KNOWLEDGE BASE ARTICLE

How Policy Compliance Is Calculated for a Selected Date

2026 © Vitextra SIA. All rights reserved.

Disclaimer

For the purposes of this Disclaimer:

- **Company** (referred to as either "the Company", "We", "Us" or "Our" in this Disclaimer) refers to Vitextra SIA, LV-1009 Riga, Matise iela 61 - 25.
- **Document** refers to the Knowledgebase Article.
- **You** means the individual accessing the Document, or the company, or other legal entity on behalf of which such individual is accessing or using the Document, as applicable.
- **Website** refers to Vitextra, accessible from https://vitextra.com

Disclaimer

The information contained in the Document is for general information purposes only.

The Company assumes no responsibility for errors or omissions in the contents of the Document.

In no event shall the Company be liable for any special, direct, indirect, consequential, or incidental damages or any damages whatsoever, whether in an action of contract, negligence, or other torts, arising out of or in connection with the use of the contents of the Document. The Company reserves the right to make additions, deletions, or modifications to the contents in the Document at any time without prior notice.

Errors and Omissions Disclaimer

The information given by the Document is for general guidance on matters of interest only. Therefore, errors can occur even if the Company takes every precaution to ensure that the Document's content is current and accurate. Plus, given the changing nature of laws, rules, and regulations, there may be delays, omissions, or inaccuracies in the information contained in the Document.

The Company is not responsible for any errors or omissions, or for the results obtained from the use of this information.

Fair Use Disclaimer

The Company may use copyrighted material that the copyright owner has not explicitly authorized. The Company is making such material available for criticism, comment, news reporting, teaching, scholarship, or research.

The Company believes this constitutes a "fair use" of any such copyrighted material as provided for in section 107 of the United States Copyright law.

If You wish to use copyrighted material from the Document for your own purposes that go beyond fair use, You must obtain permission from the copyright owner.

"Use at Your Own Risk" Disclaimer

All information in the Document is provided "as is", with no guarantee of completeness, accuracy, timeliness or of the results obtained from the use of this information, and without warranty of any kind, express or implied, including, but not limited to warranties of performance, merchantability and fitness for a particular purpose.

The Company will not be liable to You or anyone else for any decision made or action taken in reliance on the information given by the Service or for any consequential, special or similar damages, even if advised of the possibility of such damages.

Contact Us

If you have any questions about this Disclaimer, You can contact Us by email: support@vitextra.com.

Table of contents

Select the reporting date 4

Understand historical status rules 4

Calculate the main percentage 5

Compare the matrix, trend and median 5

Know when the result is insufficient 5

Reconstruct one assignment by hand 6

Explain differences between two saved reports 6

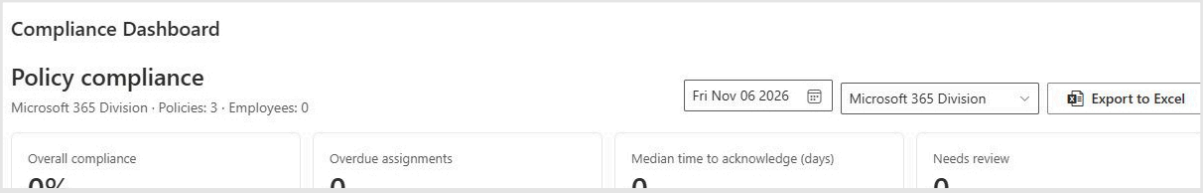
Verify a report before sharing 6

The date filter in Compliance Dashboard calculates an earlier view from the assignment records currently available. It is useful for comparing progress, but it is not a complete event-by-event historical database. Interpret the result with the policy scope, department filter and current record state in mind.

Select the reporting date

Open Compliance Dashboard with reporting access and choose **Status as of the selected date**. You can select today or an earlier date. Review any policy-specific link, configured category restriction and department selection before comparing results. Those filters determine which assignments enter the calculation.

Assignments created after the selected day are omitted. For a record currently acknowledged, the calculation checks its acknowledgement date: if confirmation occurred later than the selected day, it is treated as open or overdue at that earlier point.



Selecting the date and scope of a historical calculation

Understand historical status rules

Current record condition	Calculated historical treatment
Assigned after the selected day	Not included yet.
Acknowledged on or before that day	Acknowledged.
Acknowledged later	Assigned or overdue according to the due day.
Open with an earlier due day	Overdue.
Open with no earlier due day	Assigned.
Exempt, paused or review-required	Uses the currently stored special status; earlier transitions are not fully reconstructed.

The comparisons use day boundaries rather than an exact intraday event replay.

Browser date handling can matter around time-zone boundaries. A confirmation earlier or later within the same day is not represented as separate historical snapshots by this filter.

Calculate the main percentage

Overall compliance divides acknowledged assignments by included assignments after excluding exempt and paused states. Review-required assignments remain in the denominator. The count is assignments, not unique employees.

For example, if the selected scope has 10 assignments, including 6 acknowledged, 1 exempt and 1 paused, the denominator is 8 and the compliance percentage is 75%. An employee with several policies contributes more than one assignment; the employee count shown elsewhere is a different measure.

Compare the matrix, trend and median

The policy-by-department matrix uses the current version of policies that are currently published or under review. The overall indicator can include other versions in the selected policy scope. Averaging matrix percentages is therefore not a reliable way to reproduce the overall result.

The trend has 6 monthly points, using each month end or the selected date where appropriate. The median acknowledgement duration uses completed assignments assigned within the preceding 90 days and acknowledged by the selected date. The associated UI wording refers to campaigns, but the implementation filters assignment dates rather than campaign-creation dates.

Know when the result is insufficient

Warning

A record exempted today can influence a past-date calculation even if it was not exempt on that past date. Current policy status, current version and assignment department values can also shape the report. Do not describe this view as a complete historical reconstruction or use it alone to establish every past status transition.

For a specific investigation, retain the assignment rows, acknowledgement events, version information and audit entries. A historical export uses the calculated status but still includes current stored date fields; a later acknowledgement timestamp can

appear on a row whose historical status was assigned. See KB10532. How to Export Policy Compliance Assignments to Excel.

Reconstruct one assignment by hand

Consider a sample assignment created on day 1, due on day 5 and acknowledged on day 8. Before day 1 it is not included. On day 5 it is still within the deadline. On day 6 it is overdue. On day 8, if its current record has the acknowledgement and date, the historical calculation treats it as acknowledged.

This example illustrates day-level status calculation, not a minute-by-minute event history. If the confirmation occurred late on day 8, the filter still evaluates the selected day as a whole. When exact event timing matters, inspect the evidence timestamp rather than inferring it from a daily percentage.

Now compare a currently exempt assignment. Its historical treatment uses the stored special state rather than finding the date when an exemption took effect. Even if the exemption was decided later, a past-date view can be influenced by that current state. This is why a report based solely on today's records cannot prove every status that existed at a past moment.

Explain differences between two saved reports

Two exports generated at different times for the same selected day can differ if relevant current records have changed. Policy status or version, stored assignment attributes and special states can affect the result. A difference should prompt reconciliation of the scope and records, not an immediate conclusion that the date filter is randomly changing data.

For comparison, retain the selected date, policy/category restrictions, department and export time. Identify a sample of changed rows and inspect their assignment and evidence records. Determine whether the difference comes from a later confirmation, a special-status change, a different current version or another scope change.

Use wording such as “calculated from the records available at export time” when presenting a historical result with these limits. Do not use the dashboard as the sole source for an assertion about every past exemption or pause. Version history, acknowledgement events and the administrative audit log provide different supporting context, although none should be assumed to capture every possible external SharePoint change.

Verify a report before sharing

Record the selected date, policy/category scope and department. Reconcile a few known examples manually, including one confirmed after the date and one exemption. Explain the calculation limits alongside any historical conclusion. For a current operational dashboard, see KB10508. Compliance Dashboard: How to Analyze Policy Acknowledgement.