Enterprise \ Employees

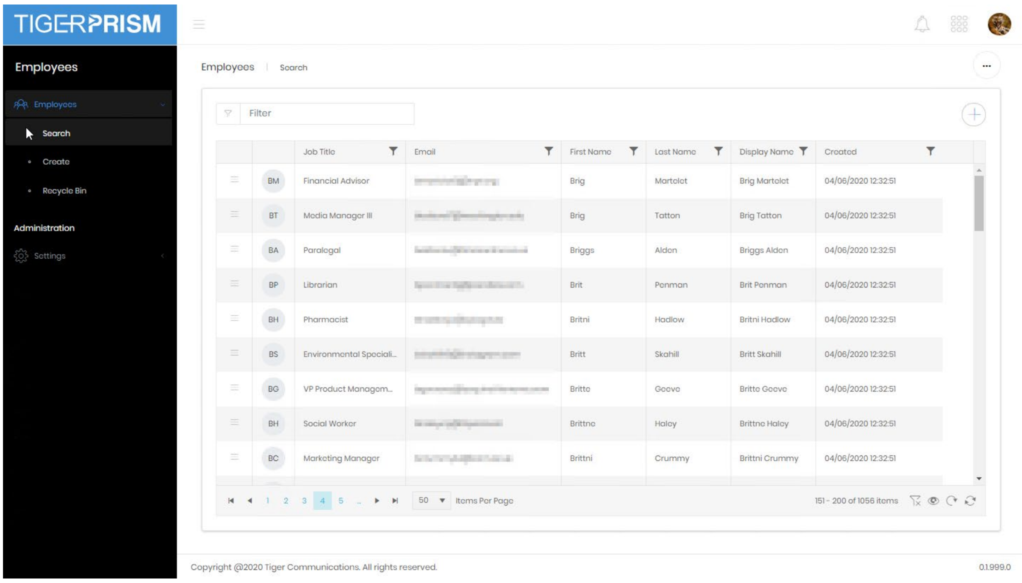
Overview

The Employees module allows you to view, edit and add company employees to Prism's database. Once configured in here, employees can be assigned to organizations in one of the three directory trees and can have endpoints assigned to them.

In most cases the employee database will be populated by, and often kept up to date by, import from an external database, sources like Active Directory and Cisco AXL are most common. Even so, there are many available fields for employees, and some of these can be manually updated even when directory integration is configured. This is a change from all previous versions of Prism, which effectively locked the employee database to manual changes when integration was configured. Now, any field which is not updated by the integration process may have manual entry which will not be overwritten/discarded.

Search

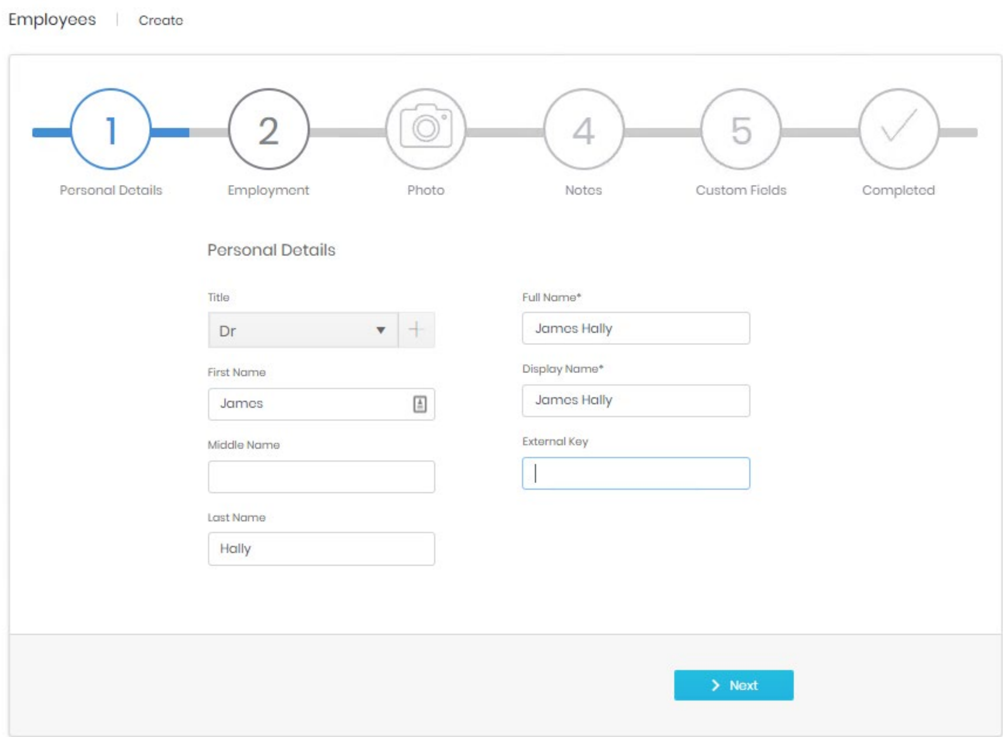
The search page shows a list of all existing employees configured in the system. From here you can filter employees and select one to view or edit the Detail page. For grid controls see Common Features.



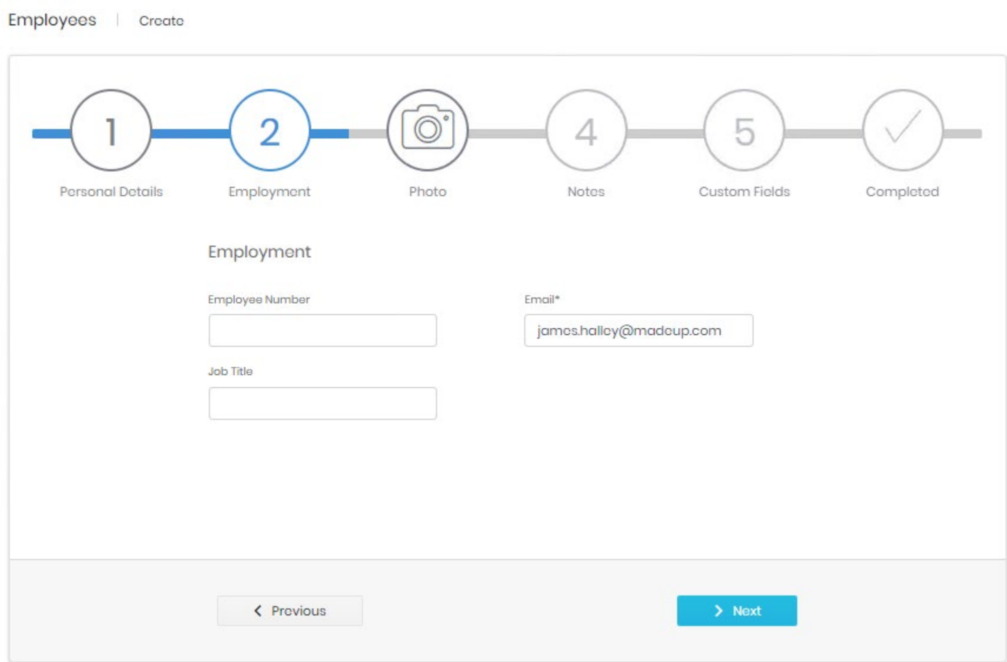
Create

Employee creation is run through a process with six stages.

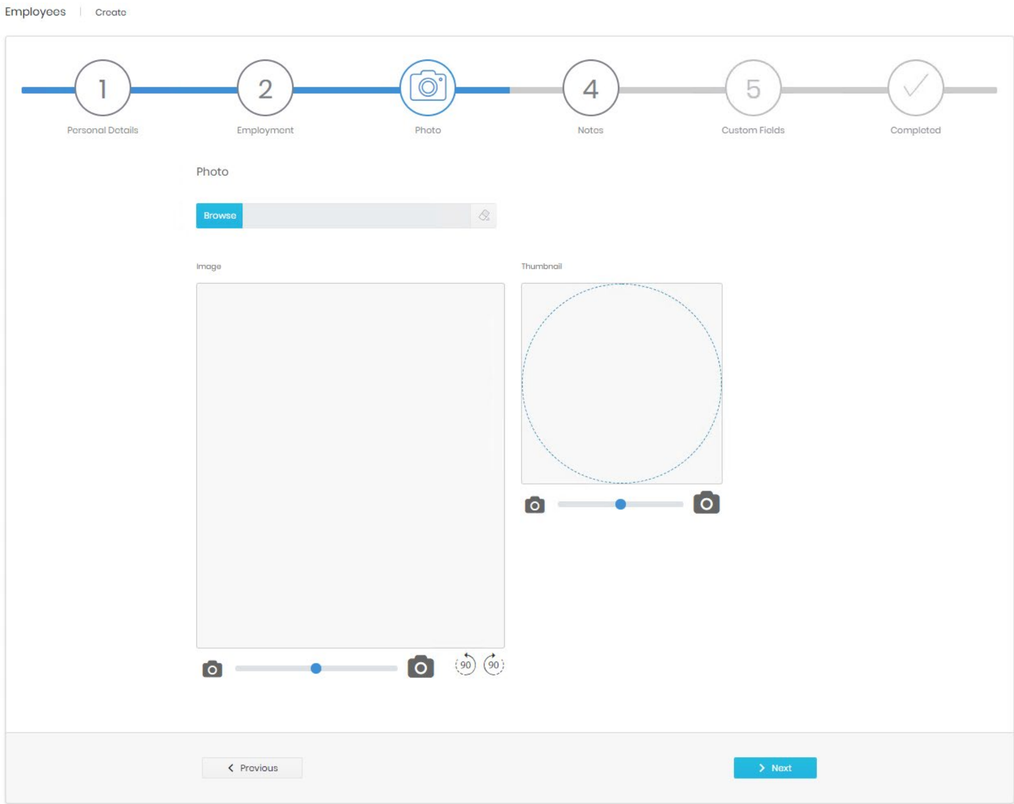
Stage 1 allows you to enter Personal details. Most fields are optional, but a Full Name and Display Name are required. An External Key can be added if an external database is likely to be in use.



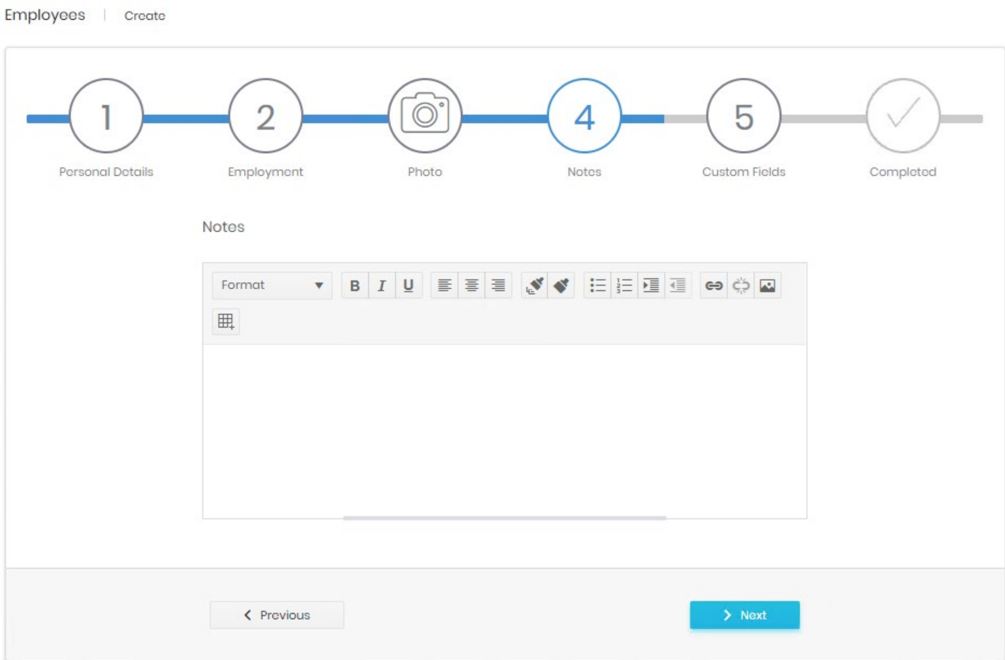
Stage 2 contains employment specific detail, only an email is required at this stage.



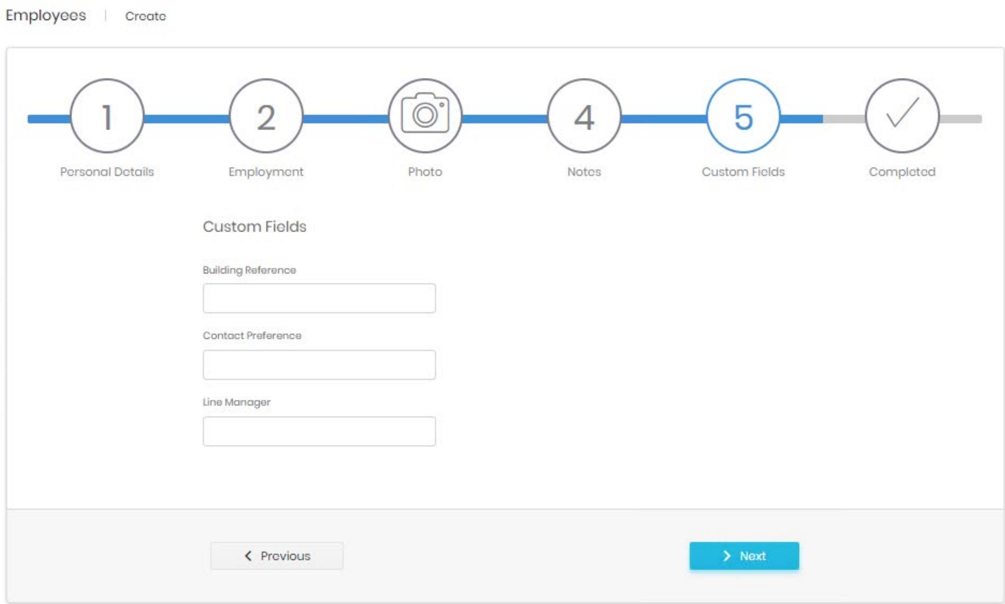
Step 3 allows you to upload and manipulate a picture to use on the record.



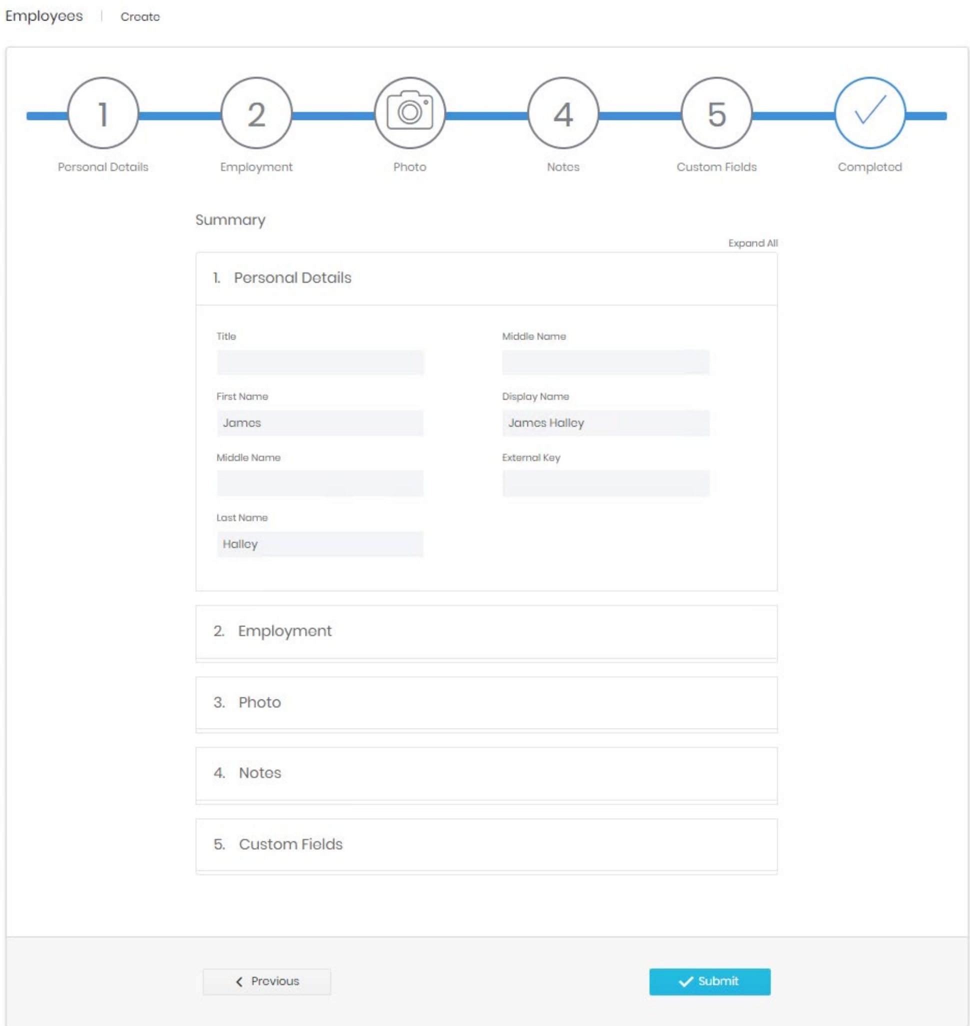
Stage 4 allows for Notes to be added on the Employee. This is free, formatted text and can include links, tables, and pictures.



Stage 5 shows any custom fields that have been enabled for Employee record in Settings. If no fields are enabled, this stage is skipped.

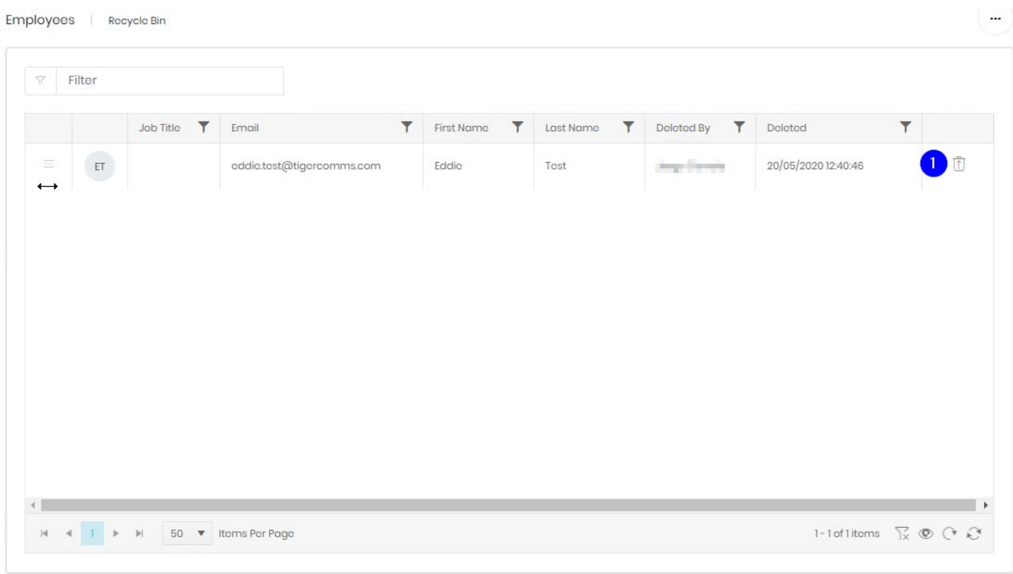


The final step shows a summary of the details entered, allowing final confirmation before the record's creation.



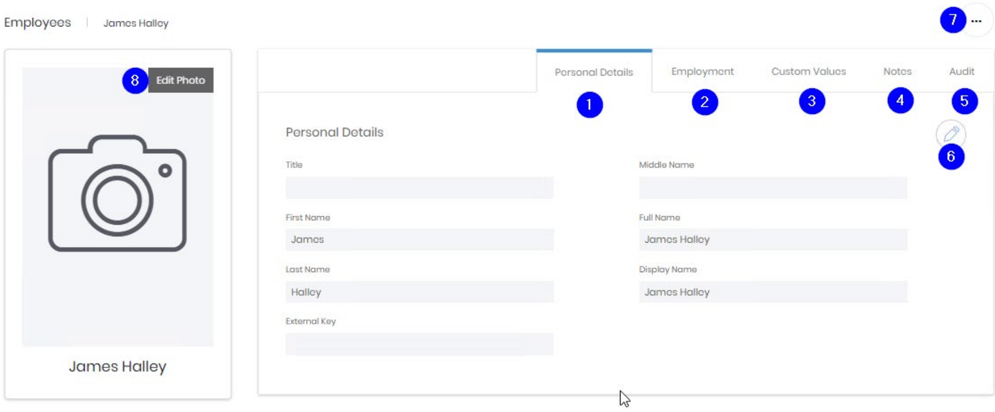
Recycle Bin

The Recycle bin page looks very similar to the search page and has all of the same controls plus an additional one. This button will restore the deleted Employee.



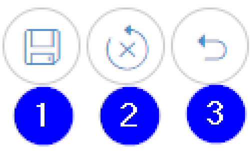
Detail page

The detail page for an employee displays all relevant information configured against the record. It includes defined personal (1) and employment information (2), any notes and values entered against the custom fields that can be configured by a system administrator (3 and 4).



The 5th tab (5) shows audit information including the creator and last modifier of the record, as well as the dates of creation and modification.

Each tab has an edit button (6) which allows the information on that tab to be modified. Once on the edit page there are thee further controls



Save changes (1) – submit changes and return to the details page

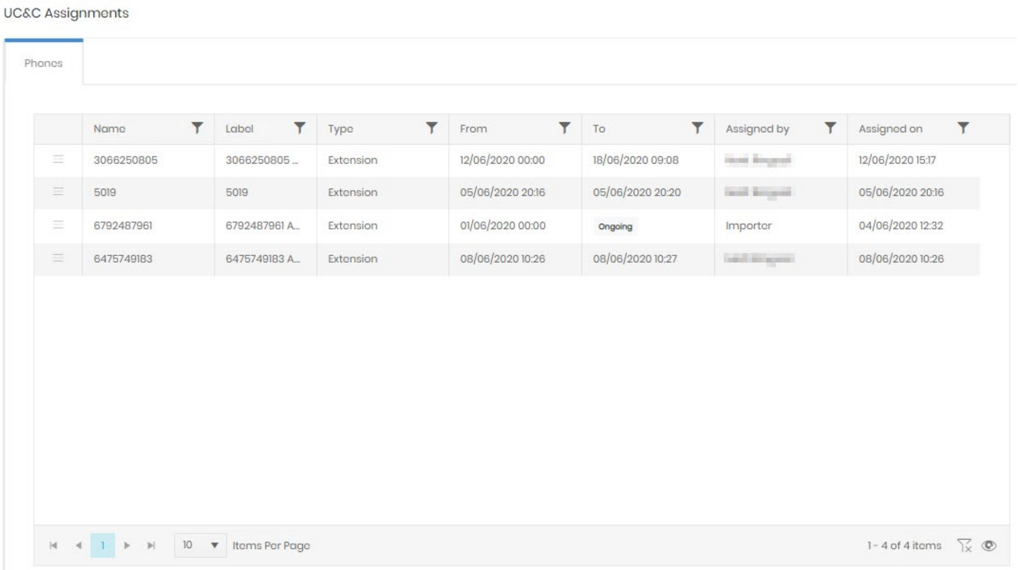
Reset changes (2) – discard any changes but stay in edit mode

Cancel (3) – discard any changes and return to the details page

Above the tabs on the page is the ellipsis icon (7). This contains the delete command. Once confirmed the site is deleted and moved into the Recycle Bin.

The contact picture on the details page can be edited (8). Either a new image can be selected, or the existing one can be zoomed, panned or cleared as required.

Additionally, the Employee detail page shows present and historical UC&C assignment information. This allows quick checks on when an endpoint was assigned or removed from use.



Name	Label	Type	From	To	Assigned by	Assigned on
3066250805	3066250805 ...	Extension	12/06/2020 00:00	18/06/2020 09:08		12/06/2020 15:17
5019	5019	Extension	05/06/2020 20:16	05/06/2020 20:20		05/06/2020 20:16
6792487961	6792487961 A...	Extension	01/06/2020 00:00	Ongoing	Importer	04/06/2020 12:32
6475749183	6475749183 A...	Extension	08/06/2020 10:26	08/06/2020 10:27		08/06/2020 10:26

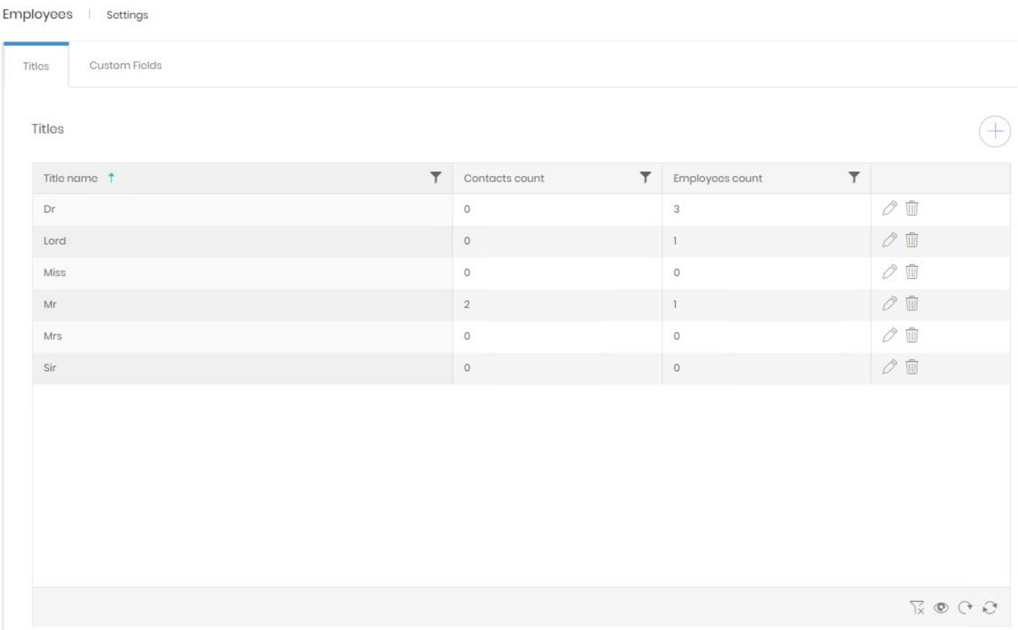
Administration - Settings

Employees

These settings are only available to system administrators. There are two tabs available.

Titles

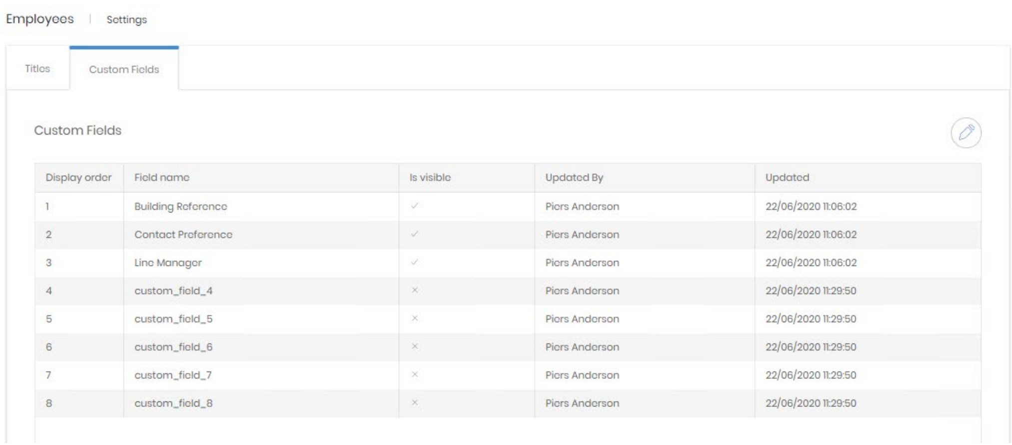
Titles allow you to configure the dropdown for an employee's salutation. The list comes preconfigured with common titles (Mr, Mrs etc) but others can be added if required. A title cannot be destroyed until no employees or contacts are using it.



Title name	Contacts count	Employees count
Dr	0	3
Lord	0	1
Miss	0	0
Mr	2	1
Mrs	0	0
Sir	0	0

Custom fields

Enabled Custom fields appear in the details page for every employee.

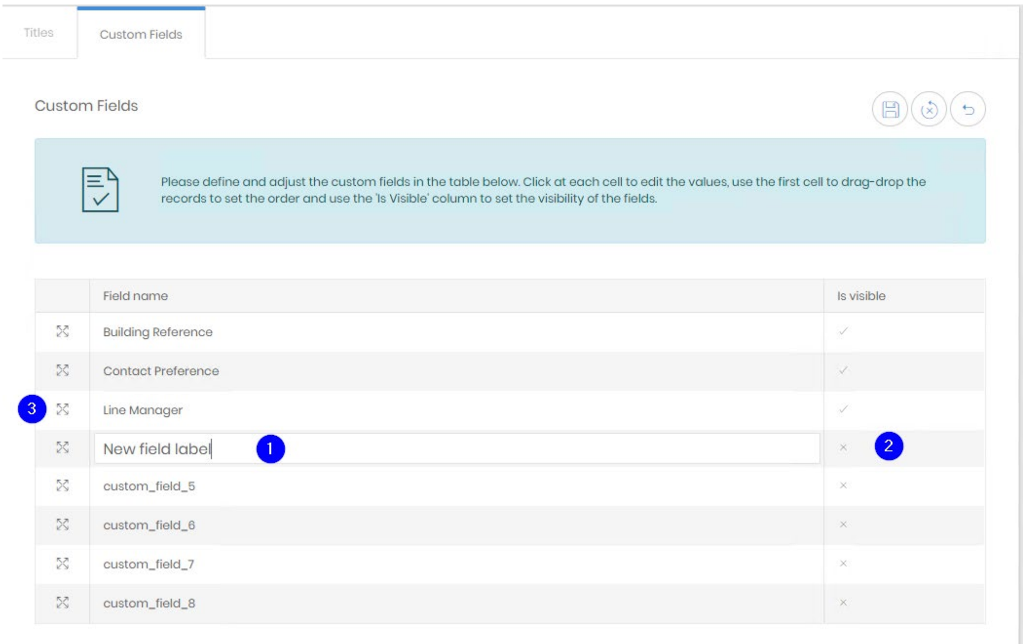


Display order	Field name	Is visible	Updated By	Updated
1	Building Reference	✓	Piers Anderson	22/06/2020 11:06:02
2	Contact Preference	✓	Piers Anderson	22/06/2020 11:06:02
3	Line Manager	✓	Piers Anderson	22/06/2020 11:06:02
4	custom_field_4	×	Piers Anderson	22/06/2020 11:29:50
5	custom_field_5	×	Piers Anderson	22/06/2020 11:29:50
6	custom_field_6	×	Piers Anderson	22/06/2020 11:29:50
7	custom_field_7	×	Piers Anderson	22/06/2020 11:29:50
8	custom_field_8	×	Piers Anderson	22/06/2020 11:29:50

Editing Custom Fields

These fields can have any label the administrator adds, and these fields can be populated manually or by Integration.

Three of the maximum 8 fields have been enabled for users to see, and those two have been labelled appropriately for a specific purpose.



1. Click on the label to edit the line directly.
2. Click on the tick or cross once to enter in line editing, then tick or untick the box to enable or disable the field for users.
3. Click and drag on the handle to reorder the fields.

Save when changes are complete.

Note
If no custom fields are marked 'Is visible' then a Custom Values tab will not appear in either the creation wizard or the detail page for employees. Integration will continue to populate values in those fields when they are not visible.