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When an employee separates—or is terminated—from the company, your tasks will depend upon how the employee separates (permanent or temporary), whether the employee has any hardware, and whether the employee has an Active Directory (AD) account.

Human Resources (HR) will inform you of the type of separation in its notice. Using Cherwell, you can automatically create work items for reclaiming hardware and disabling accounts. You'll also document the actions you took in the work items. Using AD, you can disable network access and give other users proxy access to the former user's data and email account. If the user is temporarily leaving the company—going on FMLA, for example—you'll need to "soft disable" the account. If the user is permanently leaving the company, you'll entirely disable the employee.

This document outlines creating work items, and tasks you need to complete to close the work items.



Prerequisites

Prerequisites are listed below, along with places where you can find additional information, if available.

Prerequisite	Resources
Access to Cherwell on Desktop team	None
Access to the Term – Change Reason Codes spreadsheet.	None
Access to Active Directory (AD)	None
Member of MYR-DESKTOP-TEAM	File access

First Steps

When HR notifies you of a separation through a ticket in Cherwell, first check AD to see if the user has an account. If the user does not have an account, close the ticket, and enter the following in **Close Description** field:

No IT accounts found via name or EMP#, where [name] is the former user's name, and [EMP#] is the user's number.

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* Common Tasks	Overview Details Activity Journals	Resolution Details Tasks (0) Rela	ted Cls (0)
Create Problem Incident Actions Control Level 2 and 3 Remote Control Cl Retroot Control	Close Description No IT accounts found via Na	ame or EMP#	• <u>A</u>

If the user has an account, determine the type of separation by comparing the code in the notice sent by HR with the Access to the Term – Change Reason Codes spreadsheet. If the code indicates a "soft disable," the user is temporarily going on leave, or is transferring to another location in the company.

In those cases, the user's hardware will remain with the user's department. You'll need to change the user's password, and temporarily disable user's AD account. Proxy users are created only if someone with the appropriate authority requests it.

Termination Process Flowchart





Create Work Items for a Terminated Employee

Follow the steps below to create the IT work items for a terminated employee.

1. In Cherwell, open the ticket for terminating an employee, then go to the Tasks tab.



2. In the Tasks tab, click One-Step in the menu bar, then select One-Step Manager from the list.

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Create Problem	Title			
* Incident Actions	Expire E1 Roles/Access	WORK ITEM 104546	i	
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Remote Control Cl				
Reboot Computer		Title *		Status
Create a Problem		Evoire E1 Poles/Access]
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- 3. In the One-Step Action Manager window, complete the following steps:
 - Ensure the **Teams** > **Desktop** folders are expanded.
 - Click Term Ticket.
 - Click **Run**.



Cherwell creates the following tasks for the ticket:

- Expire E1 Roles/Access
- Network Disablement
- Reclaim Hardware



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Remote Control Cl				
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Queues		Please expire the E1 roles/accou	ints for:	Actions
Incident 124188 on New R		JSMITH		
				Assign to Me
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- Open the Queue Manager		Assigned Team	Assigned To	Add a Downstream Task
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Incident - Any event that causes or may cause an interruption to service or may impact the actual or		ERP Technical	× ×	
perceived quality of service. The		Туре		
minimize Service Level Agreements breaches.		Work Item	~	

The red font indicates that the work item is not assigned to someone for completion.



4. For each work item, update the **Description** field as needed and assign the work item to a team, as detailed below.

Expire E1 Roles/Ac	cess	Network Disable	ment	Reclaim H	ardware
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Open the Queue Manager. Process & Terminology Mhat cause or service		Assigned Team Desktop	Assigned To		Add a Downstream Task Visualize Task Dependency Workflow



5. Assign the work item to the appropriate individual. Click Assign to Me to assign the Network Disablement and Reclaim Hardware work items to yourself, unless the tasks will occur during a time when you are unavailable. In that case, use the Assigned To list to assign them to an available individual.



6. Click **Save** in the toolbar immediately after making changes.



Complete the Work Items

Follow the steps below to complete the work items for a terminated employee.

Note: Make sure you document all your actions in the **Completion Details** field of the ticket in Cherwell. For more information, see <u>Close the Work Item</u>.





Complete the Reclaim Hardware Work Item

You need to reclaim the former user's hardware only if the user is entirely terminated. You do not need to take any action if you are soft disabling the user.

- 1. Ask the manager for the former employee's computer.
- 2. In the Overview tab, click **CMDB** to open the database that tracks what hardware was assigned to users.



3. Enter the former employee's username in the **Search** field, then click **Go**.

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4. Select the username from the list of results.

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Create Problem	VIT 210 ACTIVE PF14HKVD
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5. Make note of the computer's friendly name and the former employee's business unit's location ID.

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6. Click **Back** to return to the Overview tab in the work item.



7. Add the computer's friendly name and the former employee's business unit's location ID to the **Description** field.

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Incident 125408 on New R-			A	Add a Downstrea	am Task				
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8. Change the work item's status to **Pending**.





9. When you are prompted to select a reason for the pending status, select **Reclaiming Hardware**. Then, click **OK**.



- 10. When you receive the computer, label it with its friendly name and the business unit's location ID on a piece of tape.
- 11. Close the work item. See <u>Close the Work Item</u> for information about this step.



Complete the Network Disablement Work Item

To disable the former user's network, disable the user's AD account, and find and archive any of the user's folders that contain data. Delete empty folders.

Remember to track your progress in Cherwell.

Disable the Former User's AD Account

Before making changes to the user's account, update the ticket's status in Cherwell. Disabling a user's account involves changing the user's password, moving their account to the Disabled organizational unit (OU), deleting any mobile numbers, and updating the account's description.

1. In the work item in Cherwell, click **Acknowledge**. The status changes to **In Progress**.

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INCIDENT 12	4188		Creat	ed by CherwellServices on 3/17/2021 at 4:25 P
IT Service Desk > Re	port Outage or Error > Submit Inciden	t	Last modifi	ed by Francisco Earnan on 3/22/2021 at 9:19 A
STATUS	RESPONSE BREACHED	RESOLVED	CUSTOMER	ASSIGNED TO
Resolved	3/17/2021 5:41 PM	3/17/2021 5:41 PM	Default Customer	Promission Joanna
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}∃New Work Item 🗙 🖡	🖣 📢 Record 3 of 3 🕪 🕬 🝸 🕞 🕯	& • 🖶 📩 View •		
Title				
Expire E1 Roles/Access	WORK ITEM 105005	5		
Reclaim Hardware				
	Title*		Status	
	Reclaim Hardware			
			New	
	Description		Acknowledge	
	JSMITH was assigned [COMPUT	ER NAME]	Actions	
			Actions	
			Assign to Me	
			Link to Upstream Task	
			Add a Downstream Task	
	Assigned Team	Assigned To	Visualize Task Dependence	v Workflow

2. Find the user's AD account. Make sure it matches the employee's name. If you find a discrepancy, check with the Security Team to determine the correct account name, and to make sure there are not duplicate names.



3. In the Active Directory Users and Computers window, begin resetting the former user's password by finding the user, right-clicking the user's name, then selecting **Reset Password**.



4. In the Reset Password box, change the **New password** and **Confirm password** fields to **EmpowerHH:MM!**, where HH:MM is in military time.



5. Clear the User must change password at next logon checkbox, then click OK.

Reset Password		?	×
New password:	•••••		1
Confirm password:	•••••		
User must change (password at next logon		
The user must logoff Account Lockout State	and then logon again for the is on this Domain Controller: I account	change to take Unlocked	effect.
	ОК	Car	ncel

6. In the Active Directory Users and Computers window, begin moving the former user's account to the Disabled OU by right-clicking the user's name, then selecting **Move**.







7. In the Move box, select **MYRGroup Users > Disabled**. Then, click **OK**.

8. In the Active Directory Users and Computers window, click the former user's name to open the Properties window.



9. In the Properties window, update the former user's account description to: **Disabled, Date [YYYY-MM-DD format], [Tech's Initials], [Cherwell Ticket #]**.

-

Security F	Member Of	Password	d Heplicat	on L	Jial-In mote cou	Objec
Remote Desktop S	ervices Profile	0	OM+	Att	ribute Er	ditor
General Address	Account	Profile	Telepho	nes	Organ	ization
8						
First name:			Initials			
Last name:						
Display name:	-					
Description:	Disabled, 202	21-02-24, B	8H, #1222	47, SE	CO, Hen	der
Office:	SEC-Henders	on				
Telephone number:] [[]	Other	
E-mail:		≅myrgroup	com			
Web page:	sturgeonelect	nic com			Other	

For example: Disabled, 2021-01-01, DA, #123456

- 10. Copy the text that you just entered in the **Description** field before you click **OK**.
- 11. Go to the **Telephones** tab.



12. Paste the text from the Description field in the Properties window into the **Notes** field in the Telephones tab of the former user's account.

	Prop	erties			?	>
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Security	Er	vironment	Sess	sions	Remote c	ontrol
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Notes: Disabled, 2	021-02-24	. BH. #122247	,			< >
	0	к	ancel	Apply		Help



13. Remove any mobile number listed in the terminated user's profile by deleting the phone number in the **Mobile** field; then click **OK**.

	Prop	erties						?	×
Published 0	ertific	ates	Member Of	Pa	asswor	d Replica	ation	Dial-in	Object
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Telepho Home: Pager:	ne ni	umbers						Other Other	
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IP phor	e:						(Other	
Notes:									< >
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Search for and Archive the Former User's Folders

You need to reclaim the former user's hardware only if the user is entirely terminated. You do not need to take any action if you are soft disabling the user.

- 1. Using your elevated credentials account, locate the former user's H: drive folders in File Explorer. The user could have had more than one, so check the following folders:
 - \\den-san1a\Users
 - \\den-san1a\RM_Users
 - \\den-nasuni-f2\Users

Note: Watch for duplicate folders, or folders named "Documents," in Nasuni.



2. Some folders are called "Documents," instead of a user's name. To view the names of users associated with the Documents folders in the Filename column—as shown in the following example—complete the steps below.

Image: Image	w						- 0	×
Pin to Quick Copy Paste access Cipboard	path shortcut	Copy to Organize	e New New folder New	ltem ▼ access ▼	Properties	Open •	Select all Select none Invert selection Select	
← → → ↑ 💆 → Network →	den-nasuni-f2 >	users >			v õ	Search u	isers	<i>م</i>
System32 ^ 🗌 N	ame FAllen Favorites		Date modified 10/15/2020 7:55 AM 8/18/2017 11:25 AM	Type File folde	er	Size	Filename FAllen Favorites	^
3D Objects	Documents	ŝ.	3/15/2019 11:49 AM	File folde	er		fcamp	
Desktop	fdavison		10/21/2018 9:15 PM	File folde	er		fdavison	
				-		Constant of the second		

- a. In File Explorer, go to the **View** tab.
- b. In the **Current view** group, click the **Add columns** list, and select **Choose columns** to open the Choose Details window.

File H	ome Sh	nare	View									^ ?
Navigation	Preview p a	ane ne	Extra Mediu	arge icons Im icons	E Large icons	* * *	Sort		Add columns -	 ☐ Item check bo ✓ File name extent ✓ Hidden items 	nsions Hide selected items) Options
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	a land		A						Title			
📙 Disal	ble in AD								Choose columns			



c. Locate and select the Filename checkbox; then click OK.



The Filename column now displays in File Explorer, and it lists users' names. It is helpful to sort by the Filename column.

3. If the user's folder appears as "Documents," remove the desktop.ini file from the folder to change it to the user's name. If deleting the file doesn't change the name, you'll need to change it manually.

Note: If you can't see the desktop.ini file, complete the steps below.

a. In File Explorer, click **Options**.

						_	o x
File	Home Share	View					^ (2
Navigation	Preview pane	Medium ic	cons Small icons	Sort ⊨	 ☐ Item check boxes ☑ File name extensions ☑ Highter items 	Hide selected	Options
pane *	Panes	11C2	Layout	by ▼ 📖 Current view	Show/hide	items e	•



b. In the Folder Options window, in the View tab, locate and clear the **Hide protected operating** system files (Recommended) checkbox; then click OK.



- 4. If the former user's folders are empty, delete them. Otherwise, rename the folders according to their original location—for example, jsmith.nasuni. If the user had more than one folder in Nasuni, enumerate the folders (for example, jsmith.nasuni1, jsmith.nasuni2, etc.).
- 5. Cut and paste the user's folders to move them into the corresponding archive folder outlined below, based the user's geographic location.
 - In the Western US: <u>\\den-san1a\GroupShares_ArchiveDEN_TERM-USERS</u>
 - In the Eastern US: <u>\\den-san1a\RM_GroupShares_ArchiveRM_TERM-USERS</u>

Note: If the user has multiple folders, add one of the following notations to indicate its original location:

- .Nasuni
- .DEN-SAN (for the Users folder on den-san1a)
- .RM-SAN (for the RM_Users folder on den-san1a)



Provide Proxy Users Access to the Former User's Folders

- If the user's manager asked for access to the former user's folders, or delegates another user, modify the terminated user's folder's permissions to provide the proxy user with read-only access. Complete the following steps:
 - a. In File Explorer, find the user's folder in its archive location:
 - \\den-san1a\GroupShares_ArchiveDEN_TERM-USERS
 - <u>\\den-san1a\RM_GroupShares_ArchiveRM_TERM-USERS</u>
 - b. Right-click the folder, then select **Properties**.

Open Open in new window Pin to Quick access	ut Move Copy Delete Rena to to to Organize	Mew Mew folder New	access • Properties	pen
Scan with Sophos Anti-Virus	an1a > Groupshares > _Archivel	DEN > _TERM-USERS	~ C	
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Pin to Start	er	3/2/2021 4:25 PM	File folder	
Send to	> e (name conflict from MYRGRO	3/2/2021 4:25 PM	File folder	
Cue	- dova	3/5/2021 3:34 PM	File folder	
Conv	dova (name conflict from MYRG	3/2/2021 4:26 PM	File folder	
	– tic	3/5/2021 3:34 PM	File folder	
Create shortcut	enport	3/8/2021 7:51 AM	File folder	
Delete	ison	4/25/2018 8:41 PM	File folder	
Rename	TIS	3/4/2020 11:22 AM	File folder	
Properties	an .	3/5/2021 3:34 PM	File folder	
	🗈 Nasuni	10/11/2019 6:07 PM	File folder	
ight Network	.SAN	10/11/2019 6:06 PM	File folder	
Client\	dobe	3/3/2021 3:08 PM	File folder	
DEN-ROOTCA	lobeTemp	3/3/2021 3:08 PM	File folder	
	(name conflict from MYRGRO	3/2/2021 4:26 PM	File folder	

c. In the [Object Name] Properties window, go to the Security tab, and click Edit.



d. In the Permissions for [Object Name] window, click Add.

roupshares_Archive	DEN_TERM
MYRGROUP\Winfile	· IA Al Fold
ROUP\Winfile - Help	Desk)
CIFS\administrators	5
Add	Remove
Alow	Deny
Allow	Deny
Alow	Deny
Allow	Deny
Alow	Deny
	MYRGROUP\Winfile - Help ROUP\Winfile - Help JP\Domain Admins) _CIFS\administrators Add

2. Search for the proxy user by entering the proxy user's full name, then clicking **Check Names**.

Select Users, Computers, Service Accounts, or Group	25 X
Select this object type:	
Users, Groups, or Built-in security principals	Object Types
From this location:	
myrgroup biz	Locations
Enter the object names to select (examples):	
(@myrgroup.com)	Check Names
Advanced	OK Cancel



3. In the Permissions for [Object name] window, make sure the proxy user is selected; then give the proxy user **Read** access, and click **OK**.

Object name: \\den-san1a\	Groupshar	es_Archive	DEN_TERM
Group or user names:			
Minfile - IA All Folders RO	(MYRGR	OUP\Winfile	e - IA All Fold
💐 Winfile - Help Desk (MYR	GROUP\W	Winfile - Help	p Desk)
MyRGR	OUP\Dom	ain Admins)	1
administrators (DEN_SVM	11_CIFS\a	dministrators	s)
	@myrgrou	p.com)	
4 "IIII III ("	@myrgrou	ip.com)	
	@myrgrou	dd	Remove
Permissions for	i@myrgrou A	dd	Remove Deny
Permissions for and	A A	dd	Remove Deny
Permissions for Annual	A A	dd	Remove Deny
Permissions for Modify Read & execute List folder contents	A A	dd	Remove Deny
Permissions for Annual	A A	Allow	Remove Deny
Permissions for Modify Read & execute List folder contents Read Write	A A	dd	Remove Deny

- 4. Check the proxy user's AD profile to confirm they are a member of one of the following winfile groups—based on the former user's location—to ensure they can access the former user's folders:
 - Winfile _ArchiveDEN _TERM-USERS
 - Winfile _ArchiveRM _TERM-USERS

Complete the following steps:

- a. In AD, search for the proxy user. The search results display in the Find Users, Contacts and Groups box.
- b. Click the proxy's name to go to the user's Properties window.

File Edit View Find: Users, Contacts, and Users, Contacts, and Grou Name: Description:	Groups V In:	ji myrg	roup.biz V	Browse Find Now Stop Clear All	
Search results:					
Name	Employee ID	Туре	Description		
8		User	MYR, Thornton, C	o, it	
<					>
1 item(s) found					



c. In the Member Of tab, make sure the proxy user is a member of the appropriate winfile – Archive group (Winfile - _ArchiveDEN _TERM-USERS) or Winfile - _ArchiveRM _TERM-USERS).

Click **OK** if the user is a member to return to the Permissions for [Object name] window, and proceed to <u>Step 5</u>. Click **Add** if the user is not.

-	Prop	erties					ŝ
Security	E	vironment	Sessio	ons	F	lemote co	ontrol
Re	emote Desk	top Services P	rofile			COM+	
General	Address	Account	Profile	Tele	phones	Orga	nization
Published C	ertificates	Member Of	Password	Replic	cation	Dial-in	Object
Member of	h,						
Name		Active Directo	ory Domain	Servic	es Folde	er.	^
XA App	Adobe	myrgroup biz/	MYRGroup	Users	/Citrix		
_XA App _XA App _XA App _XA Tes <	-MS Offi -Remote -Sharefil t Produc	myrgroup biz/ myrgroup biz/ myrgroup biz/ myrgroup biz/	MYRGroup MYRGroup MYRGroup MYRGroup	Users Users Users	/Citrix /Citrix /Citrix /Citrix	>	,
Add	. 1	Remove					
Primary gro	oup: D	omain Users Th ere is n	o need to c	hande	Diman		



d. In the Select Groups window, in the Enter the object names to select field, type winfile - _archive, then click OK.

Select Groups		×
Select this object type:		
Groups or Built-in security principals		Object Types
From this location:		
myrgroup.biz		Locations
Enter the object names to select (<u>examples</u>):		
Winfilearchive		Check Names
Advanced	ОК	Cancel

e. Select the appropriate archive folder in the results; then click **OK** to return to the [Object Name] Properties window.

Aultiple Names Found More than one object matche nore names from this list, or, re	d the name "Winfilearchive". Select a senter the name.	one or
Matching names:		
Name	Description	In Folder
🗟 WinfileArchiveDE	Winfile - ArchiveDEN Term-Users	
I IN WITH - ACTIVELIT	T THE WITHER - ACTIVED IN BOILD	
K WinfileArchiveRM	K WinfileArchiveRM _Term-Users	
MinfileArchiveRM	l Rolup	myrgroup.biz/MYRGroup Users
٢		>
		OK Cancel

- f. In the [Object Name] Properties window, click **OK**.
- 5. If the former user's manager or admin assistant requested access to the user's OneDrive, create an additional work item in the termination ticket, and assign the work item to Desktop Engineering.

Provide Proxy Users Access to the Former User's Email

- 1. Go to www.admin.exchange.microsoft.com/#/mailboxes, and log in with your elevated credentials.
- 2. In the Exchange admin center, go to **Recipients** > **Mailboxes**.

		Exchange adm	n center
=			
ŵ	Home		Wallboxes
8	Recipients	^	g ⁰ Add a shared mailbox
1	Mailboxes		
	Groups		Display name ↑
	Resources		*EmailOnlyTemplate
	Contacts		
	Mail flow	~	*EmailOnlyTemplate
-			*Email [®] • • • • • • • • • • • • • • • • • • •

3. Search for the former user by entering the user's name in the **Search** field.

	MYR	Exchange admin ce	nter			Q	3	?	(π)
≡ ©	Home		Mailboxes						î
8	Recipients	^		ather.	×	7 Filter	r ~ ≡	~	
	Mailboxes		~ ~			_	_		

4. Click the user's display name in the search results to display a flyout menu with options for working with the user's mailbox and account.





5. On the flyout menu, click Manage automatic replies.

- 6. In the Manage Automatic Replies window, complete the following steps:
 - a. Select the following options and checkboxes:
 - i. Automatic replies
 - ii. Send automatic replies to senders outside this organization
 - iii. Reply to all senders



b. Set both internal and external replies to the following:

"[Term user] is no longer with MYR Group. Please direct all correspondence to [Proxy User] at proxyuser@myrgroup.com"

Note: If no proxy is specified, omit the second sentence.

c. Click Save.







7. If a point of contact (POC) is specified, click **Manage mailbox delegation** on the flyout menu.





8. For the Read and manage option, click Edit.

9. Click + Add permissions and search for the designated POC.

	MYR	Exchange admin cen	iter	A	Q	3	?	(π)
								×
ŵ	Home		Manage mail	oox delegatio	n			
8	Recipients	~	+ Add permissions					
1	Mailboxes		Add read and manage	e permissions				
	Groups		Search by display name	e or email address				
	Resources Contacts		Read and manage (2)					
	Mail flow	~	0	@myrgroup.co	m		5	<
?≞	Roles	~	•	@myrgro	up.com		>	<
G	Migration	×		~	-		_	



10. Search for the designated POC by entering the POC's name in the **Search** field.



11. In the search results, select the user's checkbox, then click **Save**.

	MYR	Exchange admin center	国 Q 缴 ?	n
=				×
a	Home		Add read and manage permissions	
8	Recipients	~	× م	
	Mailboxes		Adding (1)	
	Groups		FL @myrgroup.com ×	
	Contacts		Results (1)	
P	Mail flow	2	R @myrgroup.com	
				and the second
			Save Cancel	

12. When you are notified that mailbox permissions are added window, click Close.



Remove the Former User from Outlook Lists and Software Groups

1. Find the former user's account in AD by locating the user in the appropriate OU.

Note: If you look for the user by searching for the user's name, the windows that are needed to hide the user's name will not display.

2. In the Attribute Editor tab, locate and click the **msExchHideFromAddressLists** attribute. Then, click **Edit**.

Published Ce	ertificates	Member Of	Passwor	d Replicat	ion D)ial-in	Object
Security	Er	vironment	Sest	sions	Ren	note co	ontrol
General	Address	Account	Profile	Telepho	ones	Orga	nization
Remote I	Desktop Se	ervices Profile	C	OM+	Att	ribute 8	dtor
Attributes:							
Attribute		Value					^
msExchH	ABRootDe	p (not set)					
meEychH	ARShowlo	D (not set)					
msExchH	deFromAd	d <not set=""></not>	2				
msexcnm	отемироз	L <not set=""></not>	8				
msExchH	omeMTAS	L <not set=""></not>					
msExchH	omeServer	<not set=""></not>					
msExchH	ouseldenti	fier <not set=""></not>					
msExchill	IACL	<not set=""></not>					
msExchill	Address	<not set=""></not>					
msExchill	IAP4Settin	gs <not set=""></not>					
msExchin	IAPOWAU	<not set=""></not>					
msExchin	ImetaPhys	i (not set)					
msExchin	mutable d	<not set=""></not>					~
<	mutable 3	d (not set)				>	
	_		_		10		_
Edit						Filter	
					_		



Boolean Attribute Editor		\times
Attribute:	msExchHideFromAddressLists	
Value:		
True		
O False		
Not set		
	OK Cancel	

3. In the Boolean Attribute Editor, change the Value to True. Then, click OK.



4. In the Member Of tab, select all **DL** (distribution lists) and **WinApp** groups to which the user belongs, then click **Remove**. A message will ask you to confirm your changes; click **Yes**.

Security	En	vironment	Sess	ions	Re	mote co	Iortrol
Remote Desktop Services Profile		00	+MC	Ab	Attribute Editor		
General Wiblished Ce	Address stificates	Account Member Of	Profile Password	Telepho Replicati	nes on (Orga Dial-in	nization Object
Member of:							
Name			Ac	tive Direct	ory Do	omain S	ie ^
DL-HUEN	No.		my	rgroup biz	/MYR	Group (
DL-HUEN	l Chicago		my	rgroup biz	/MYR	Group (
Domain U	sera		my	rgroup biz	/Users	3	1
JDE-E1	1022202		my	rgroup biz	MYR	Group I	U
MobileApp	p-VPP-Blue	beam-Huen	my	rgroup biz.	/MYR	Group I	U
PP_Meter	ing		тту	rgroup biz	/MYR	Group (D
Charles Charles	A second second			manager and the local sectors.	/HVD	Company serve I	
Sharehie	Access		my	rgroup biz	MTP	Caroup (
WinApp-C	365-E1-U	sers	my my	rgroup biz	/MYR	Group (-
WinApp-0	Access 365-E1-U	sers	my my	rgroup biz	/MYB	Group (~
Add	Access)365-E1-U	ens Vemove	my	rgroup biz	/MYR	Group (-
MinApp-C	Access 0365-E1-U	iens Nemove	my my	rgroup biz	/MYR	Group (
MinApp-C	365-E1-U	iens Remove	my	rgroup biz	/MYB	Group (
Add	Access)365-E1-U p: D	iemove Iomain Users	my my	rgroup biz	/MYR	Group (
Add	Jacoess Jacoess Jacoess F Jacoess F	Vemove Domain Users	my my	igroup biz	/MYR	Group (
Add	ACCess J365-E1-U Ip: Dr any Group	tens Temove omain Users There is n you have	o need to o	thange Pri	MYB /MYB	roup u	nless
Add Primary gro.	Access 3365-E1-U p: De ary Group	Remove amain Users There is n you have application	o need to o Macintosh	change Pri	many g POSIX	Group (> roup ur -compli	niess
Add	ACCess J365-E1-U Ip: Dr ary Group	Remove omain Users There is n you have application	o need to o Macintosh	change Pri	mary g POSIX	roup u	nless
Add	Access 3365-E1-U up: Dr ary Group	Remove omain Users There is n you have application	o need to o Macintosh 18.	change Pri	many g POSIX	roup u	nless
Add	Access 3365-E1-U p: Do any Group	Vemove Omain Users There is n you have application	o need to o Macintosh	change Pri	many g POSIX	roup u	nless
Add	JS65-E1-U	tens Remove omain Users There is n you have application	o need to o Macintosh	change Pri	mary g POSIX	roup u	niess

5. Document the lists and groups from which you removed the user in the **Completion Details** field of ticket in Cherwell.



6. If you removed the user from WinApp groups, create a work item in Cherwell, and in the **Title** field, enter **Reclaim Licenses [User Name]**. Then, list the removed WinApps in the **Description** field.



Use the table below to enter the common name of the software, instead of the software's object name.

Object Name	App Name
WinApp-Adobe-Acrobat Pro DC	Adobe Acrobat Pro DC
WinApp-Acrobat-All Apps Plan	Adobe All Apps Plan
WinApp-Adobe-Captivate	Adobe Captivate
WinApp-Adobe-CC	Adobe Creative Cloud
WinApp-Acrobat-Illustrator	Acrobat Illustrator
WinApp-Acrobat-InDesign	Acrobat InDesign
WinApp-Blackline	BlackLine
WinApp-Bluebeam	Bluebeam for PC
WinApp-Cherwell	Cherwell

Object Name	App Name
WinApp-Const-Monkey	Construction Monkey
WinApp-O365-E3-Audio Conf	Teams Audio Conference License
WinApp-O365-Power BI Pro	MS Power BI Pro
WinApp-O365-Project OL Premium	MS Project OL Premium (Plan 5 license)
WinApp-O365-Project OL Pro	MS Project OL Pro (Plan 3 license)
WinApp-O365-Visio OL P2	MS Visio
MobileApp-VPP-Bluebeam	Bluebeam for iPad License
MobileApp-VPP-Bluebeam-Huen	Bluebeam for iPad License (Huen Only)

7. Assign the work item to the IT Administrative Lead. If the Administrative Lead is not available, assign it to the Service Desk Supervisor.



At that point, the person who was notified can reclaim the license for the software.



- 8. If the former user is a member of the WinApp-Const-Monkey group, send an email to Construction Monkey at <u>admin@constructionmonkey.com</u> to remove the user's access. It is recommended that you send this email from Cherwell, so that all the IT information for the user's termination is in one location. From the termination ticket in Cherwell, complete the following steps:
 - a. Click the **Journals** tab.
 - b. Find a Journal-Mail History item, and click it to open it.





c. Click E-mail, and select Forward.





d. In the email form, inform Construction Monkey that the former user is no longer an employee at MYR Group, and ask that it removes the user's access. Then, click **Send**.

≽ E-mail Message		_		×
🖾 Send 👗 🎦 🕄 ! 🕑 🗗 🛛 🖼 🖉 Send via IT-HelpDesk	~			
Calibri • 12 • B / ⊻ E Ξ Ξ ≡ ≔ = =				
To admin@constructionmonkey.com				
Cc				
Subject: FW: Termination Notification to IT - Q				
Please remove access for <u>@myrgroup.com</u> Let me know if you need any further info.				^
Regards,				~
Attach to current Incident history				
Attach to recipients Options	Sen	d	Can	el

- e. Construction Monkey will email you to notify you when your request is complete. If it replies to the email you sent, the response will be in the ticket. Otherwise, copy and paste the response from the email to the ticket.
- 9. Send an e-mail to the proxy user, notifying the user of access to the terminated user's mailbox and H: drive files (if applicable).



Close the Work Item

- 1. In Cherwell, document your work in the work item as appropriate, then click **Save**.
- 2. When you receive the user's hardware, enter in the **Completion Details** field something similar to the following: **Hardware was returned [MM/DD]. Placing in BU [business unit] stock.**
- 3. If the user had an AD account, enter the following in the **Completion Details** field, as appropriate:
 - Indicate where you moved the user's folder (_ArchiveDEN or _ArchiveRM).
 - Name the groups from which you removed the user's AD account.
 - Indicate that you set autoreply.
 - Indicate that you hid the mailbox from address lists.
 - Name who received proxy access (if applicable).





4. When the work item is complete, click **Close**.

rdile T	Attach > PXL1522-AD	DMINISTRATIVEASSISTANT-	pdf	Access 042821.pdf	SoD 042821.pdf	Acces		
Quick Search	P3 INCIDENT 1273 IT Service Desk > Report	88 t Outage or Error > Submit Incident						
Search • P	STATUS	RESPONSE BREACHED	RESOLVE WITHIN					
Open Advanced Editor.	In Progress Next: Resolve	4/27/2021 6:22 PM	2 days 01 hour					
Common Tasks								
Home	Overview Details Activity Journ	als Tasks (5) Related Cls (0)						
CMDB	E New Work Item X K4 44 Record 3 of 5 >> >> T + 1 46 + 1 🛱 📩 View +							
Create Problem	Title							
ncident Actions <u> f Escalation to Level 2 and 3</u> <u> P Remote Control Cl</u>	E1 Permissions - Heather Kla File Access Permissions - He Shared mailbox access - Heat Shoretel Phone Setup - Heath	WORK ITEM 106044	L					
Rebool Computer	Software Order Request - He	Title *			Status			
Create a Problem		Shared mailbox access -						
Nominate for KB Quick Template	ninate for KB ck. Template •		Description		In Progress Close			
lueues					Actions			
<u>icident 127388 on New R</u> 🔹					Assign to Me			
					Link to Upstream Tas	k		
		Assigned Team Assigned To			Add a Downstream Ta	isk		
- Open the Queue Manager					Visualize Task Depend	dency Workflow		
Open the Queue Manager		Durlan			visualize Task Depend	Jency Workite		





5. When prompted, select **Completed** as the close reason.

Revision History

Version	Date	Description	Approver	Reference ID
1.0	9-Feb-2021	Initial version.		None