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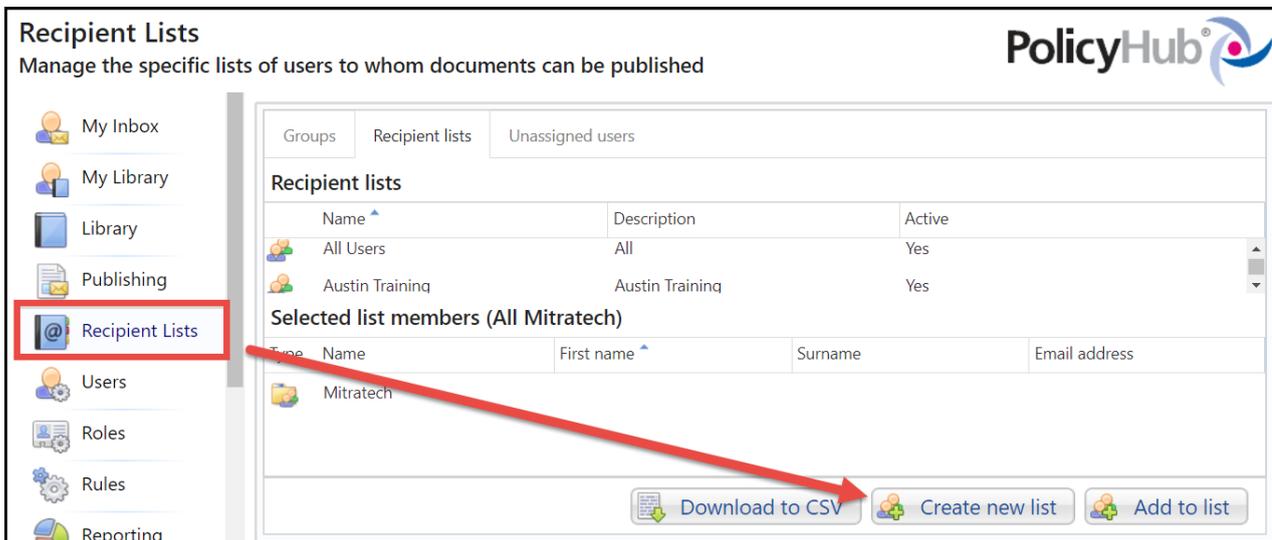
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Introduction

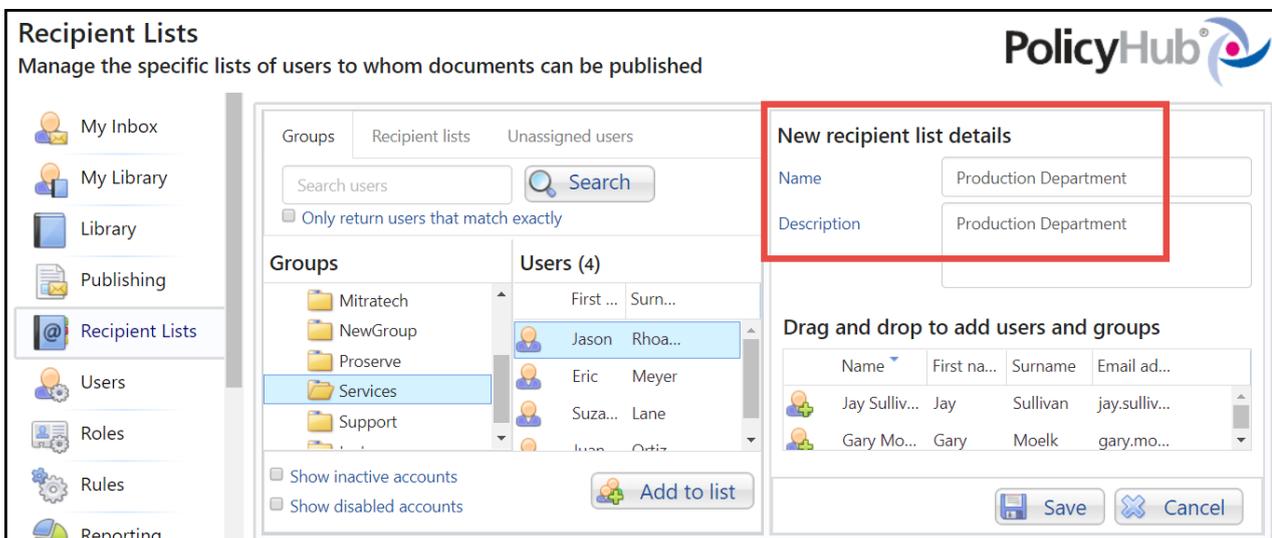
This guide shows how to create Recipient Lists which are one of the building blocks needed when creating and sending Publications.

Creating a New Recipient List

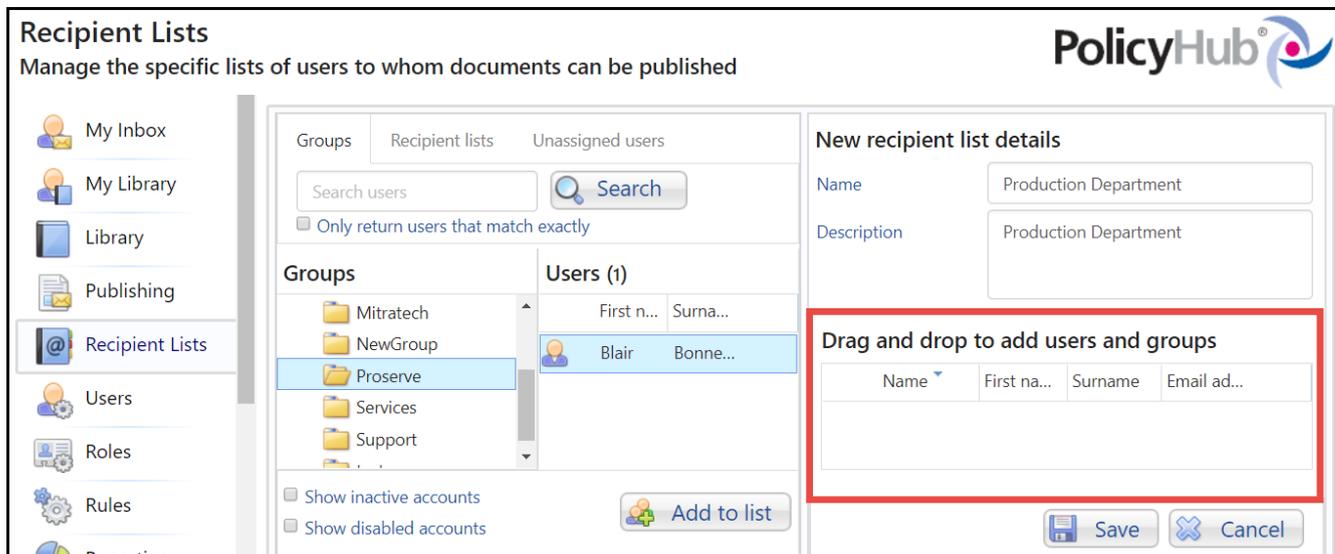
Step 1: Click on *Recipients Lists* in the left-hand column and in the *Recipient Lists* screen click the button "Create new list":



Step 2: In the *New recipient list details* section on the right-hand side of the screen add a *Name* and *Description* of your list.



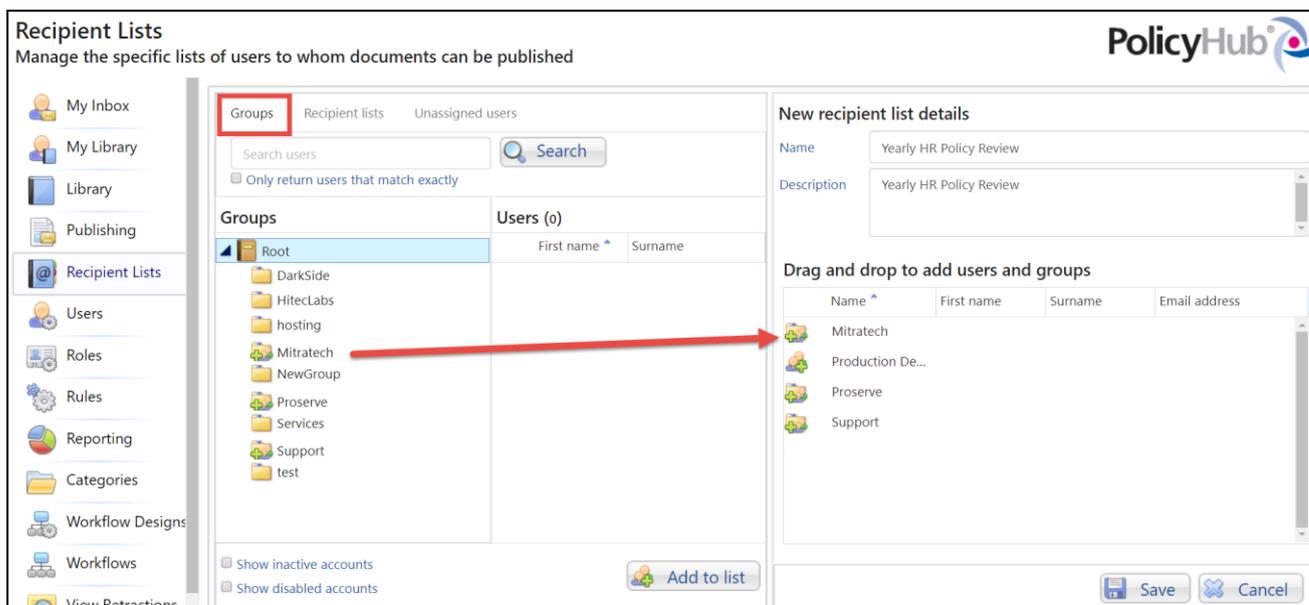
Step 3: Next you need to add people to the Recipient list by populating the box in the bottom right hand section of the screen.



People can be added to the list from any combination of the 3 tabs in the top left-hand section of the screen.

From the Groups tab (normally recommended method):

- In the *Groups* folder structure in the bottom center of the screen, drill down to find the folder containing the user(s) you want to add to the list. The user(s) in that folder will display under the *Users* list to the right of *Groups*.
- Find the User(s) you want to add and do one of the following:
 - Drag and drop an entire group to the right



- Right-click on the group and the Users in that group will display in the Users column. Then either drag the user over to the right OR click the drop down arrow to the right of the user and in the drop-down box below their name (as shown below) click *Add to recipient list*

- You may alternatively drag an entire group into the new recipient list.

The screenshot displays the PolicyHub interface for managing recipient lists. The main heading is "Recipient Lists" with the subtitle "Manage the specific lists of users to whom documents can be published". The interface is divided into several sections:

- Left Navigation Panel:** Contains icons and labels for "My Inbox", "My Library", "Library", "Publishing", "Recipient Lists" (highlighted), "Users", "Roles", and "Rules".
- Top Tabs:** "Groups" (highlighted with a red box), "Recipient lists", and "Unassigned users".
- Search Area:** Includes a "Search users" input field and a "Search" button. Below it is a checkbox for "Only return users that match exactly".
- Groups List:** A tree view showing folders: "Mitrtech", "NewGroup", "Proserve", "Services" (highlighted with a red box), and "Support". A red arrow points from this "Services" folder to the "Users" list.
- Users List:** Titled "Users (4)", it shows a table of users with columns for "First ..." and "Surname ...". A context menu is open over a user, showing options: "Add to recipient list" (highlighted with a red box), "Deactivate user", and "Reporting".
- Right Panel:** "New recipient list details" with input fields for "Name" (Production Department) and "Description" (Production Department). Below this is a table titled "Drag and drop to add users and groups" (highlighted with a red box) containing the following data:

Name	First na...	Surname	Email ad...
Gary Mo...	Gary	Moelk	gary.mo...
Eric Meyer	Eric	Meyer	Eric.Mey...

At the bottom of the right panel are "Save" and "Cancel" buttons.

From the *Recipient Lists* tab:

- Find the list(s) you want to add users from and do one of the following:
 - Drag and drop the group to the right and all members of the group will be added to your new Recipient list
NOTE: If you select a recipient list, the individual names will not display. You will now have a list within a list (any names added to the “parent” list will then also be part of this “child” list).
 - Right-click on the list and in the drop down box (as shown below) click *Add to recipient list*
 - Right-click on the list and in the drop down box (as shown below) click *Show all users*. Then either drag and drop each user to the right, or right-click on each user you want to add and click on *Add to recipient list* in the box that displays

Recipient Lists
Manage the specific lists of users to whom documents can be published

Groups **Recipient lists** Unassigned users

Recipient lists

Name	Description	Active
All Mitratech	All Mitratech	Yes

Selected list

- + Add to recipient list
- Edit list
- Delete list
- Deactivate recipient list
- Show all users
- Reporting

New recipient list details

Name: Production Department
Description: Production Department

Drag and drop to add users and groups

Name	First name	Surname	Email ad...
Gary M...	Gary	Moelk	gary.mo...
Jay Sulli...	Jay	Sullivan	jay.sulliv...

Download to CSV Add to list Save Cancel

From the *Unassigned users* tab:

- You will see listed *Users not in a recipient list* if there are any (this tab will not show any users if there are none unassigned (as show below):
 - Drag and drop to the right and any users you want to add to your Recipient list or right-click on the user(s) and in the drop down box click *Add to recipient list* as shown in the tabs above
 - NOTE: This tab can also be used as a check to see which users were NOT yet assigned to a list.

Recipient Lists
Manage the specific lists of users to whom documents can be published

Groups Recipient lists **Unassigned users**

Users not in a recipient list (0)

First name	Surname	Email addr...	Created
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Show users only in unnamed recipient lists
 Show users only in inactive recipient lists

Add to list

New recipient list details

Name: Production Department
Description: Production Department

Drag and drop to add users and groups

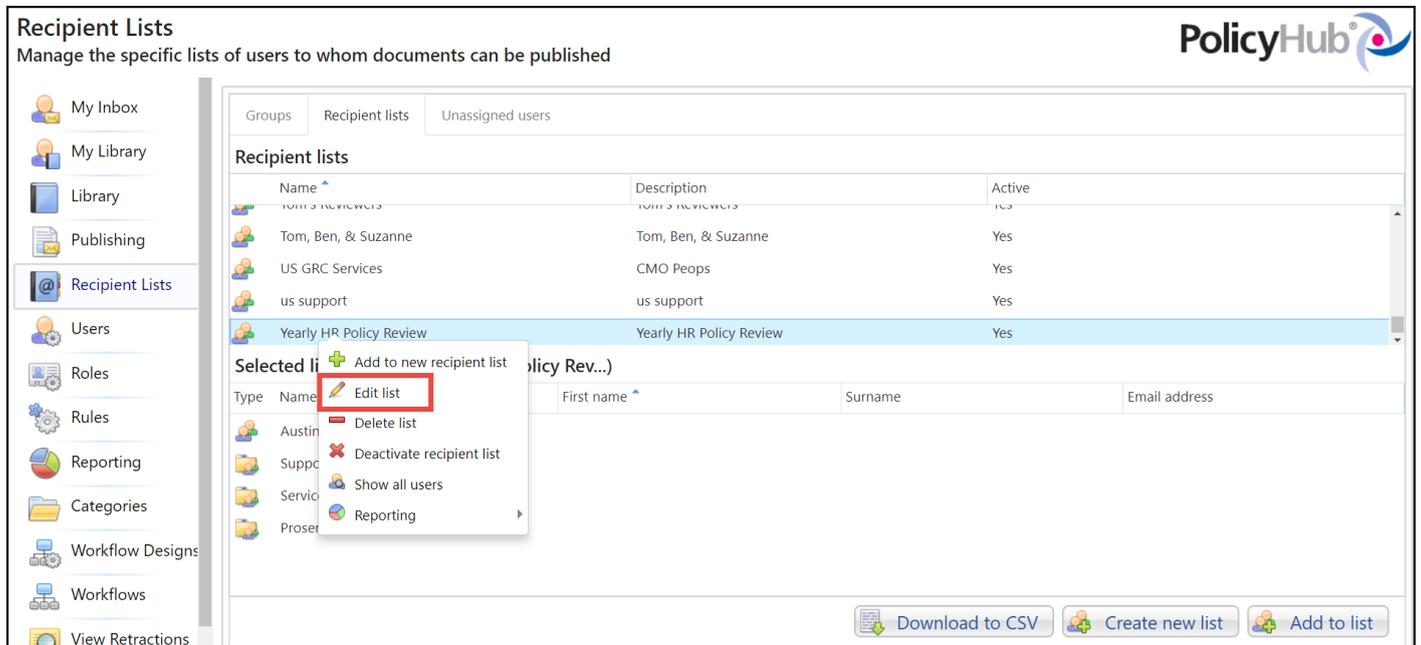
Name	First name	Surname	Email ad...
All Mitra...			
Gary M...	Gary	Moelk	gary.mo...

Save Cancel

Step 3: Click Save at the bottom of the screen.

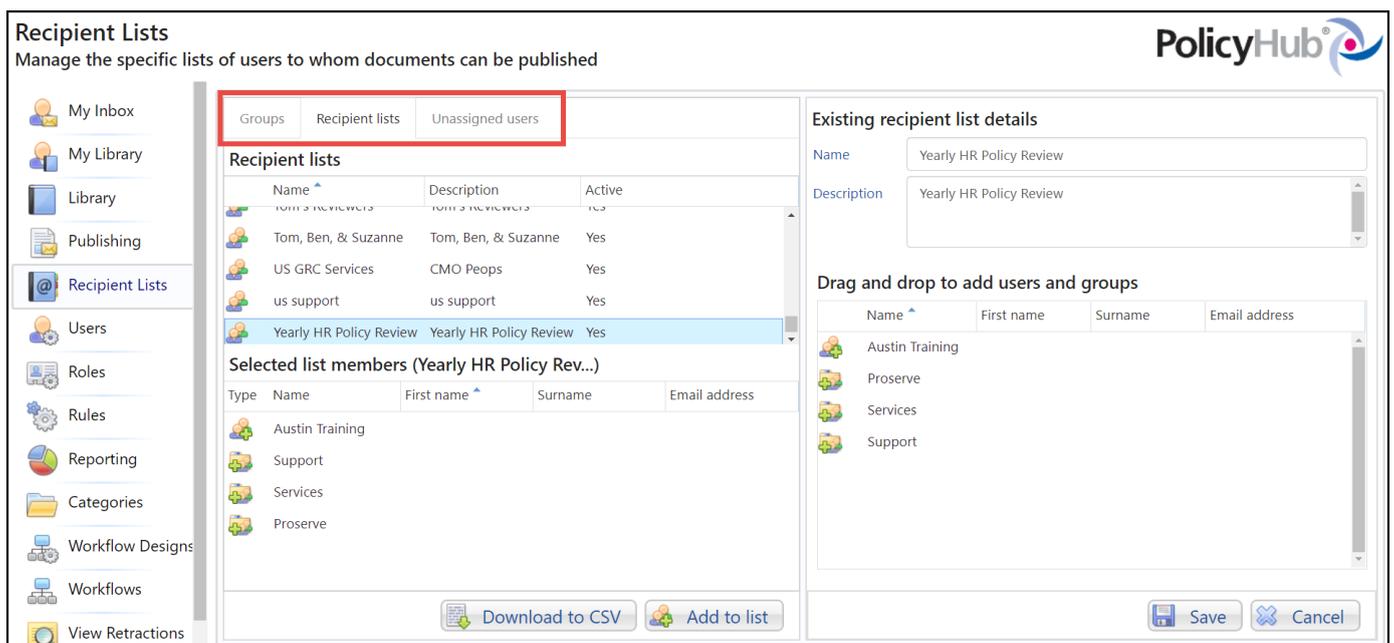
Adding New People to an Existing Recipient List

Step 1: Click on *Recipients Lists* in the left-hand column and in the *Recipient Lists* screen find the recipient list you want to add people to. Right click on the list and in the drop down box click the button “Edit list”:



Step 2: In the screen that displays, use the tabs above the Recipient lists to find new users to drag and drop to the right-hand column, as you initially did in Step 3 of the section Creating a New Recipient List. Then click the Save button.

Note that only the name of your list displays in the bottom right-hand side of the screen, and not all individual members.



Removing People from an Existing Recipient List

Step 1: Click on *Recipients Lists* in the left-hand column and right-click the recipient list to which you want to remove users. In the drop down box, click *Edit list*.

The screenshot shows the PolicyHub interface for managing recipient lists. On the left, a navigation menu includes 'My Inbox', 'My Library', 'Library', 'Publishing', 'Recipient Lists', 'Users', 'Roles', and 'Rules'. The main area is titled 'Recipient Lists' and contains a table of lists. The 'Production Department' list is selected, and a context menu is open over it. The menu options are: 'Add to new recipient list', 'Edit list' (highlighted with a red box), 'Delete list', 'Deactivate recipient list', 'Show all users', and 'Reporting'. A red arrow points to the 'Production Department' row in the table.

Name	Description	Active
Production Department	Production Department	Yes

Step 2: Go to the section Drag and drop to add users and groups in the bottom right-hand section of the screen. Find the user you want to remove from the list and do one of the following:

- Right click on the user name or click the drop down button to the right of the name.
- Click *Remove user from selected recipients*

The screenshot shows the PolicyHub interface for editing a recipient list. The 'Production Department' list is selected, and the 'Existing recipient list details' section is open. The details show the list name and description. Below this is the 'Drag and drop to add users and groups' section, which contains a table of users. The user 'Gary Moelk' is selected, and a context menu is open over it. The menu options are: 'Remove user from selected recipients' (highlighted with a red box), 'Save', and 'Cancel'. A red arrow points to the 'Gary Moelk' row in the table.

Name	First name	Surname	Email ad...
Jay Sullivan	Jay	Sullivan	jay.sullivan...
Gary Moelk	Gary	Moelk	gary.moelk...
Boston Offi...			

Click **Save** at the bottom of the screen.