

AD groups and how we use them in Xoralia

It would be an unmanageable task to assign documents to your wider organisation by individual. To resolve that problem, Xoralia uses Active Directory (AD) and O365 Groups to help target a document for attestation.

When assigning a document, the document owner can select as many Groups or individuals as they want within the Assign to audience field. This field is smarter than it looks, when using an AD group it is also dynamic and will adapt to changes made within the Active Directory automatically.

The screenshot displays the Xoralia document management interface. On the left, a sidebar shows navigation options like 'Choose library', 'Documents you manage', and 'Tools'. The main content area shows a document titled 'Employee handbook' with a 'View document' button. The document text is visible, including sections for 'Employee handbook', 'Expiry date', 'Quiz', and 'Assign to'. The 'Assign to' field is set to 'Dan's demo team'. The 'Read by date' field is set to '30' days, and the 'Make this recurring' checkbox is checked. The 'Recur every' field is set to '365' days. The interface also shows a 'Due for review' status and a 'View read report' button with a 100% completion indicator.

For example, if you assign a document to an AD group of people to read and they have 30 days to read the document, as and when new people are added to the group Xoralia will assign the document to them too. When using the relative read by date field, this also gives the new user the amount of time specified to read the document as to when they were added. It may be the case everyone needs to read the document by a fixed date, lets say 31/03/2023 – but we think that would be less likely than a relative date as to when the document was requested to be read by each user.

Subsequently, if a user is removed from the Active Directory group the opposite happens – the assignment for the user to attest to the document is cancelled. However, users and their read records will always remain. If an individual leaves the organisation, their read audit log is not lost and will still be available within the document read reports ‘log’ tab.

The screenshot shows the Xoralia interface for a document titled "Annual Leave Policy" (Version: 1.1). The document is assigned with a quiz (13% completion). The "Read Report" tab is active, displaying a table of users who have interacted with the document. The table has columns for Name, Version, Date assigned, Status, and Date actioned.

Name ↑	Version ↑	Date assigned ↑	Status ↑	Date actioned ↓
Amber Oakes aoakes@contentformula.com	1.1	09/08/2022	read	09/08/2022
Dan Hawtrey dhawtrey@contentformula.com	1.1	09/08/2022	unread	09/08/2022
Dan Hawtrey dhawtrey@contentformula.com	1.1	09/08/2022	read	09/08/2022

User reports for everyone will also always be available in the reports tab for Xoralia system admin users.

The screenshot shows the Xoralia interface with the "Reports" tab selected. The page provides instructions on how to use the reports and lists several report categories that can be downloaded. A search bar is visible with "Amber Oakes" entered, and a "Download report" button is present.

Reports

You can download and use the below suite of reports to understand usage within your organisation for Xoralia

- Xoralia system information
- Document information
- Documents expired or pending review
- Document and associated assignments
- User read history

See details of an individual and their read status and history per document

Amber Oakes

Download report

You must select a user above to download this report