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VDocs User Guide.

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In this document the following colour references apply

Purple means a VDocs button option, found in Word's top "Review" ribbon

Blue means one of the Verification pane tab options

Orange means a Report, accessed either via the top VDocs button options or the Verification pane tabs

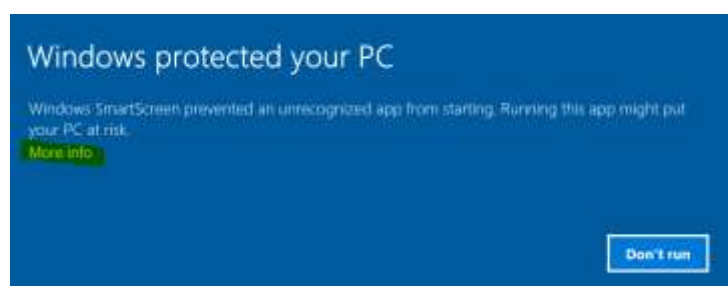
Installing VDocs into desktop versions of Microsoft Word

Set Up.exe installation

To download our MSI package, go to the resources section of <https://v-docs.com.au>

If prompted, first install the VSTO Runtime by clicking <https://www.microsoft.com/en-us/download/details.aspx?id=48217>

When you run the installer, you may be prompted with the following security screen. Simply click the "More info" and "Run Anyway" links and follow the prompts from there.

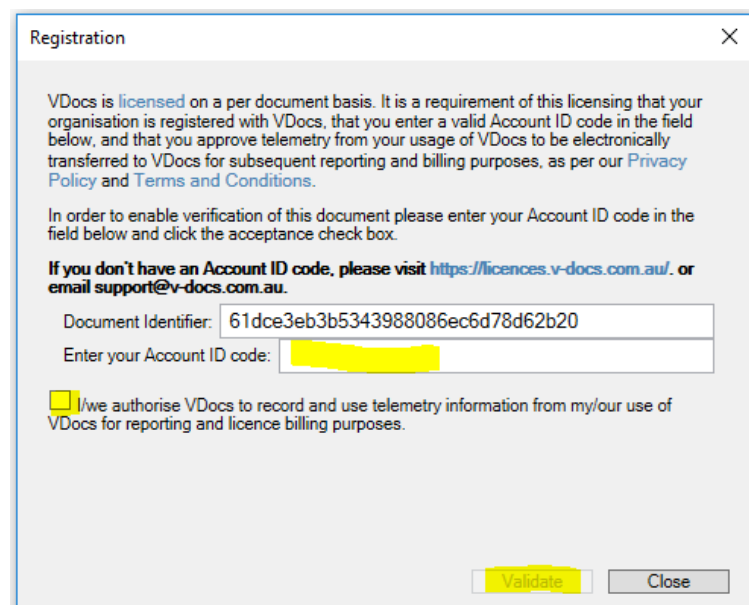


Now launch Microsoft Word and sign in with your [company] credentials.

Licensing

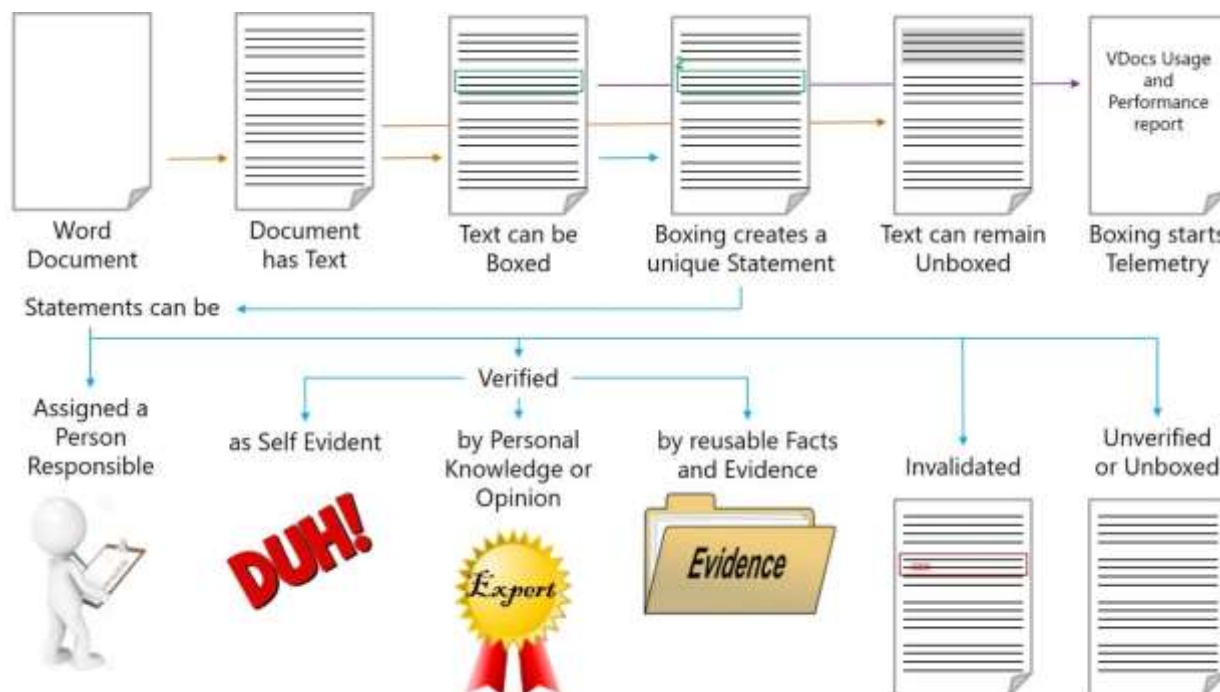
VDocs is licensed for use by Readify Limited. Licensing registration can be viewed here - <https://licences.v-docs.com.au>.

The first time you access key VDocs functionality within a document, or by clicking **Licence Details** under the **Generate** option, you will be prompted to enter your Account ID key. Copy and paste your Account ID into the licence key field provided on the pop up form, click the terms checkbox, and then click Validate.

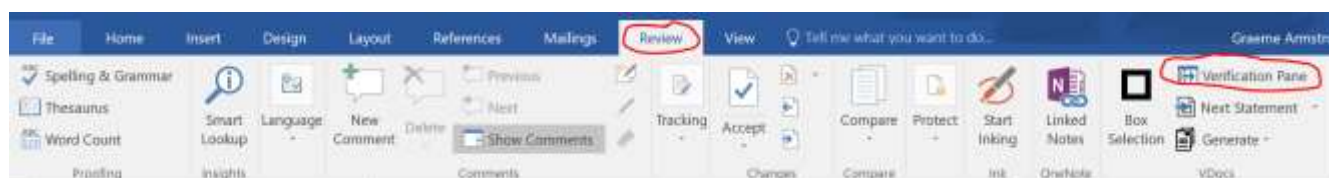
A "Registration" dialog box with a close button (X) in the top right corner. The text inside reads: "VDocs is licensed on a per document basis. It is a requirement of this licensing that your organisation is registered with VDocs, that you enter a valid Account ID code in the field below, and that you approve telemetry from your usage of VDocs to be electronically transferred to VDocs for subsequent reporting and billing purposes, as per our Privacy Policy and Terms and Conditions." Below this, it says: "In order to enable verification of this document please enter your Account ID code in the field below and click the acceptance check box." Then: "If you don't have an Account ID code, please visit https://licences.v-docs.com.au/ or email support@v-docs.com.au." There are two input fields: "Document Identifier:" with the value "61dce3eb3b5343988086ec6d78d62b20" and "Enter your Account ID code:" with a yellowed-out field. At the bottom, there is a checkbox labeled "I/we authorise VDocs to record and use telemetry information from my/our use of VDocs for reporting and licence billing purposes." and two buttons: "Validate" and "Close".

Using VDocs

The general principals of VDocs are as follows.



Click on the "Review" ribbon button option in the main Word menu, and then click the **Verification Pane** button under the VDocs section.



The Navigation Pane slides out from the right and contains three menu tabs, **Context**, **Statements**, and **Facts**.

Statements

A Statement is the primary component in VDocs, albeit a child of the Document.

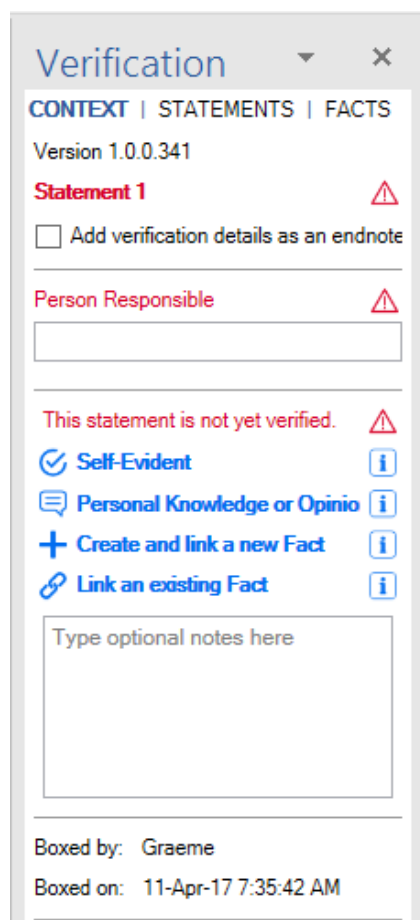
To Box a Statement, select the Statement text in your document and click the **Box Section** button option in the top ribbon.

Note: limitations apply to boxing across paragraph breaks (see next section).

Note: boxing a statement records a statement consumption entry against your subscription.

Video provides a powerful way to help you prove your point. When you click Online Video, you can paste in the embed code for the video you want to add.

An outline of the boxed area now appears with a unique Statement number at its starting point. The verification options of the Statement automatically present under the **Context tab** in the Verification pane. **The Context tab is used to present details of Statements and Facts** and can be used interchangeably as you click from a Statement to a Fact and vice versa.



All Statements start life as incomplete, due to them being Unverified and without a Person Responsible assigned. However, they do show by whom and when they were boxed and also provide an optional Statement Note field which, along with the red highlights, guide users as to what is required to complete the Statement.

Click away from the Statement and then mouse back over it. The entire Statement section will be highlighted as either

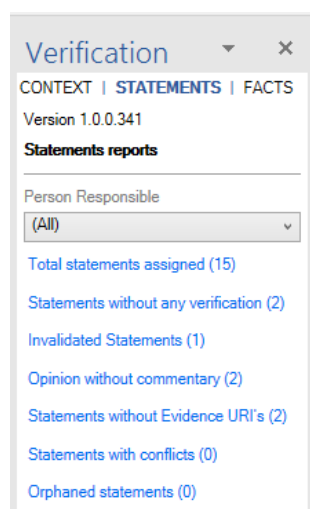
- Grey for all statement in Word 2010, regardless of completion status
- Green for Complete Statements in Word 2013 and 2016
- Red for Incomplete Statements in Word 2013 and 2016

Video provides a powerful way to help you prove your point. When you click Online Video, you can paste in the embed code for the video you want to add.

Clicking back into the boxed area now shows a similarly coloured outline of the text selected.

These colour highlights are also included in the read only marked up **Boxed Versions** of the document created under the **Generate** option in the top ribbon. This applies to all versions of Word.

This new Statement will also appear in the **Statements tab** reports. All statements appear in the Total statements assigned report. Inclusion in other reports depends on their completeness.



The Statement will also appear in the **Verification Table** and the **Statistics** report under the **Generate** option in the top ribbon.

To clear a Statement, click into the Boxed area of the document and click the **Unbox Section** button option in the top ribbon. The previous Statement number is retired and any verification or invalidation is lost. Likewise, the Statement is removed from all **Statement tab** reports, as well as the **Verification Table** and **Statistics** reports.

To complete a Statement, you only need to complete two sections under the Context tab.

- Assign a Person Responsible
- Verify the Statement

Person Responsible

To assign a Person Responsible simply type their name in the field provided. For clarity we recommend you type the first and last name, or select them from the prompt if they have been assigned to a previous statement.

*Note: There is purposely no validation on the Person Responsible field, which allows the Statement to be assigned to anyone, including people outside your organisation. Statements without a Person Responsible appear under the "Blank / no one assigned" filter under the **Statements tab**.*

Verification

Statements can be verified in 3 ways.

- Marked as Self-Evident
- Verified as Personal Knowledge or Opinion
- Linked to an external source of Evidence via a Fact

As the name suggests, Self-Evident verification applies to Statements which, by most reasonable assessments, require no further proof or commentary.

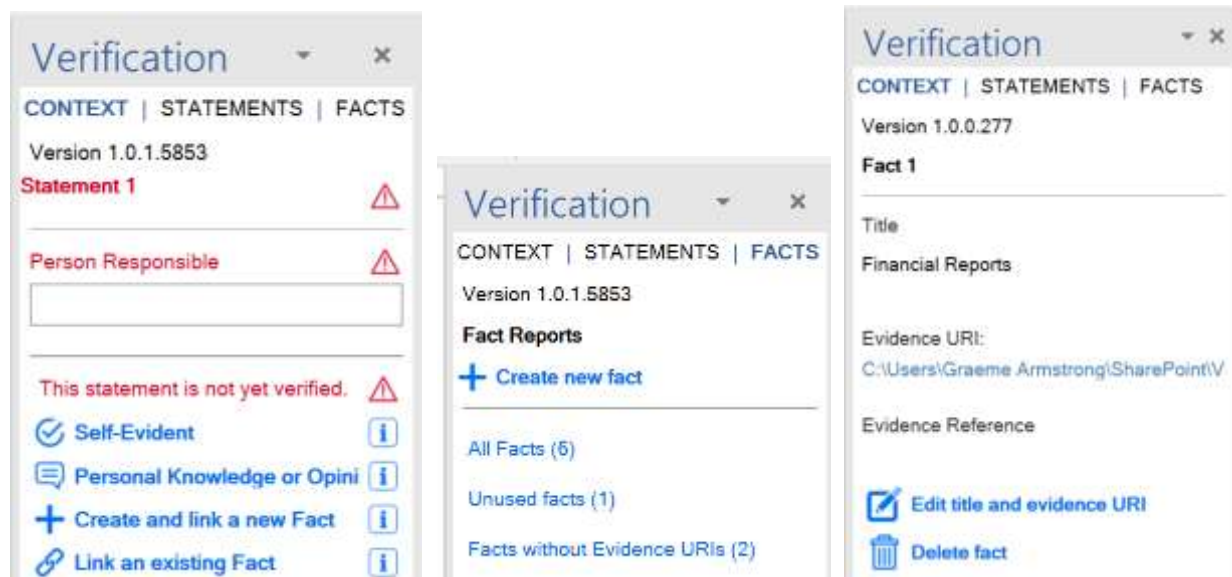
Personal Knowledge or Opinion verification only requires a short commentary by the Personal Responsible, typically reflecting that person's demonstrable expertise on the subject.

Facts and Evidence

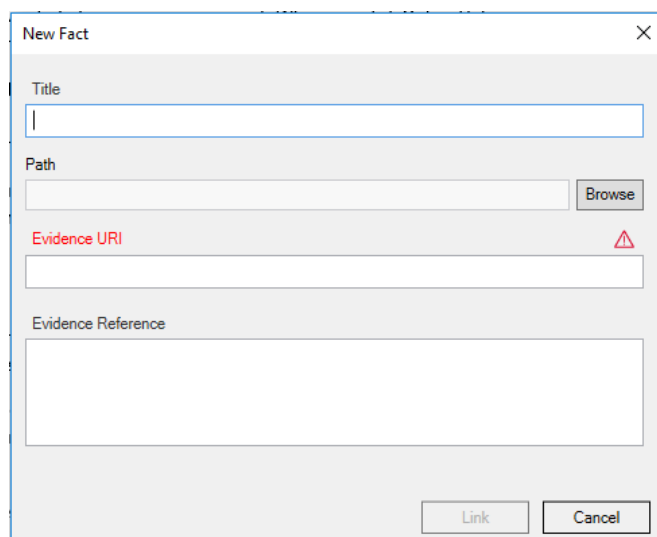
Facts are how we verify a Statement by linking external documented Evidence. A Statement may be verified by multiple Facts, and a Fact may be shared across multiple Statements, thus easing the overhead associated with Evidence needing to be referenced multiple times.

New Facts can be created via

- the standard verification options panel,
- independently via the "New Fact" link under the **Facts tab**,
- or by creating a copy of an existing Fact (via the edit function).



To complete a Fact only requires a "Title" and an "Evidence URI". An optional "Evidence Reference" field is provided for additional context about the specifics of the Evidence, such as a paragraph number within a document or cell range within a spreadsheet.



There are three ways to append the Evidence URI to a Fact

- Type any text into the Evidence URI field, including a document ID from your records management system
- Paste a copied URI from a document or a URL from a website into the Evidence URI field
- Use the browse feature options provided

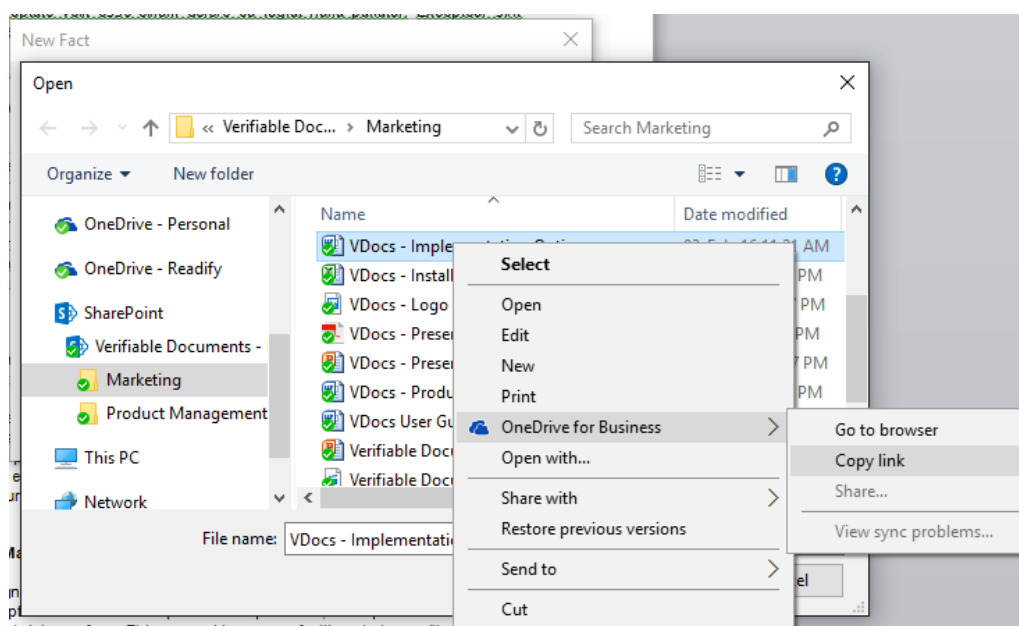
Selecting an Evidence document by browsing returns the local path to that document, even if it is synced with a SharePoint site library. For example:

<C:\Users\Graeme\SharePoint\Verifiable Documents - Documents\Marketing\VDocs User Guide.docx>

This means only the local user will be able to later open that document by clicking its link in the **Context tab**. However, selecting an Evidence document by browsing **also captures the last date/time the document was edited**, which we subsequently recheck when running the **Verification Table** (see below)

To copy the SharePoint path of a synced Evidence document

- click the browse icon in the Evidence URI field
- right click the Evidence document
- mouse over the "OneDrive for Business" option, and
- click the "Copy Link" option



Then close the browse dialogue box and paste the link into the Evidence URI field. This will return a path like:


<https://readify.sharepoint.com/sites/products/verifiable-documents/Shared%20Documents/Marketing/VDocs%20User%20Guide.docx?web=1>

Using this path means anyone with the appropriate permissions will be able to later open and view the Evidence document from SharePoint by clicking its link under the **Context tab**. However, this technique does not capture the Evidence document's last date/time edited.

Facts can also be removed from Statements by clicking the cross adjacent to the Fact in the Context tab view.

Changing Verification

To change any verification of a Statement, click into the boxed text area and click the "cross" adjacent to any Facts, or the link provided for other verification, and begin the verification process again.

 **Unverify this statement.**

Invalidating a Statement

Making any changes to the text within a verified Boxed Statement automatically invalidates its verification. Beyond flagging the Statement as Invalidated, no changes are made to the verification details.

To change or remove the previous verification, click the "✘" icons next to any Facts that no longer apply, or click the "Unverify this Statement" link (above) and begin the verification process again.

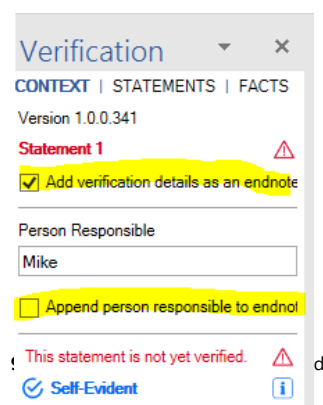
To re-establish the previous or changed verification, click the "Approve this Statement" link below the verification details,

 **Approve this statement.**

Note: Clicking Undo, Cntr+Z, or Cntr+X to remove the text changes within the boxed Statement will not re-verify the Statement. The only way to do this is as per the instructions above.

Endnotes

To show verification data within the main document, use the Endnotes feature. When a Statement is showing in the **Context tab**, click the first Endnote checkbox, and optionally the second one where a Person Responsible has been assigned.



You can then globally show or hide Endnotes within the document by selecting your preferred option under the **Unbox Section** button in the top ribbon.

Unboxing a Statement

Click anywhere in the Statement, ensuring it is the correct statement and that the usual highlights appear. Then click the

Note: unboxing a statement does not record a statement consumption credit against your subscription.

Reports and other features

There are several reports included with VDocs to help manage the verification process from beginning to end. They are as follows

Statements tab (filtered by Person Responsible, including Blank / No Person Responsible Assigned)

- Total Statements assigned
- Statements without Verification
- Opinions without Commentary
- Facts without Evidence URI's
- Invalidated Statements
- Statements with Conflicts
- Orphaned Statements

Facts tab (all reports are searchable)

- All Facts
- Unused Facts
- Facts without Evidence URI's
- Facts with Conflicts

*Note: clicking a Statement or Fact from one of the reports above automatically presents their details under the **Context tab**. The entire report also presents in the bottom section of the **Context tab** for easy navigation through all Statements or Facts within the report.*

Generate button (under VDocs in the top ribbon)

- **Verification Table** – this is spreadsheet that details all Statements, Verification, and Person Responsible data. Ultimately used as a final sign off schedule by those responsible, it is also an ideal tool to regularly view and filter the verification details and progress of your document. Note: When running the **Verification Table** report, we recheck all last date/time edited data captured when using the “browse” to evidence documents feature. The results appear in the last column of the report as follows
 - Matched: the current date time matches the date/time when the evidence was linked. This means the evidence document hasn't been changed
 - Not Matched: the date/times are different, which means the evidence document has likely changed
 - Not Linked: means the evidence document wasn't linked via the browse feature

- **Statistics** – this is a graph that captures and displays the progress of your verification day by day. Whilst a great review aid, it also provides significant “burn down” insights as to when your verification process will likely finish.

Next... button (under VDocs in the top ribbon) – this button is used to globally navigate the document between either boxed statements or unboxed sections.

Microsoft Word for Windows only

VDocs only works with Microsoft Word for Windows, versions 2010, 2013, and 2016. **It does not work with Word Online, nor with Word for Mac, iOS, or Android.**

Orphaned Statements and Conflicts

Simultaneous or offline verification of the same section of a document by 2 or more users **is inherently risky** due to limitations in the way Microsoft Word merges or synchronises embedded XML, which is the way we store VDocs verification data. Where merge conflicts arise we do our best to present an audit trail of the conflict, including reports by persons responsible and compromised verification data, however we cannot guarantee the accuracy of this data. Therefore, **simultaneous or offline verification of the same section of a document should be avoided at all times.**

Correcting Invalidated or Nested Statements

As noted above, clicking Undo, Cntr+Z, or Cntr+X to remove the text changes within the boxed area of an invalidated Statement will not re-verify the Statement. The only way to do this is to click the "Approve this statement" link. However the colour highlights can alternate during the undo process leading to interim green / complete readings, however these ultimately correct themselves back to red / incomplete after you click away from and back into the statement once or twice. The same applies when attempting to "nest" one statement inside another, either by cut and paste or drag and drop. More importantly, repeat combinations of changes, re-verification, and undo on a Statement can lead to the Statement presenting as verified when it is invalid and vice versa. Caution should be taken when altering, correcting, and or re-verifying Statements.

Word 2016 slow close

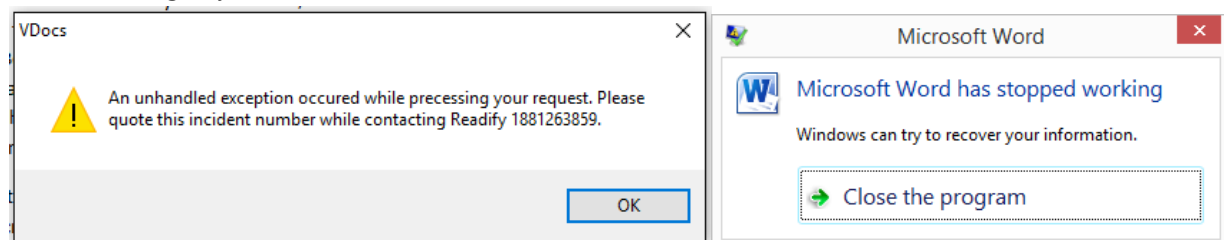
Microsoft have identified that touch screen devices running Word 2016 with COM Add-Ins (such as VDocs) may experience a delay of up to 30 seconds when closing Word. Whilst disabling the COM Add-In will alleviate the problem, it is not caused by the specific Add-In, and is beyond our control.

Locating VDocs Log Files

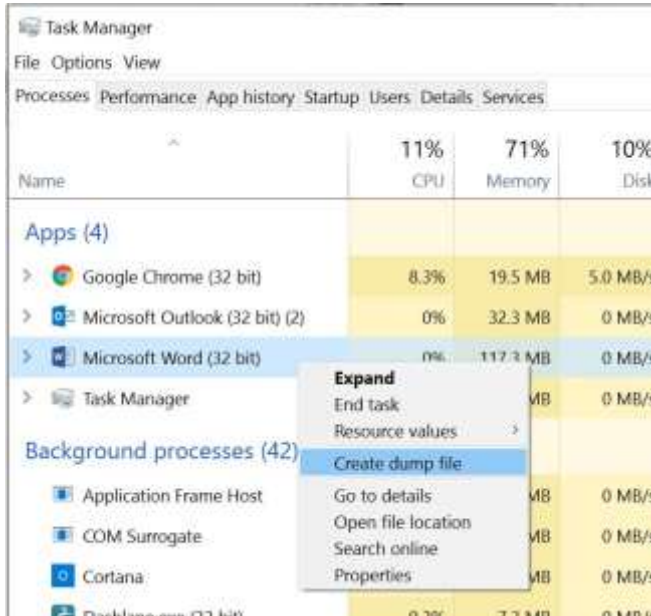
VDocs creates a daily log file which it saves under "Documents / VDocs Logs". When requested, please email the relevant daily log file to Readify product support.

Creating a Word Dump File

If you experience a VDocs error or Word crash message, such as these, it is helpful to capture a dump file before clicking any buttons to continue.

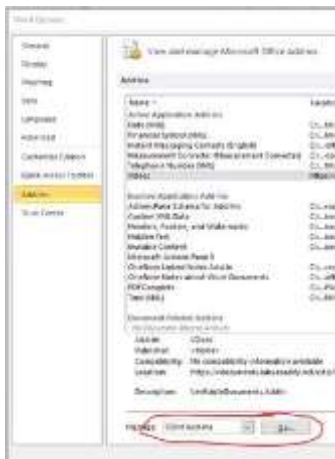


Immediately launch the task manager, Ctrl+Alt+Del, right click on the Word application listing, and click "Create dump file". Save it and, when requested, zip it and email it to Readify product support, along with a description of the usage that led to the error or crash.



Disabling VDocs

Within Word, navigate via File / Options / Add-Ins / COM Add-Ins and click Go.



Find VDocs in the list, uncheck its box, and click OK.



Uninstalling VDocs

Navigate to the same COM Add-Ins dialogue box above, click on VDocs, and click Remove. Alternatively, you can use the uninstall function via Control Panel / Programs and Features.

VDocs End User License Agreement

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This End User License Agreement ("EULA") is a legal agreement between YOU as Licensee and Readify for VDocs. By installing, downloading, copying, or otherwise using VDocs, you indicate your complete and unconditional acceptance of the terms of this EULA. If you do not agree to the terms of this EULA, promptly delete any copies of VDocs in your possession.

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SEVERABILITY

If any provision of this agreement is found to be unlawful or void, then that provision shall be severed from this agreement and will not affect the validity of the remaining provisions.

GOVERNING LAW

This Agreement shall be construed, interpreted, and applied in accordance with the law of the State of Victoria, Australia. The Courts of Victoria, Australia shall be the exclusive forum and venue to resolve any and all disputes arising out of or relating to this Agreement.



Thank you

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