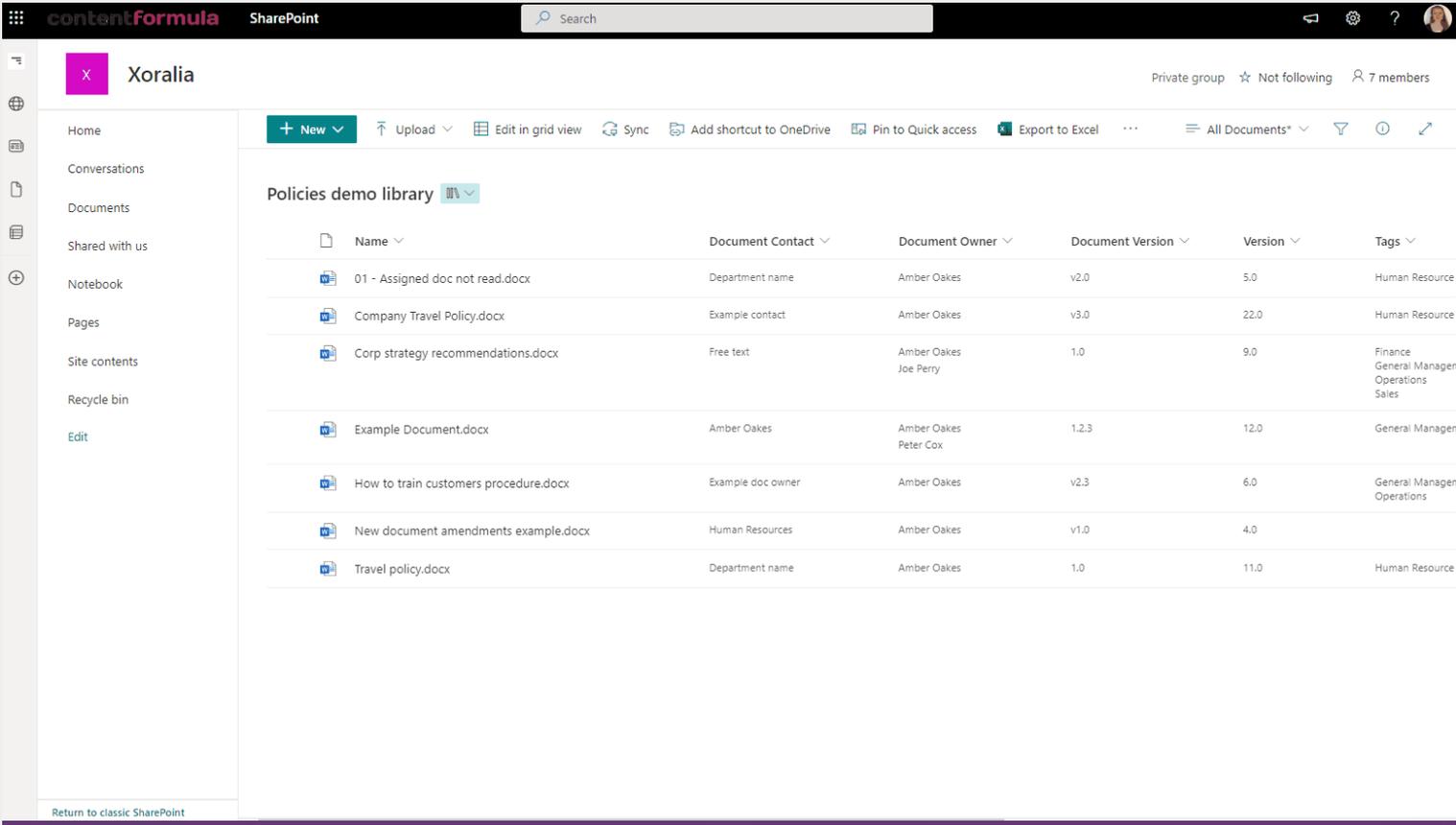


How to manage document reviews and version control

There are many ways in which you can utilize SharePoint’s version control functionality. However, in order for Xoralia to work correctly and to get the best reporting out of Xoralia our recommended process is as below.



Important notes:

Don't include version numbers within document titles, such as "[Document title] v1.0" or "[Document title] June 2022", as this dilutes the importance of the document title and also suggests that you may be keeping

multiple iterations of the same document within a SharePoint document library.

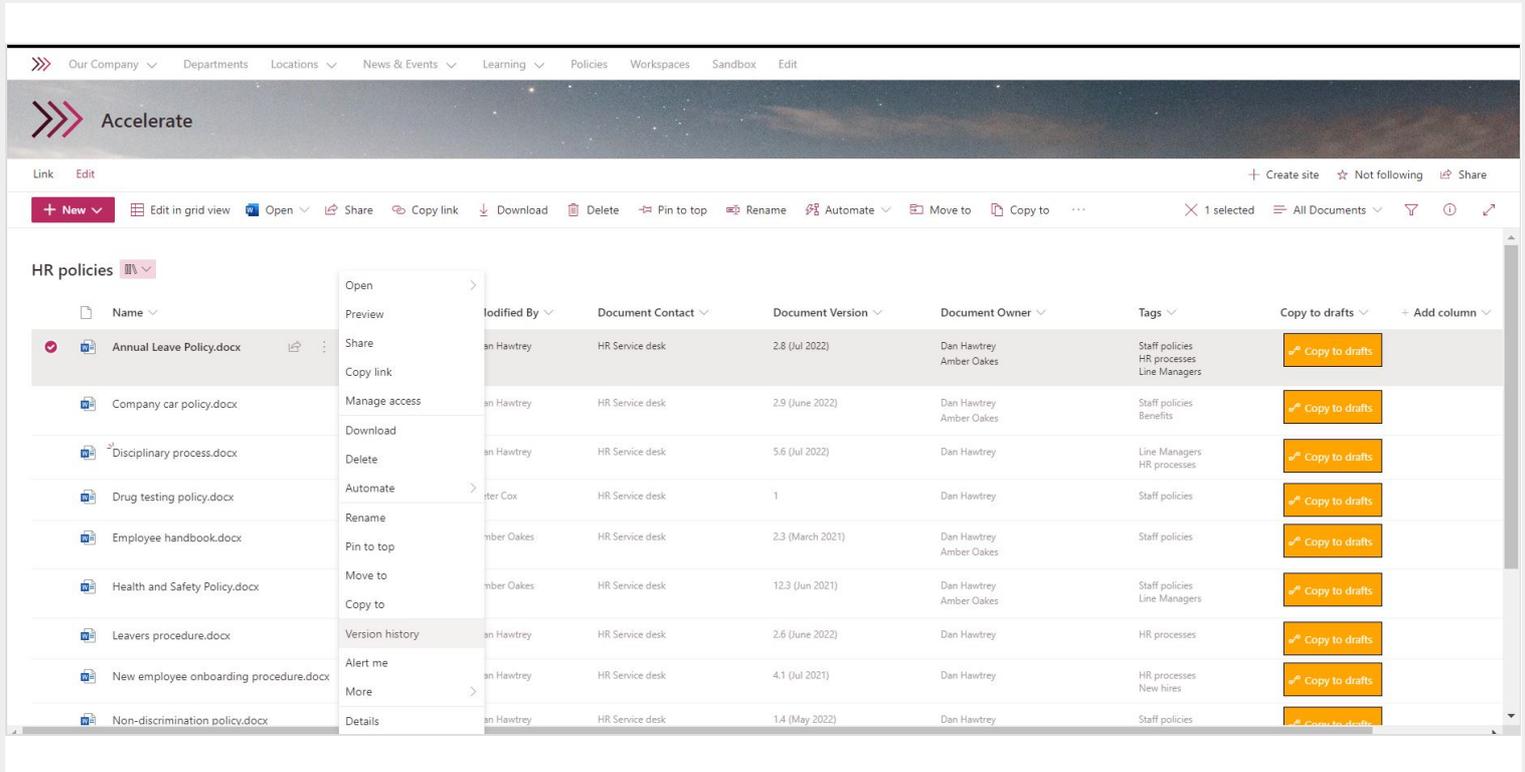
Our requirement is that you keep one document per policy/procedure, and it's content changes as per its lifecycle - but with the same document title (retaining its SharePoint document ID). The only change to the document records within SharePoint (excluding the content) is that the Document Version metadata column is updated at an appropriate time as to when the document content itself is updated (and perhaps sent for review). When up-versioning a document by using the drag and drop functionality within Xoralia, the document title must be the same and you must overwrite the existing document within the document library in order to keep the assignments within Xoralia active and to create a rolling read record history.

If you delete a document from its document library, then upload a new document (even with the same document title) SharePoint considers this a new document and gives it a new Document ID, therefore the assignment records and read history will no longer display within Xoralia.

The screenshot shows a SharePoint document library interface for 'HR policies'. The table lists various documents with their respective metadata. The 'Document Version' column is circled in purple, highlighting the versioning information for each document.

Name	Document Contact	Document Owner	Document Version	Tags	Copy to drafts
Annual Leave Policy.docx	HR Service desk	Dan Hawtrey Amber Oakes	1	Staff policies HR processes Line Managers	Copy to drafts
Company car policy.docx	HR Service desk	Dan Hawtrey Amber Oakes	2.9 (June 2022)	Staff policies Benefits	Copy to drafts
Disciplinary process.docx	HR Service desk	Dan Hawtrey	5.6 (Jul 2022)	Line Managers HR processes	Copy to drafts
Drug testing policy.docx	HR Service desk	Dan Hawtrey	1	Staff policies	Copy to drafts
Employee handbook.docx	HR Service desk	Dan Hawtrey Amber Oakes	2.4 (July 2022)	Staff policies	Copy to drafts
Health and Safety Policy.docx	HR Service desk	Dan Hawtrey Amber Oakes	12.3 (Jun 2021)	Staff policies Line Managers	Copy to drafts
Leavers procedure.docx	HR Service desk	Dan Hawtrey	2.7 (July 2022)	HR processes	Copy to drafts
New employee onboarding procedure.docx	HR Service desk	Dan Hawtrey	4.1 (Jul 2021)	HR processes New hires	Copy to drafts

There's no need to worry when it comes to losing old document version and its content. The back-end of SharePoint is powerful and previous document iterations can always be found using the Version history feature under the Document epilepsies. You can restore old versions of documents using this tool.



See example document below that has been assigned to and read by a document reader in Xoralia. The version the users has read is Leavers procedure, version 2.7 (July 2022).

Xoralia Last synced: 05/08/2022 at 12:47

Open in SharePoint Reports Settings

Choose library: HR policies

Documents I must read
All documents in this library

Documents you manage
Documents that have expired
All my documents

Tools
My dashboard

Leavers procedure Version: 2.7 (July 2022)
Read by date 12/08/2022 Last updated 05/08/2022
Contact HR Service desk

100% Assigned

Read Report Download this report

Read Not Read Log Filter by: All departments All locations All groups Reset all

Search for a name, location or department in this list

Select all Mark as not read

Name ↑	Department ↑	Location ↑	Group ↑	Version read ↑	Date read ↑
Amber Oakes aoakes@contentformula.com	Project Management Offi...	N/A	N/A	2.7 (July 2022)	05/08/2022

However, if a new version of the document is uploaded (and overwrites the previous document in the SharePoint library) the new version is displayed in Xoralia. Note document title MUST be the same to enable this functionality and audit history within Xoralia.

Accelerate

Link Edit

+ New Upload Edit in grid view Sync Add shortcut to OneDrive Pin to Quick access Export Automate Integrate

HR policies

Name	Document Contact	Document Owner	Document Version	Tags	Copy to drafts	Modified
Employee handbook.docx	HR Service desk	Dan Hawtrey Amber Oakes	2.4 (July 2022)	Staff policies	Copy to drafts	July 25
Health and Safety Policy.docx	HR Service desk	Dan Hawtrey Amber Oakes	12.3 (Jun 2021)	Staff policies Line Managers	Copy to drafts	March 7
Leavers procedure.docx	HR Service desk	Dan Hawtrey Amber Oakes	2.8 (Aug 2022)	HR processes	Copy to drafts	A few seconds ago

If the user is expected to re-read the document due to the up versioning, the document owner will need to mark the user as unread using the 'mark as not read' functionality. This will automatically send a notification to the user to re-read the document. Once they then re-read the document, all history will be stored in Xoralia.

The screenshot displays the Xoralia interface for a document titled "Leavers procedure" (Version: 2.8 (Aug 2022)). The document is marked as "Assigned" (100%) and has a "Read by date" of 12/08/2022 and a "Last updated" date of 05/08/2022. The contact is "HR Service desk" and the tag is "HR processes".

The "Read Report" section includes a "Download this report" button and a table with the following columns: Name, Department, Location, Group, Version read, and Date read. The table lists three read events for Amber Oakes (aoakes@contentformula.com) in the Project Management Office, with versions 2.8 (Aug 2022) and 2.7 (July 2022) read on 08/08/2022 and 05/08/2022 respectively.

Name ↑	Department	Location	Group	Version read	Date read
<input type="radio"/> Amber Oakes aoakes@contentformula.com	Project Management Offi...	N/A	N/A	2.8 (Aug 2022)	08/08/2022
				2.7 (July 2022)	05/08/2022
				2.7 (July 2022)	05/08/2022

At the bottom left, it says "Powered by xoralia V 2.4.1".