

Assign required reading

Antoinette France - 2023-12-06 - Required Reading

How to assign required reading

This article provides guidelines for assigning required reading to Holocentric Connect users. Any item that has a relevant role can be assigned as required reading.

TIP

When an item is first created, the Required Reading option will be ticked automatically.

To assign required reading, Administration permissions are strongly recommended. Learn more about how to change your web app permissions please see the [Manage users](#) article.

This article includes the following topics:

1. Assign an item as required reading
2. View required reading information

1. Assign an item as required reading

1.1 Access the item you want to assign as required reading and click **Open**.

The screenshot shows the 'Governance' section with a 'Policies' sub-section. A table lists policies, with the first row highlighted in red. The 'Open' button in the top right of the table is also highlighted with a red box.

Policy name	Category	Relevant to	Last edited	Status
code	filter list to tex...	filter list to ...		Published + unpublished
Code of conduct	Human Resource ...	Chief Informat...	01 Jul 2022 11:56 AM	Published v4

1.2 Click **Start Editing**.

The screenshot shows the 'Code of conduct' policy page. The 'Start Editing' button is highlighted with a red box.

Code of conduct Start Editing

Overview Policy Related Items Version

GENERAL DETAILS


Description: The purpose of this policy is to make it clear what the company expects from employees, and employees are required to be familiar with and comply with the terms of this policy at all times.

**Image is for illustrative purposes only. Menu bar options vary based on your permissions or*

organisation's subscription .

1.3 Write a summary of what will be changed and click **OK**. This activates the release management workflow.

Start Editing this Policy



A separate draft version will be created for editing. It is only visible to editors, until published.

Publishing is coordinated in 'Home' / 'Manage Changes', where items can be published in a release together.

Summary of what will be changed:

[Cancel](#) [OK](#)

1.4 Click **Edit**.

Code of conduct **Draft** v5 Finish All Editing

[Overview](#) [Policy](#) [Related Items](#) [Version](#)

GENERAL DETAILS Edit

Description: The purpose of this policy is to make it clear what the company expects from employees, and employees are required to be familiar with and comply with the terms of this policy at all times.

RELATED ITEMS

1.5 Click **Assign** to assign the content to specific roles.

BROWSING DETAILS Cancel

Summary: Save

Roles this is relevant to: Assign

Required reading: This item is required reading for the Roles it is relevant to

1.6 Search for the role and then click **Select**.

Assign which Roles this is relevant to

Role name

oper

Operations Manager

1 item

Cancel **Select**

1.7 Be sure to tick **This item is required reading for the Roles it is relevant to**. Once you have finished, click **Save**.

Governance > Policies Search

Code of conduct Draft v5 Finish All Editing

Overview Policy Related Items Version

BROWSING DETAILS Cancel

Summary: **Save**

Roles this is relevant to:

- Chief Information Security Officer (CISO) ✕
- Hiring Manager ✕
- Operations Manager ✕

Assign

Required reading: This item is required reading for the Roles it is relevant to

**Image is for illustrative purposes only. Menu bar options vary based on your permissions or organisation's subscription .*

1.8 Click **Finish All Editing** and publish the item by following the release management workflow.

Governance > Policies Search

Code of conduct Draft v5 Finish All Editing ↓

Overview Policy Related Items Version

Description: Edit

The purpose of this policy is to make it clear what the company expects from employees, and employees are required to be familiar with and comply with the terms of this policy at all times.

RELATED ITEMS

Related Regulations: FT Commonwealth Procurement Rules (CPRs) Regulation

Related Processes: Employee Onboarding Process Draft v4

IMPORTANT

The item will only be assigned when it has been fully published.

Please note, once an assigned item has been edited and published, it will be re-assigned as required reading to all the relevant roles. Users with that role will need to read and understand the updated version.

If you do not wish to re-assign the item, untick the box next to the message “This item is required reading for the Roles it is relevant to” when editing the item.

2. View required reading information

Users with Administration permissions can view whether users have completed their required reading. Instruction for viewing this information are provided below:

2.1 Access **People > Users** and double click on the user’s name, or click **Open User Details**.

Holocentric Home Operations Governance Documents People Admin Antoinette France

People Search

Users Persons Roles Positions ↑

List of people who can use this web app Open User Details Delete Download Add New User

First (given) name	Last (family) Name	Email / sign-in	Permissions	Roles	Status
<input type="text" value="h"/>	<input type="text" value="filter list to text en..."/>	<input type="text" value="filter list to text ..."/>	<input type="text" value="filter list to ..."/>	<input type="text" value="filter list to t..."/>	
HP Harry	Potter	harry.potter@hog...	Process Viewi...		Invited

**Image is for illustrative purposes only. Menu bar options vary based on your permissions or organisation's subscription .*



2.2 Click **Required Reading**.

People > Users Search 🔍

Harry Potter User Details ↑

Profile & Permissions Responsibilities **Required Reading**

List of all material that this user needs to read and understand, for the roles perform in their job View Change Details Open

Item name	Item type	Change summary	Reading Status
<input type="text" value="filter list to text entered here"/>	<input type="text" value="filter list to text ..."/>		All
 Add new customer to CRM	Process		! Required Reading
 Code of conduct	Policy	Assign required reading	! Required Reading

**Image is for illustrative purposes only. Menu bar options vary based on your permissions or organisation's subscription .*

END