

Xoralia policy management software: Product overview (Data sheet)

Why do you need a policy management solution like Xoralia?

Your policies and procedures are critical for your business. They ensure that employees can successfully carry out their role, taking the right steps in their daily work and making the right decisions. They minimise risks in organisations, supporting key processes such as Health & Safety and underpinning regulatory and legal compliance across multiple areas. They help to drive efficiency and raise productivity. They help get new employees onboard successfully. And more.

But policies don't look after themselves. You need effective approaches for policy management to ensure that:

- your people can find the policies they need at the right time
- policies are fully kept up to date
- and that you're able to report on them to meet all your compliance requirements.

And none of these is a given, all coming with their own significant challenges.

A policy management software solution like Xoralia is essential for successfully managing your policies. It will help you to overcome different challenges around policy access, automate much of the management, and provide robust reporting for compliance and audit. In short, supporting your people, minimising risk and improving processes.

Xoralia's key features

Central policy library where employees can search or browse across all policies

One source of truth with document version control, leveraging the power of SharePoint and Microsoft 365

Automated approaches for the heavy lifting on administration covering notifications, reporting and more

Lifecycle management to help policy owners keep their policies up to date

Mandatory reads and employee attestation (also known as certification or acknowledgements) features with compliance reporting, so your policies are read and understood

Policy management: Key challenges and pain points

Policy management can be challenging when your employees can't easily find the policies they need. Meanwhile administrators have to manage their policies manually, relying on email which is both time-consuming and frustrating.

- Having multiple versions of policies in circulation (on paper and digitally) with employees not quite knowing which is the right one, increasing the risk of errors or policies being ignored altogether.
- Employees not being able to access or find key policies at the actual time they need them.
- Employees wasting time by emailing support functions or their colleagues to get a copy of a policy, rather than accessing documents on a self-serve basis.
- Policy owners not keeping their policy documents up to date or reviewing them on a regular basis.
- Finding it near impossible to get all employees to confirm they have read and understood a policy or a policy change, and then having to report on this for compliance purposes.
- Wasting hours of time managing policies and employee attestation processes manually, using email and spreadsheets.
- Failing to target the right policies to the right employees, particularly in larger, complex or global businesses.

Easy access, easy administration

Xoralia takes much of the pain away by providing a trusted central policy library where employees know they can find the latest version of a policy. And because Xoralia is built on SharePoint it can easily integrate into your existing SharePoint intranet or Microsoft 365 digital workplace. This integration with Microsoft also means Xoralia automatically knows who is who in your organisation via Entra ID (formerly, Active Directory).

Xoralia also uses automation to make policy management and administration a breeze, helping policy owners to keep everything up to date, and doing all the heavy lifting on processes around onboarding, employee attestation, and compliance-based reporting. No more email and spreadsheets!

Key features



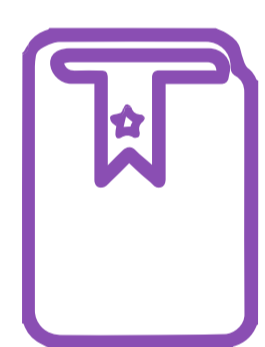
Central policy hub

One central place for all your policy documentation for both employees and policy owners, with search and browsing options.



Reporting and tracking

Automated, real-time reporting to measure adoption, track success and see who is or isn't reading your policies. Includes analytics, dashboards, audit trails and Power BI integration.



Mandatory reads

Notify users to request them to acknowledge that they have read and understood mandatory policies, with automated reminders, supporting onboarding, annual recurring mandatory reads, compliance processes and more.



Notifications and reminders

Automatically send notifications to individuals about new or updated policies, as well as reminders to read mandatory policies, allowing you to "set and forget".



Target individuals and groups

Ensure your people see policies relevant to their location, department / division and role leveraging existing Microsoft 365 groups and Entra ID profile data.



Line manager dashboards

Real time dashboards let line managers know whether or not their direct reports are reading their mandatory policies.



Easy attestation

Use electronic signatures for mandatory reads to demonstrate compliance reporting to third parties and use tracking to achieve high read rates.



Advanced search

Flexible search options to ensure policies are easily findable using custom keywords, tags and metadata to filter the search by department, location, topic and more.



Quiz builder

Build custom quizzes with pass marks to test employees to ensure they have digested and understood a particular policy.



Review & expiry

Help policy owners keep documents up to date with automated review dates and reminders, as well as personalised views to manage policies through their lifecycle.



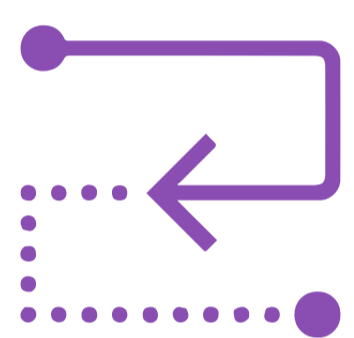
Teams & Viva integration

All policies are accessible via Teams and employees can even use the attestation features, all within the daily flow of work. Now also accessible from the Viva Connections dashboard.



Personalised dashboard

A personalised dashboard so that every user can see the policies they need to read and attest to.



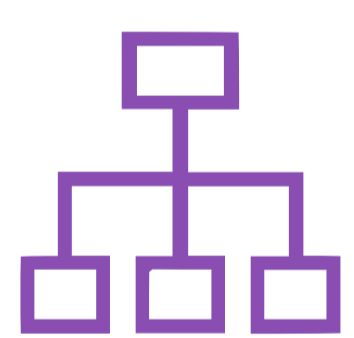
Workflows

Use approval workflows, audit trails and automation to help create and update policies in a controlled way.



Read history records

The read report allows policy document owners to view who has read and attested to their documents, when it happened and which version was read.



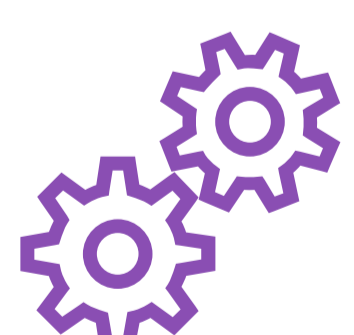
Version control

Ensure there is only one version of a policy in circulation and keep track of changes with the ability to roll back if necessary.



Line managers dashboard

Allows line managers to view policy-related task progress across their team, including attestations.



Rich API

Use Xoralia's API to integrate with other applications across your digital workplace.

Why choose Xoralia?

There is a lot of choice in the policy management software market. Here are just some of the reasons Xoralia stands out:

Meets everyone's needs

Packed with features to support users, policy owners, compliance managers, HR, and executive boards.

Ticks the boxes

Mature, feature-rich solution with well-designed and intuitive interfaces.

Microsoft 365 integration

Based on SharePoint, integrating seamlessly with your existing Microsoft 365 digital workplace.

Fit for purpose

Highly secure, scalable, flexible, extendable and configurable – a solution that fits **your** needs.

Quick and easy implementation

Get up and running in hours if necessary.

No learning curve

Based on popular Microsoft technologies like Word, PowerPoint, SharePoint and Teams - so it is already familiar. But Xoralia has also been carefully designed to be intuitive, with support and clear documentation.

Effortless to manage

100% SaaS solution so all upgrades are managed by us.

Regular updates

An active product roadmap, regularly updated with new features and improvements.

Influenced by you

Requests and feedback from our customers heavily influence our product roadmap.

Reliable vendor

Managed by Content Formula, with decades of international experience in SharePoint, Microsoft 365 and the digital workplace space.

Which organisations use Xoralia?

- Because it so flexible, Xoralia can be used by everybody, from smaller organisations with simple needs through to large, complex enterprises with advanced compliance needs.
- Xoralia is used across multiple sectors including Healthcare, Financial services and banking, Energy and utilities, Education, Manufacturing, Retail, Construction and more.

Get in touch

Want to explore how Xoralia can support compliance and policy management in your organisation? Get in touch or arrange a free demo on <https://Xoralia.com> !