People, Employees and External Users Subtables

The two subtables (Employees and External Users) of the people table are used to store information about individuals, including any associated company or contact information. People may be external or internal to your company. It is important to put employees on the right Groups and Teams to control their access.

In this document, the terms "contact," "user," and "people"/"person" are used interchangeably.

People outside your company should generally go in the External Users table, while Employees should go into the Employees table. We recommend that all individuals be stored in the system as an Employee or an External User, even people who will not be able to access the system as a user.

- The External Users subtable stores external people who may or may not be users of the system. Each record includes fields to associate these users with companies, contracts, events, and other activities that relate to external users.
- The Employees subtable holds information about company employees, like home address and working hours, which the External Users table does not. LDAP or Active Directory authentication can be used to create and update users in the Employees subtable.

As a background table, many other tables link to the information stored in one of the People subtables.

Use Case for External Users

External users may be created manually by guests and members of the Base ServiceDesk, Contract Manager, Customer Manager, Marketing, Project Manager, Sales, Business Admin, and Admin groups. They may also be created as the result of a conversion from a Lead or Contract record, or may be created as part of an import from another database.

If a new external user is created (either directly or from a contract or contract party) and a login value is not entered, the system runs a rule to set the login to their email address (if they have one) and sets a default, unique password, but blanks out the default team. This allows the user to be recognized if they respond to an email from the system without actually giving them the ability to login to the system. This rule can be modified if you want such users to belong to a specific team so they can access the system through an end user portal.

Self-registration is available so that users can create their own logins, using the limited-access "register" account. Records created by the login of "register" are added to the Customer group and the Customer Team by default.

To create a link to permit self-registration, substitute the items in <brackets> below with the URL for your system, your KB Name, and the Exit URL you want to take users to:

```
https://<server-hostname>/gui2/login.jsp?KeyID=0&KB=<KB-
name>&user=register&password=Register678&State=New:contacts.Customer&GUI=no
/EUI&ExitURL=<yourpage>
```

This will allow the user to enter their contact information and then will log them out. They will not be able to choose from a list of companies, but instead will type in a company name. To see how this hyperlink is constructed, see Hyperlink Keywords and Examples.

When they save their user record, an email is sent to the 1st Level Support Team informing them that a contact has self-registered and asking them to validate the user's access and link them to the appropriate existing company in the system. This email template could be modified to send to anyone in your organization responsible for vetting users.

Use Case for Employees

Employees may be created in a variety of ways.

- A user with permission to create employees can add new employee records
- They can be automatically created via sync with Active Directory or LDAP or the first time they log in using one of those authentication methods
- They may also be created from a SAML provider, such as Okta, when they first log into the system
- They are often imported during implementation from an Excel or .csv spreadsheet

Once an employee is given access to the system, their user information can be modified in a variety of ways:

- An admin user can deactivate their access and update their information
- Sync with LDAP or AD can update information that has changed in some other system
- Scheduled import/updates from another backend system can update their information if it changes
- The user may modify any fields they are allowed to edit by clicking on My Profile in the Home section of the left pane

It is good to develop your own procedure for deactivating an employee who has been terminated. We do not recommend deleting users who leave the company. Setting an empty value in either the Groups or the Primary team field will prevent the user from logging in, while preserving the history of what that user has done in the system.

Employee

| Save ▾ | Cancel ▾ | Contact Information | Job | Related Records | Emails | History | ‹‹ ›› 🖨 📧 |

Collapse All

| ID | 420 | | Contact Table | Employee ▾ |
| Work Status | Working ▾ | | Export to Outlook | |

⌄Employee Information

First Name	Richard		Last Name	Morton
Title	Project Manager		Department	Development ▾
Email	rmorton@example.com		Email Pager	
Direct Phone	555-444-5555 Ext.		Cell Phone	
Company	Agiloft 🔍		Location Name	▾

⌄User Information

| *Login | projectmgr | | *Password | ●●●●●● 🔅 |
| | | | *Confirm Password | ●●●●●● 🔅 |

Note: Please include the Primary Team value in the Teams field

Primary Team	Project Manager Team ▾		Teams	Internal Customer Team, Project Manager Team 🔴
Group	Base ServiceDesk, Internal Customer, Project Manager 🔴		Current Roles	Base Service Desk group only, Internal Customer for service desk, Project Manager 🔴
Roles Use Assigned License				
User time zone	(GMT-08:00) Pacific Time (US & Canada); Tijuana - Pacific Standard Time ▾			
Picture	Attach/Manage			
	Drag&Drop files			

⌄Add or Remove Roles

Update Role	▾		Type of Update	◉ Add ◯ Remove
Role Description				
Role Group				
Role Team				

Save and Continue

| Role Update Notes | |

Automation

The default automation on the employee subtable includes the following actions:

- If you are using Adobe Sign for e-signature, and the value in the Adobe Sign Sender field is set to or changes to Yes, a user account is automatically created for the user at Adobe Sign, so that they can send envelopes under their own name.
- If the value in the Adobe Sign Sender field changes from Yes to No, that account is automatically disabled at Adobe Sign.

See the Adobe Sign Tables and Setup section for more details.

There is another rule that handles document approval generation when an employee is identified as a reviewer on the Documents table. The rule runs down to the employee and generates the approval record from there.

Ownership of People Records

Employee and External User records are owned by the user whose login matches the Login field of the record. More simply, each Employee or External User owns their own record.