



# Administration Guide

Organization Portal 24.1



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Organization Portal 24.1 Administration Guide

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## Change Log

Date	Change Description
2024-02-03	Initial release.
2024-03-13	Updated <a href="#">Introduction on page 5</a> and <a href="#">Getting started on page 6</a> .

# Introduction

FortiCloud Organization is a centralized account management service that consolidates multiple FortiCloud accounts into Organization/Organizational Units (OUs). The service provides a single pane of visibility management across FortiCloud accounts to manage assets and cloud services, inviting accounts, hierarchical account grouping (OUs), and access roles for user permissions.

The Organization Portal includes the following features:

## Create Organization

- Create a new Organization to consolidate multiple accounts.

## Manage OU hierarchy

- Create a hierarchy of Organizational Units (OUs).

## Invite/Join Organization

- Invite FortiCloud accounts to join the organization to manage the invited accounts.

## Dashboard and visibility

- Single pane of glass visibility into your Organization resources across multiple FortiCloud accounts.



For the purpose of this document, the term "users" will be used to describe available user types, such as IAM users and external IdP roles.

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## Prerequisites

The following items are required to establish an organization and invite other FortiCare accounts to join the organization:

- FortiCloud Premium contract



The Organization Portal full functionality cannot be accessed without a valid FortiCloud Premium contract in the Root account. If the contract is missing, expired, or soon to be expired, a warning message is displayed prompting the user to purchase the contract through a Fortinet Partner.

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# Getting started

This section outlines how to get started with the Organization Portal:

- [Key concepts on page 6](#)
- [Overview of creating and managing Organizations on page 7](#)



More information on creating and managing Organizations can be found in the [Asset Management](#) and [Identity & Access Management](#) guides.

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## Key concepts

### Organization:

An *Organization* is a hierarchy comprised of Organizational Units (OU) and Member Accounts. Each Organization can have a maximum three levels of OUs.

### Organizational Units (OU):

*Organizational Units (OU)* are nodes in your Organization. How you choose to define the nodes is up to you. For example, a node can be a region or a division of your company. In the Organization Portal, OUs appear as folders that contain accounts and sub-OUs.

### Root Account:

The *Root Account* is the account that created the Organization. An Organization can have only one Root Account.

The Root Account user:

- Can create an IAM user and delegate permissions to manage the organization
- Is responsible for managing the entire organization
- Adds and deletes an organization and sub-OUs
- Invites members to join an organization
- Cannot be changed to a Member Account

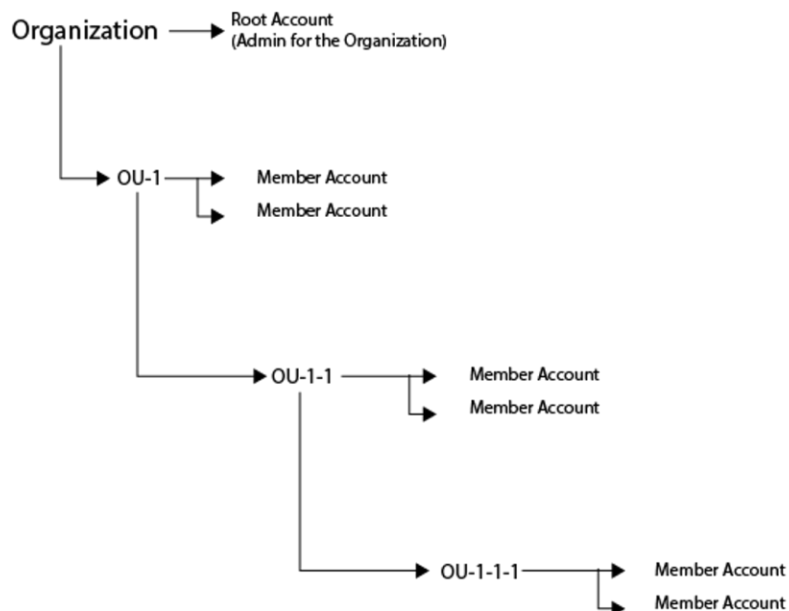
### Member Account:

A *Member Account* is a FortiCloud account that joins an Organization. To join an Organization, the Member Account must accept an invitation. A Member Account can be a member of only one organization at a time.

Member Accounts:

- Cannot remove themselves from an Organization. To leave the Organization, they must request to be removed.
- Member Accounts cannot see the other members in the organization.

## Example Organization structure



While the organization is divided into a hierarchy, the user location within the hierarchy is independent of their permissions. The user's access is dependent on their permission profile and scope, including the available and selected scope. For more information, see [Available and selected scope](#) in the Identity & Access Management (IAM) Guide.

## Overview of creating and managing Organizations

When creating an Organization and adding Organizational Units (OUs) and Member Accounts, there is a general process that you can follow.

### To create and manage an Organization:

1. [Set up the Organization on page 8.](#)
2. [Invite accounts to join the Organization on page 8.](#)
3. [Manage users on page 9.](#)
4. [Access the Organization on page 9.](#)



More information on creating and managing Organizations can be found in the [Asset Management](#) and [Identity & Access Management](#) guides.

## Set up the Organization

The first step for creating an Organization requires the Root Account user to create the Organization and define the Organization hierarchy with OUs.

The process for setting up the Organization and OUs is as follows:

1. Log in to the FortiCloud account that will act as the Organization Root Account.
2. Add a FortiCloud Premium License from <https://support.fortinet.com>. See [Registering assets](#) in the Asset Management guide and [Prerequisites on page 5](#).
3. Access the Organizational portal:
  - Go to *My Account > My Account (IAM version) > Account Preferences* and click *Enable Organization Feature*. See [Enabling Organizations](#) in the Identity & Access Management guide.
  - Go to <https://support.fortinet.com/organizations/>.
4. Click *Create Organization* and follow the prompts to create the Organization. See [Creating an organization on page 11](#).
5. Go to the Organization portal and use the gear icon to create the OUs and Organization hierarchy. See [Adding and deleting OUs on page 20](#).

See [Organizations on page 11](#) and [Organizational Units \(OU\) on page 19](#) for more information about creating Organizations and hierarchy.



The Root Account user performs all of the steps in Step One.

---

## Invite accounts to join the Organization

Once the Organization and OUs have been created, you can invite Member Accounts to join the Organization OUs using invitation tokens.



Member Accounts can also be created directly in the Organization Portal using the New Member Account button. See [Creating new Member Accounts on page 23](#).

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The process for inviting accounts is as follows:

1. The Root Account user generates the invitation token for each OU from the *Invitation Token* page. See [Creating invitation tokens on page 32](#).
2. The Root Account user invites accounts to join the Organization OUs by sharing the assigned invitation token and Organization portal link (<https://support.fortinet.com/organizations/>) with Member Account users.
3. Member Account users go to <https://support.fortinet.com/organizations/>.
4. Member Account users select *Join Organization* and use the provided invitation token to request access.
5. The Root Account user approves Member Account requests from the *Invitation Token* page. See [Invitation Approval on page 34](#).

See [Invitations on page 31](#) for more information about invitation tokens.





Member Accounts can create the account password by using the *Forgot Password?* feature when logging into the portal.

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## Manage users

Once Member Accounts are added to the OUs, you can create an Organization administrative IAM user that can create and manage IAM users for the Organization OUs.

The process for creating an Organization administrative IAM user is as follows:

1. Go to the IAM portal.
2. Create a new permission profile for the Organization administrative IAM user:
  - a. Go to *Permission Profiles* and create a new profile.
  - b. Set the type to *Organization*.
  - c. Add the Organization portal, IAM portal, Asset Management portal, and any other necessary portals.
  - d. Set the Organization portal, IAM portal, and Asset Management portal access to *Admin*.See [Permission profiles within Organizations](#) in the Identity & Access Management guide for more information.
3. Create the Organization administrative IAM user:
  - a. Go to *Users* and create a new IAM user.
  - b. Set the type to *Organization*.
  - c. Set the *Permission Scope* to the Organization.
  - d. Select the permission profile created in the previous step.
  - e. Generate the password.See [Creating users, user groups, and roles within Organizations](#) in the Identity & Access Management guide for more information.



The Root Account user performs all of the steps in Step Three.

---

## Access the Organization

Once you have created the Organization administrative IAM user, you can begin accessing the Organization, OUs, assets, and so on.

The process to accessing the Organization is as follows:

1. Log into FortiCloud as the new Organization administrative IAM user:
  - a. Go to <https://support.fortinet.com>.
  - b. Log in using the new administrative IAM user credentials.
  - c. Select the top level Organization when prompted.See [Logging into an OU account](#) in the Identity & Access Management guide for more information.

2. Create permission profiles and IAM users for each of the OUs. See [Permission profiles within Organizations](#) and [Creating users, user groups, and roles withing Organizations](#) in the Identity & Access Management guide for more information.



If an IAM user has administrative access to the Organization portal and a permission scope set to an OU, this IAM user can create new IAM users below them in the hierarchy. See [Permission scope with organizations](#).

---

3. Access OUs or OU Member Accounts using the context switch dropdown menu:
  - Go to the Asset Management portal to switch to OU Member Accounts or OUs, view the OU consolidated view, or transfer assets across OU Member Accounts. See the [Asset Management guide](#) for more information.
  - Go to the IAM portal to manage OU Member Account users or switch to OU Member Accounts. See the [Identity & Access Management guide](#) for more information.

See [OU context switch](#) and [Permission scope with Organizations](#) in the Identity & Access Management guide for more information.

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The Organization administrative IAM user performs all of the steps in Step Four. The Root Account user cannot access other OU accounts directly.

---

# Organizations

This section contains information on:

- [Creating an organization on page 11](#)
- [Joining an organization on page 14](#)
- [Deleting organizations on page 16](#)

## Creating an organization

When you create an Organization your account becomes the Root Account for the organization. Users with the proper permissions can add Organizational Units (OU) and invite members to join the organization.





The Organization Portal must first be enabled by the Master User. See [Enabling Organizations](#) in the Identity & Access Management (IAM) Guide.

### To create an organization:

1. In the Organization Portal (<https://support.fortinet.com/organizations/>), click *Create Organization*.


**Start to Use** ★  
**Organizational Units**


Arrange all accounts into distinct Organizational Units to centrally apply permissions across multiple accounts in the cloud.


Join Organization  Create Organization 

**Consolidate All Your Accounts into an Organization**

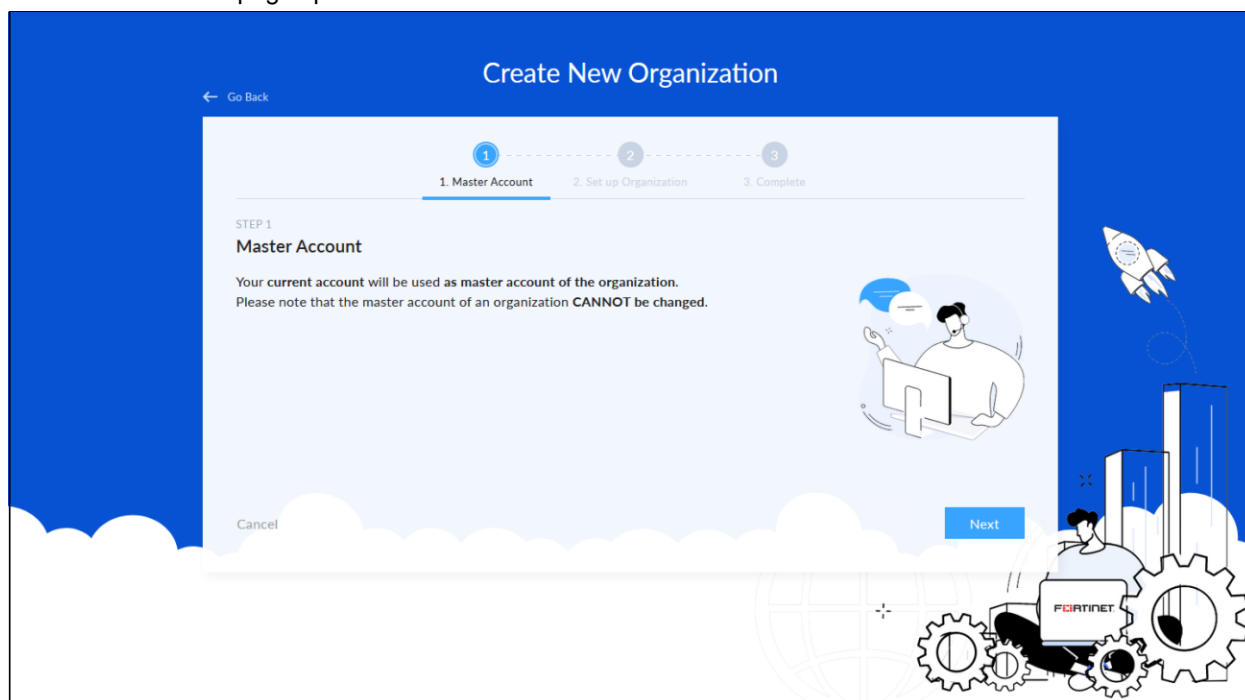
After you create an organization, you cannot join this account to another organization until you delete its current organization.

  
**Grow Your Organization**  
Invite Existing Accounts To Join Your Organization  
[Learn More](#)

  
**Manage Organizational Units**  
Model An Ou Structure To Represent Your Requirements  
[Learn More](#)

  
**Assign Proper Permissions**  
Assign Proper Permissions To Your Organizational Units  
[Learn More](#)

The *Master Account* page opens.



2. Click *Next*. The *Set up Organization* page opens.
3. Set up your organization.

<b>Input Organization Info</b>	Select this option to create your organization with the GUI.
<b>Upload Organization Structure</b>	Select this option to create the organization and Organizational Units with an Excel sheet. See <a href="#">To create an organization with the Bulk Import template</a> .
<b>Organization Name</b>	Enter a name for the organization.
<b>Description</b>	Enter a brief description of the organization.

← Go Back

## Create New Organization

1. Master Account 2. Set up Organization 3. Complete

STEP 2  
Name Your Organization

☒ Input Organization Info ☐ Upload Organization Structure

Organization Name: \*

Description:

Cancel Create Organization

4. Click *Create Organization*. The *Complete* page opens.
5. Click *Close & Go To General*. The *General* page opens.

### To create an organization with the Bulk Import template:

1. On the *Set up Organization* page, click *Upload Organization Structure*.

← Go Back

## Create New Organization

1. Master Account 2. Set up Organization 3. Complete

STEP 2  
Name Your Organization

☐ Input Organization Info ☒ Upload Organization Structure

Please download a file template to prepare your file

Organization Structure File Upload

Cancel Create Organization

2. Download the *Bulk Import* template.
3. Use the template instructions to enter the OU information and create the organization hierarchy.

4. After you have completed the template, click *Organization Structure File Upload*, and upload the file.
5. Click *Confirm*.

## Joining an organization

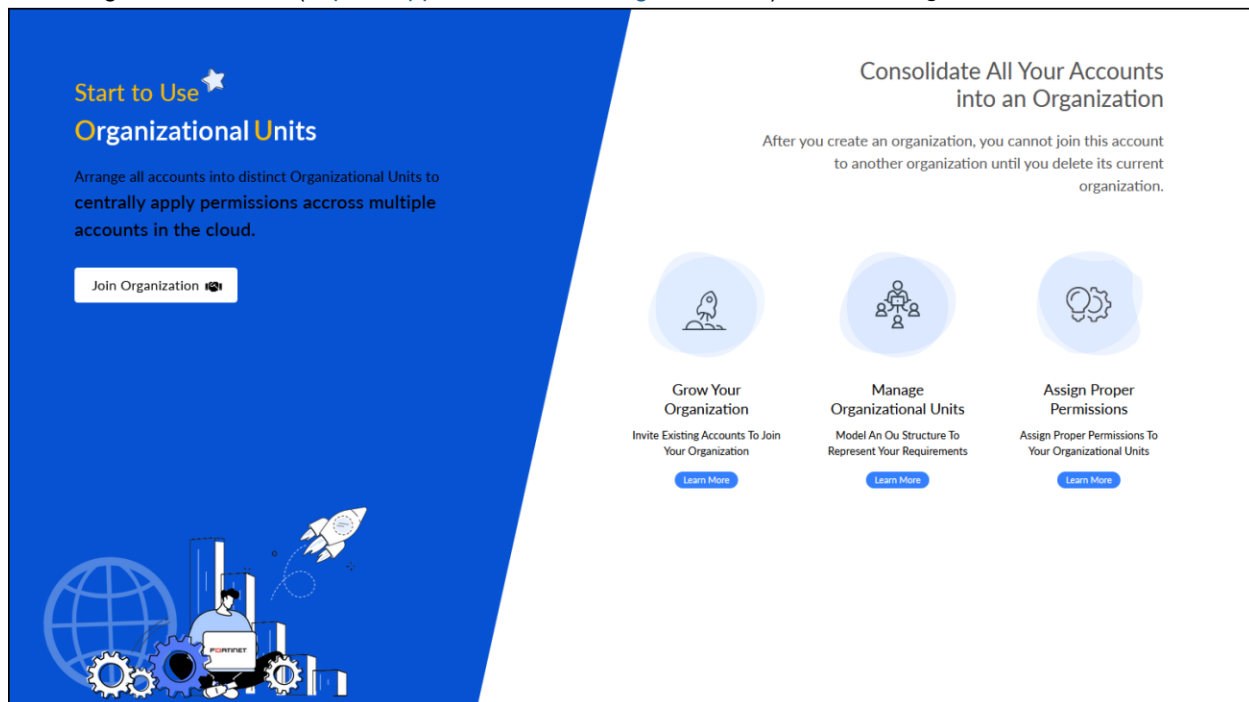
A Member Account must have an Invitation Token to join an organization. See [Invitations on page 31](#).



Member Accounts can also be created directly in the Organization Portal using the New Member Account button. See [Creating new Member Accounts on page 23](#).

### To join an organization:

1. In the Organization Portal (<https://support.fortinet.com/organizations/>), click *Join Organization*.



You cannot join an organization if the Root account's FortiCloud Premium contract is expired. See [Prerequisites on page 5](#).

The *Input Invitation Token* page opens.

2. In the *Invitation Token* field, enter the token and click *Next*. The *Organization Info Preview* page opens.

The screenshot shows the 'Join Organization' interface with a blue header and a white form area. The form has a progress bar at the top with four steps: 1. Input Token (active), 2. Organization Info, 3. Terms & Agreement, and 4. Complete. Below the progress bar, the text 'STEP 1' and 'Input Invitation Token' are displayed. There are two input fields: 'INVITATION TOKEN\*' and 'COMMENT'. At the bottom left is a 'Cancel' button, and at the bottom right is a blue 'Next' button. The background features a blue sky with white clouds, a rocket, and a person sitting at a desk with a laptop labeled 'FORTINET' and several gears.

3. Review the information and click *Next*. The *Terms & Agreement* page opens.
4. Read and accept the terms of the agreement and click *Submit*. The *Complete* page opens.

The screenshot shows the 'Join Organization' interface with a blue header and a white form area. The form has a progress bar at the top with four steps: 1. Input Token, 2. Organization Info, 3. Terms & Agreement (active), and 4. Complete. Below the progress bar, the text 'STEP 3' and 'Accept Terms & Agreement' are displayed. A text box contains the following text: 'ON BEHALF OF THE CUSTOMER, AS A REPRESENTATIVE AUTHORIZED TO BIND THE CUSTOMER, I UNDERSTAND AND AUTHORIZE THE JOINED ORGANIZATION AND ITS REPRESENTATIVES TO MANAGE MY ACCOUNT, I HEREBY AGREE THAT FORTINET SHALL HAVE NO LIABILITY ASSOCIATED WITH THE JOINED ORGANIZATION'S ACTIONS AND MY DECISION TO AUTHORIZE THE JOINED ORGANIZATION TO MANAGE MY ACCOUNT AND THE CUSTOMER HEREBY INDEMNIFIES AND RELEASES FORTINET FROM ANY SUCH LIABILITY, AND I AGREE TO ENSURE, TO THE EXTENT THE JOINED ORGANIZATION IS ACTING IN MY PLACE AS "CUSTOMER" UNDER THE SERVICES TERMS AND CONDITIONS, THE JOINED ORGANIZATION SHALL BE BOUND BY ALL OBLIGATIONS IN THE SERVICES TERMS AND CONDITIONS.' Below this text box is a checkbox with the text 'I understand that the Admin of the organization can manage my account permission after I joined this organization.' At the bottom left is a 'Cancel' button, and at the bottom right are 'Previous' and 'Next' buttons. The background features a blue sky with white clouds, a rocket, and a person sitting at a desk with a laptop labeled 'FORTINET' and several gears.

### 5. Click *Close & Go to IAM*.

Join Organization

1. Input Token 2. Organization Info 3. Terms & Agreement 4. Complete

STEP 4  
Complete

✓ Request submitted successfully!  
Your request to join the organization Vancouver School Board has been submitted to the Admin for approval. You will receive a notification once your request is approved.

ORGANIZATION DETAILS

ORGANIZATION NAME	ORGANIZATION ID
Vancouver School Board	1074298
DESCRIPTION	
N/A	
MASTER ACCOUNT NAME	MASTER ACCOUNT EMAIL
company 1015827	1015827@test.com

Close & Go To IAM

You will be notified when your request to join has been approved.



Member Accounts can create the account password by using the *Forgot Password?* feature when logging into the portal.

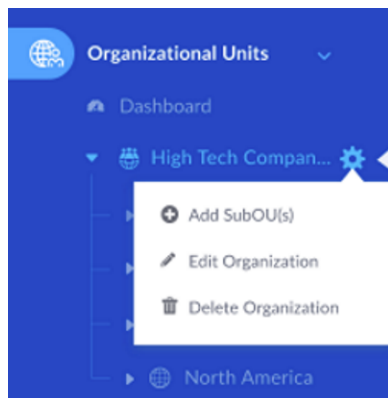
## Deleting organizations

The Root Account user can delete an organization from the left-hand menu. Deleting the root organization is permanent and cannot be undone.

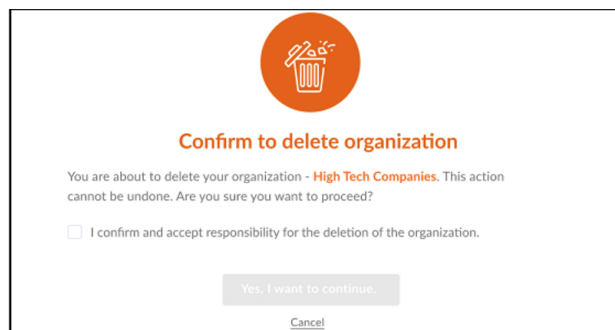


### To delete an organization:

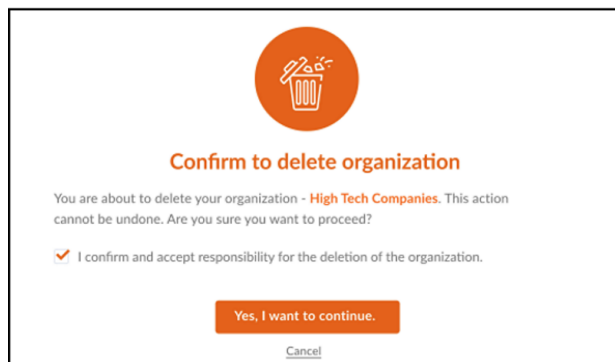
1. Hover over the organization name and click the gear icon. A dropdown list is displayed.



2. Select *Delete Organization*. A confirmation message is displayed.



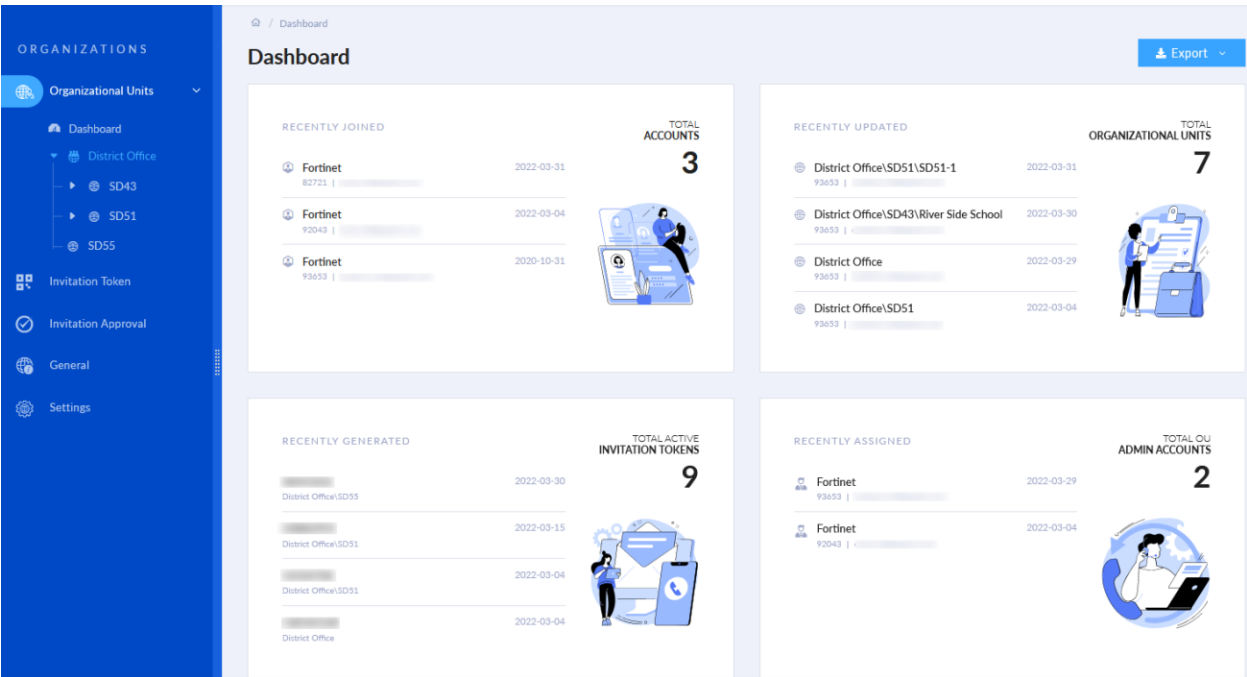
3. Select the checkbox to confirm you understand that the organization will be deleted.



4. Click *Yes, I want to continue*. The organization will be deleted.

# Dashboard

If the user had proper Organization/ Organizational Unit (OU) permission, the *Dashboard* displays information about your organization. Use the dashboard to monitor the number of accounts, Organizational Units, and Invitation Tokens. The Dashboard is only visible to users with the proper permissions. The views in the account will vary depending on the scope of the user's role.



The *Dashboard* displays the following information:

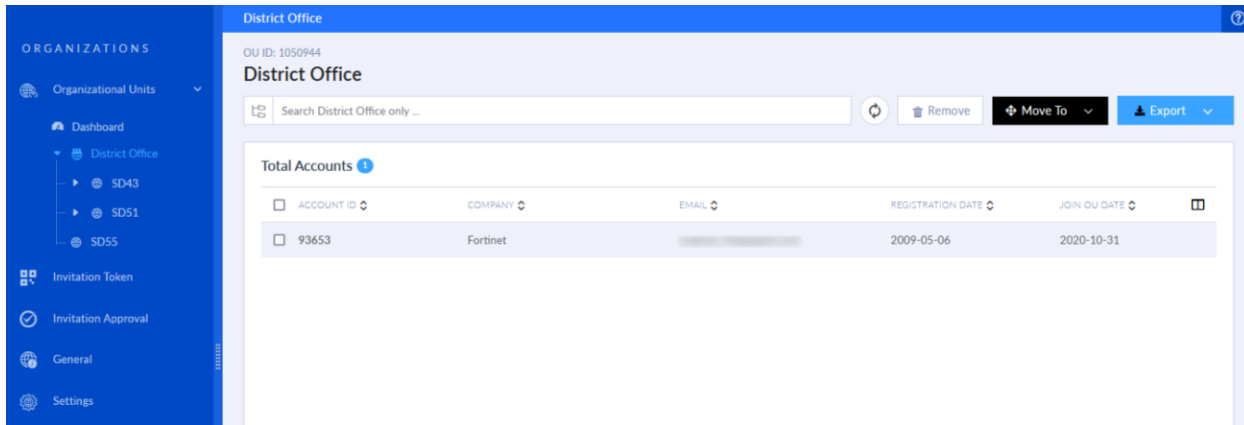
<b>Recently Joined</b>	Displays the accounts that joined the organization and the total number of accounts.
<b>Recently Updated</b>	Displays the organizations that were updated (moved, renamed, and so on) and the total number of organizations.
<b>Recently Generated</b>	Displays recently generated invitation tokens and the total number of active invitation tokens.

Select *Export* to export details on the OU and accounts or OU structure.

## Organizational Units (OU)

*Organizational Units (OU)* are folders for organizing your accounts. You can create a maximum of three levels of OUs to build the structure of your organization. Users with the proper permissions can move Member Accounts between OUs and remove accounts from the organization.

Logging in as a user with the proper permissions will allow you to see OUs and Organization Portal features. Depending on the user's available scope, the user can delegate permissions to other users and define what they can access.

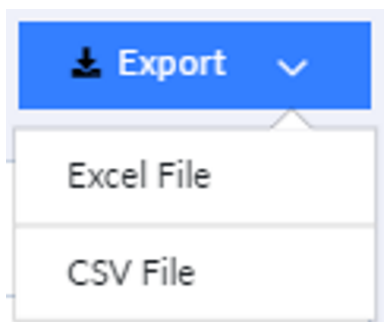


The *Organizational Units* page displays the following information:

<b>Account ID</b>	The ID for the Member Account.
<b>Company</b>	The company the account belongs to.
<b>Email</b>	The email address for the account.
<b>Registration Date</b>	The date the account was created.
<b>Join Date</b>	The date the account became a member of the organization.

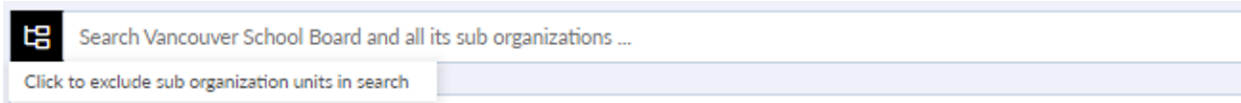
### To export the Organizational Unit:

In the banner, click *Export OU > Export File* or *CSV File*.



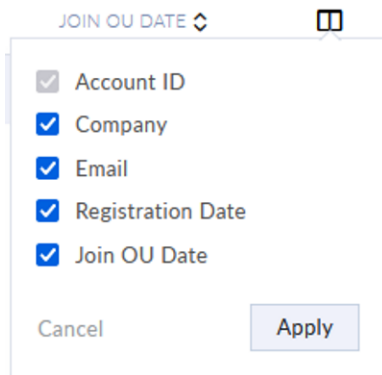
### To switch views in the search field:

Click the folder icon in the search bar to include or exclude OUs in the search.



### To show or hide columns:

1. At the left side of the page, click the *Select columns to display* menu.
2. Select the columns you want to hide or display and click *Apply*.

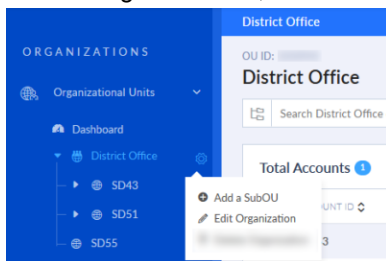


## Adding and deleting OUs

You can create up to three levels of Organizational Units (OU). After the OU is created, you can edit the organization details, move the OU or delete it.


### To create an Organizational Unit:

1. In the navigation menu, hover over the Organization name and click the gear icon.



2. Click *Add a SubOU*. The *Add a SubOU to <org\_name>* dialog opens.

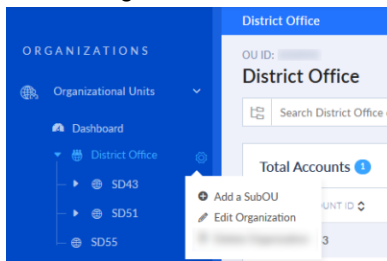
3. Enter the *OU Name* and *OU Description*, then click *Confirm*. The unit is added to the organization.



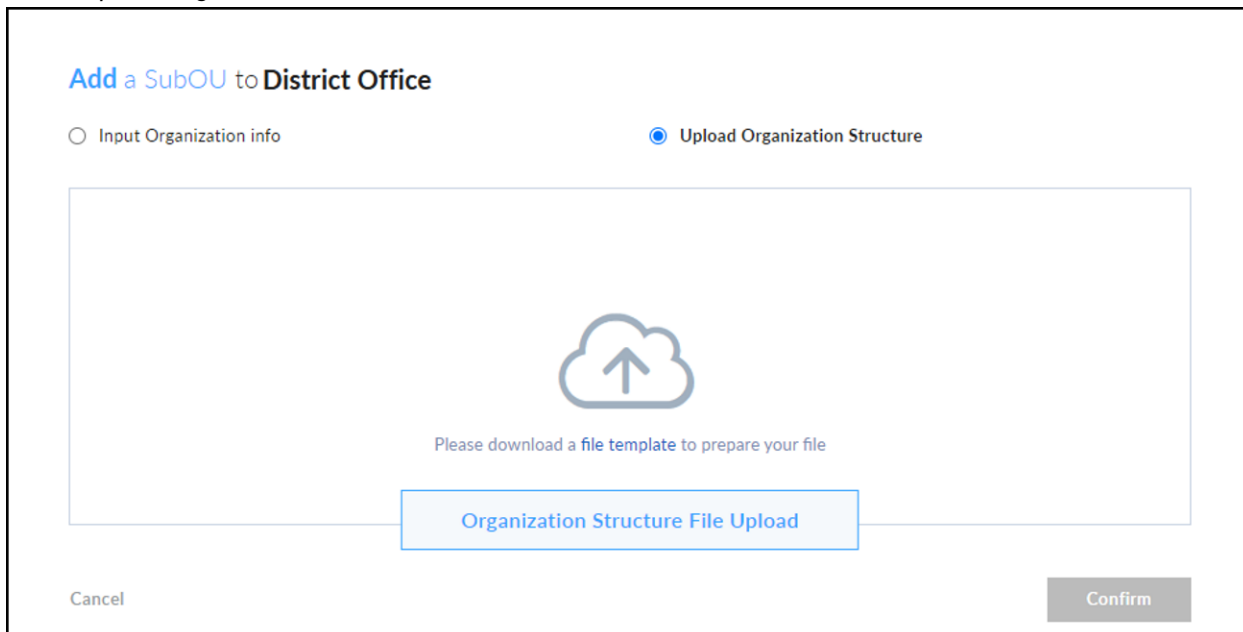
The screenshot shows a dialog box titled "Add a SubOU to Vancouver School Board". It has two radio buttons: "Input Organization info" (selected) and "Upload Organization Structure". Below the radio buttons are two input fields: "PARENT OU NAME" with the value "District Office" and "PARENT OU ID" with the value "1050944". Below these are two more input fields: "OU NAME\*" and "OU DESCRIPTION". At the bottom left is a "Cancel" button, and at the bottom right is a blue "Confirm" button.

### To bulk upload the organization structure:

1. In the navigation menu, hover over the Organization name and click the gear icon.



2. Click *Add a SubOU*. The *Add a SubOU to <org\_name>* dialog opens.

**3. Select *Upload Organization Structure*.**

**Add a SubOU to District Office**

☐ Input Organization info ☒ Upload Organization Structure

Please download a [file template](#) to prepare your file

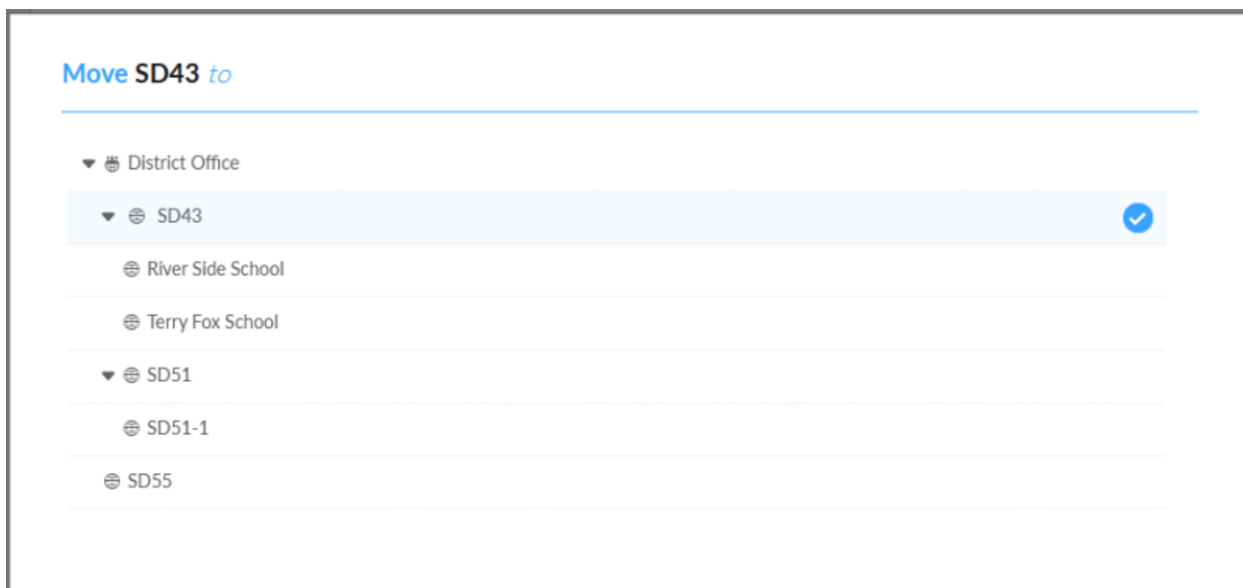
Organization Structure File Upload

Cancel Confirm

4. Select *file template* to download the template file.
5. Complete the template with your organization's information and save it.
6. Select *Organization Structure File Upload*. The File Explorer opens.
7. Select the file you want to upload and click *Open*.
8. Click *Confirm*.

**To move an Organizational Unit:**

1. Hover over the OU name and click the gear icon.
2. Click *Move OU*. The *Move <OU\_name>* dialog opens.
3. Click *Select* next to the folder you want to move the OU.



**Move SD43 to**

▼ District Office

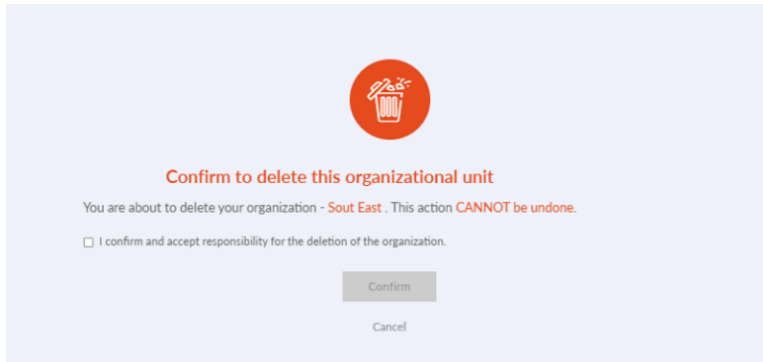
- ▼ SD43 ☒
- ⊕ River Side School
- ⊕ Terry Fox School
- ▼ SD51
  - ⊕ SD51-1
  - ⊕ SD55

### To delete an Organizational Unit:



You cannot delete an OU if it contains accounts. You cannot restore an OU after it is deleted.

1. Hover over the OU name and click the gear icon.
2. Click *Delete OU*. The *Confirm to delete this organizational unit* dialog opens.
3. Accept the terms of the deletion and click *Confirm*.



### To edit an Organization's details:

1. Hover over the Organization name and click the gear icon.
2. Click *Edit Organization* or *Edit OU*. The *Edit <OU\_name>* dialog opens.
3. Update the *OU Name* and *OU Description*, and click *Confirm*.

## Creating new Member Accounts

New Member Accounts can be created directly within the Root account Organization or a SubOU without an invitation token.

The new Member Account can be linked to a real email address or a new dummy email address generated at the same time as the Member Account. If you use a real email address, a notification email will be sent to the address and authentication is required. If you use a dummy email address, you cannot perform the features of a Master Account, such as resetting the password. However, the dummy account can still perform standard tasks, such as moving assets.



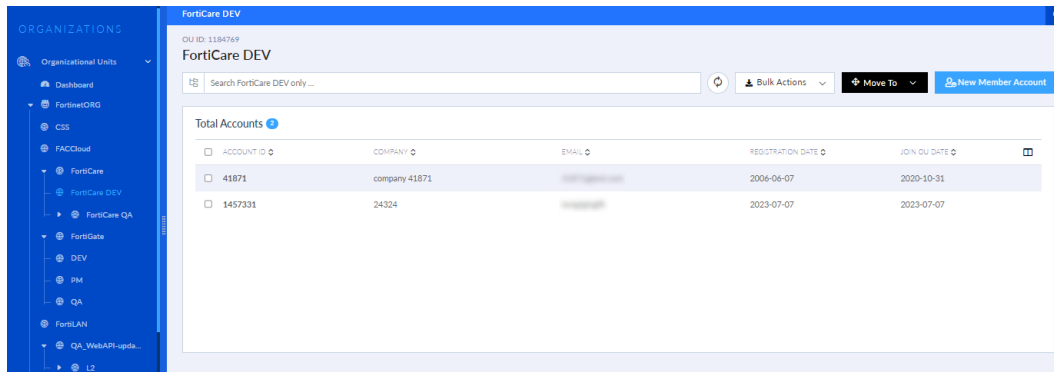
A new Member Account cannot be created if the Root account's FortiCloud Premium contract is expired. See [Prerequisites](#) on page 5.

### To create a Member Account:

1. Select the Organization or SubOU that you want to add the Member Account to.



The Organization level that you can select and add a Member Account to is dependent on your permission scope. See [Permission scope with Organizations](#) in the Identity & Access Management (IAM) guide.



2. Click *New Member Account*. The *New Member Account* dialog is displayed.

#### New Member Account

☐ I want to use a real email

Choose an OU  
FortinetORG

First Name Last Name

Title Company

Address Country  
Select a Country

City State/Province

ZIP/Postal Code Phone

Fax Industry  
Industry

Organization Size  
Organization Size

Cancel

Submit

3. Define the Member Account's email status:



- Select *I want to use a real email* to input an existing email address. Fields are displayed to enter the email address.

## New Member Account

☒ I want to use a real email


* Email		* Confirm Email	
* Choose an OU FortinetORG			
* First Name		* Last Name	
Title		* Company	
* Address		* Country Select a Country	
* City		State/Province	
ZIP/Postal Code		* Phone	
Fax		Industry Industry	
Organization Size Organization Size			

Cancel

Submit

- Leave *I want to use a real email* unselected to have a dummy email address created for the Member Account.
4. Select the SubOU that you want the Member Account to be linked to from the *Choose an OU* dropdown menu.
  5. Configure the *New Member Account* dialog fields as required.
  6. Click *Submit*.
  7. If the Organization Portal detects a more accurate match for the inputted address, a dialog is displayed.

We detected a better match for your address:

 4260 Still Creek Dr  
Burnaby, BC  
V5C 6C6

- ☐ Use the suggested address and continue to next step
- ☐ Use the address you entered as is and continue to next step
- ☒ Go back and edit the address manually

Cancel

Continue

- Select *Use the suggested address and continue to next step* to replace the inputted address with the suggested address.
  - Select *Use the address you entered as is and continue to next step* to use the inputted address.
  - Select *Go back and edit the address manually* to edit the inputted address.
8. Click *Continue*.
  9. If the inputted address is detected as incomplete or incorrect, a warning message is displayed.

**Oops! The entered address is incomplete or incorrect.**

Please confirm that you want to use it or update your input for a more accurate result.

- ☐ Use the address you entered as is and continue to next step
- ☒ Go back and edit the address manually

Cancel

Submit

- Select to continue with the inputted address to ignore the message.
- Select to return to the previous step and edit the inputted address.

10. Click *Continue*. A confirmation message is displayed.

## Managing Member Accounts

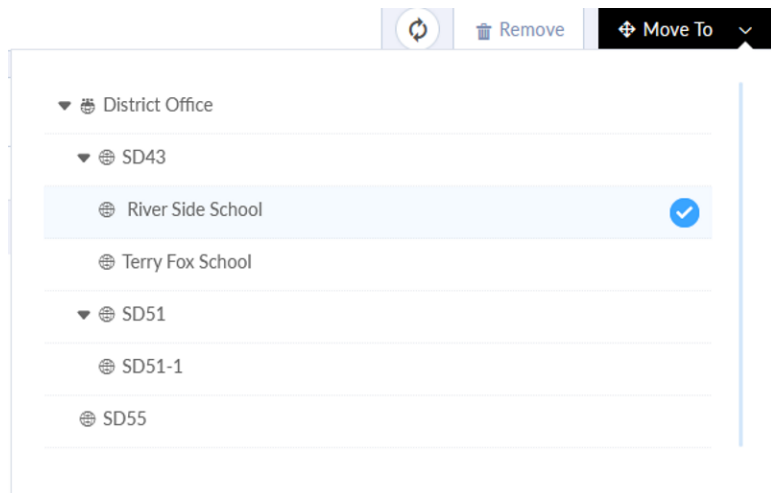
Users with the proper permissions can move a Member Account between Organizational Units or remove an account from the Organization.



Select multiple accounts in the list to perform a bulk removal or move a group of accounts between OUs.

### To move a Member Account:

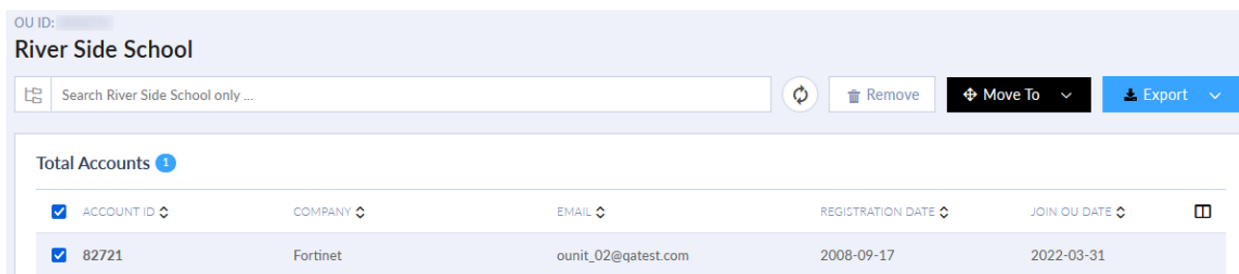
1. Select an Organizational Unit from the side menu.
2. Select a Member Account in the list and click *Move To*.



3. Select an OU from the list and click *Select*. The *Confirm to move* dialog opens.
4. Click *Confirm*.

**To remove a Member Account:**

1. Go to *Organizational Units > Dashboard* and open an OU.
2. Select an account in the list and click *Bulk Actions > Remove*. The *Confirm to Remove* dialog opens.



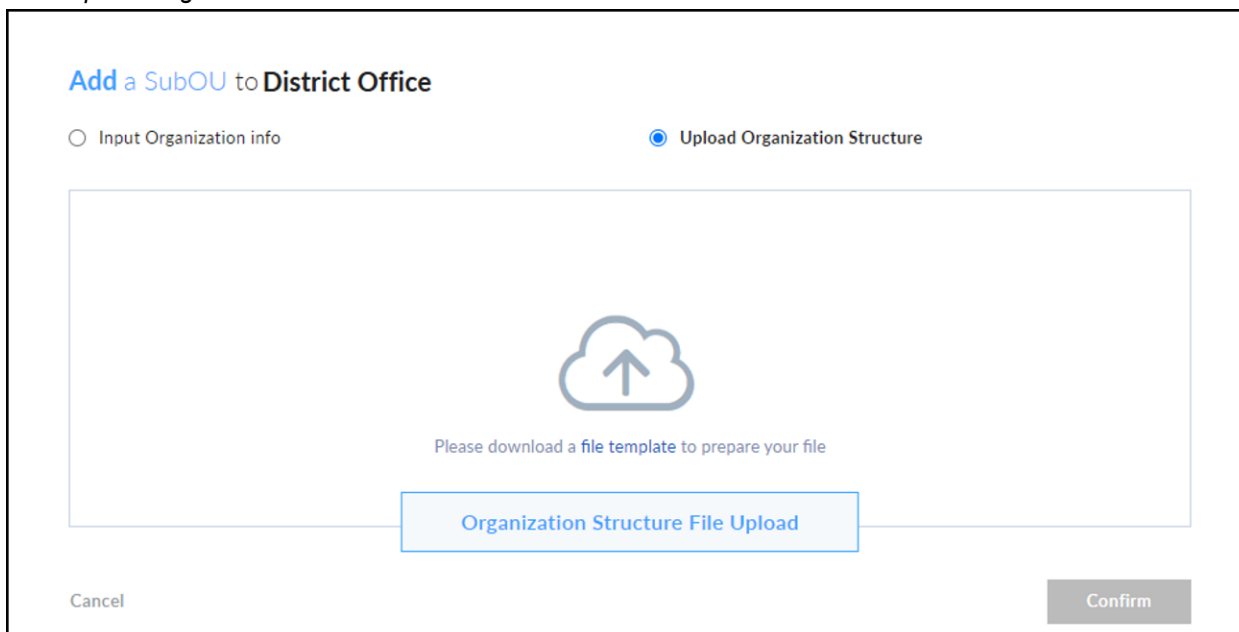
3. Click *Confirm*.

## Updating an organization with a bulk import

You can use the Bulk Import template to update the organization.

**To update an organization with the Bulk Import template:**

1. Hover over an organization name until the gear icon appears.
2. Click *Add a SubOU*. The *Add a SubOU to <OU\_name>* dialog opens.
3. Click *Upload Organization Structure*.



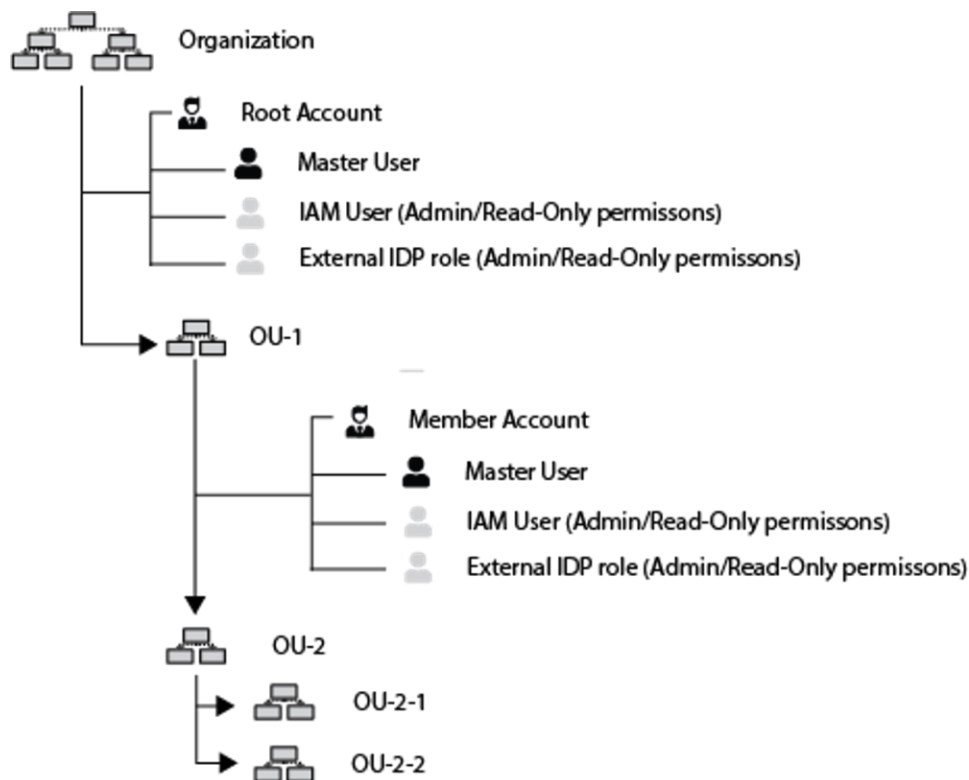
4. Download the *file template* and enter the OU information.
5. After you have completed the template, click *Organization Structure File Upload*, and upload the file.
6. Click *Confirm*. The detected OU organization will display after loading.
7. Click *Confirm*.

## User permissions

After the Master User creates the organization, they can create an IAM user with the same level of permissions. This IAM user can then be used to create other IAM users and delegate their permissions. For more information, see the [Identity & Access Management \(IAM\) Administration Guide](#).

## Accounts, Users and Permissions

<b>Account Type</b>	This role applies to the organization. There are different types of accounts: <ul style="list-style-type: none"><li>• <b>Root Account:</b> The account that created the organization.</li><li>• <b>Member Account:</b> Accounts invited to organization with no administrative privileges</li></ul>
<b>User Type</b>	Under each account is a different type of user: <i>Master User</i> , <i>IAM User</i> , and <i>IDP role</i> .
<b>Permissions</b>	Each user type has permissions: <b>Master User:</b> <ul style="list-style-type: none"><li>• Owns the Root Account for the Organization.</li></ul> <b>IAM user and IDP role:</b> <ul style="list-style-type: none"><li>• Access Role permissions: <i>Admin</i>, <i>Read-Only</i>, and Not Assigned.</li></ul>
<b>Access Roles</b>	Admin access or Read-Only access within the selected account.



While the organization is divided into a hierarchy, the user location within the hierarchy is independent of their permissions. The user's access is dependent on their permission profile and scope, including the available and selected scope. For more information, see [Available and selected scope](#) in the Identity & Access Management (IAM) Guide.

## Root Account

View	Action	Master User	Access Role		
		Root Account	Admin	Read Only	Not assigned
Organization	Update	✓	✓		
	Delete	✓	✓		
	Export	✓	✓	✓	

View	Action	Master User	Access Role		
		Root Account	Admin	Read Only	Not assigned
Organizational Unit	Read	✓	✓	✓	
	Add	✓	✓		
	Update	✓	✓		
	Delete	✓	✓		
	Bulk Delete	✓	✓		
	Move	✓	✓		
	Export	✓	✓	✓	
Invitation Token	Read	✓	✓	✓	
	Add	✓	✓		
	Update	✓	✓		
Invitation Approval	Read	✓	✓	✓	
	Approve	✓	✓		
	Decline	✓	✓		
General	Read	✓	✓	✓	✓
Settings	Read	✓	✓		
	Update	✓	✓		

## Member Account

View	Action	Master	No Org Role
General	Read	✓	✓

# Invitations

Invitation tokens are secure method of inviting Member Accounts to join your organization. See [User permissions on page 28](#).

After you generate a token, you can distribute it via SMS, Teams, or Slack. After a Member Account replies to the invitation, you can verify the invitation and accept or decline the response.

## Invitation Tokens

The *Invitation Token* page displays the following information:

<b>Token</b>	The invitation token for email invitations.
<b>OU ID</b>	The unique ID for the invitation token.
<b>OU Path</b>	The OU's branch in the organization.
<b>Comment</b>	Any notes about the invitation token.
<b>Expiration Date</b>	The date the token expires.

## Invitation process

1. Create an invitation token. See [Creating invitation tokens on page 32](#)
2. Send the invitation token and a link to the Organization Portal (<https://support.fortinet.com/organizations/>) to the Member Account master users. You can share the Organization Portal link by copying the URL from your browser.
3. The Member responds to the invitation by joining the organization.
4. The invitation is approved. See [Invitation Approval on page 34](#).
5. The Member Account is notified they can access the portal.



## Creating invitation tokens

Create Invitation Tokens to invite Member Accounts via email.



Invitation Tokens cannot be generated if the Root account's FortiCloud Premium contract is expired. See [Prerequisites on page 5](#).

### To create an invitation token:

1. Go to the *Invitation Token* page and click *Generate Token*. The *Generate Token* dialog opens.

Invitation Token

Download
Generate Token

Total Tokens 1

Show Expired

TOKEN	OU ID	OU PATH	COMMENT	EXPIRATION DATE	ACTION
		[OU_FCDemo02]	Burnaby	2022-03-06	

2. Configure the token settings:

#### Choose An Organization

Select the Organization or OU from the dropdown.



<b>Token Expiry Date</b>	Click the calendar icon to select the token expiry date.
<b>Comment (Optional)</b>	Enter a description of the token.
<b>Generate a separate token for each SubOU</b>	Enable this option to create unique token for each OU in the organization.

3. Click *Generate Token*.

### To download a token:

1. Go to the *Invitation Token* page and select a token(s) in the list.




TOKEN	OU ID	OU PATH	COMMENT	EXPIRATION DATE	
<input checked="" type="checkbox"/>		District Office\SD55	test token for SD55	2022-04-10	
<input checked="" type="checkbox"/>		District Office\SD51		2022-04-10	
<input checked="" type="checkbox"/>		District Office		2022-04-10	

2. Copy the token or click *Download* to save it to your computer as an Excel file.

**To edit the token expiration date:**

1. Go to the *Invitation Token* page.
2. Click the *Edit* icon next to the token *Expiration Date*.

Total Tokens 3 □ Show Expired

TOKEN	OU ID	OU PATH	COMMENT	EXPIRATION DATE	ACTION
<input checked="" type="checkbox"/>		District Office\SD55	test token for SD55	2022-04-10	
<input type="checkbox"/>		District Office\SD51		2022-04-10	
<input type="checkbox"/>		District Office		2022-04-10	

3. In the *Token Expiry Date* field, set the new expiry date.


### Edit Token Expiry Date

TOKEN

OU ID

TOKEN EXPIRY DATE

2022-03-06



Cancel

Save Change

4. Click *Save Change*.



One token can be used for multiple Member Accounts to join the Organization under the same location.

## Invitation Approval

After the invitation token has been sent, the recipient can then use it to join the organization. When they request to join the organization, the request will appear on the *Invitation Approval* page, which displays the generated tokens and the accounts that received an invitation. Use the *Invitation Approval* page to approve the invitation response.

Invitation Approval				
<div> <div>Search</div> <div> <div>Decline</div> <div>Approve</div> </div> </div>				
TOKEN	OU ID	OU PATH	COMMENT	# OF ACCOUNT REQUESTED
		District Office		0
		District Office		0
		District Office		0
		District Office		0
		District Office\SD51		0
		District Office\SD55	test token for SD55	0
▶		District Office\SD51		2
▶		District Office\SD51		1

The *Invitation Approval* page displays the following information.

<b>Token</b>	The Invitation Token number.
<b>OU ID</b>	The Organizational Unit ID.
<b>OU Path</b>	The Organizational Unit name and the sub-OU.
<b>Comment</b>	Comments entered when the token was created.
<b># of Accounts Requested</b>	Number of accounts submitted a joined organization request.
<b># of Accounts Pending Approval</b>	The number of accounts that have not been approved.
<b>Expiration Date</b>	The token expiry date.



Invitation requests cannot be approved or denied if the Root account's FortiCloud Premium contract is expired. See [Prerequisites on page 5](#).

#### To approve an invitation:

1. Go to *Invitation Approval* and expand a token in the list.
2. Select an invitation and click *Approve*.  
The *Confirm to approve* dialog opens.
3. Select the acknowledgment.
4. Click *Confirm*.



You can also approve the invitations in bulk by clicking the *Select all* checkbox at the top of the list.

---

# General

The *General* page displays information about the account.

### General

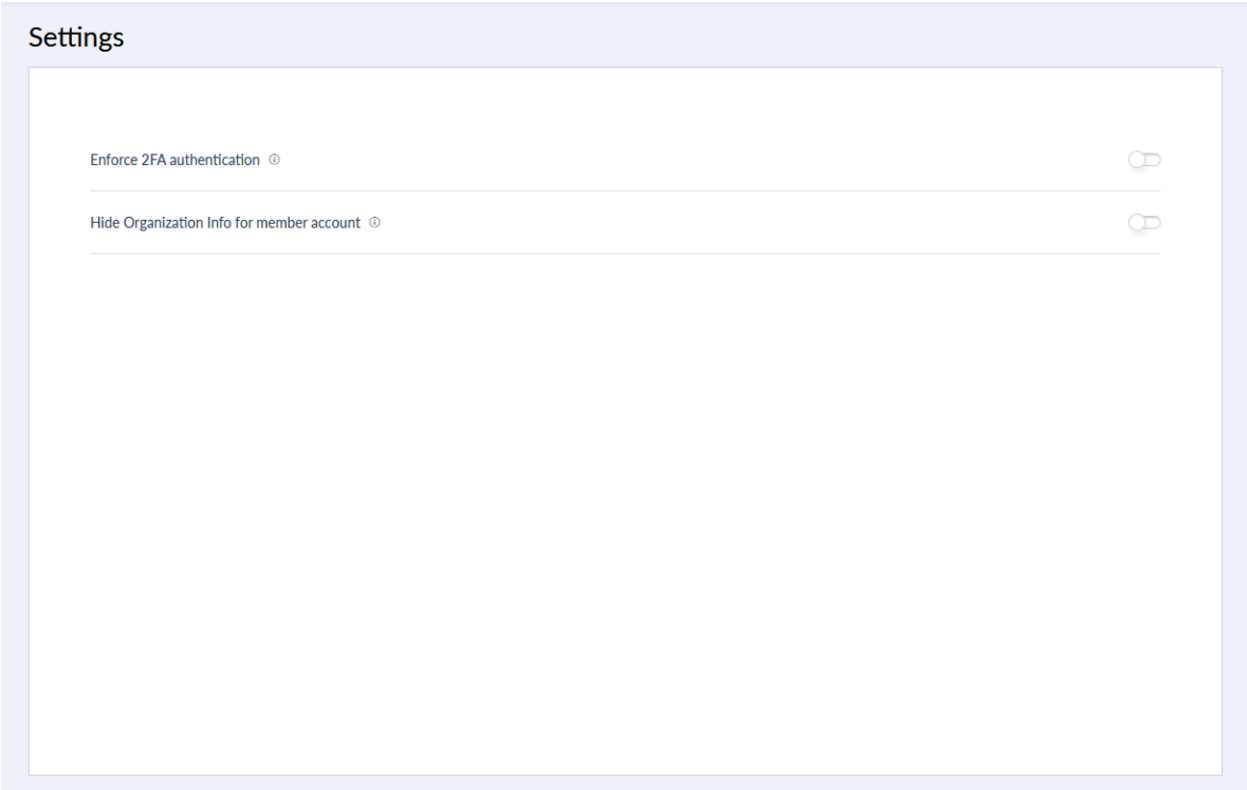
ORGANIZATION NAME	ORGANIZATION ID
OU_FCDemo02	1049031
DESCRIPTION	REGISTRATION DATE
FortiCare Team	2022-01-19
MASTER ACCOUNT NAME	MASTER ACCOUNT EMAIL
Fortinet	

The *General* page displays the following information:

<b>Organization Name</b>	The name of the parent organization.
<b>Description</b>	The description of the organization.
<b>Master Account Name</b>	The name of the master account.
<b>OU Path</b>	The Organizational Unit's branch in the organization hierarchy.
<b>Organization ID</b>	The organization's unique ID.
<b>Registration Date</b>	The date the organization was created.
<b>Master Account Email</b>	The email address of the master account.

# Settings

The *Settings* page is used to manage the Organization settings.



Use the *Settings* page to enable the following settings:

<b>Enforce 2FA authentication</b>	Enable two-factor authentication for all customers that belong to the organization.
<b>Hide Organization Info for managed account</b>	Hides the Organization link in the <i>Assets &amp; Accounts</i> menu in Member accounts.



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