

Publishing Documents

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Introduction

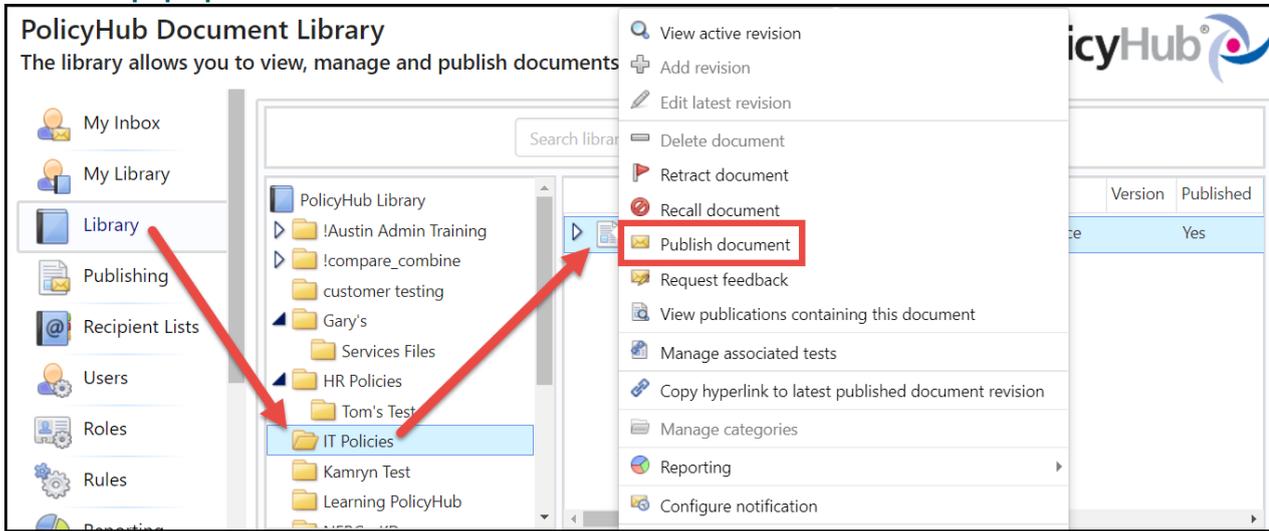
This guide shows how to publish documents. This entails sending documents out to your end-users, either simply uploading them to their library or requiring them to open and attest to having read them.

NOTE: A single Publication may contain any number of documents, tests, and/or questionnaires.

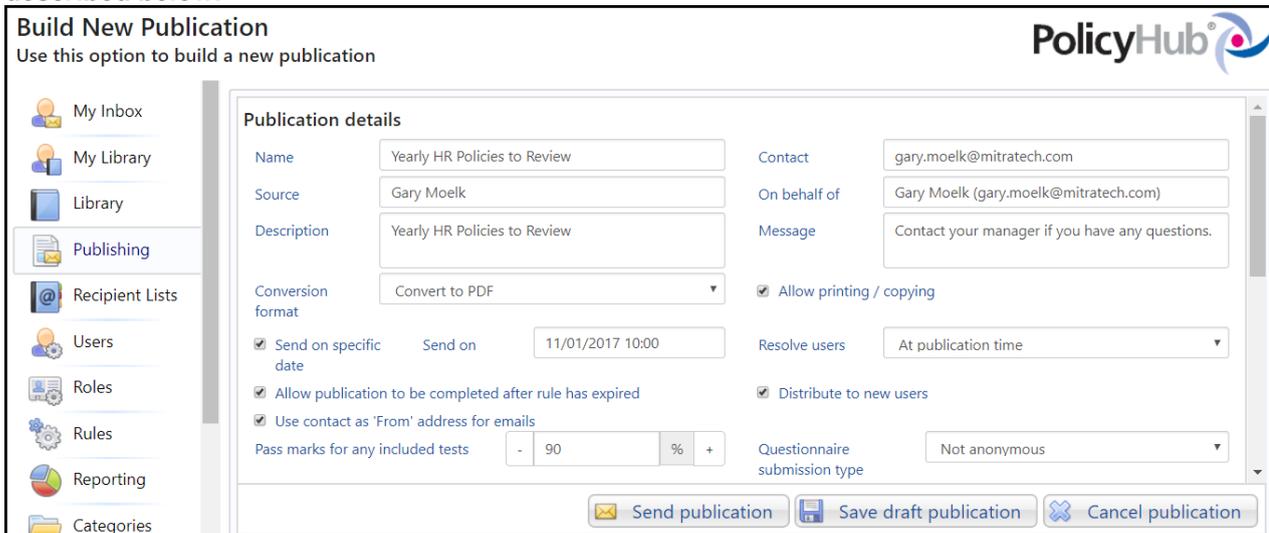
Creating a New Publication

Step 1: Go to the *Library* menu item in the left-hand column:

- Click on the folder that contains at least one of the documents you want to publish.
- Right-click one of the documents you want in your publication.
- In the pop up box click **Publish document**.



Step 2: Complete the desired fields in the *Publication details* section at the top of the screen, as described below.



- **Name:** Enter a name for the Publication. This name is displayed in the recipient’s Inbox – this field is required.

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- **Source:** Person or organization responsible for the publication – this field is required.
- **Description:** Any further detail you want to add about the publication – this description will be seen by the end-user when clicking the info icon.
- **Conversion format:** The file format (either Source or PDF) in which you want the end-user to receive the document(s) in the publication – the PDF option is relevant only for Office documents.
- **Contact:** Email address that you may (optionally) designate as the contact for this publication
- **On behalf of:** The name of the person or department the Publication is being sent on behalf of.
- **Message:** The message will be included in the email notification after the standard text when the Publication is sent. (This *Message* is ignored if the rule used has *Send notification message* set to *No*.)
- **Allow printing/copying:** If you select *Convert to PDF* as the *Conversion format*, this checkbox will display where you can choose to allow the recipients to print the document (By default, *Allow printing/copying* is selected.)
- **Send on specific date:** By default the Publication is sent when the *Send Publication* button is clicked. When *Send on specific date* is selected, you can configure a date and time when the Publication will be sent. NOTE: If you select *Send on specific date*, you cannot Save a draft publication.
- **Allow publication to be completed after rule has expired:** Allows the recipients to complete a Compliance Publication after the due date that is defined in the accompanying rule.
- **Distribute to new users:** If checked, when new Users are added to a *Group*, (if the Group is part of your Recipient List), the new users will also be sent the Publication.
- **Use contact as 'From' address for emails:** Will use your contact email address as the From address on the email notification. If this tick box is cleared, the default address is used.
- **Send status updates to this address:** (This option is available for Feedback/Review Publications only.) When this option is selected, the Reviewer will be sent an email when each user finishes their review.
- **Pass mark for any included test:** (This option is available only when a Test is part of the publication.) Enter a value between 0 and 100. This is the percentage of correct answers the recipient needs to pass the Test.
- **Questionnaire submission type:** (This option is available only when a Questionnaire has been added to the *Items to be published*.) Select *Not anonymous*, *Optionally anonymous* or *Anonymous*.

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Step 3: In the “Items to be published section”, the original item you clicked in Step 1 will already be in the list. If you want to add other documents to your publication click the button **Add documents** in the bottom right hand of the section.

Build New Publication
Use this option to build a new publication

PolicyHub

My Inbox
My Library
Library
Publishing
Recipient Lists
Users
Roles
Rules
Reporting
Categories
Workflow Design

Description	Version	Show differences	Publish type	Modified date	Modified by	Used
branch example	1.00	No	Take questionnaire	10/4/2017	Gary Moelk (gary...	0
Mitratech Trade C...	2.03	No	Read document	6/6/2017	US Support (ussup...	4
PolicyHub Test	1.00	No	Take test	10/5/2017	Gary Moelk (gary...	1

Intended recipients

Name	Description	Publication rule	Priority
Gary	Gary		Normal

Send publication Save draft publication Cancel publication

Step 4: The Library screen will display. Drill down to the folder(s) that contains the document(s) that you want to add to the publication. After you have clicked on and highlighted the document(s), click the **Select** button at the bottom of the screen.

Search library Search Advanced

PolicyHub Library

- !Austin Admin Training
- lcompare_combine
- customer testing
- Garry's
- HR Policies
 - Tom's Test
- IT Policies
- Kamryn Test
- Learning PolicyHub
- NERC - KD
- New folder
- Questionnaire
- test
- Test Folder
- tom
- Tom & Ben#

Name	Description	Version	Published	Added by	Source	On behalf of	Created	Next review	Classif
Services Files									
Branch Example	Branch Example		No	Gary Mo...	Gary Mo...	Gary Moel...			
By_Their_Fruit3-27-2017	By Their Fruit		Yes	Gary Mo...	goelk	Syntax			
CMO_Entity Tabs-gwm	Enter the help project title h...		Yes	Gary Mo...	Enter you...	Enter your ...			
Flash Report Config	Flash Report Config		Yes	Gary Mo...	Gary Mo...	Gary Moel...			
Intelligence Test	Intelligence Test		Yes	Gary Mo...	Gary Mo...	Gary Moel...			
Mitratech Trade Compliance	Mitratech Trade Compliance		Yes	Gary Mo...	Mark Rida	Gary Moel...		None	
PolicyHub Questions	PolicyHub Questions		No	Gary Mo...	Gary Mo...	Gary Moel...			
PolicyHub Test	PolicyHub Test		Yes	Gary Mo...	Gary Mo...	Gary Moel...			
PolicyHub Training	PolicyHub Training		No	Gary Mo...	Gary Mo...	Gary Moel...			
PolicyHub Walkthrough	PolicyHub Walkthrough		Yes	Gary Mo...	Gary Mo...	Gary Moel...			
PolicyHubTrainingAgenda	PolicyHubTrainingAgenda		Yes	Gary Mo...	Lee Colli...	Gary Moel...			

Select Cancel

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Step 5: You will be returned to the *Build New Publication* screen that you have been completing. Scroll down to the *Intended Recipients* section and click the *Add recipients* button.

Build New Publication
Use this option to build a new publication

PolicyHub

My Inbox
My Library
Library
Publishing
Recipient Lists
Users
Roles
Rules
Reporting
Categories
Workflow Design

Description	Version	Show differences	Publish type	Modified date	Modified by	Used
Branch Example	1.00	No	Take questionnaire	10/4/2017	Gary Moelk (gary...	0
Creating and Editi...	1.00	No	Read document	10/27/2017	Gary Moelk (gary...	0
Intelligence Test	1.00	No	Take test	10/23/2017	Gary Moelk (gary...	1

Intended recipients

Name	Description	Publication rule	Priority
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Send publication Save draft publication Cancel publication

Step 6: You will be taken to the screen *Select recipients to be used*. Select recipients from the Recipients lists tab (refer to the QRG “Creating and Editing Recipient Lists” for more information if you do not see the Recipient List you need):

- Select the Recipient list that you want to add and then click the Select button at the bottom of the screen (all users in the Recipient list will be selected).

Select recipients to be used

Groups Recipient lists Unassigned users

Recipient lists

Name	Description	Active
Production Department	Production Department	Yes
Reviewers	Reviewers	Yes
Root	root	Yes
Services US	Services US	Yes

Selected list members (Production Departmen...)

Type	Name	First name	Surname	Email address
	Jay Sullivan	Jay	Sullivan	jay.sullivan@mitratech.com
	Gary Moelk	Gary	Moelk	gary.moelk@mitratech.com
	Boston Office Users			
	Austin Training			

Download to CSV Create new list Add to list

Select Cancel

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Step 7: You will be returned to the Build New Publication screen.

- Select a Publication rule for each of the Intended recipients. You may select different rules for each or keep the same rule for all.

NOTE: Priority is important **ONLY** if you have multiple recipient lists where a user falls within more than one list **AND** the rule is different for those Recipient Lists.

NOTE: If you have a Test as part of your publication, you will need to use a Publication rule that contains Test criteria.

Build New Publication
Use this option to build a new publication

PolicyHub

Description	Version	Show differences	Publish type	Modified date	Modified by	Used
Branch Example	1.00	No	lake questionnaire	10/4/2017	Gary Moelk (gary...	0
Creating and Editi...	1.00	No	Read document	10/27/2017	Gary Moelk (gary...	0
Intelligence Test	1.00	No	Take test	10/23/2017	Gary Moelk (gary...	1

Intended recipients

Name	Description	Publication rule	Priority
Austin Training	Austin Training	2 weeks & an intelligence test	Normal
All Users	All	2 weeks & an intelligence test	Normal
All Mitrtech	All Mitrtech	2 weeks & an intelligence test	Normal

Send publication Save draft publication Cancel publication

Step 8: Click the *Send Publication* button.