

Contents

Introduction.....	1
Creating a New Recipient List.....	1
Adding New People to an Existing Recipient List.....	5
Removing People from an Existing Recipient List.....	6

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":

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

PolicyHub

Groups Recipient lists Unassigned users

Recipient lists

Name	Description	Active
All Users	All	Yes
Austin Training	Austin Training	Yes

Selected list members (All Mitrataech)

Type	Name	First name	Surname	Email address
Mitrataech				

Download to CSV Create new list Add to 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.

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

PolicyHub

Groups Recipient lists Unassigned users

Search users Search

☐ Only return users that match exactly

Groups

- Mitrataech
- NewGroup
- Proserve
- Services
- Support

Users (4)

First ...	Surn...
Jason	Rhoa...
Eric	Meyer
Suza...	Lane
Jose	Ortiz

☐ Show inactive accounts
☐ Show disabled accounts

Add to list

New recipient list details

Name Production Department

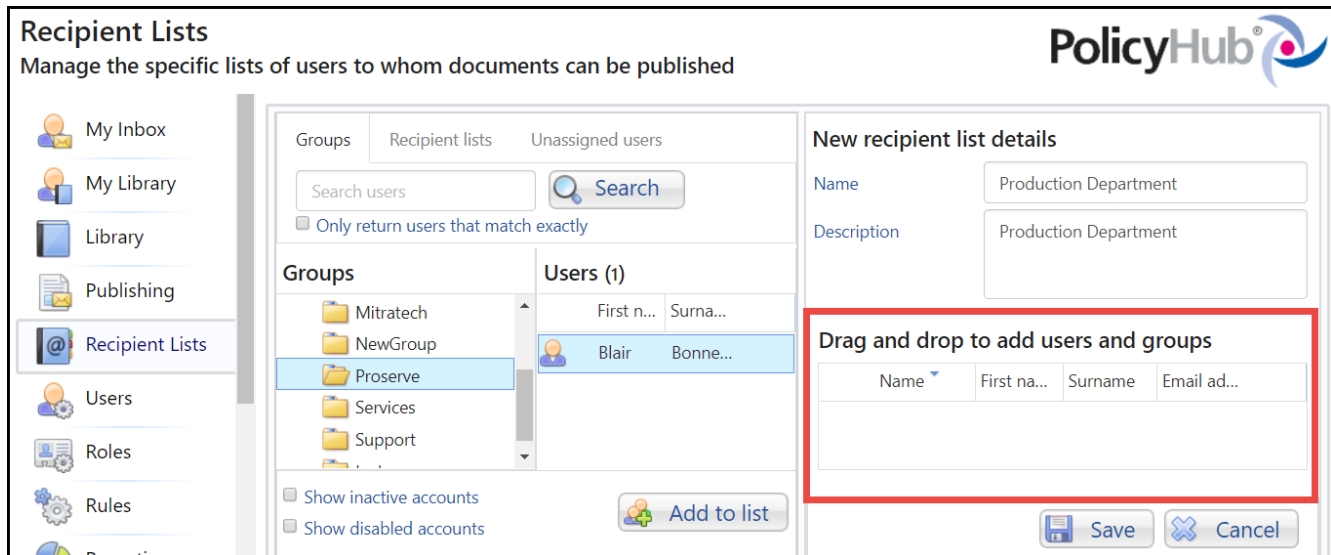
Description Production Department

Drag and drop to add users and groups

Name	First na...	Surname	Email ad...
Jay Sulliv...	Jay	Sullivan	jay.sulliv...
Gary Mo...	Gary	Moelk	gary.mo...

Save Cancel

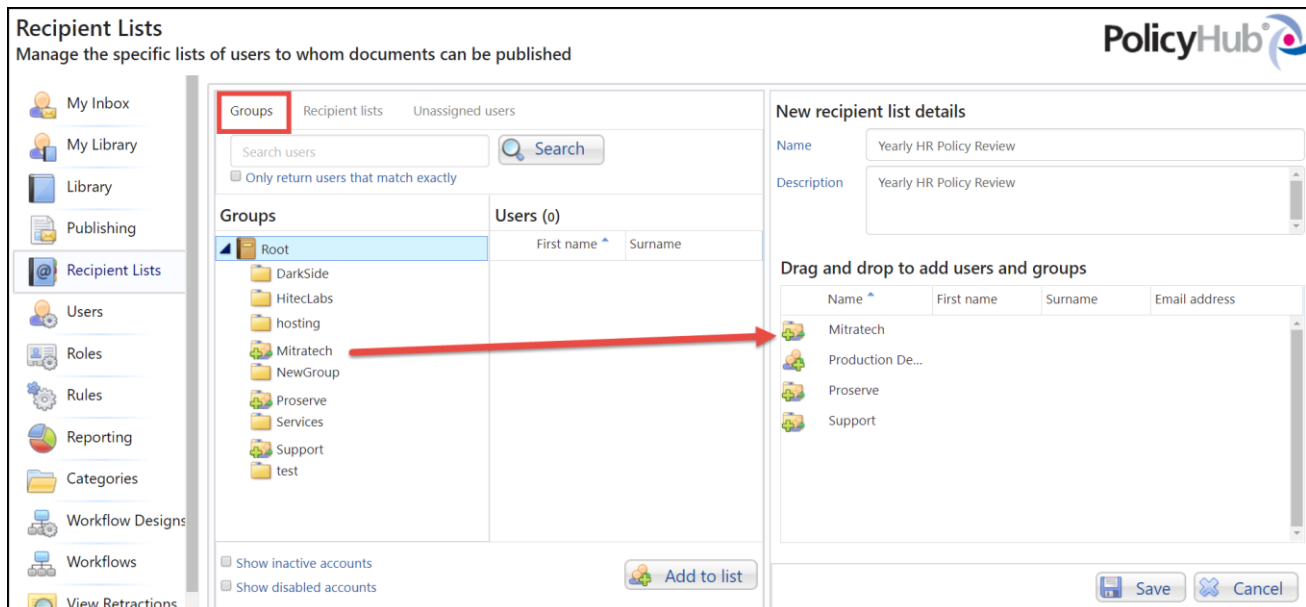
Step 3: Next you need to add people to the Recipient list by populating the box in the bottom right hand section of the screen.



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. On the left, a sidebar contains navigation links: My Inbox, My Library, Library, Publishing, Recipient Lists (highlighted), Users, Roles, Rules, and Reporting. The main content area is titled 'Recipient Lists' with the subtitle 'Manage the specific lists of users to whom documents can be published'. It features three tabs: Groups, Recipient lists, and Unassigned users. The 'Groups' tab is active, showing a search bar and a checkbox for 'Only return users that match exactly'. Below the search bar, there are two columns: 'Groups' and 'Users (4)'. The 'Groups' column lists folders: Mitrtech, NewGroup, Proserve, Services (highlighted), and Support. The 'Users (4)' column shows a table of users with columns for First name, Surname, and Email address. A red box highlights the 'Groups' tab and the 'Services' folder. A red arrow points from the 'Services' folder to the 'Add to recipient list' button in the context menu. Another red box highlights the 'Add to recipient list' button. On the right, the 'New recipient list details' panel shows fields for Name and Description, both set to 'Production Department'. Below this, a red box highlights a table with the heading 'Drag and drop to add users and groups'. The table has columns for Name, First name, Surname, and Email address, and it lists two users: Gary Moelk and Eric Meyer. At the bottom right, there are 'Save' and 'Cancel' buttons.

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

PolicyHub

Groups Recipient lists Unassigned users

Search users Search

☐ Only return users that match exactly

Groups

- Mitrtech
- NewGroup
- Proserve
- Services
- Support

Users (4)

First ...	Surn...
Jason	Rhoa...

+ Add to recipient list

✖ Deactivate user

Reporting

+ Add to list

☐ Show inactive accounts

☐ Show disabled accounts

New recipient list details

Name Production Department

Description Production Department

Drag and drop to add users and groups

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

Save Cancel

Creating and Editing Recipient Lists

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 Mitrtech	All Mitrtech	Yes

Selected list

Type	Name	Email address
Mitrtech	Mitrtech	

Context menu options:

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

Buttons: Download to CSV, 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...
Gary M...	Gary	Moelk	gary.mo...
Jay Sulli...	Jay	Sullivan	jay.sulliv...

Buttons: 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
------------	---------	---------------	---------

☒ Show users only in unnamed recipient lists
☒ Show users only in inactive recipient lists

Buttons: 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...

Buttons: 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”:

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

Groups Recipient lists Unassigned users

Recipient lists

Name	Description	Active
Tom's reviewers	Tom's reviewers	Yes
Tom, Ben, & Suzanne	Tom, Ben, & Suzanne	Yes
US GRC Services	CMO Peops	Yes
us support	us support	Yes
Yearly HR Policy Review	Yearly HR Policy Review	Yes

Selected list (Yearly HR Policy Review)

Type	Name	First name	Surname	Email address
Group	Austin Training			
Group	Support			
Group	Services			
Group	Proserve			

Download to CSV Create new list Add to 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.

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

Groups Recipient lists Unassigned users

Recipient lists

Name	Description	Active
Tom's reviewers	Tom's reviewers	Yes
Tom, Ben, & Suzanne	Tom, Ben, & Suzanne	Yes
US GRC Services	CMO Peops	Yes
us support	us support	Yes
Yearly HR Policy Review	Yearly HR Policy Review	Yes

Selected list members (Yearly HR Policy Review)

Type	Name	First name	Surname	Email address
Group	Austin Training			
Group	Support			
Group	Services			
Group	Proserve			

Existing recipient list details

Name: Yearly HR Policy Review

Description: Yearly HR Policy Review

Drag and drop to add users and groups

Name	First name	Surname	Email address
Austin Training			
Proserve			
Services			
Support			

Download to CSV Add to list Save Cancel

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*.

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

Groups Recipient lists Unassigned users

Recipient lists

Name	Description	Active
Production Department	Production Department	Yes

Selected list members (Production Departmenten...)

Type	Name	First name	Surname	Email address
User	Jay Sullivan	Jay	Sullivan	jay.sullivan@mitratech.com
User	Gary Moelk	Gary	Moelk	gary.moelk@mitratech.com

Download to CSV Create new list Add to list

Context menu options: Add to new recipient list, Edit list, Delete list, Deactivate recipient list, Show all users, Reporting.

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*

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

Groups Recipient lists Unassigned users

Existing recipient list details

Name: Production Department

Description: Production Department

Drag and drop to add users and groups

Selected list members (Production Departmenten...)

Type	Name	First name	Surname	Email address
User	Jay Sullivan	Jay	Sullivan	jay.sullivan@mitratech.com
User	Gary Moelk	Gary	Moelk	gary.moelk@mitratech.com

Download to CSV Add to list

Context menu options: Remove user from selected recipients, Save, Cancel.

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