

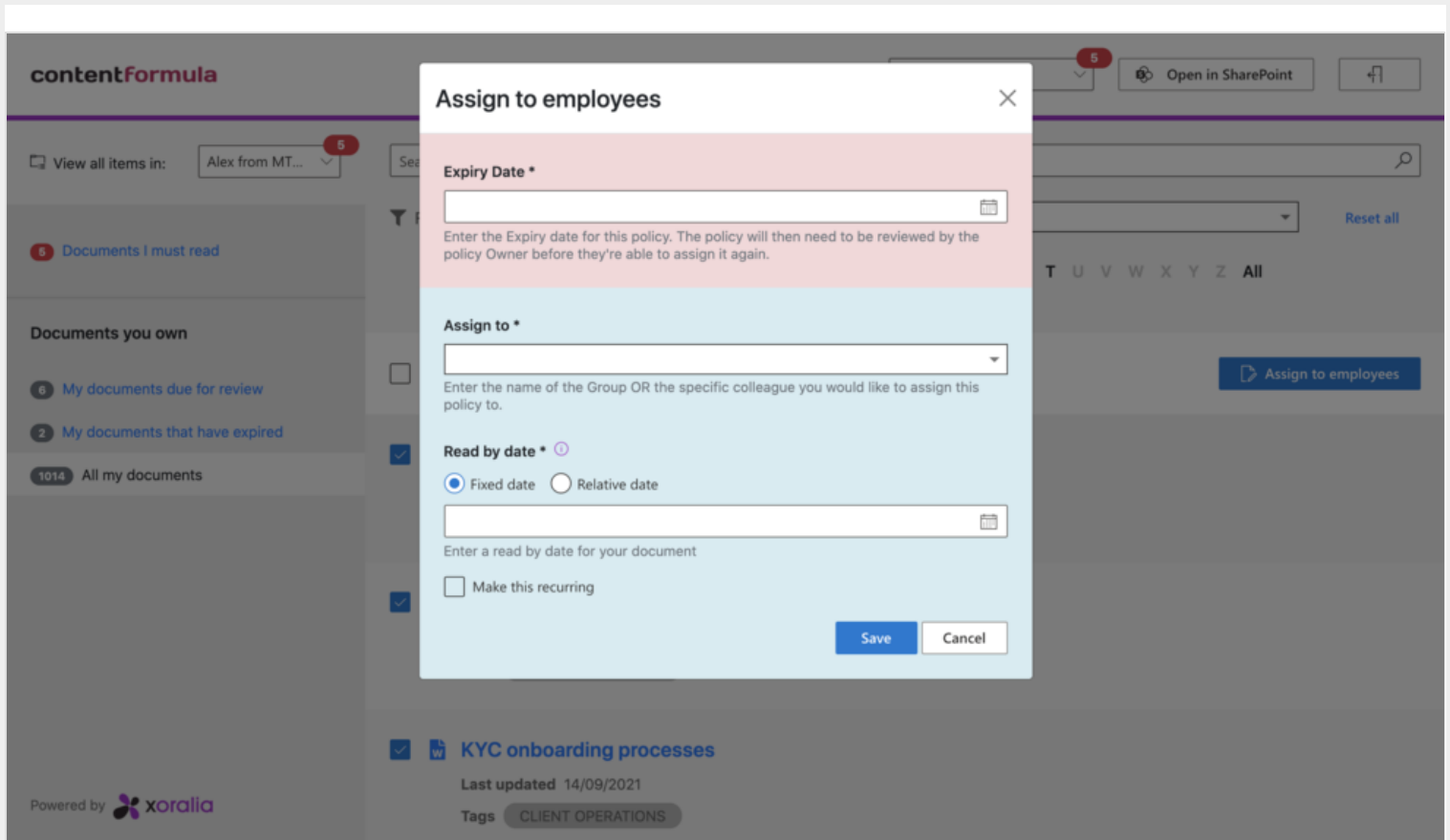
Bulk assignments

There may be times when you want to assign multiple documents at once with the same assignment settings (i.e. due dates, target audience etc.). This could be especially true when you are first setting up Xoralia.

To bulk assign several docs at once go to the 'All my documents' view in Xoralia and select the documents you want to assign. Then click the 'Assign documents' button in the top right. This will launch a pop-up. The fields in the pop-up are the same as those in a single document assignment.

The screenshot displays the Xoralia document library interface. At the top, the 'contentFormula' logo is on the left, and the 'Document library:' dropdown is set to 'Alex from MTR (5)'. A red notification bubble with the number '5' is present above the dropdown. To the right are 'Open in SharePoint' and a share icon. Below the header, a search bar contains 'Alex from MT...' with a red notification bubble '5' and a search icon. A 'Filter by:' section shows 'CLIENT OPERATIONS' and 'All tags' selected, with 'All contacts' in the second dropdown and a 'Reset all' link. An alphabetical index 'A B C D E F G H J K L M N O P Q R S T U V W X Y Z All' is visible. On the left sidebar, 'Documents I must read' has a red bubble '5', and 'Documents you own' has three sub-sections: 'My documents due for review' (6), 'My documents that have expired' (2), and 'All my documents' (1014). The main content area shows three document cards, each with a checked selection box and a 'w' icon. The first card is 'Onboarding new customers process', the second is 'Anti-money laundering policy', and the third is 'KYC onboarding processes'. All cards show 'Last updated 14/09/2021' and 'Tags CLIENT OPERATIONS'. A blue oval highlights the selection boxes and the 'w' icons. In the top right corner, a blue button labeled 'Assign to employees' is also circled in blue. The footer shows 'Powered by Xoralia'.

To bulk assign, select the relevant docs and click the 'Assign to employees' button



The bulk assignment pop-up is very similar to single assignments

Note that you can't bulk assign documents that already have assignments set up (in fact, Xoralia won't even allow you to select docs that already have assignments). If you wanted to do that you would need to clear the existing assignments first.