

# Reporting

If a document is assigned to an audience as a must read, then owners and admins can view reports for that document. The reports show who in the target audience has and hasn't read the document. There is no reporting for documents that have not been assigned.

Reports can be accessed via any of the document owner views in Xoralia.

The screenshot displays the contentFormula document library interface. At the top, the 'Document library' dropdown is set to 'Alex from MTR (5)'. The main content area lists four documents, each with a 'View read report' button circled in blue. The documents are:

- health and safety policy for front line workers** (Version: 1.2): 100% Read, 0% Not read. Read by date: Dynamic, Review date: 27/08/2021, Expires: 26/09/2021. Last updated: 10/09/2021. Tags: Front Line Worker, Human Resources, CENTER MANAGEMENT. Status: Due for review, Assigned.
- File1**: 79% Read, 21% Not read. Read by date: 06/09/2021, Review date: 09/08/2022, Expires: 08/09/2022. Last updated: 10/09/2021. Status: Assigned.
- FileRoot1**: 3% Read, 97% Not read. Read by date: 01/10/2021, Review date: 10/08/2022, Expires: 09/09/2022. Last updated: 10/09/2021. Tags: Human Resources, CLIENT OPERATIONS, IT. Status: Assigned.
- Документ**: 12% Read, 88% Not read. Read by date: Dynamic, Review date: 06/10/2021, Expires: 05/11/2021. Last updated: 13/09/2021. Status: Assigned.

On the left sidebar, there are navigation options: 'View all items in: Alex from MTR...', 'Documents I must read' (5 items), 'Documents you own' (6 items), and 'All my documents' (10 items). The bottom left corner features the 'Powered by Xoralia' logo.

**contentFormula** Document library: Alex from MTR (5) 5 [Open in SharePoint](#)

View all items in: Alex from MTR... 5 **File1** 79% Read 21% Not read

Read by date 06/09/2021 | Review date 09/08/2022 | Expires 08/09/2022  
Last updated 10/09/2021 Assigned

**Read Report**

Read Not Read Filter by: All departments All locations All groups [Reset all](#)

Search for a name, location or department in this list

— Mark as not read

<input type="radio"/>	Name ↑	Department	Location	Group	Version read	Date read
<input type="radio"/>	Aaron ALLEN	Human Resources	Birmingham	MTR_TEST	N/A	10/09/2021
<input type="radio"/>	Aaron ALVARADO	Consulting	San Diego	MTR_TEST	N/A	10/09/2021
<input type="radio"/>	Aaron ARNOLD	Front Line Worker	Manchester	MTR_TEST	N/A	10/09/2021
<input type="radio"/>	Aaron AUSTIN	Retail	Lisbon	MTR_TEST	N/A	10/09/2021
<input type="radio"/>	Aaron BECK	Marketing and Communic...	Manchester	MTR_TEST	N/A	10/09/2021
<input type="radio"/>	Aaron BROWN	Information Technology	Paris	MTR_TEST	N/A	10/09/2021

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## The 'Read' tab

In the 'Read' tab the document owner can override a user's read state by selecting one or more users and clicking the 'Mark as not read' button. This will remove the user from the 'Read' tab and put them back into the 'Not read' tab. It will also trigger reminder notifications for that user as if the document had just been assigned to them. For auditing purposes, the action of overriding a user's state, whether it is for 'read' or 'not read', is written to the backend database along with the name of the document owner who overrode the status.

The 'Version read' column shows the manual version number of the document that the document owner has assigned to the document, not the SharePoint version history number which is automatically assigned by SharePoint as part of version control.

contentFormula

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### Read Report

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

Search for a name, location or department in this list 🔍

Mark as read

<input type="radio"/>	Name ↑	Department	Location	Group	Overdue by
<input type="radio"/>	Aaron FISCHER	Front Line Worker	Oxford	MTR_TEST	7 days
<input type="radio"/>	Aaron FOSTER	Human Resources	Barcelona	MTR_TEST	7 days
<input type="radio"/>	Aaron FREEMAN	Digital Services	Oxford	MTR_TEST	7 days
<input type="radio"/>	Aaron GARNER	Retail	Los Angeles	MTR_TEST	7 days
<input type="radio"/>	Aaron GEORGE	Front Line Worker	Bristol	MTR_TEST	7 days
<input type="radio"/>	Aaron GONZALEZ	Human Resources	Barcelona	MTR_TEST	7 days

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## The 'Not read' tab

In the 'Not read' tab the document owner can override a user's read state by selecting one or more users and clicking the 'Mark as read' button. This will remove the user from the 'Not read' tab and put them into the 'Read' tab. It will also cancel the assignment for that document and trigger a notification for that user telling them that they no longer need to read the document. For auditing purposes, the action of overriding a user's state, whether it is for 'read' or 'not read', is written to the backend database along with the name of the document owner who overrode the status.

The document owner can also send a personal email message to one or more users in the 'Not read' tab. Other users (e.g. the user's line manager) can also be added to the message in the CC field.