

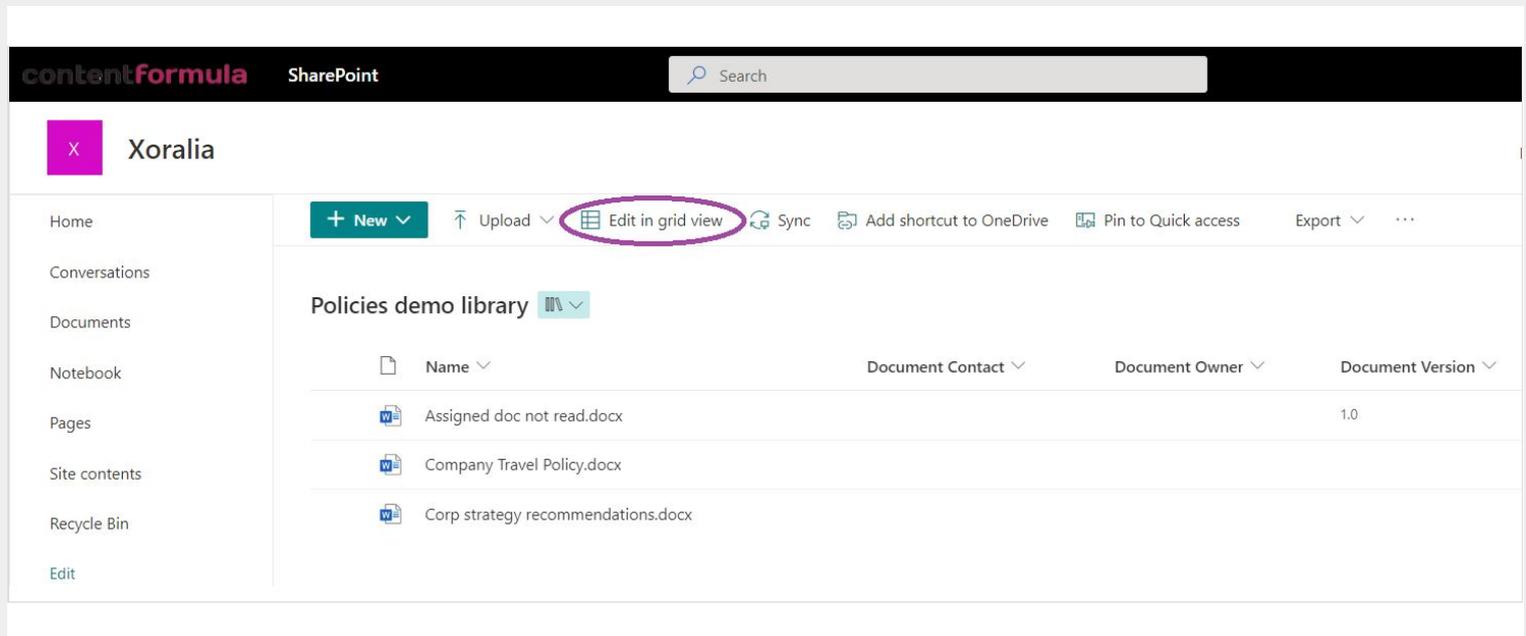
Assigning documents to users to read

Document owners and admins can assign read tasks to users and groups. When a task is set, all the users who have been assigned the task will receive an email informing them that they have to read the document.

A Document Owner has the ability to assign a document to a user or group/s to read in Xoralia. The metadata field that drives these permissions can be found in SharePoint.

How to assign yourself or others as Document Owners

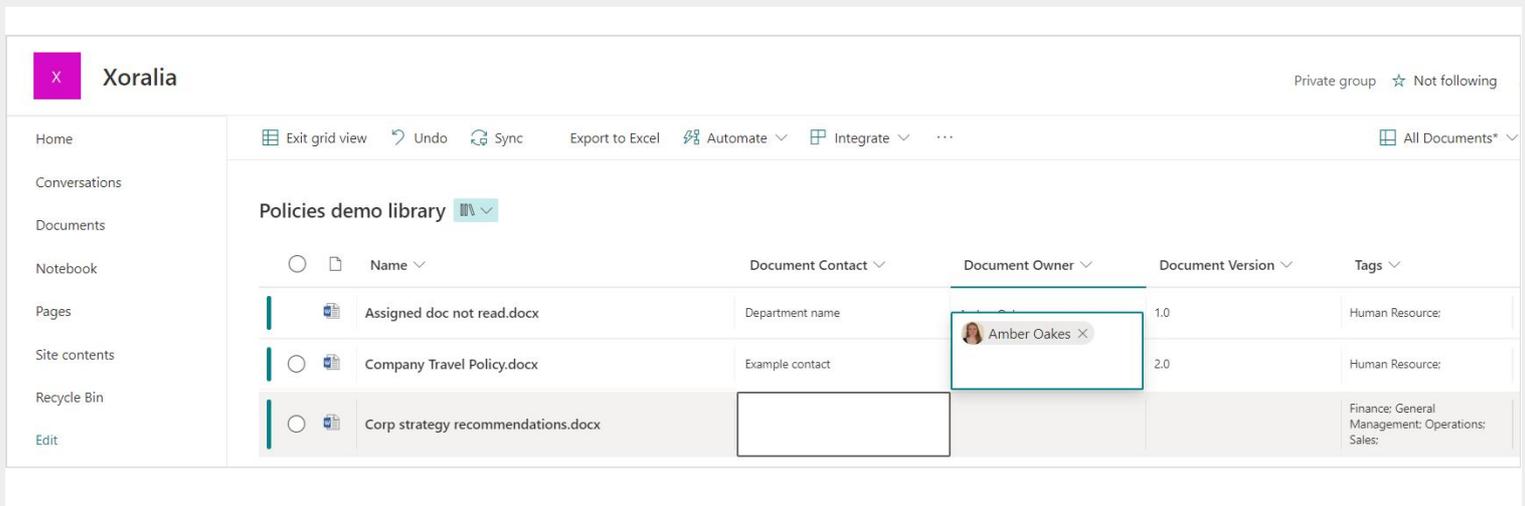
1. Navigate to your SharePoint site and document library associated with Xoralia. You should see 3 columns which drive the access and data displayed in Xoralia, Document Contact, Document Owner and Document Version. Edit these columns using grid view.



The screenshot shows the SharePoint interface for a document library named 'Policies demo library'. The 'Edit in grid view' button is highlighted with a purple circle. The table below displays the document list with columns for Name, Document Contact, Document Owner, and Document Version.

Name	Document Contact	Document Owner	Document Version
Assigned doc not read.docx			1.0
Company Travel Policy.docx			
Corp strategy recommendations.docx			

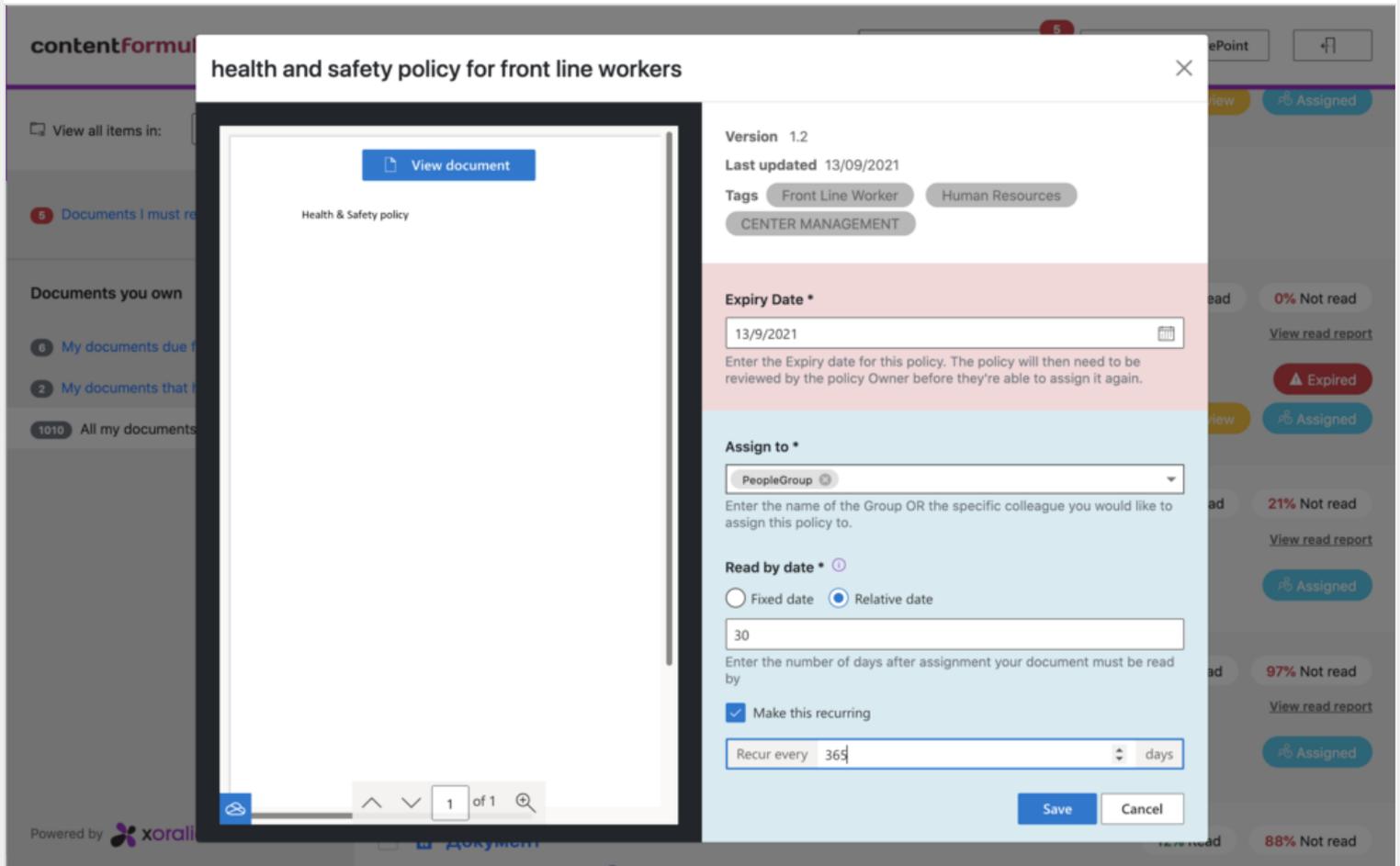
2. The Document Owner column is a 'People Picker' field. Select as many Document Owners as you need within your Active Directory to manage the document within Xoralia. Giving people the Document Owner permission means they will be able to set expiry dates, assign documents, set read by dates and access document read history in Xoralia.



3. Exit grid view once done, then wait a few minutes for Xoralia to sync and pull through the new permission level.

How to assign a document to a person or group

Once the user has the correct permissions from SharePoint as described above, an admin menu 'Documents you manage' will appear in the navigation within Xoralia. To assign a document click 'All my documents' in the left hand navigation and find the document you want to assign from the list that is presented. Clicking the document will launch a pop-up. Within this pop-up you can set the target audience, the read by date and whether it is a recurring or one-off assignment. Note that the document must also have an expiry date.



1. Expiry date

In order to be assigned, a document must first have an expiry date set. If there is already an expiry date you can skip this step.

2. The audience

In the 'Assign to' field you can build the audience that will be assigned the document. Simply enter the names of the people you want to assign it to. As you type the system will auto suggest names in a drop-down for the you to select from. The system will also suggest Active Directory Groups and Office 365 Groups. To find all the groups available in your organisation type the word 'group' in the field. A document can be assigned to a mixture of groups and individuals.

2. The read by date

The read by date, which can be a fixed (i.e. specific) date or a relative date. Choosing relative date is best if you are assigning a document to a group. This is because if you choose a fixed date then new group members

could join after this fixed date and therefore receive an assignment where the due date has already past. By choosing relative date you are setting:

1. The number of days after the assignment date that existing group members have to read the document
2. The number of days after the join date that any new group members must read the document.

Example:

On 1st January, John assigns his document to the AD Group 'Finance team' and sets the read by date as 'relative' and 31 days. All members of the group receive an email notification on 1st January telling them they have to read the document by 31st January. On 1st March, Susan joins the Finance team and is added to the 'Finance team' AD Group by the IT admin. Although no change has been made in Xoralia, it automatically sends Susan an email notification telling her that she needs to read the document by 31st March. This is because Xoralia monitors groups to see if there are new joiner or leavers.

3. Recurring assignments

If your assignment is a recurring one, check the 'Make this recurring' checkbox and specify the number of days after which you want it to repeat. For example, if I am assigning the IT Security Policy and I want readers to re-read it once a year I set the number of days as 365.

Notes and details about using groups

Note that if a user joins a group that has a document assigned to it, then that new group member will be assigned the document from that point. The document owner does not have to worry about assigning the document to new joiners provided that groups are being properly managed inside your organisation (this is typically done by IT or HR). On joining a group the new member will receive an email notification telling them about the assignment, due date etc. Bear in mind that if you are using groups for assignments then be sure to select 'Relative date' when setting the due date for the assignment. The due date will be relative to the date when the user joined the group.

Similarly, if a group member leaves or is removed from the group then any assignments set for the group will be cancelled for that individual. The user will receive an email notification telling them that their assignments have been cancelled.

The above notes are both true for AD Groups and Office 365 Groups.