

Capture Employee Acknowledgements of Reading Documents in SharePoint online and Microsoft Teams

Introduction

Read and Understood accelerates digital transformation safeguarding businesses in the Microsoft Modern Workplace, where employees make informed business decisions based on documents published in SharePoint and Teams. Ensuring that new or updated documents are acknowledged as '**read and understood**' by employees.

Read and Understood fully automates the process of sending Reading Acknowledgement Request for new and/or updated documents. SharePoint content editors need only concern themselves with maintaining the documents.

Key features:

- Automated sending of Reading Acknowledgement Request whenever documents are created or updated
- Employees manage their acknowledgment reading requests in Teams, SharePoint web page or Email
- Reports in Excel to achieve compliance / Quality Management System (QMS) goals
- Onboarding to automate new starters reading of key documents
- Support for Active Directory Groups - to address notification recipients
- Adding and editing documents in SharePoint does not change for Content Editors. Simple rules are created to define the documents for which employees are required to acknowledge reading

Reporting

Reporting provides an audit history of each document version, detailing employees who did or did not acknowledge reading. In addition, an acknowledgement summary is sent by email and a summary is sent to a recipient's manager. When addressing notification recipients, using Azure Active Directory Groups, it is possible to report on Reading Acknowledgement Requests sent to members of those groups. Example reports:

- [Site Compliance Report by Employee](#)
- [Site Compliance Report by Group Membership](#)

Installation

To add the Read and Understood Add-in follow our detailed online installation and configuration steps at <https://readandunderstood.com/appsource-installation>.

Adding the Add-in to a SharePoint site

The person installing the Read and Understood add-in to a SharePoint site needs either Full Control permissions or to be a member of the Site Owner group.

Once the add-in is installed to a site, configuration is simple by following the on-screen instructions. This process can be seen in the video linked below.

Help and Support:

- Read our [FAQS](#)
- To get in touch please contact us at <https://spadditions.zendesk.com>
- Find out [What's new](#)

In addition, to maximise the benefits of RAU with your SharePoint implementation, we offer free a Teams meeting with one of our SharePoint consultants. To schedule your call, follow this link: <https://calendly.com/team-read-and-understood/setup-consultation>

Flexible Plans to meet your needs

When adding Read and Understood to a site you choose the plan that best suits your reading acknowledgement requirements. A Free plan is available for low use scenarios such as small Microsoft Teams sites. Customers opting for paid plans benefit from Microsoft Office 365 Email integration to send ~300,000 emails every month.

All plans include a 30-day trial period with no credit card details required. See additional purchase pricing here: <https://readandunderstood.com/read-and-understood-site-pricing>

How Read and Understood works

Simple rules are created to define the documents for which employees are sent Reading Acknowledgement Requests. Using regional settings in SharePoint at midnight local time, the rules are used to process selected documents. When first installed, Read and Understood operates in a trial mode allowing the rules to be processed on-demand in real-time. This accelerates evaluation of the end-to-end Reading Acknowledgement Request process to be completed without waiting several days.

Once the rules are created, all new and updated documents which match a rule are automatically processed to send Reading Acknowledgement Requests via email.

What the rules define:

- The selection of:
 - an individual document,
 - groups of documents by library,
 - across a site, or
 - by content type
- Which employees will receive Reading Acknowledgement Requests through a combination of SharePoint groups, Azure Active Directory groups and Active Directory users
- The period, in days, over which a Reading Acknowledgement Request must be completed
- The frequency, in days, after which to send a Reading Acknowledgement Request to employees who have not acknowledged reading
- Fully customizable email templates that include embedding of SharePoint document column values

Just before you go:

Complete installation and configuration instructions are available from our website at <https://readandunderstood.com/appsource-installation>.

Other features and updates are available at <https://readandunderstood.com>

Thank you!