



HCL MT CH-MSP Product Documentation

Managing External Users

Managing external user access

- Provisioning external users
- What external users can and can't do

Provisioning external users

The following presentation describes the flow for [external user data manipulation](#).

Provisioning external users is a separate step that should be performed after the data migration has been completed on the production server. For general description where this step fits in the overall process of data migration, please refer to [Database migration overview](#).

In general, registering a user involves two steps:

- add them to LDAP
- provision them to Connections to establish their records in all applications
- Note: for existing 'internal users' in the migrating organization, they do not need to be provisioned to Connections, because database migration migrates all their records to Connections already

Import external users to LDAP

- Get a dump of all external users for the org: Follow Step 7 in [Production Import Preparation](#)
 - For each external user in the dump, they will have:
 - A new 'subscriberId', by appending the migrating organization ID to the original subscriber ID, e.g., 1000531575**1000530836**
 - An auto-generated email as a place holder, by inserting the migrating organization ID into the email, e.g. john_hcltestorg2.**1000530836**@isc4sb.com
 - Note: Because the email addresses are auto generated during the data massaging process for external users, as 'place holders', they need to be replaced when real email addresses are made available, and it is not recommended to import them to LDAP as they are at this point, since they will need to be updated later anyway
- Based on the external user list, MSP needs to establish a process to:
 - communicate with customers and/or external users, and decide which external users will continue to collaborate in an organization
 - collect following info for each external user:
 - their email, which should be different from any email that has been in use at the same deployment (this is similar restriction on IBM Cloud today). Their original email can be kept as long as there is no conflicts in LDAP
 - optionally, external user's first name, last name and display name as they prefer in the migrating organization
 - format external user's information into a csv file
 - generate an ldif file based on the csv file
 - Make sure that the following LDAP attribute is set for each external user on both the flat and org trees: **ibm-socialPersonalRole: visitor**
 - import the ldif file to LDAP
 - Note: if the process is defined to handle external users one at a time, then each ldif file would just contain one record for one single user

Provision external users to Connections

- Using their new subscriber IDs from the data dump, call [Provisioning APIs](#) with '**AddSubscriber**' operationId in the JSON payload to provision external users to Profiles, Files and Wikis
- It is not necessary to provision users to other Connections apps because users will be automatically provisioned upon their first access to the apps
- It is most likely that external users already exist in all databases, except Profiles, during data import. But to cover some odd cases, it is recommended to provision them to Files and Wikis too so that external users are able to access Files and Wikis after they log in

External user appearances in Connections applications

Right after the data migration, and before external users are eventually registered to Connections as described in the two steps above, please observe the following behaviors:

- they do not exist in Profiles. The provisioning API call will create records in Profiles
- Internal users can see their names in various membership views if they were a member before
- Their names would show up as 'inactive'
- When hovering over their names, their business card would indicate that the user does not exist
- Internal users can not search and view any external users' profile

What external users can and can't do

As a general rule, external users in the Multi-Tenant environment can participate fully in things they are directly involved with, such as a file they've created or that someone has shared with them. The experience is similar, but not identical, to that in Connections on-premises.

External user experience – what they CAN do

- Collaborate fully as members in communities
- Follow these things:
 - Standalone Files that they uploaded, or that were shared with them
 - These community apps: Files and Folders, Forums and Forum Topics, Activities, and Wikis/Wiki pages
- View and download files that are shared with you
- Edit files in HCL Docs
- See activity stream content to which they have access
 - Recent Updates (and Status Updates if they are @mentioned) in communities they are members of
 - On homepage for content they follow, content in communities they are members of, or posts they are @mentioned in
- "Like" content
- Edit their profile by clicking their picture and selecting My Profile
- View abbreviated business cards of people that share content with them (cards don't contain clickable links for employee names)
- Share files with people
- Participate in chats
- See status updates if they are @mentioned in them

External user experience – what they can NOT do

- Invite people to their network, or Follow people
- Mention people
- Post status on their homepage or Profile page
- Follow blogs/ideation blogs (and for this release, communities--planned for future)
- Create a community, or be a community owner
- See public microblogs
- See public or moderated communities, or restricted communities that they are not a member of
- See public files
- See or search the company directory (including using type-ahead) to find people
- See recommended content or people (Recommendations widget still displays, but with message that there are none)
- Access the Profiles menu
- Access other user profiles
- See community metrics

Note: Although they could in IBM Cloud, a person from one organization cannot join or be added to a community from another organization. If a community that was migrated to Multi-Tenant from IBM Cloud previously had such a member, their community status updates are preserved, but any files from their org linked to in the updates are NOT available in the MT visitor model, and those links are broken. This is expected behavior.