title	Basic Advice on First Aid at Work.pdf
ID	8
Required audiences	First Aiders clb2019\helen
Required period	365 days
Recommended audiences	
Recommended period	
Location	Open location

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.

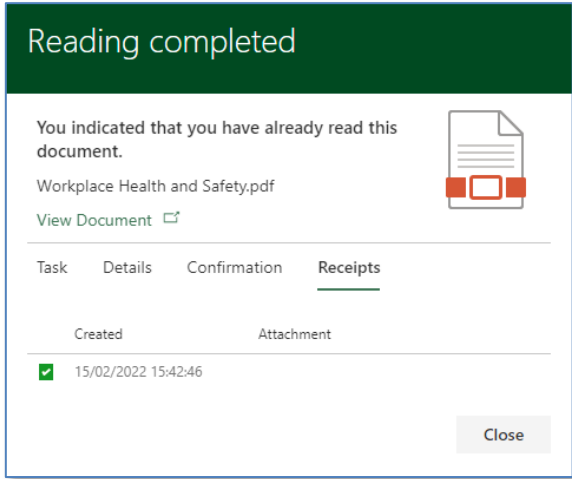
Note: If your organization is using the 'force view document' feature, you will not be able to confirm that you have read a document and agree with the statement until you have clicked on a link to the document and opened the file. If this is the case, the message "you must click 'View Document' before 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 organization 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 organization 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 and have moved out of the group required to read the document.

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

Reading Receipt



Receipt Nbr: 5
Created On: 7/31/2013 11:15 AM
Assigned To: sp2013\demo.admin
Issue Reason: Reading completed

This document certifies that the user "sp2013\demo.admin" has confirmed reading the document "Accident reporting policy" on the date: 7/31/2013 11:15:17 AM.

Reading Task Details:
Created : 7/30/2013 Due: 8/6/2013 Completed: 7/31/2013

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

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.

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.