

We Proudly Present:



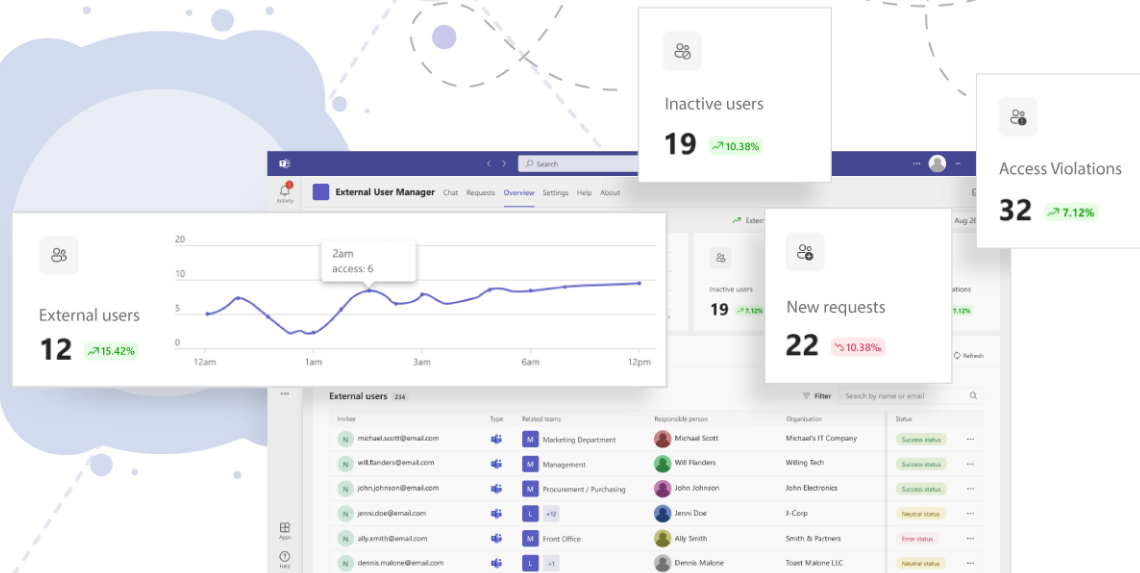
EXTERNAL USER MANAGER

CONTACT US:

www.solutions2share.com

info@solutions2share.com

+49 (0)911 1313 3660



External User Manager Features

- Dashboard with comprehensive information about external users, their status and connected teams / groups
- Request access for guest users in Teams and Microsoft 365 groups
- Request & approval workflow
- Lifecycle management: Remove guest users automatically, based on predefined rules or inactivity
- Onboarding portal: Provide compliance documents such as PDFs, videos, HTML pages (e.g. NDAs, GDPR agreements, onboarding videos, etc.)
- Reminder and automated rejection if onboarding is not completed
- Import existing guests: Apply lifecycles, start or skip onboarding, automatically run the import every X days
- Metadata for guests
- Access control
- Access history
- Access review process with automated notifications
- Offboarding notifications
- Deactivate existing Teams / Groups for external access
- Reports
 - Active users
 - Access review
- Optional add-ons bookable:
 - Webhook (for SaaS customers)
 - REST API

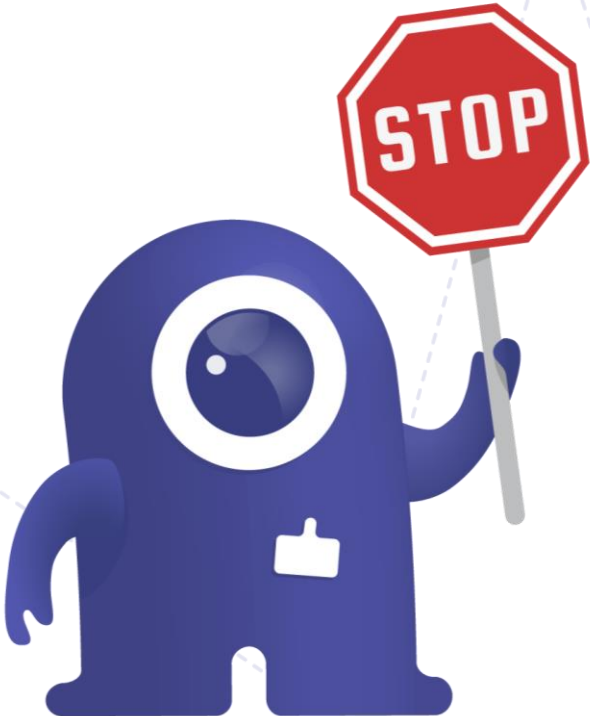
Hi! I am Eumy.

Nice to Meet you!



Enterprise Edition Features

- Organizational Request: approve entire domains (coming soon)
- Extended graphical customization of the onboarding portal
- CSV export report for all guests
- Included in the Enterprise Edition:
 - Webhook
 - REST API



Request New Guest Users

Team members can request access for guest users in the tab “Externals” from within the Team.

Team owners see a list of all open requests, ...

...as well as all currently active external users.

Request new guest users by clicking on this button.

Team owners are set as approvers by default. (Optionally, you can instead give approval rights to your admins.)

Open Requests(4)

Requester	Request	Approvers	Status
R	Grant access for anton.mueller@google.net	C Communications	✓
R	Grant access for werner.neumann@web.de	C Communications	✓
R	Grant access for ina.jansen@gmail.com	C Communications	✓

Active external users(2)

Name	Approved by	Status
anita.berger	MA MOD Administrator	✓
mark.sender	MA MOD Administrator	✓

Team owners can approve or deny the requests, ...
...and can also decide to remove guest users from the Team.



Request external user

Invite mail address
Please provide the valid email address of the person you want to invite

Mail*
j.doe@hotmail.com

Cancel Next

Enter the details for the new guest user:

Invite E-Mail

Enter the e-mail address of the guest user. (Note: The guest needs to have a Microsoft 365 work or school account. If they do not have one, they will be prompted to create a free Microsoft account associated with their email before they can join your Team/Group.)

Teams / Groups

Select one or more Team/Group.

Comment

Add a comment explaining why the new guest user should have access.

After you have filled in all fields, click on “Next”.

Keep Control Of Your Data

External User Manager

Configuration

1 Settings

- Welcome
- Setup
- Approval
- Notification

2 Security

- Access Review

Grant permissions to the External User Manager app.

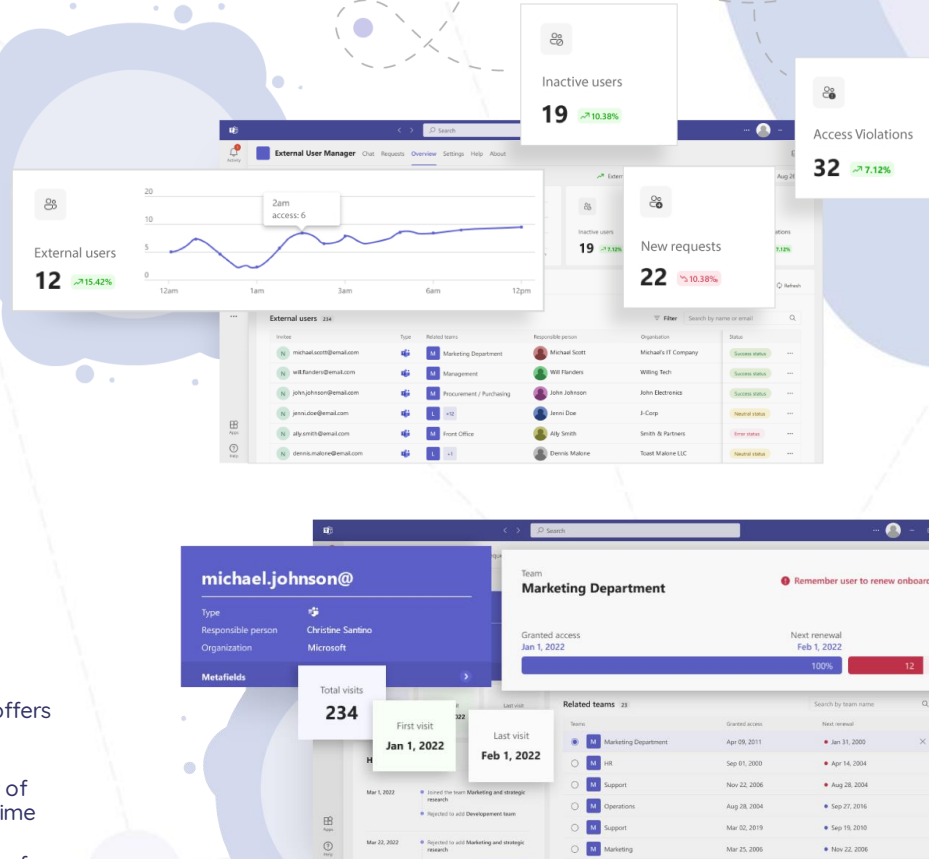
Set up the approval process and, if necessary, define additional approvers.

Select which notifications the users and you yourself want to receive.

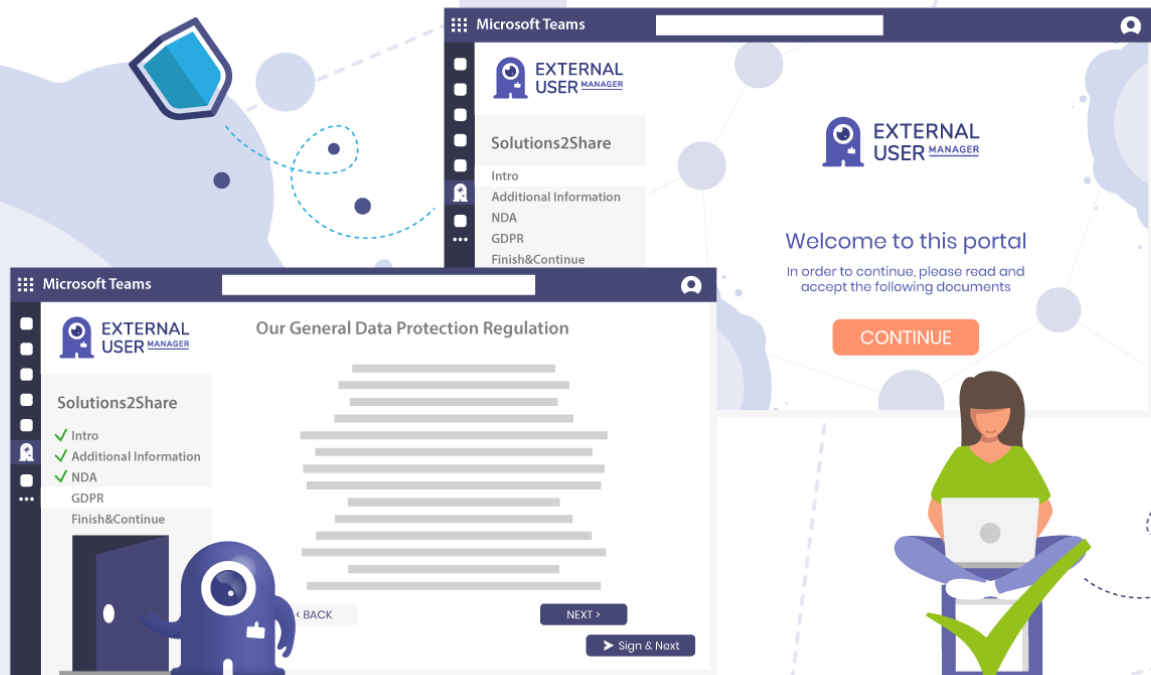
Configure an access review process to regularly check your external users.

External User Manager offers detailed reports on:

- the average number of external users over time
- the average number of new external users over time



Onboarding Process For External Users



External User Manager's integrated onboarding process helps you set binding guidelines and offer guest users the best start possible.

The onboarding process is completely adaptable to your requirements. Apart from the customizable logo, you can:

- ask the external user for additional information
- offer documents to read and sign (GDPR, NDA, communication rules etc.)
- integrate videos to view and sign
- offer helpful information about your company (organization charts, contact persons etc.)

Afterwards, download all signed documents at any time.

What About Microsoft's Features?

Comparison of External User Manager vs. Microsoft out-of-the-box



	Request & approval workflow	Metadata for guests	Naming conventions	Lifecycle management	Onboarding portal with compliance docs	Deactivate existing teams for guests	Check access agreements: NDA, GDPR	Access review process	Lifecycle & access review notifications	Manage already existing guests	Add-ons: Webhook, REST API, flows
External User Manager	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
Microsoft ootb	✓	✗	✗	only with E5 license*	✗	✗	✗	only with E5 license*	✗	✗	✗

* or additional security license

External User Manager Roadmap

In our roadmap for External User Manager, you will always find the latest information on planned features. You also have the opportunity to vote on topics or provide feedback and ideas!

<https://app.loopedin.io/external-user-manager>

The screenshot displays the External User Manager Roadmap interface, organized into three main columns: 'In progress', 'Up next', and 'Future'. Each column contains a list of features with descriptions and a vote count.

- In progress**
 - Features**
 - Blacklist for specific Teams**
To give you more control over external user access, we've introduced a blacklist feature. Now, you can specify Teams where external users should not be invited, ensuring better security and compliance. (13 votes)
 - External User Governance**
Approve External Users: Easily review and approve external users before granting them access.
Lifecycle Management: Set predefined lifecycles for users to ensure timely access reviews and removals.
Naming Conventions: Implement consistent naming conventions for better organization.
Policies & Approval Groups: Introducing robust policies and designated approval groups to streamline the external user management process. (0 votes)
 - Domain Whitelisting and Blacklisting via Entra**
To enhance security and compliance, we now support Entra configurations that allow or block specific domains. This feature enables you to have more granular control over which external domains can interact with your Teams environment. High Trust is required and needs to be consented after the release. (0 votes)
 - CI Customization Dashboard (For Enterprise Customers Only)**
- Up next**
 - Security**
 - Access Overview**
Lists of accessed files. (13 votes)
 - Organisation Request**
With this new feature only one of the company must sign the NDA /other documents and not all of them. By the company determined responsible person also will be notified regarding this information.
New request (Step 2: Company information)
Form fields: Responsible user email address (email@gmail.com), Company name (Acme), Company ID (123456789), and Address (123 Main St, New York, NY 10001). Buttons: Back, Cancel, Submit.

- Future**
- Features**
 - Immediate Access Review**
Admin can enable Access Review for external User. (9 votes)
 - Optional Onboarding for specific conditions (Policy)** (6 votes)
 - Access Violations (V3)** (10 votes)
 - Shared channels**
Shared channels will be implemented when it's OA (general availability). (3 votes)



You can find all our tutorial videos
in our Youtube channel!

www.youtube.com/c/Solutions2Share/videos

