

## Provisioning External Users

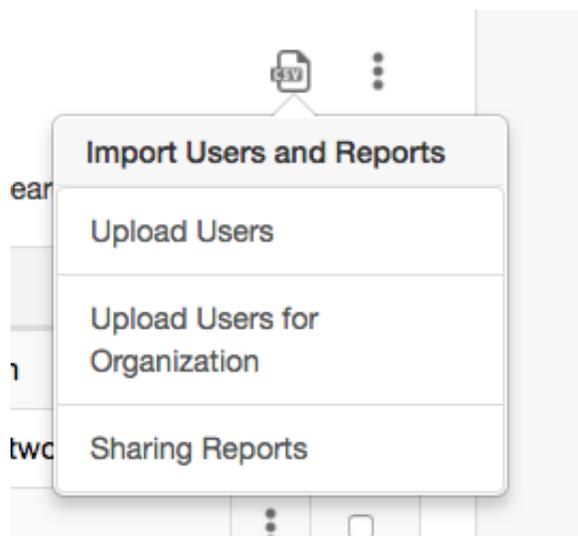
Users can be provisioned one at a time or in bulk from a CSV File. The user provisioning process is always initiated and controlled by the admin. This ensures that only eligible users who should have access to receive shared content can provision an account.

### Provisioning users one at a time

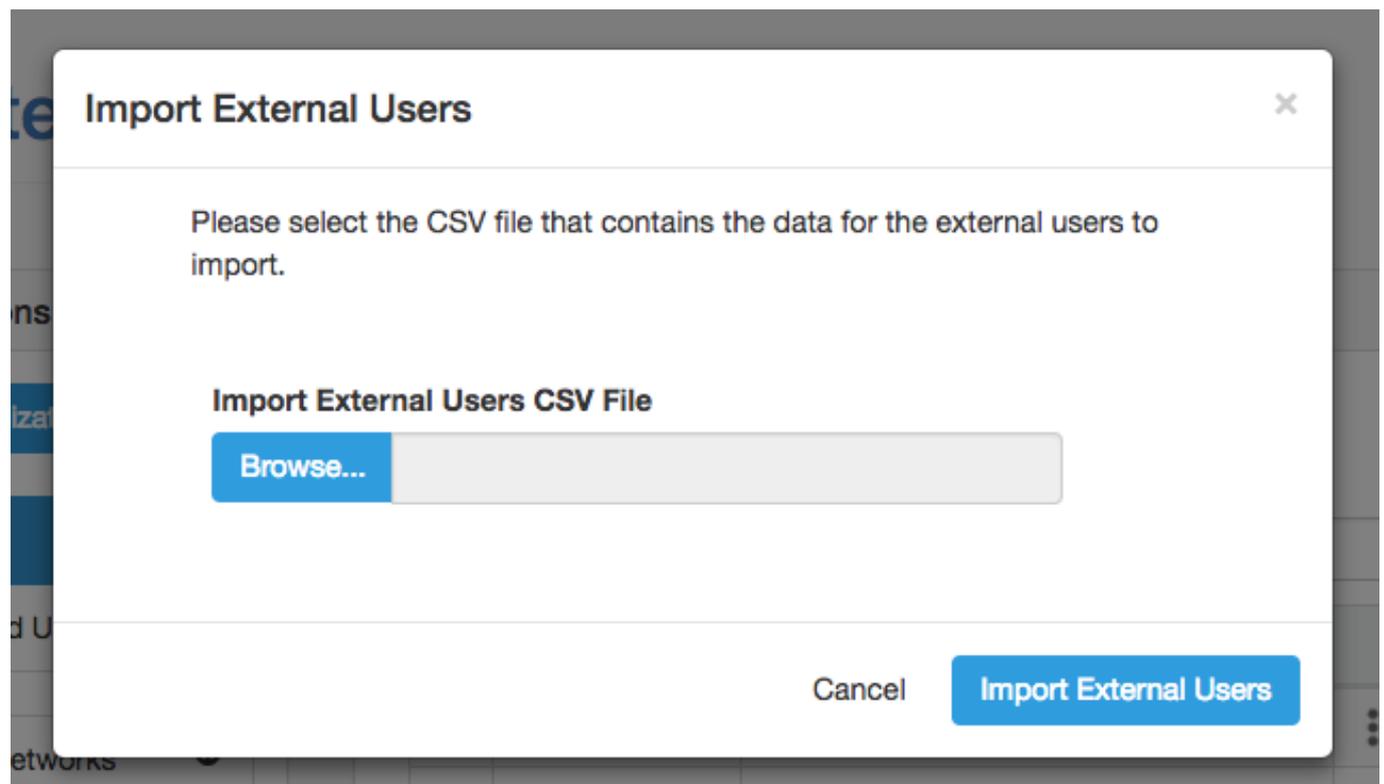
1. Clicking the *Add User* button and enter the user's name, email address, the organization the user should be a member of and the User Group (see [Settings](#)) the user should be assigned to.
2. A time-limited unique provisioning link is emailed to the external user to provision their account
3. The external user fills out and submits the provisioning form and are subject to an account activation process which includes setting up security questions for use in password resets, verifying their phone number by receiving an SMS with an OTP code and optionally setting up Google Authenticator as a 2nd factor authentication option.
4. On completing the account activation process the user receives a welcome email and their account is activated. Only users who have completed the account activation process can access shared folder or files.

### Provision Users in bulk through CSV File

External users can be provisioned from a CSV through the CSV menu .



The user will be presented with a dialog to enter the CSV file and on clicking *Import External Users* the users will be added to the list of users. On importing users, a provisioning email is not automatically sent to the external users imported. The admin will have to select the newly provisioned external users and send the provisioning emails to them.



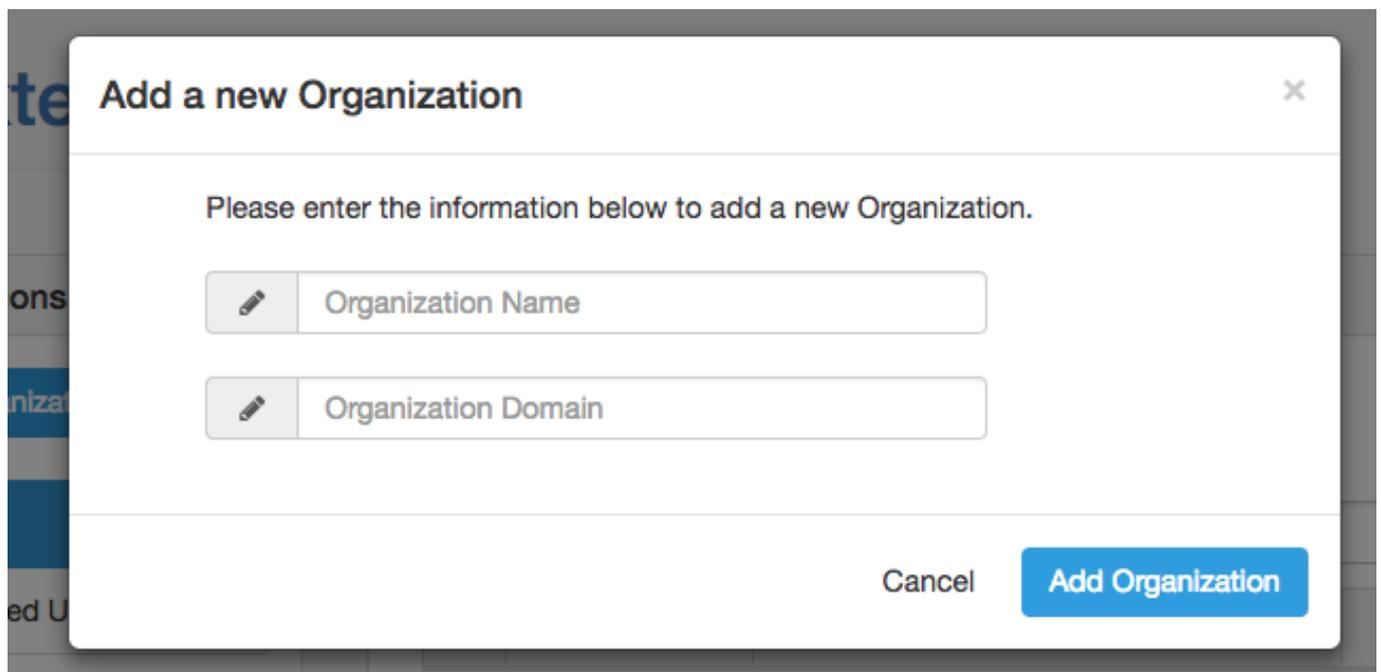
There are 2 options for uploading external users from a CSV File. The *Upload Users* menu item will upload users into any organization. If the organization does not exist the organization will be created. The CSV file must have the following columns.

Name,Email Address,Org Domain,User Group

Adding external users through the *Upload Users for Organization* menu will open a sub-menu with the existing organizations. Selecting the organization will open the *Import External Users* dialog to select the CSV file for importing the users. The CSV file must have the following columns  
Name,Email Address,User Group

## Organizations

Organizations are a way for grouping users. Typically this would be the company the external users work for, but it could also be used for other domain specific ways of grouping users. A new organization is added through the *Add a new Organization* dialog by specifying an Organization name and domain and clicking the *Add Organization* button.

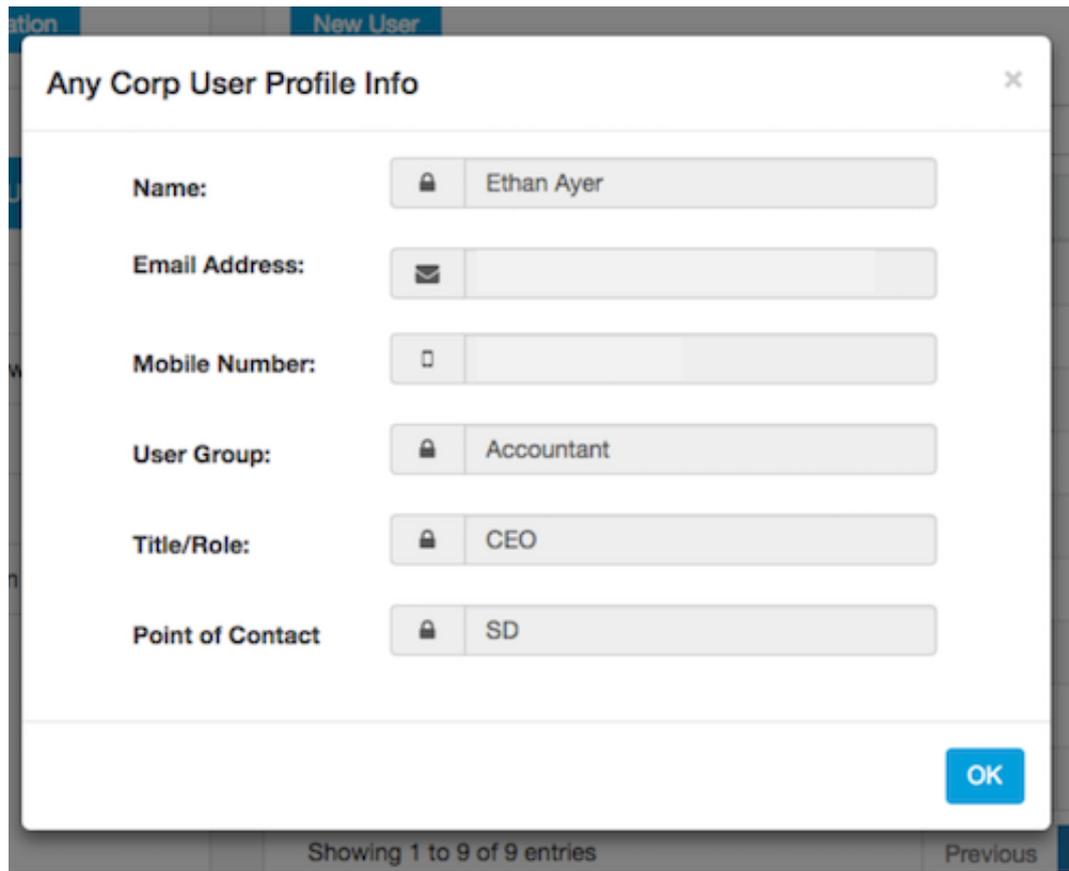


The image shows a modal dialog box titled "Add a new Organization". The dialog contains the following elements:

- Title bar: "Add a new Organization" with a close button (X) on the right.
- Instructional text: "Please enter the information below to add a new Organization."
- Input fields: Two text input fields, one labeled "Organization Name" and one labeled "Organization Domain". Each field has a small pencil icon to its left, indicating it is editable.
- Buttons: At the bottom right, there are two buttons: "Cancel" and "Add Organization". The "Add Organization" button is highlighted in blue.

## External User Management Actions

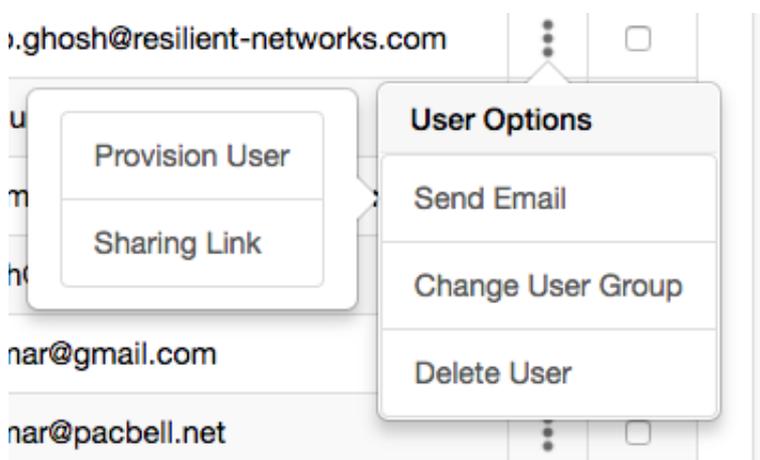
Clicking on the user details icon  in the first column of the Users table opens the User Details popup that has more information about the provisioned external users.



Actions on individual users can be performed by clicking on the user menu  on the right most column in the user's table.

Group action can be performed by selecting the users by clicking on the checkbox in the user row and then performing the group action through the group action menu above the user's table. All users can be selected by clicking on the checkbox that is in the header row of the users table.

The following group actions can be performed:

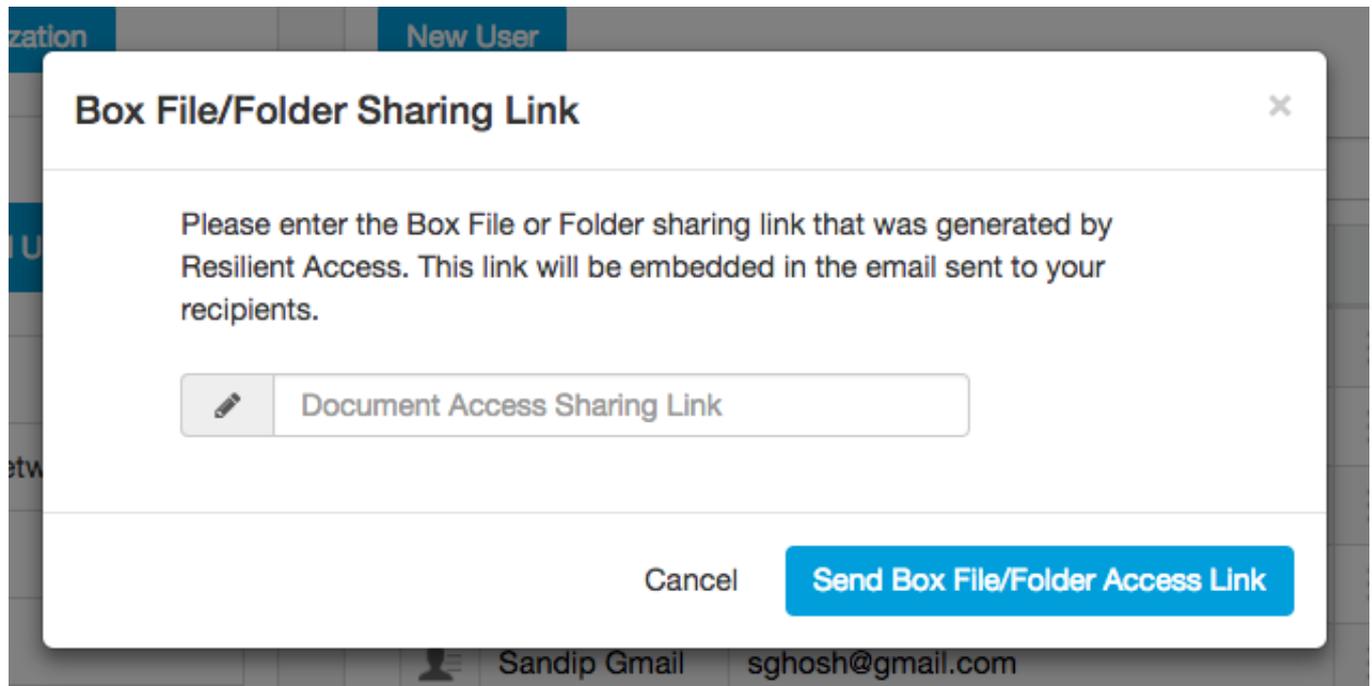


### Send Provisioning Email

The Send Email -> Provision User menu item will send the provisioning email to the selected users.

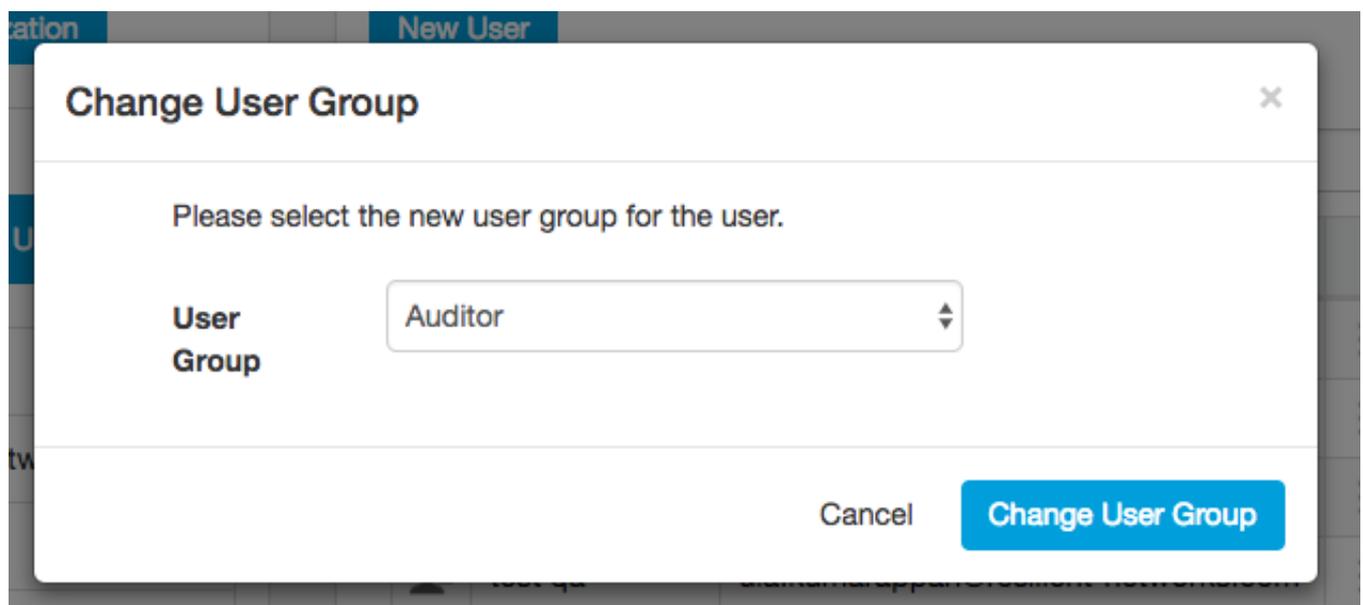
### Send Shared Link Email

Clicking on the Send Email -> Sharing Link menu item will open the *Box File/Folder Sharing Link* dialog to send the unique shared link email to the selected users.



### Change User Group

This action allows the admin to change the User Group the user is a member of through the *Change User Group* dialog



## **Delete User**

Deletes the selected user after asking for the admin to confirm.

## **Sharing Reports**

The CSV menu allows the admin to download the Shared Link report and the User Group report. Each of these reports will generate and download a CSV file that has all the shared links in the case of the Shared Link report and all the Box folders in an Enterprise Box account that are shared by User Group.