Dropbox Business Deployment Guide

Dropbox Business

Introduction

Congratulations on choosing Dropbox Business! This guide will walk you through the decisions and setup process to ensure a smooth deployment. Transitioning to Dropbox Business will help your team stay organized, collaborate more easily, and keep all their data safe.

As an admin, you can easily add or remove team members, monitor sharing activity, and protect company data. Is there another person who should help set up your team?

Learn how to add or change an admin

We created this guide by bringing together best practices from key customers to walk you through the decisions and setup process. Deploying Dropbox Business can be completed in about 4-12 weeks depending on requirements and complexity. We also have a wealth of support resources, including a robust help center, community forums, YouTube videos, and self-guided training.

Let's get started!

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Phase 1
Discover
& Plan

The Discover and Plan phase of your deployment is crucial to the success of Dropbox Business at your organization. Let's start by looking at your current architecture and configuration needs, before reviewing potential third party integrations.

Learn how to use Dropbox

Get the most out of Dropbox with online, self-paced training courses. You'll come away with a solid understanding of Dropbox fundamentals and discover new ways to apply these to your team as they get started in Dropbox. The training is available whenever you need it, wherever you need it, on any device.

Take the self-guided training

The Admin and Help Desk trainings will show you how to manage and support your team. We recommend starting with Team members training though, for you to learn the product. Be sure to take notes and think about how you will leverage this training to educate your pilot and end users.

# Install the desktop application

Dropbox provides a desktop application for Windows, MacOS, and Linux. Click the link provided to install the appropriate version for your machine now:

https://dropbox.com/downloading

Want to install the desktop application on all team member computers at once? Dropbox has a managed enterprise installer for supporting SCCM/Group policy (Windows only).

Install Dropbox for all team members
Review desktop system requirements

Save hard
drive space
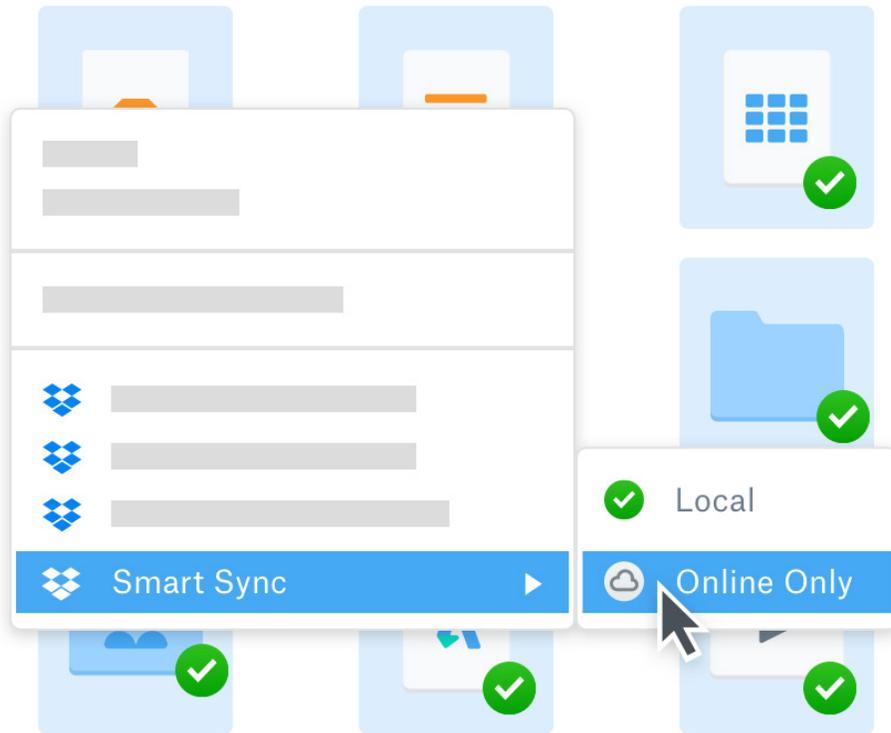
Smart Sync is a Dropbox feature that lets your team see and access every file and folder in their Dropbox, right from their desktop, while taking up practically no hard drive space. It's the perfect way to reclaim gigabytes of space without changing your team's workflow. Try turning on Smart Sync for your team to see how much time and space you can save.

Turn on Smart Sync

Secure your account

Enhance security of your account by enabling two-step verification (also known as two-factor authentication or 2FA) and integrating with a single-sign on (SSO) provider. This increases protection while supporting team members' ability to access Dropbox, without having to remember another password.

Enable two-step verification
Set up SSO (Advanced and Enterprise plans only)

Set team-wide permissions

Dropbox allows for granular control over your specific configuration. It's important to validate the settings are appropriate for your specific organization before inviting the pilot users.

Review and configure permissions

Identify pilot users

Select a few pilot users to test your settings before rolling out Dropbox to the full team. For example, you could (1) test your Dropbox account configuration, communications, and training plan with just the IT team, or (2) select a group of champion users, or (3) select one department in your company.

Plan user provisioning

Before you send out invites, let's figure out how we're going to provision users first. The option you select will depend on your current environment and how you provision IT applications for your company.

Option 1: through the Admin Console
Recommended for pilot users and small teams

1. Sign in to dropbox.com using your admin credentials
2. Click Admin Console
3. On the Members page, click Invite members
4. Enter users' email addresses (100 at a time), and click Invite to team.

Option 2: through an Integration
Recommended if you already have SSO or are planning to implement

- Active Directory Connector
- Identity Management Providers (IDP)

Set up Groups

With Groups you can create and manage lists of members who need access to the same information, like a department or project team. Group members are automatically added to all shared folders that the group has been invited to.

Review and configure Groups

Give your team a space to work together

A team folder is a powerful tool for sharing company content with your team. With team folders you can:

- Automatically sync content in team folders to all group members
- Choose to share individual files or folders inside a team folder
- Grant explicit access to the right audience at the right folder levels

Review and configure Team Folders

Integrate with third party apps
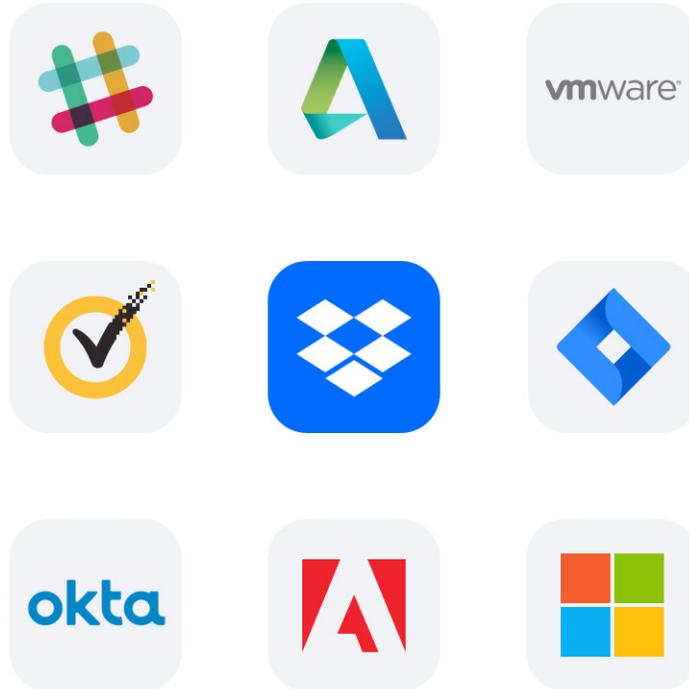
Dropbox provides a robust API which hundreds of third parties have used to develop applications that work seamlessly with Dropbox. Whether you're using Google, Microsoft, Adobe, Slack, Atlassian, or Salesforce, we've likely got an integration so your team can avoid switching between tools and duplicating work. We also integrate with best-of-breed security partners like Okta, VMware, Symantec, and Netskope.

[Connect third-party apps](#)

Dropbox supports a robust network of API endpoints for both teams and users, to expedite your administrative workflows and help your apps integrate with Dropbox.

[Review APIs and build your apps](#)

Phase 1
Checklist

Are my account security settings configured (2FA, SSO, IDP)?
Have I documented and defined my requirements to deploy Dropbox?
Have I configured my account settings in the Admin Console?
Have I documented and defined how my users will get the Dropbox application?
Have I documented the method and onboarding path for user onboarding?
Have I drafted company communications templates?
Have I taken Dropbox self-guided training and accounted for how
users will be trained?
Have I confirmed user deployment groups?

Phase 2
Build
& Pilot

Now that you've set up your Dropbox Business account, you can test the
environment and start onboarding pilot users before inviting all end users.

Communicate with your team

Effectively communicating expectations to your end users is critical to the success of the deployment of Dropbox at your organization. Below are some samples that can be customized, and used as a starting point. Some questions to think about:

- When will my end users get a Dropbox account?
- How will my end users log in to Dropbox?
- What expectations do I have of my end users in Dropbox?
- What applications are integrated into Dropbox to support end user experience?

Communication is key to managing change, and we've made it easy for you. Take a look at these email templates for suggested communications to your IT team, executives, pilot users, and end users.

Onboard Pilot Users

Finalize the list of pilot users you'd like to invite to Dropbox. Invite these users to the team with your selected User Provisioning method from phase 1, and the communications templates above.

We recommend giving your pilot users a few days to validate test cases and confirm that requirements meet expectations in the onboarding process. To do so, test the entire user experience and onboarding process, including the communications and training below, to confirm whether any changes will be needed prior to rolling out to all end users.

Train Pilot Users

Training your pilot users is a great opportunity to test learning capabilities with a small audience before the broader deployment giving you an opportunity to make any required changes to your communications and training plans.

We recommend developing a training approach that segments your users into different segments to meet both their learning needs and style.

Train your team

FAQ

What if the user has a basic or plus account associated with their invited email account?

What if the user has a personal account they want to keep separate from their work account?

What if there is another team that already is on Dropbox? Can they be merged with the new team?

How do I migrate data from a server to Dropbox?

Phase 3
Enable
& Rollout

Once the pilot users have tested your rollout plan—including account configuration, user onboarding, communications and training—it's time to roll out Dropbox to the entire organization.

Train End Users

Educating and supporting users throughout their transition to Dropbox is critical to the success of your deployment. By proactively providing opportunities to support your end users, you can reduce overhead on IT, while promoting user engagement and participation in advance of the full deployment. Use this time to train your users based on the plan you tested during the pilot.

We recommend developing a training approach that places your users into different segments to meet their learning needs and style.

Train your team

Congratulations!

You're all set up and ready to use Dropbox with your team.

It's important to keep up-to-date on changes to Dropbox. Here are some additional resources:

Learn more about Dropbox in the Help Center
Contact Dropbox Support
Check if Dropbox is up