January 2026, v.2

SETTING UP
QC READ & UNDERSTOOD

support.qc-analytics.com

Getting started with QC Read & Understood

The QC Read & Understood for Confluence Cloud app is a simple way to train your employees on how to use your documents and get their records. You can use the app to train your employees on internal processes, prepare for an ISO audit, and many other things.

With the use of the app, you will be able to:

- Assign users to R&U your Confluence documents.
- Confirm you have read and understood a page version.
- See training records for your employees.

The purpose of this document is to guide you through the app's basic functionality, so once you're done reading this, you'll have learnt how to use the QC Read & Understood app to track employee read confirmations.

First Steps

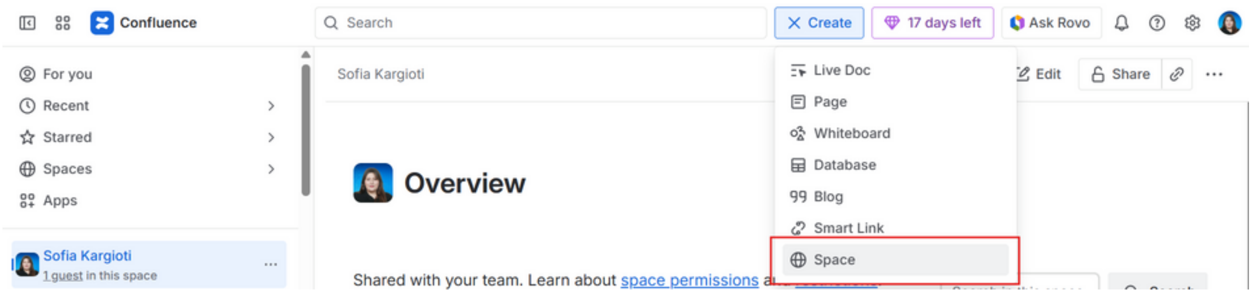
Before we dive into how you can set up the QC Read & Understood app, let's see some basic configuration you have to do for your Confluence site.

Create dedicated spaces

Create a space dedicated to your policies and procedures to organise your documents and keep all content in one place. To create a space:

1. Click on "**Create**" at the top of Confluence and select "**Space**"
2. Give your space a unique name, choose an icon, and the space's purpose, and click "**Next**"
3. Enable or disable the features you want to include and click "**Create space**".

For more information, check Atlassian's documentation.

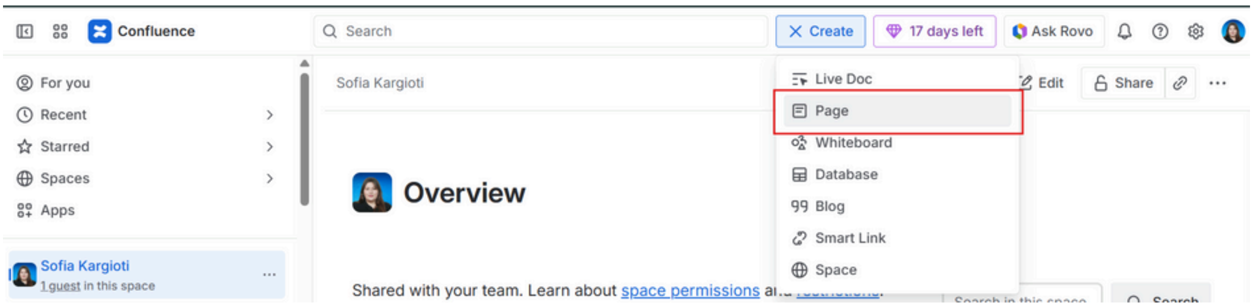


Create your pages

Once you create the space, it's now time to start writing your documents. To create a page:

1. Go to the space you created before, click "**Create**" and select "**Page**"
2. Once your page is ready, click "**Publish**"

For more information about page creation, check Atlassian's documentation.



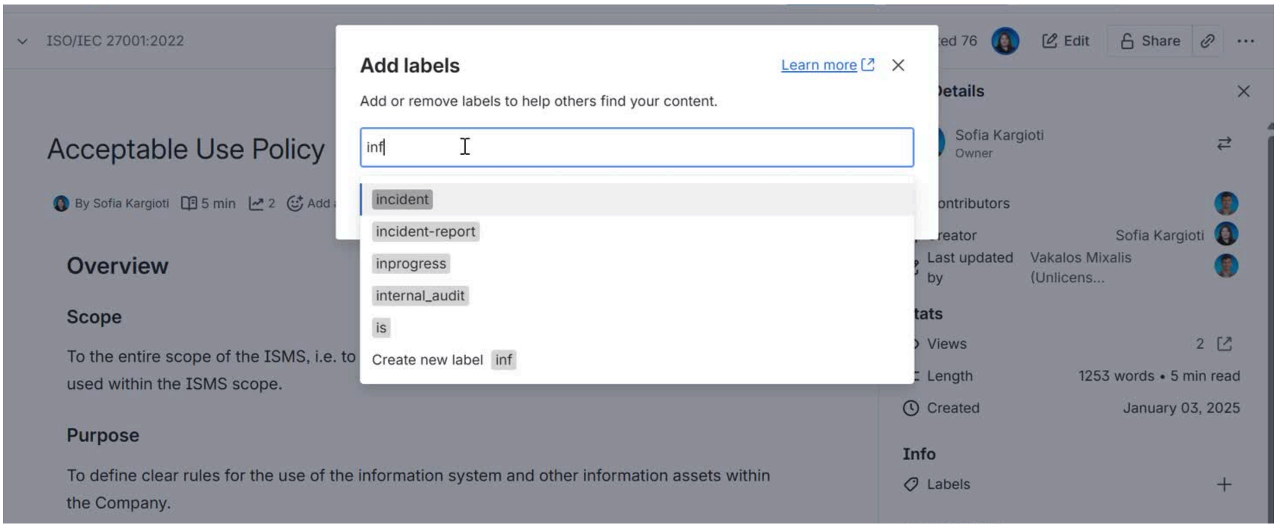
First Steps

Add labels to your pages

Make it easier to find your pages by adding labels. To add labels to a page:

1. Go to the page, and click on "**Show details**" at the bottom right corner (the ⓘ button)
2. In the "**Info**" section, click the **+** button next to the "**Labels**"
3. Type the label and click "**Close**".

For more information about how to use labels, check [Atlassian's documentation](#).

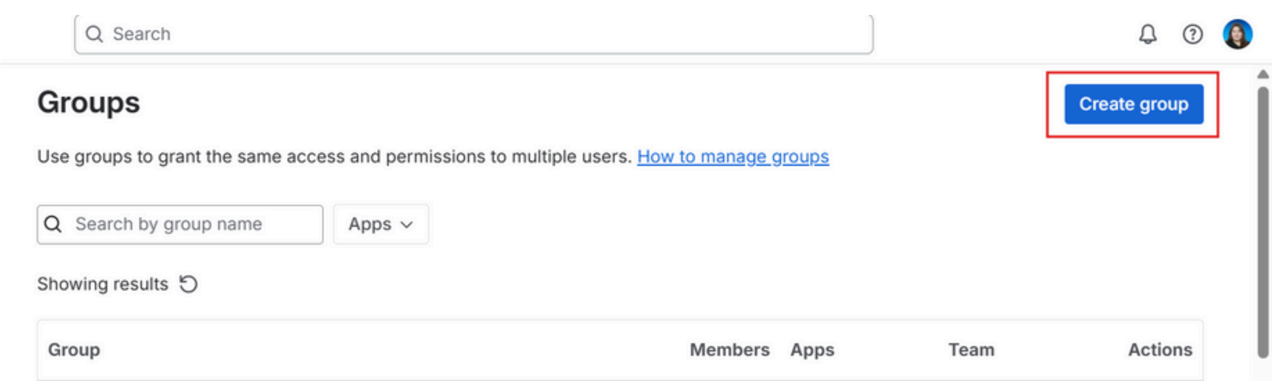


Create user groups

User groups make it easier to manage your users. You can create a group for each department or role. To create a group:

1. Click on "**Confluence administration**" (gear icon at the top right corner)
2. From the "**Atlassian administration**" select "Groups"
3. Click on "**Create group**", give your group a unique name and description, add users, and click "**Create**".
4. Once your group is created, go to the space that you'll be using for the QC Read & Understood and grant the group ["**View**" permissions](#).

For more information, check [Atlassian's documentation](#).



Configuration

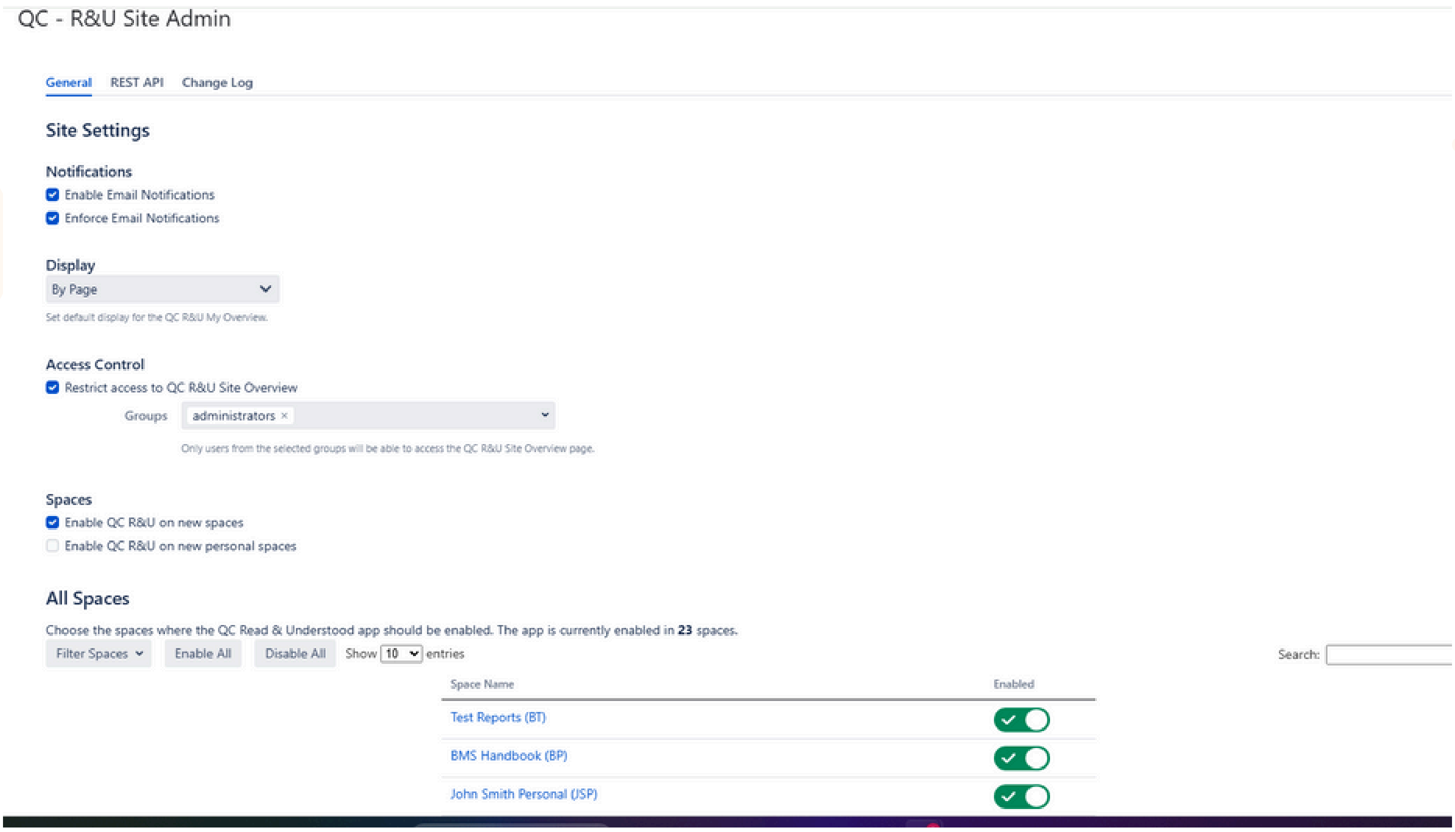
Site Level Configuration

To access the QC R&U Site Admin menu:

1. Log in to Confluence as a **site admin**
2. Click on “**Confluence administration**” (gear icon in the top right corner)
3. Navigate to the “**Settings**” section in the left sidebar
4. Open the “**Configuration**” menu and click “**QC R&U Site Admin**”

In this page, you can configure the following settings as a site admin:

- **Email Notifications**: You can enable and enforce R&U notifications to make sure all assigned users receive email notifications about their pending R&Us.
- **Display**: Choose what view the users will see when accessing their QC R&U My Overview page. Depending on which assigning method you choose, you can set the Display to be by Page or by Acknowledgement.
- **Access Control**: Restrict access to the QC R&U Site Overview to specific groups, to prevent users from seeing the R&U data of your employees.
- **Spaces**: Manage in which spaces you will be using the QC Read & Understood app.



Configuration

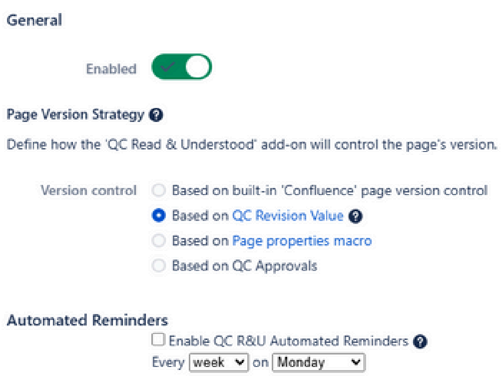
Space Level Configuration

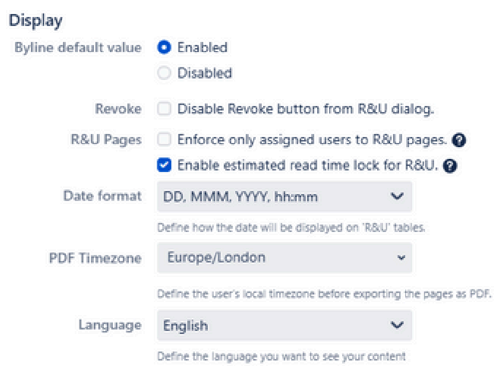
To access the QC R&U space settings:

1. Go to “**Space settings**”
2. From the “App links” menu, select “**QC Read & Understood**”
3. Navigate to the “**Settings**” tab.

In this page, you can configure the following settings as a space admin:

- **General Configuration**: Enable the app on the space without having to be a site admin.
- **Page Version Strategy**: Choose from one of the available version strategies for better control over your pages’ versions.
- **Automated Reminders**: Set up automated reminders for pending R&Us at a certain interval.
- **Byline dialog**: If enabled, the QC Read & Understood dialog will be displayed at the top of the pages.
- **“Revoke” button**: If enabled, users will also be able to revoke a page.
- **Enforce only assigned users to R&U pages**: You want this option enabled to prevent users from reading and understanding pages that aren’t assigned to them.
- **Estimated time lock**: Enable this option to prevent users from R&U until the read time has passed.
- **Date format, timezone, language**: Configure this based on your preferred date format, your timezone, and your language. The QC Read & Understood is available in six languages: Dutch, English, Finnish, French, German, and Norwegian.
- **Define access control settings**
    - Choose whether all site groups can be assigned to pages
    - Prevent the page owner from being assigned in the QC R&U Page Overview
    - Restrict QC R&U Page Overview access to admins only
    - Restrict QC Acknowledgements access to admins only
    - Turn on OTP authentication





Configuration

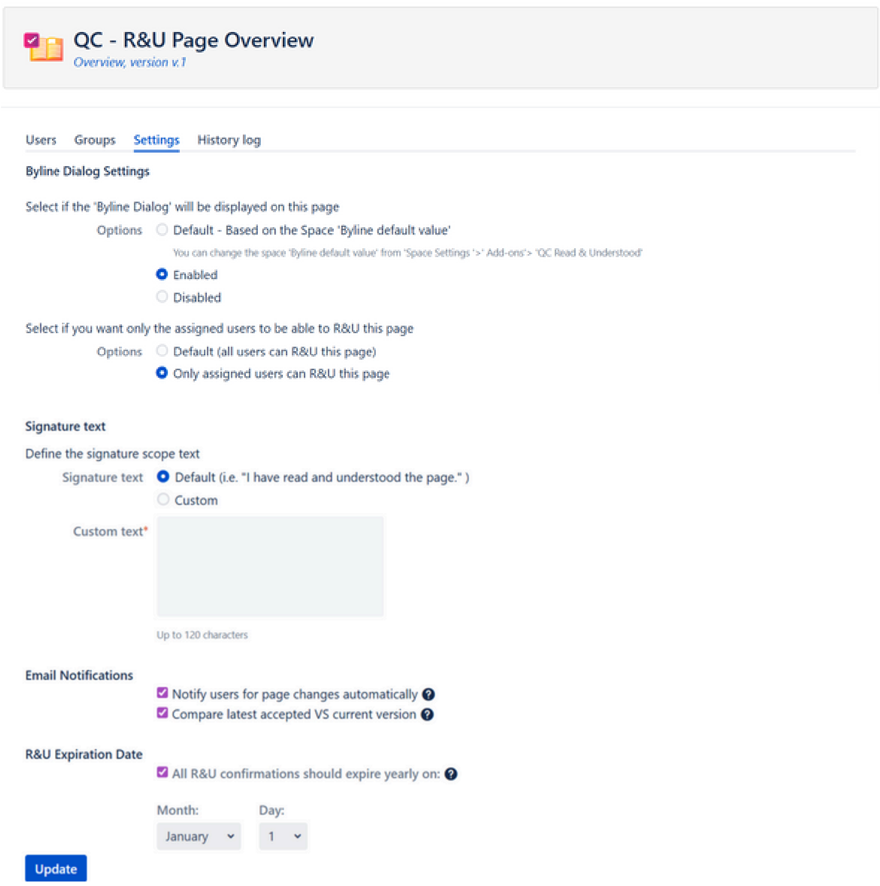
Page Level Configuration

The last step of configuration needed before starting with QC Read & Understood is on page level. To do this, follow the steps:

1. Access a page and click "**More actions**"
2. From the "**Apps**" menu, select the "**QC Read & Understood**" option
3. Navigate to the "**Settings**" tab

In this page, you can configure the following settings:

- **Byline dialog**:
  - Choose whether you want to display the byline dialog at the top of the page. If this option is left on "Default" then the app will get the specified space settings.
  - You can also choose to enforce only assigned users to R&U the page.
- **Signature text**: Set a custom signature text for the R&U dialog, depending on your company's needs.
- **Email notifications**: Enable email notifications so the assigned users are notified for page changes and define which versions should be compared in the email.
- **R&U expiration date**: Based on the way you work, you might want the R&U data to expire on a specific date each year.



Assigning Users

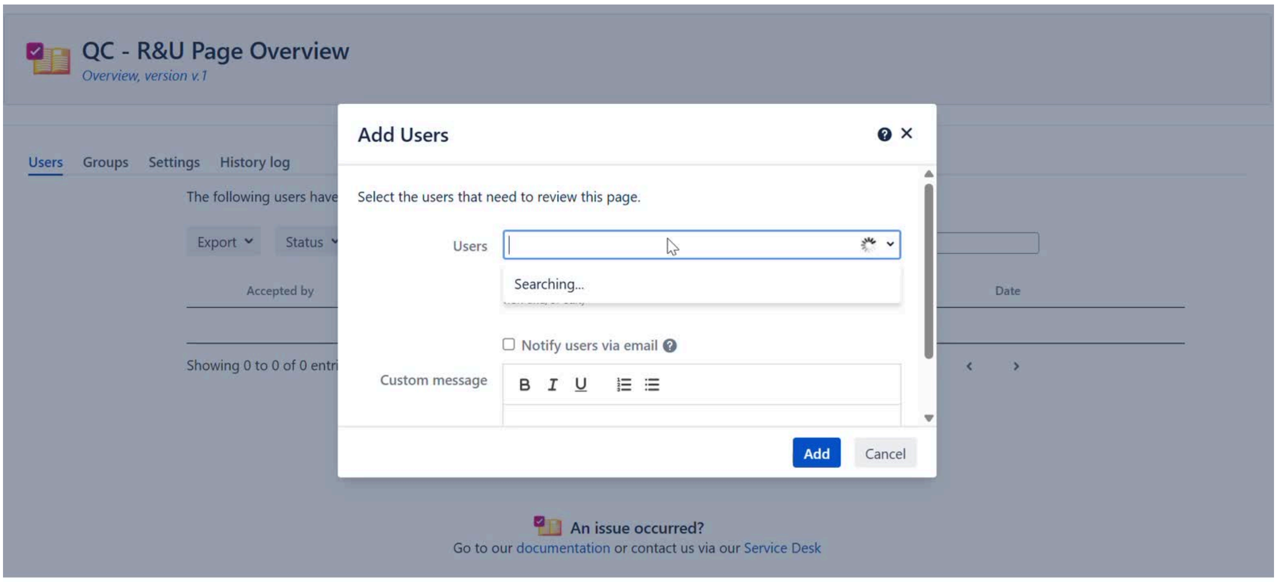
QC Read & Understood offers different ways to assign users their R&U tasks based on your company's needs:

- Using the QC R&U Page Overview,
- Using the QC Acknowledgements feature.

Using the QC R&U Page Overview

The QC R&U Page Overview is the basic way to add users to pages. In this page, you can add individual users or user groups to confirm they've read and understood the Confluence page. To find the QC R&U Page Overview, follow the steps:

1. Access a page and click "**More actions**"
2. From the "**Apps**" menu, select the "**QC Read & Understood**" option
3. In the "**Users**" tab, click the "**Add Users**" button. In case you want to add groups on the page, navigate to the "**Groups**" tab and click the "**Add Groups**" button.
4. **Select the user(s)** or **group(s)** that you want to read the page and click "**Add**"
5. **Optionally**, you can notify them that they need to R&U the page by enabling the option "**Notify users via email**".



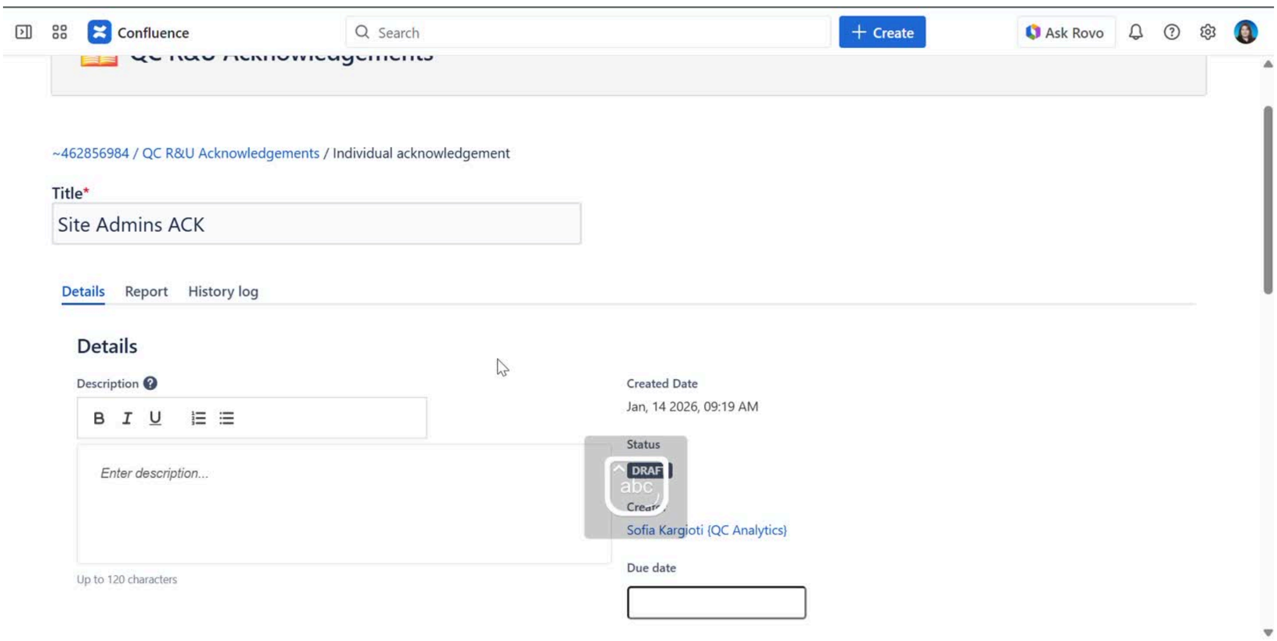
Assigning Users

Using the QC Acknowledgements feature

With the QC Acknowledgements, you are still able to assign either individual users or user groups, however, you are also able to add them to all the pages they need to R&U with only a few clicks.

To start with this feature, follow the steps below:

1. Go to **Space settings** and from the "**App links**" menu select the "**QC Acknowledgements**"
2. Click the "**Create**" button
3. Give your acknowledgement a **Title** and a **Description**, and even a **Due Date** if you want the users to R&U the included pages within a certain time period.
4. In the "**Select Users**" section, choose whether you want to assign individual **Users** or **Groups**
5. In the "**Select Pages**" section, you can configure the included pages in three ways:
    a. Based on their **Ancestor Page**: include child pages of a certain ancestor
    b. Selecting individual **Pages** from the space
    c. Including pages based on their **Labels**.
6. Configure settings like **R&U expiry** and **Email Notifications**, and **Publish** your acknowledgement.



Reporting

QC Read & Understood includes several report options to monitor the R&U progress of your users.

- **QC R&U Page Overview**: You can see which of the assigned users have R&U a specific page
- **QC R&U Space Overview**: See an overview of the pages included in your space.
- **QC R&U Site Overview**: See a site-wide overview of R&U data.
- **QC Acknowledgements report**: Check the progress of an Acknowledgement using its report table.
- **QC R&U My Overview** Stay up-to-date with your pending R&Us using the QC R&U My Overview table.
- **Embedded macros:**
    - **By user macro**: Displays the R&U data of a specified user.
    - **By user group macro**: Displays the R&U data of the specified user groups.
    - **By label macro**: Displays the R&U data of pages that contain a certain label.
    - **By page macro**: Displays which of the assigned users have R&U a specific page, like the QC R&U Page Overview.
    - **By acknowledgement macro**: Similar to the Acknowledgements report table, it displays the progress of an Acknowledgement.
    - **My overview macro**: Similar to the QC R&U My Overview report, it shows all your assigned pages and your R&U status for each one of them.