Online Distribution List Management
User Guide

Revised 8/21/2018

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Introduction

About Online Distribution List Management

Online Distribution List Management allows clients to manage their STAR report distribution lists. Update email addresses and properties on a distribution list, or request the creation or deletion of a distribution list all through the self-service, online interface. For increased transparency in the distribution list update process, clients can view or edit pending changes and view an audit history of all changes made in the past 90 days.

Additional functionality for web user management is available for users with dSTAR distribution lists.

Supported Browsers

- Chrome
- Internet Explorer 11

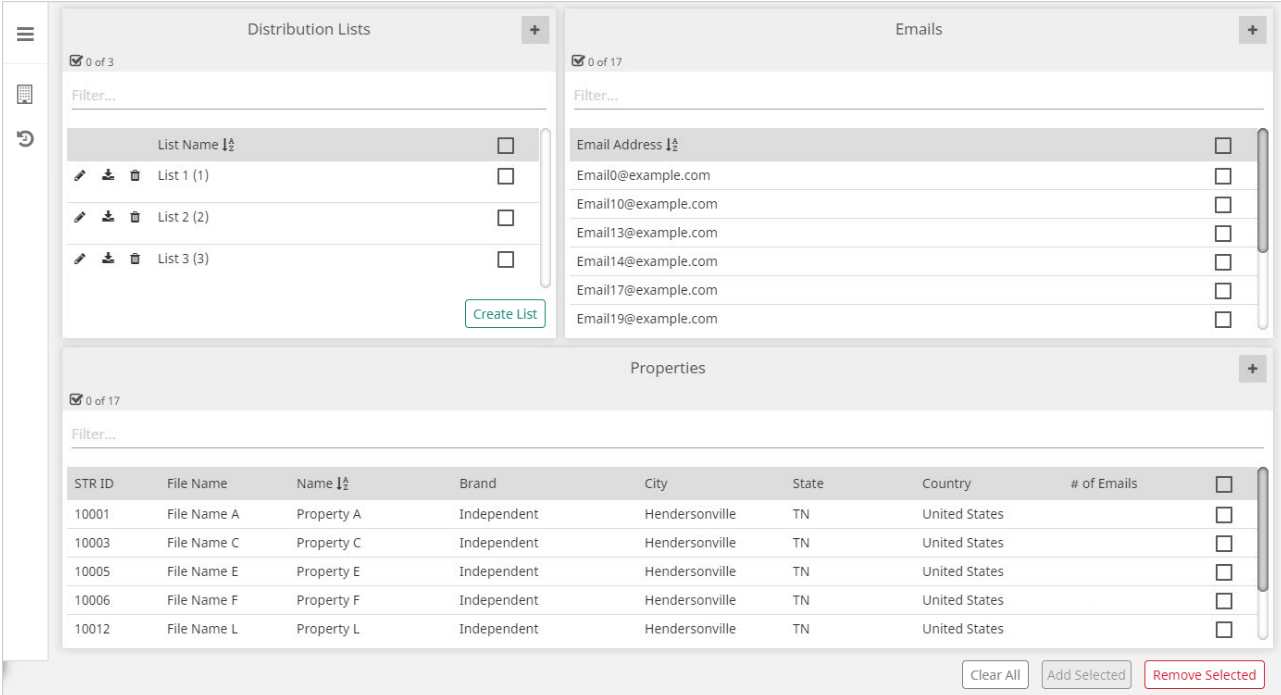
Quick Reference Guide

The purpose of this quick reference guide is to provide an overview of the Online Distribution List Management application and to focus on some of the common functionality.

Unified View

Upon logging into Online Distribution List Management, the default landing page is the unified view. This page contains the distribution lists, emails, and properties tables for quick distribution list management all in one place. To return to the unified view at any time, click the hotel icon from the left-hand navigation menu.

Screen layout



Working with tables

Highlighting/selecting records

To make changes to your distribution lists, the appropriate combination of distribution lists, emails, and properties must be selected. Highlighting records provides another layer of filtering. When you highlight a record, the other tables display data filtered by the highlighted record. Highlighting a record also selects the checkbox, enabling the addition or deletion of the selected record.

Click a record in any grid to highlight that record. This filters the other grids by that record and selects the checkbox to enable the addition or deletion of that record.

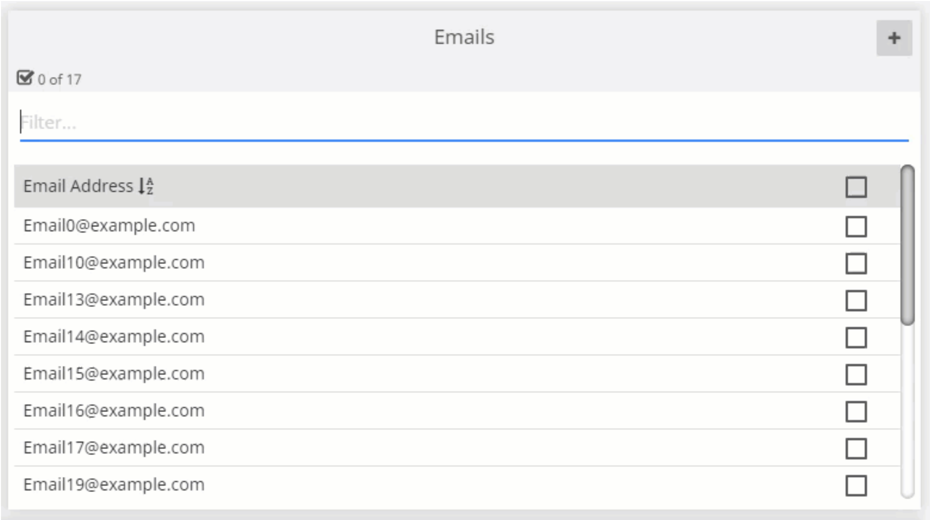
You can select a record without highlighting it by selecting the checkbox.

Note: *When a record is highlighted, the other tables display the record being filtered.*

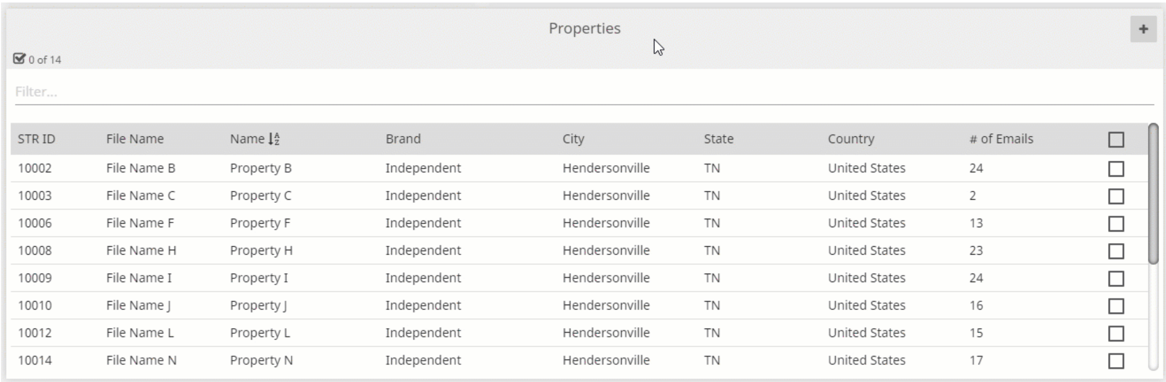
Note: *You can select multiple records, but only one record in each table can be highlighted.*

Filtering/sorting records

Use the text filter at the top of a grid to refine displayed data. Start entering the filter criteria and the grid will update in real time.



Click any of the column headings to sort by that column. Click the column heading again to reverse the sort order.



STR ID	File Name	Name	Brand	City	State	Country	# of Emails
10002	File Name B	Property B	Independent	Hendersonville	TN	United States	24
10003	File Name C	Property C	Independent	Hendersonville	TN	United States	2
10006	File Name F	Property F	Independent	Hendersonville	TN	United States	13
10008	File Name H	Property H	Independent	Hendersonville	TN	United States	23
10009	File Name I	Property I	Independent	Hendersonville	TN	United States	24
10010	File Name J	Property J	Independent	Hendersonville	TN	United States	16
10012	File Name L	Property L	Independent	Hendersonville	TN	United States	15
10014	File Name N	Property N	Independent	Hendersonville	TN	United States	17

Table views

When making changes to your distribution lists, there are two ways to view the tables:

DEFAULT VIEW

By default, the application displays the distribution lists you have access to, as well as all of the emails and properties associated with those lists. Highlighting a record in any of the tables will filter the other tables by that highlighted record.

For example, if you highlight a property, the emails and distribution lists tables will only display email addresses and distribution lists that are linked with that property.

When viewing tables in the default view, the **Remove Selected** button is active, and the **Add Selected** button is deactivated.

Note: *You can only* ***remove*** *emails/properties from distribution lists while in the default table view*

Flipped View

In our example above where you highlighted a property, click the plus sign icon on the email table. This will "flip" the table and display all of the email addresses that ARE NOT linked with that property.

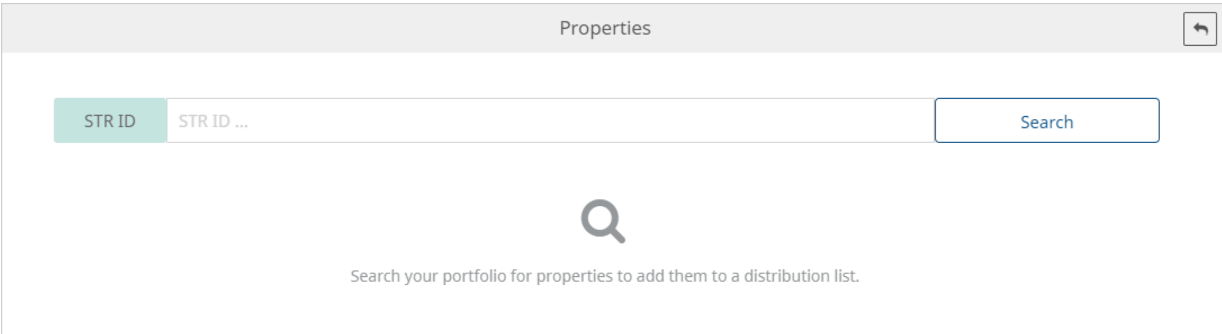
When viewing tables in the flipped view, the **Add Selected** button is active, and the **Remove Selected** button is deactivated.

***Note:** You can only **add** emails/properties to distribution lists while in the flipped table view.*

Click the return arrow icon on any table to return to the default view.

Additional Table View Notes

The properties table is the only exception to the flipped table view. Rather than showing properties not linked to a distribution list or email address, the properties table provides a search mechanism to find other properties in your portfolio to add them to a list.



Property file names

The property file name represents the name that will appear on your delivered report. If the file name is blank, it will default to the STR ID. To edit a property file name:

1. Highlight a distribution list
2. Click the pencil icon
3. Enter the desired file name
4. Click the check mark to save changes

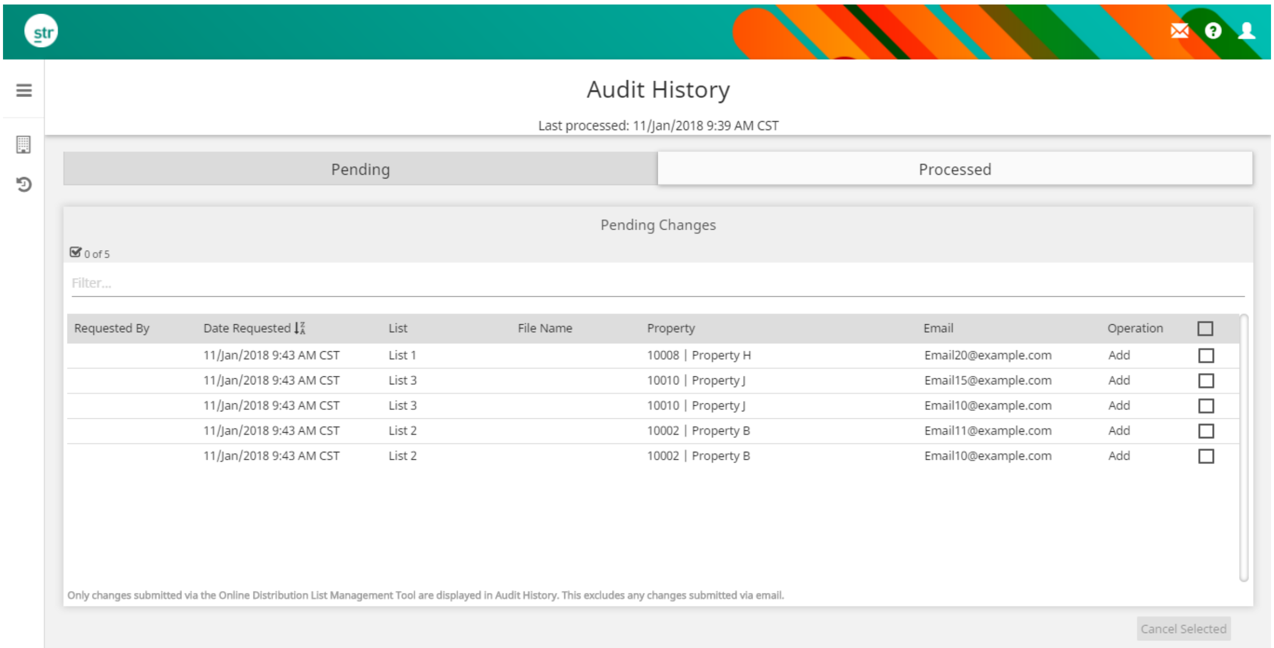
STR ID	File Name	Name
	File Name A	
10003	File Name C	Property C
10012	File Name L	Property L
10018	File Name R	Property R
10025	File Name Y	Property Y

***Note:** When a custom file name is added, you will be unable to delete that file name. You can edit the file name but cannot return to a blank file name.*

Audit History

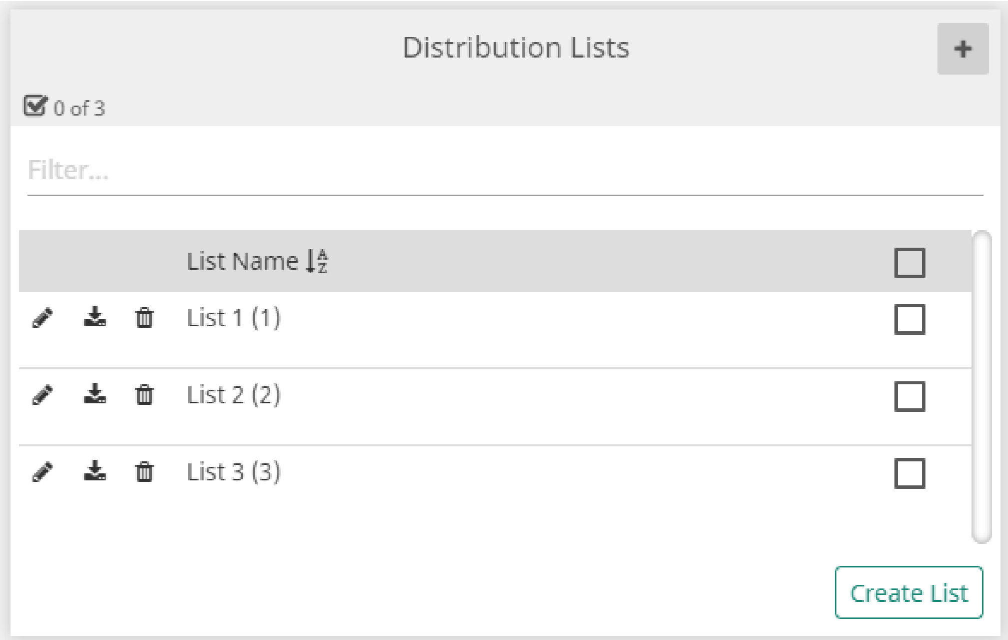
Audit history is a record of both pending and processed changes to your distribution lists. To access audit history, click the history icon from the left-hand navigation menu.

Screen layout



Maintaining Distribution Lists

The following are administrative features, aside from managing the properties and email addresses on a distribution list.



Create a distribution list

Need to create a new distribution list? Follow these steps to submit a request to our team:

1. Click **Create List**
2. Enter a reason for the new list and click **Submit**
3. Click **Close** to acknowledge the successful request to create a list

Rename a distribution list

Customize your list names to be more memorable and easier to organize:

1. Click the pencil icon
2. Enter the new list name and click the check mark

Note: *The system assigned distribution list name will always appear in parentheses.*

Download a distribution list

Export your distribution list to an Excel workbook:

1. Click the download icon
2. Open the workbook to view the distribution list data in Excel

Delete a distribution list

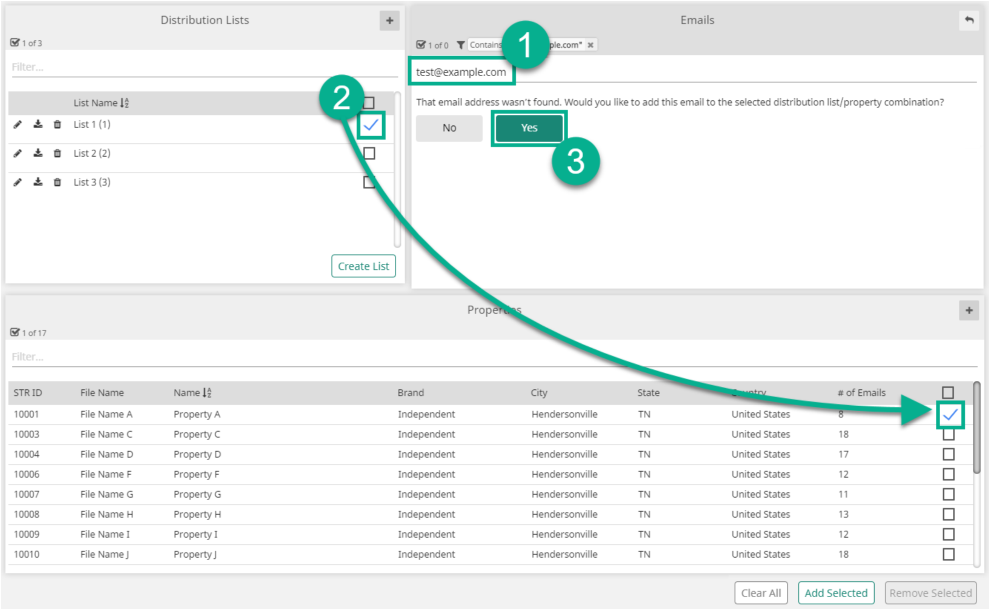
Need to delete a new distribution list? Follow these steps to submit a request to our team:

1. Click the trash icon
2. Enter a reason for deletion and click **Submit**
3. Click **Close** to acknowledge the successful request to delete a list

Adding Emails/Properties to a Distribution List

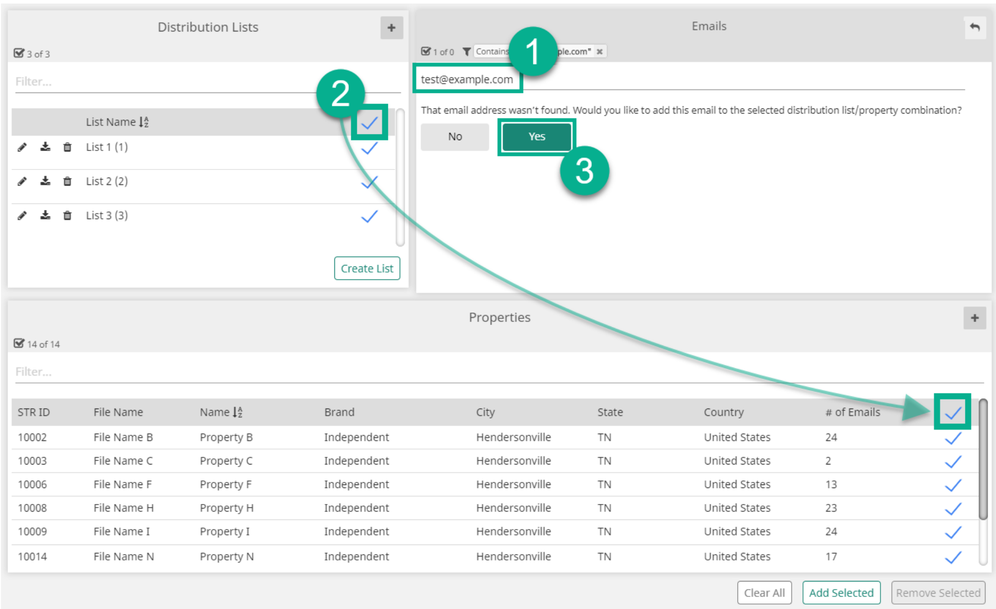
There are a few different ways to approach adding emails/properties. Here are a few common scenarios:

Adding a new email address to one list and one property



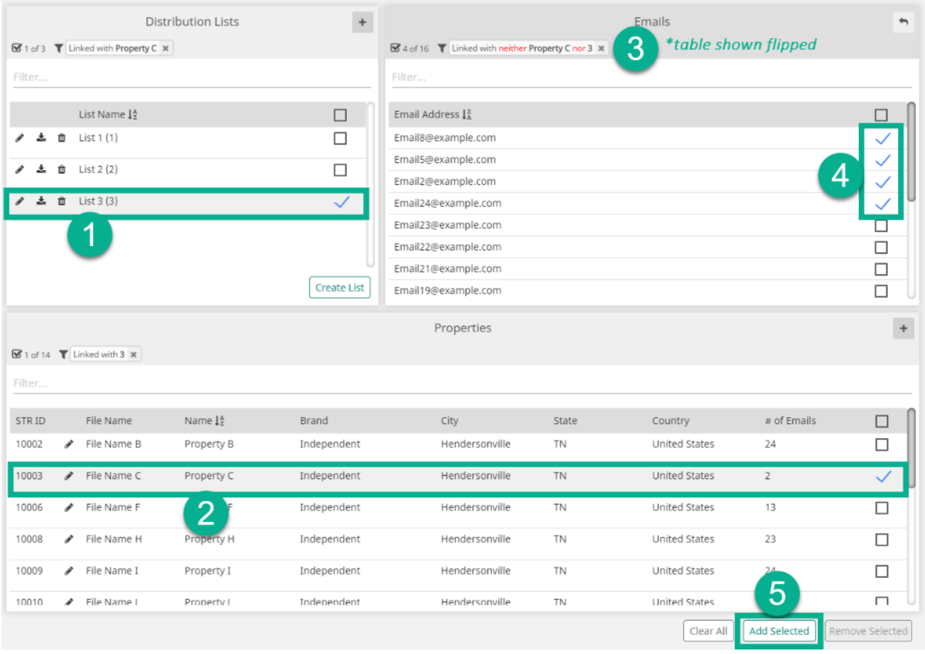
1 Enter the new email address to add in the emails table filter
2 Select the desired distribution list and property
3 Click **Yes** to add the email
4 Click **Yes** to confirm the addition

Adding a new email address to all lists and properties



1 Enter the new email address to add in the emails table filter
2 Select all distribution lists and properties
3 Click **Yes** to add the email
4 Click **Yes** to confirm the addition

Adding existing email addresses



1 Highlight a distribution list (*filters emails and properties tables by that list*)

2 Highlight a property (*filters emails and lists tables by that property*)

3 Click the plus sign icon + to "flip" the emails table – the table now displays all emails NOT associated with the highlighted list and property

4 Select the emails to add to that combination

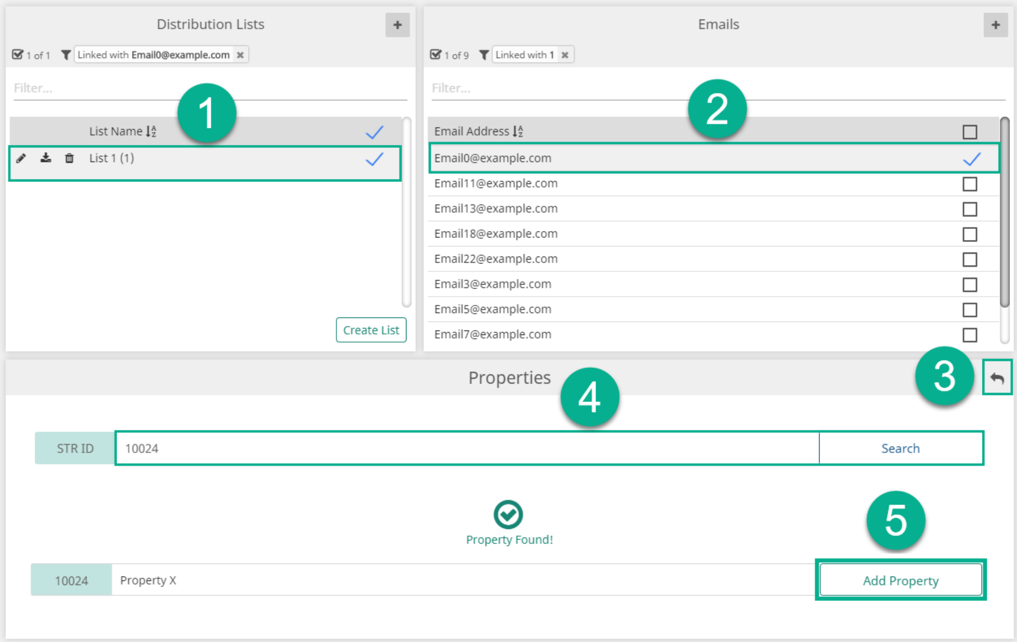
5 Click **Add Selected**

6 Click **Yes** to confirm the addition

***Note:** If records are not highlighted, a flipped table view will contain the same records as the default table view. Whether you are selecting or highlighting, you still have to flip a table in order to add records.*

***Note:** When working with multiple selections make sure you are selecting records, rather than highlighting them. Highlighting any one of the records will filter the other tables by the highlighted record.*

Adding a new property



1 Highlight a distribution list (*filters emails and properties tables by that list*)

2 Highlight a email address (*filters lists and properties tables by that email address*)

3 Click the plus sign icon to "flip" the properties table (*in the screenshot, properties table is already flipped*)

4 Enter an STR ID and click **Search**

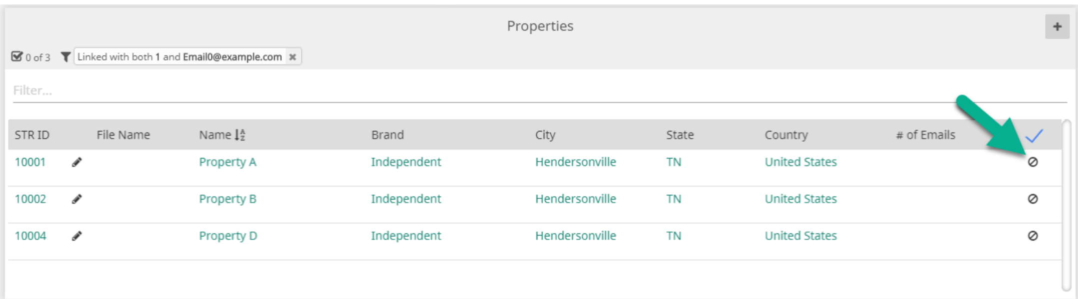
5 Click **Add Property**

6 Click **Yes** to confirm the addition

***Note:** After adding emails or properties, your changes can now be viewed in the audit history processed changes table.*

Cancelling pending changes

If needed, after pending changes have been submitted, you can cancel those changes individually from the unified view. This is particularly useful when needing to cancel one or two changes.



1 Highlight any combination of the pending change that needs to be cancelled (*ex: highlight a single distribution list and a single email address*) – in the case of a pending addition, the record is highlighted in green

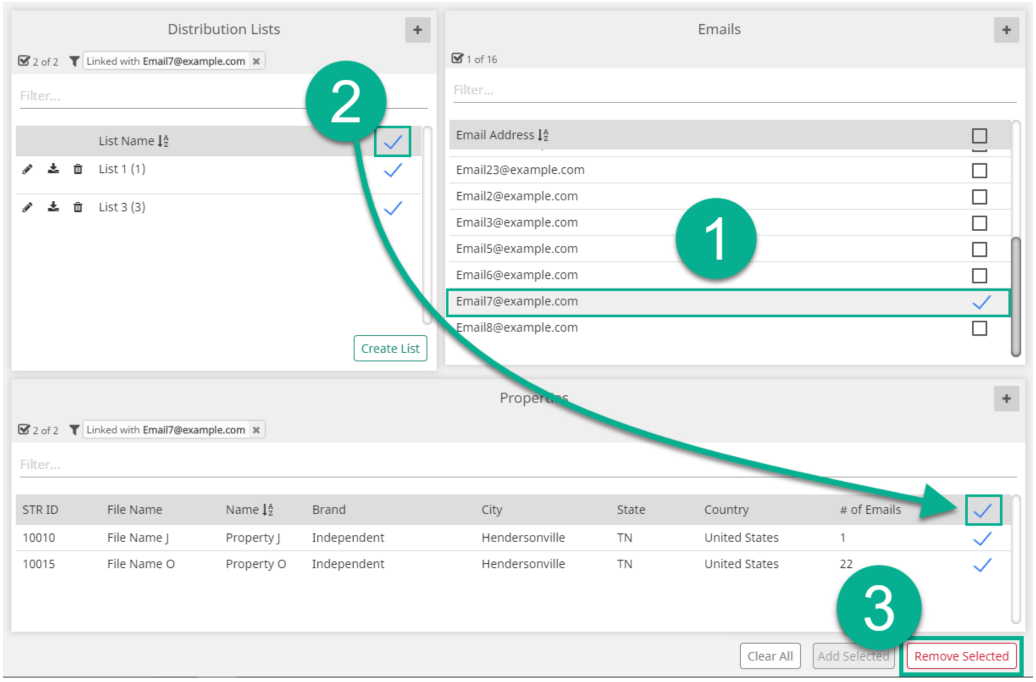
2 Click the cancel icon to immediately cancel that single pending change

***Note:** For cancelling larger numbers of pending changes, navigate to the audit history pending changes table.*

Removing Emails/Properties from a Distribution List

There are a few different ways to approach removing emails/properties. Here are a few common scenarios:

Removing one email address from all lists and properties



1. Highlight the email address to remove (*filters lists and properties table by that email address*)
2. Select all distribution lists and properties
3. Click **Remove Selected**
4. Click **Yes** to confirm the removal

Removing multiple emails

Removing multiple email addresses follows the same steps as a single email address, but instead of highlighting a record, use the checkbox to select multiple records.

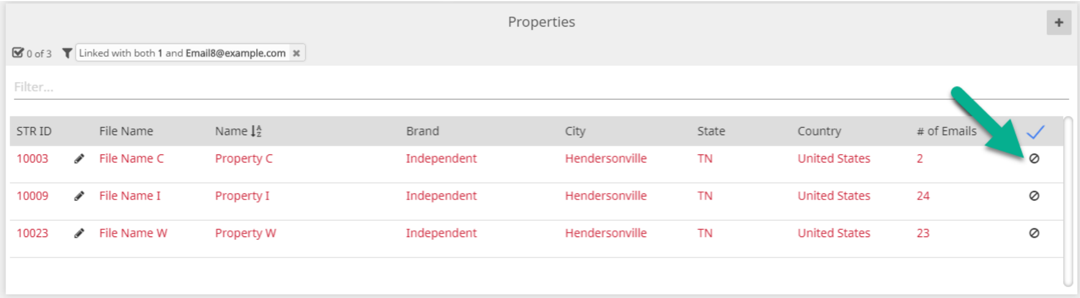
Note: *When working with multiple selections make sure you are selecting records, rather than highlighting them. Highlighting any one of the records will filter the other tables by the highlighted record.*

1. Select the email addresses to remove
2. Select all distribution lists and properties from which you wish to remove the email addresses
3. Click **Remove Selected**
4. Click **Yes** to confirm the removal

Note: *After removing emails or properties, your changes can now be viewed in the audit history processed changes table.*

Cancelling pending changes

If needed, after pending changes have been submitted, you can cancel those changes individually from the unified view. This is particularly useful when needing to cancel one or two changes.



1. Highlight any combination of the pending change that needs to be cancelled (*ex: highlight a single distribution list and a single email address*) – in the case of a pending removal, the record is highlighted in red
2. Click the cancel icon ⊘ to immediately cancel that single pending change

Note: *For cancelling larger numbers of pending changes, navigate to the audit history pending changes table.*

Viewing Audit History

Audit history is a record of recent changes to your distribution lists.

View pending changes

The Pending Changes table displays changes to your distribution lists that have not yet been processed. The most recent processing date is displayed below the page title.

Each record contains information about what was changed, what type of change (add, rename, delete), who made the change, and the option to cancel the pending change. The Pending Changes table is sorted by default from newest to oldest. Click any of the column headers to sort by that field.

Cancel pending changes

Select any of the pending changes checkboxes and click **Cancel Selected** to cancel the selected changes. Click **Yes** to confirm the cancellation.

View processed changes

The Processed Changes table displays changes that have been made and processed over the last 90 days. The most recent processing date is displayed below the page title.

Each record contains information about what was changed, what type of change (add, rename, delete), who made the change, and whether or not the change was processed successfully. The Processed Changes table is sorted by default from newest to oldest. Click any of the column headers to sort by that field.

Note: *Pending changes are processed once each business day. After processing, pending changes move to the processed table.*

Rejected changes

Any pending changes that are rejected during processing will be reflected in the processed changes table with a status of rejected and an associated rejection message. If your changes are rejected, you will be notified upon your next login to the site.

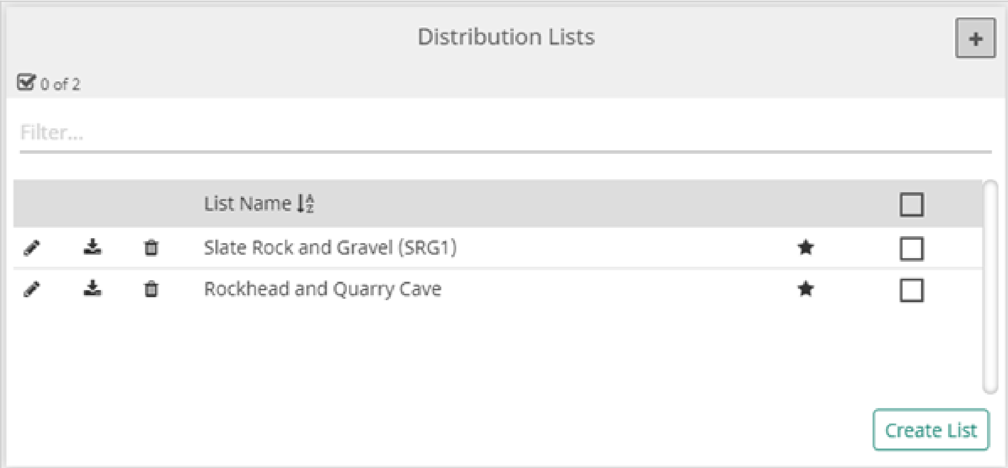
Web User Management

Note: *These features are only available for users with dSTAR distribution lists.*

Overview

Identifying a dSTAR list

dSTAR distribution lists are indicated by a star icon in the distribution lists table.



Web user icons

When a dSTAR distribution list is highlighted, each record in the emails grid displays one of two icons:

Add web user

This icon is displayed for any email address without web access. Click the icon to grant web access.

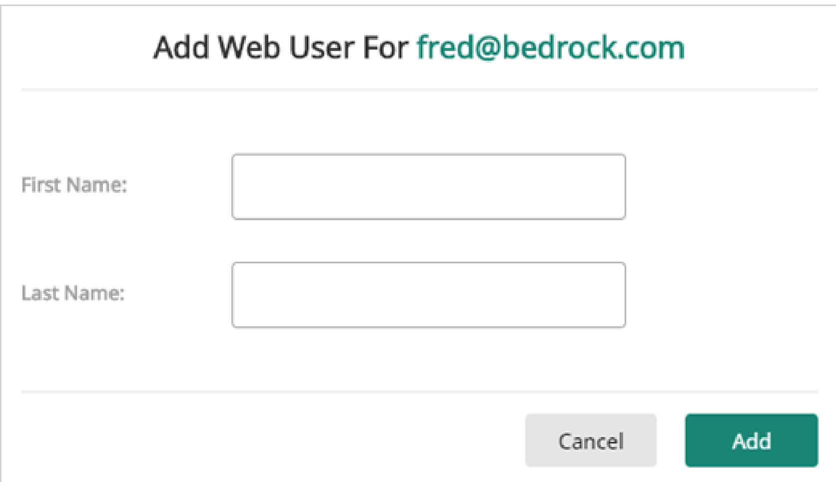
Edit web user

This icon is displayed for any email address with web access. Click this icon to view and edit web user information.

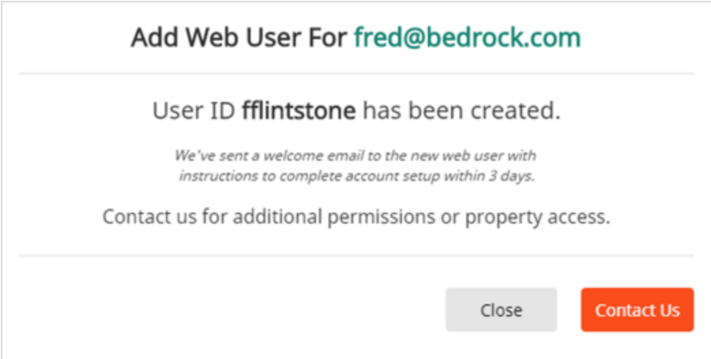
Adding web access

To add web access to a user:

1. Select the desired dSTAR distribution list
2. Click the add web user icon from the emails grid, next to the desired new web user
3. Enter the first and last name for the web user
4. Click **Add**



Upon success, you will be given the user ID for the new web user.



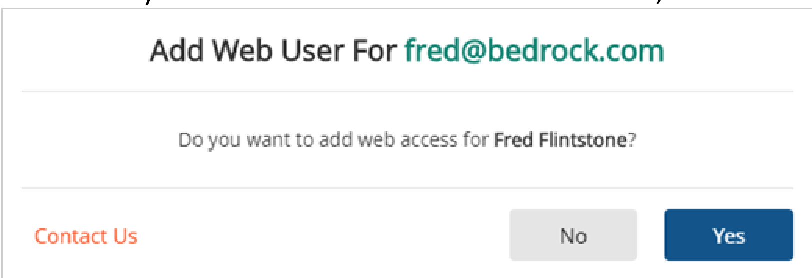
Note: *The new web user must follow the instructions found in the welcome email to complete account setup within 3 days.*

Alternative scenarios

The *Add Web User* screen will vary depending on the status of the user.

Existing contact information

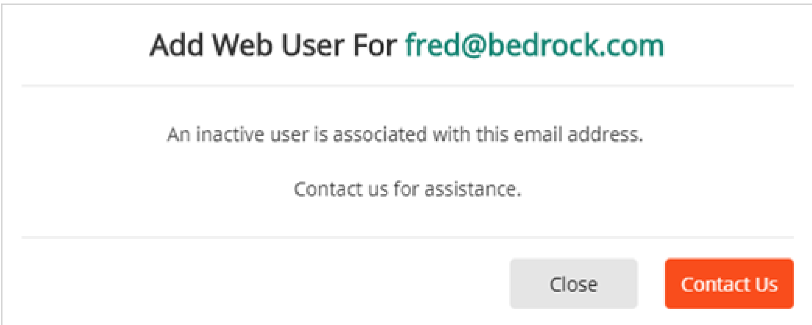
If we already have the contact information for the user, the first and last name will be displayed.



If all info is correct, click **Yes**. Otherwise, contact us to resolve the issue.

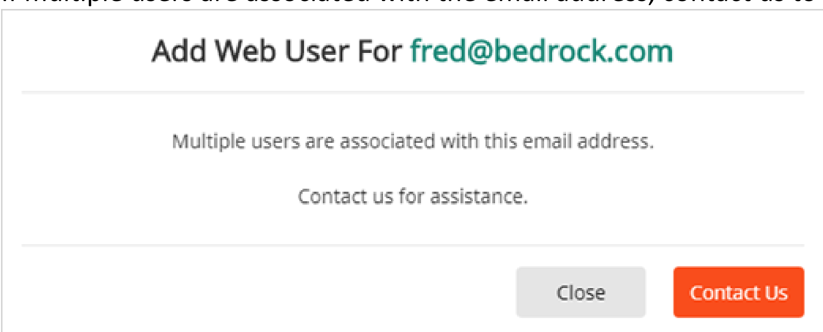
Inactive user

If an inactive user is associated with the email address, contact us to resolve the issue.



Multiple users associated with email address

If multiple users are associated with the email address, contact us to resolve the issue.

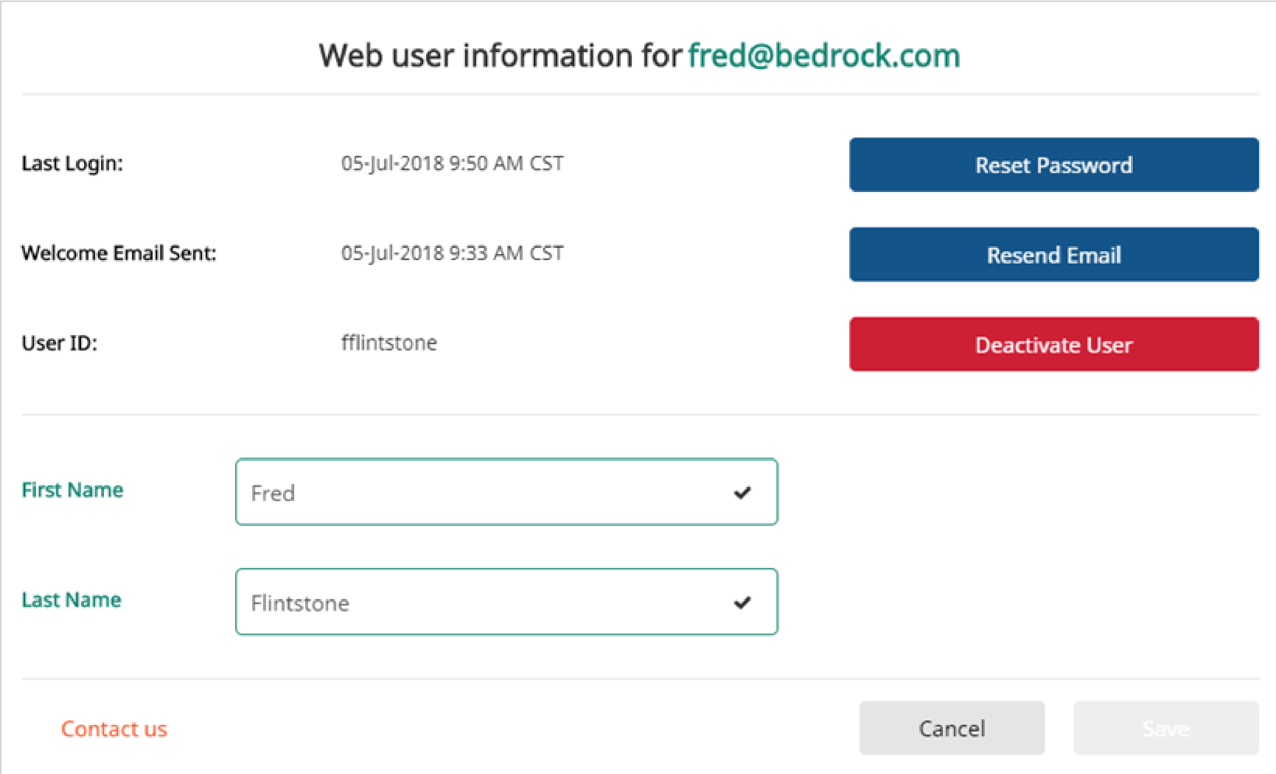


Editing web user information

The web user information window displays general web user information and actions that can be taken on the user.

To edit web user information:

1. Select the desired dSTAR distribution list
2. Click the edit web user icon



The web user's last login date and time, when the welcome email was sent, and the user ID are displayed.

Web user actions

Reset password

To reset a password for a web user, click **Reset Password**. This will send an email to the web user where they can reset their password.

Note: *In the case of a locked user, the web user will remain locked until the reset password workflow has been completed.*

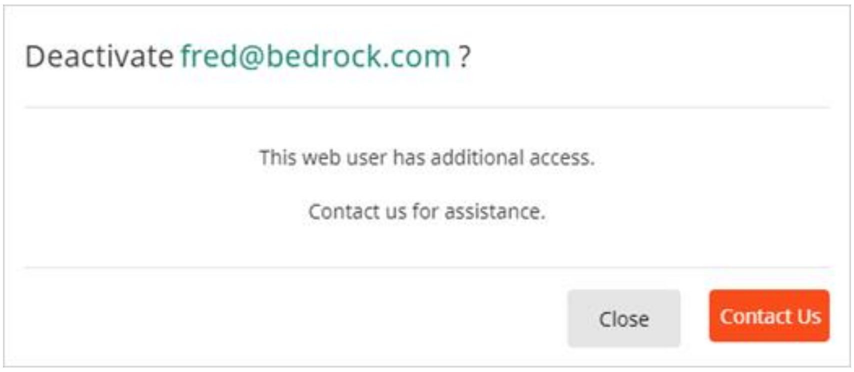
Resend welcome email

To resend the welcome email from STR that allows users to establish their password and security questions, click **Resend Email**.

Deactivate user

To deactivate a web user, click **Deactivate User**. Deactivating a web user will remove their access to dSTAR.

Note: *A web user with additional access beyond dSTAR cannot be deactivated here. Contact us to resolve the issue.*



Edit first/last name

Modify the first and last name as desired and click **Save**.

Name requirements:

- First name length must be between 1-40 characters
- Last name length must be between 1-80 characters
- Uppercase/lowercase letters, apostrophes (single quote), and hyphens are all acceptable