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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 Policy
Source: Compliance
Description: Employee code of conduct policy example 2020
Conversion format: Convert to PDF

Contact: marilyn.stanley@nowhere.not
On behalf of: CCO
Message: Message

Send on specific date
 Include in manager escalation emails
 Allow publication to be completed after rule has expired
 Use contact as 'From' address for emails

Allow printing / copying
 Distribute to new users
 Automatically retract when group membership changes

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

Buttons: Add documents, Send publication, Save draft publication, 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:

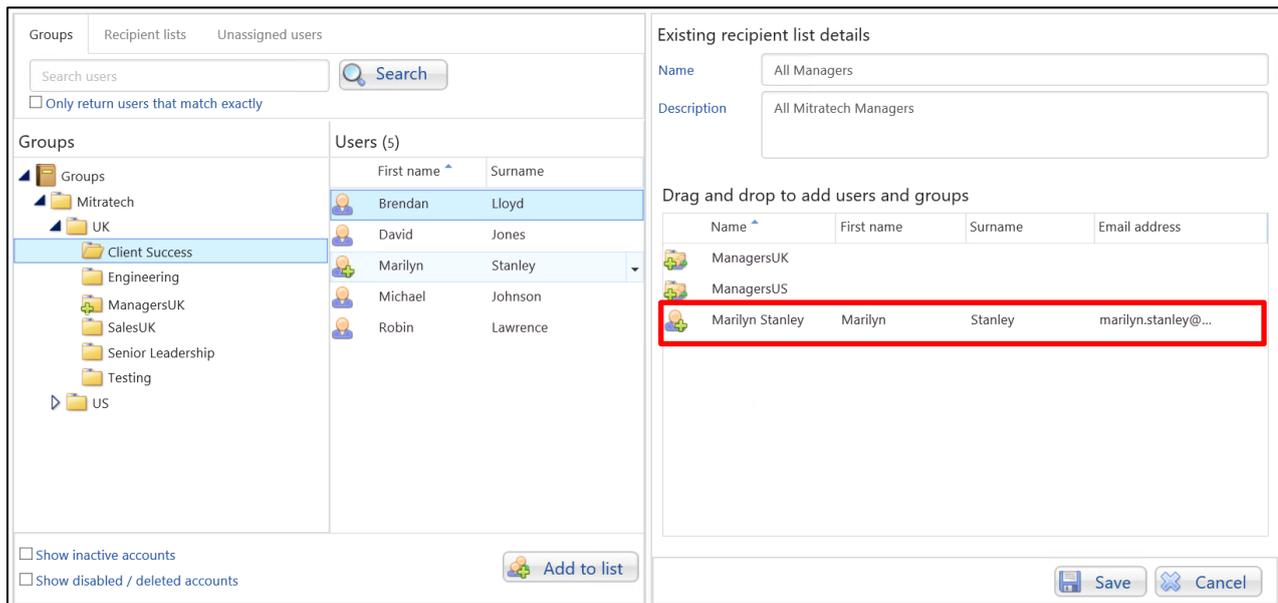
Recipient lists

Name	Description	Active
All Employees	All Employees	Yes
All Managers	All Mitrtech Managers	Yes
All Managers - UK	All Managers based in UK	Yes
All Slough Employees	All Slough Employees	Yes
Client Services	Client Services	Yes

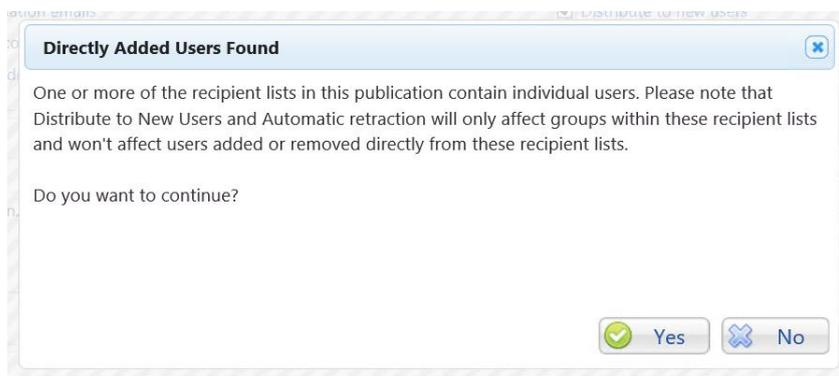
Selected list members (All Managers)

Type	Name	First name	Surname	Email address
Group	ManagersUK			
Group	ManagersUS			

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:



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:



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':

Publications list

Publication na...	Description	Source	On behalf of	Creation date	Publication d...	Publication ty...	Distribute to...	Automatic ret...	Escalation em...	Status	
	Code of Cond...	Employee co...	Compliance	CCO	22/09/2020 1...	22/09/2020 1...	Compliance r...	Yes	No	Include	In progress
	Code of Cond...	Code of Cond...	Compliance...	CCO	12/06/2020 1...	12/06/2020 1...	Compliance r...	Yes	No	Exclude	Complete
	Code of Cond...	Code of Cond...	Compliance...	CCO	04/06/2020 0...	04/06/2020 0...	Compliance r...	No			
	Code of Cond...	Code of Cond...	Compliance...	CCO	30/04/2020 1...	30/04/2020 1...	Compliance r...	No			
	Code of Cond...	Code of Cond...	Compliance...	CCO	04/02/2020 1...	04/02/2020 1...	Compliance r...	No			
	Code of Cond...	Code of Cond...	Compliance...	CCO	14/01/2020 0...	14/01/2020 0...	Compliance r...	No			
	Code of Cond...	Code of Cond...	Compliance...	CCO	13/01/2020 1...	13/01/2020 1...	Compliance r...	No			

Standard view | Full user breakdown | Non recipients

Group name	Group description	Group rule
All Slough Employees	All Slough Employees	Code of Conduct Certification & Test

- View publication
- Copy publication
- Delete publication
- Send publication
- Don't distribute to new users**
- Automatically retract
- Include in escalation emails
- Re-send publication to all non-complied users
- Retract publication
- Recall publication
- Reporting