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Introduction

Using PolicyHub helps you manage the on boarding of any new employees by ensuring that they are automatically sent the policies they need to read, acknowledge and have access to. This is achieved by ticking the 'Distribute to new user' option when creating a publication:

Publication details							^		
Name	Code of Conduct Polic	/	Con	act	t				
Source	Compliance		On b	ehalf of	ССО				
Description	Employee code of con-	duct policy example 2020	Mes	sage	Message				
Conversion format	Convert to PDF			llow printing / copying	I				
 Send on specific date Include in manager escalation emails Allow publication to be completed after rule has expired Automatically retract when group membership changes Use contact as 'From' address for emails 									
Description	Version	Show differences	Publish type	Modified date	Modified by	Used			
Employee code of	con 1.07	No	Read document	25/06/2020	Marilyn Stanley	1			
							🔁 Add documents 🗸		
				Send publication	n 🔚 Save draft pub	lication	Cancel publication		

In order for this option to work correctly, there are a number of items that need to be taken into consideration.

Using the correct Recipient Lists

Distributing to new user only works with recipient lists that contain one or many of the groups that are imported (synchronized) into PolicyHub every 24 hours:

Grou	ups Recipient list	s Unassigned users									
Recip	Recipient lists										
	Name [*]			Description		Active					
<u>_</u>	All Employees			All Employees		Yes		~			
æ	All Managers			All Mitratech Managers		Yes					
<u>_</u>	All Managers - UK			All Managers based in UK		Yes					
æ	All Slough Employe	es		All Slough Employees		Yes					
æ	Client Services			Client Services		Yes		~			
Selec	ted list member	s (All Managers)									
Туре	Name		First name 🕇		Surname		Email address				
	ManagersUK										
	ManagersUS										

Best Practice when using Distribute To New User



Just updating a recipient list by adding one or more employees, or by adding a group, does not trigger the distribute to new user process:

Groups Recipient lists Unassigned users					ting recip	ient list	details				
Search users						All Managers					
Only return users that match exactly					Description All Mitratech Managers						
Groups	Use	rs (5)									
▲ 📔 Groups		First name 📍	Surname								
🔺 🚞 Mitratech	<u>@</u>	Brendan	Lloyd	Dra	ag and dro	op to ad	d users and gro	oups			
	8	David	Jones		Name 🕇		First name	Surname	Email address		
Client Success	2	Marilyn	Stanley -	4	Manage	rsUK					
ManagersUK	2	Michael	Johnson	-	ManagersUS						
SalesUK	2	Robin	Lawrence	e e e e e e e e e e e e e e e e e e e	Marilyn	Stanley	Marilyn	Stanley	marilyn.stanley@		
Senior Leadership											
Testing											
D 🔤 US											
Show disabled / deleted accounts			🚕 Add to list						Save 😂 Cancel		

When creating the publication, if you use a recipient list that contains individuals and tick 'Distribute to new user', you will be warned that the publication won't be sent to anybody new added to the recipient list:

One or more of the recipient lists i	this publication c	ontain individual us	ers. Please n	ote that	
Distribute to New Users and Autor	atic retraction will	only affect groups	within these	recipient	lists
and won't affect users added or re	noved directly fror	n these recipient lis	ts.		
Do you want to continue?					
		6	-	(· · ·	

Best Practice when using Distribute To New User



Deactivating DTNU on Older Publications

When you publish a new version of a policy to the same set of people for attestation, you should go back and switch off distribute to new user on the previous publication. Otherwise, any new employees will receive both the previous and the new publication in their My Inbox.

Go to the publications list for the policy, right-click on the previous publication and select 'Don't distribute to new users':

Publ	ications list													
	Publication na	Description	Source	On behalf of	Creation date	Publica	tion d	Publication ty	Distribute to	0	Automatic ret	Escalation em	Status	
Ì	Code of Cond	Employee co	Compliance	CCO	22/09/2020 1	22/09/2	2020 1	Compliance r	Yes		No	Include	In progress	
	Code of Cond	Code of Cond	Compliance	CCO	12/06/2020 1	12/06/2	2020 1	Compliance r	Yes		No	Exclude	Complete	
Ò	Code of Cond	Code of Cond	Compliance	CCO	04/06/2020 0	04/06/2	2020 0	Compliance r	No	Q	View publication	ı		
ò	Code of Cond	Code of Cond	Compliance	CCO	30/04/2020 1	30/04/2	2020 1	Compliance r	No	÷	Copy publicatio	n		
ò	Code of Cond	Code of Cond	Compliance	ссо	04/02/2020 1	04/02/2	2020 1	Compliance r	No		Delete publicati	on		
	Code of Cond	Code of Cond	Compliance	CCO	14/01/2020 0	14/01/2	2020 0	Compliance r	No		Send publication	ı		
	Code of Cond	Code of Cond	Compliance	CCO	13/01/2020 1	13/01/2	2020 1	Compliance r	No	æ	Don't distribute	to new users		
Star	dard view Eu	ll user breakdow	n Non re	cinients						8	Automatically re	tract		
brai				olpronto							Include in escala	ation emails		
	Group name [*]			Group description			Group r	ule		5	Re-send publica	tion to all non-co	omplied users	
æ	All Slough Employees All Slough Employees Code of Conduct Certification							ation & Test	₽	Retract publicat	ion			
								0	Recall publication	n				
										€	Reporting		Þ	