Aspen Webster: Hello, everybody, my name is Aspen Webster. I am a trainer at Box, specifically with box. But I've been working closely with the team that's been helping out with your Qualtrics integrations to really present to you a, kind of, an understanding of both of these. How we're gonna be working with Qualtrics, specifically. And then, how that is going to integrate into Box.

So I'm really excited to be with you here as well as the other folks to get, maybe, some of your questions answered, to give you an idea, and to really move through this.

So we'll go ahead, and we're gonna dive right in, and to give you an overview, kind of, a bird's eye view. I'm seeing a comment about not being able to hear, I just wanted to check. Can other folks hear me? And maybe that's something on the side of, of that individual? I just want to check before I keep going.

Parker Cunneen: Yeah and they won't be able respond because they're there, I'm sorry –

Aspen Webster: Perfect.

Parker Cunneen: – On attendees mode. But, but folks, if you can't hear, please do try to call in. and I will post that in, that number for the folks in just one second.

Aspen Webster: Fabulous. Okay, thank you so much. I just wanted to make sure I didn't get through half of it with, with my microphone not working. Perfect, so as a, as an overview of the session today, we're going to start with the Box aspect of this. What is Box? So for perhaps some of you, maybe you've taken some Box trainings, you've worked with Box.

I'm going to give you an idea of this. Why we're going to be working with this tool, especially when it comes to our survey results, our Qualtrics information. And how it's going to be stored there. But also in terms of Box's value of how it can help ease your collaboration, keep everything in the same place. So we'll do a bit of an overview of Box.

It could be new for some of you, it might be a review for others, but to contextualize this for you. And then we'll navigate Box login so you can see what it looks like, specifically from the web application, so logging in through my browser. So you can get a view of that. We'll talk, too, about logging into Qualtrics, and where you can access those surveys.

And then we've got a bit of a Qualtrics Inbox How-To, and so we'll move through some steps here. We've got many resources available for you, or a couple of resources to be able to help with this piece in terms of giving you a step by step of how you can be ready, and know exactly where your information is going, making sure it's getting into Box efficiently, and effectively.

And then after that we get into a little bit more fun where we see, then, okay, we know what boxes is. We know how Qualtrics works with it as is integration. What can we do now that it's in Box? So dive into a bit of those sharing features, and then we'll have just some next steps. We'll have time, again, just like Parker mentioned for that Q&A at the end.

So a reminder there, that Q&A pod, if you would like to go in, and put in your information. There are three little dots. Or if you see the Q&A, and we will be able to attend to those questions at the end. So popping right in, let's start with what is Box. So we'll go through some of these benefits of Box and what it means to you. So we're gonna start, just as a general question, hey, what is Box?

And there are many answers to this. I'm sure there are things that you've heard, maybe ways that you've already been utilizing it. So just as a general idea, Box is one platform for secure content management, workflow, and collaboration. So we're going to be using it for lots of different reasons at VA. But in this case, specifically, we'll be talking about how it's used to securely house this Qualtrics survey data, and then move into some of those workflow pieces.

So you might be looking at this and thinking, okay, well secure content management, I guess I know what that means. But what do we mean by workflow? What do we mean by collaboration? And that, a lot of that is going to be about the way that Box is structured to be secure, or to be safe, but also to ensure that we're able to easily share with one another in secure ways.

So we know exactly who's getting our information. If we're sharing our survey data, we know exactly who it's going to. And I will show you specifically how you can do that within Box.

So some of these, just digging into it a little bit more, just so you know. With Box, you have unlimited storage of files. So in this case, the files themselves, you can upload as many files as you want. If you were just working in solely surveys themselves, you would be able to put as many surveys as you wanted into Box. Imagine it like the warehouse in Indiana Jones and Raiders of the Lost Ark, except that warehouse goes forever.

And then the crates themselves can be very sizeable. And so you can put in videos as needed, very large files as needed. So again, unlimited storage, whatever, it goes into box, it is in that cloud. It's stored there. You're not going to get any notifications telling you to buy more space. And then we do have the ability to share. And so, maybe, typically what we've done before is we've attached files to e-mails, or we've used other services.

In this case maybe you don't know where those files are going. They, kind of, go out into the world, and we've lost them. But in this case, we keep them in Box, and we know exactly who sees them. And then, of course, our seamless integrations, Qualtrics in and of itself, that has, this integration has been built out specifically to serve your purposes. And Box integrates with a lot of other features as well. Qualtrics is just a great example of it.

And then the other benefit here of Box is that we can access it really from anywhere. Because we're talking about cloud content management, we can log into Box from our browser. So as long as we have Internet access, we are able to get into Box. In this case though, specifically, we do want to make sure it is from a VA approved device. But if you have that, you are able to log in.

So with that said, logging in, let's dive into navigating Box, and logging right into it. So the way that we would log into Box is from a VA, just like I said, a VA approved device. We would navigate to a Veterans Affairs dot Box dot com.

And then when you do so, you're going to come upon this screen, typically. And you're going to say "Is this a part of VA?" Absolutely, I am. And you're going to click "Continue," and then you would enter your credentials login as needed.

And so in this case, just remember, again, from a VA approved device, you could come in with whatever browser you would like to utilize. And so, this can be a little bit different for folks who maybe aren't used to, maybe using browsers to host their documents. But we'll log in here, and I'll show you what this looks like.

So this is my Qualtrics. So I've come in. I've come to my Veterans Affairs dot Box dot com. And when I land here, I land on my All Files page. So again, just a bit of a review for you here of what it means to navigate Box. Or perhaps, this is new for you if you have not done so yet. But I'm going to see here all the folders that have been shared with me.

So everything here is a folder that I am a collaborator inside of. And in fact, if I hover over the space here, I, kind of, hover over a folder. It says, Collaborated folder. And if I click into that space next to it, I can see, it's owned by the admin, the VA admin. It's been shared with me as needed. And so you're gonna see a few different folders in here. I could come into the space, and perhaps this is a project folder that I'm working in.

For this, purposes of today as we talk about Qualtrics, we're actually going to be looking at some of these survey folders. As we come into them, you can see that I am inside of it as a co-owner. I'm going to talk a little bit more about what these permissions being when I get into sharing.

But just note, from this All Files page, I can't create new folders here because I don't have permission to upload or create items. That is part of Box's security features. We know exactly what our folder structure looks like in VA, and so we know exactly where our folders are going to live.

So just note that this is primarily the kinds of folders you see. You may see some gray folders. And if it's a gray folder, what that is, is that's another company's Box account that they have shared a folder with you. You may see that, you may not. I just wanted to note it in case you do. And you might be worried, gray, is this app folder broken? No that is just an external folder.

But you are likely going to see these blue folders. This is where our content is going to live. This is where we can upload content into Box where we have access. This is basically your playground. And a note about logging into Box that I just do want to add here just so we know. You must log into Box at least once every 90 days.

And if you don't, it's going to disable your account effectively. And if disabled, your data that's in there is going to stay inside of Box, your, your files, folders you've created. But you won't be able to enter and access it. So just keep that in mind. We do have a log in every 90 days. And this is another security feature, keeping your information safe. We know exactly what we're doing.

And so, there will be other Box trainings available. I, I I know that they're being done, but just know that this, of course, this is where we come for All Files page. There are elements in here that can help us sort our information better. I really, very much suggest, kind of, coming in here if you haven't already, and taking a look at some of these elements on the navigation page, and pane, including pieces like collections to sort your information.

But just know, this is our folder structure. You can always see that folder tree by coming to this All Files, toggling down to better understand what folders might be available to you.

So that's just a quick overview of the Box. Know that this is where Qualtrics information is going. When we create this, when we're going to get into this shortly, this Qualtrics integration piece, our information will be landing inside of Box. And I'll show you that here in a moment.

So in this case, just to show you how we can get into our Qualtrics piece, this is where we're going to dive into some survey reporting, and how it integrates with Box. So in this case, you would be separately logging into your Qualtrics account. And in that way, we'd go to Qualtrics dot com, click "Login." We'd enter our username, our password, enter your credentials, and sign in.

So popping back over again – if, before we are on our Box of Files page, I'm actually going to come to my Qualtrics page. So I've now logged into my Qualtrics account. I have a couple of surveys in here. So to clarify, and to repeat, our relationship to Box with Qualtrics is that those results of these surveys as we create them in here. So I'll click into my survey. I have not launched it yet, but I click into my survey.

When I do, I'm going to move through this how-to to make sure it does go to Box. But when I do have that, those results of this survey are going to automatically be pushed into Box. So these two services are going to talk to each other, which is fabulous. We don't – this is what, this is doing, this is this reducing steps for us. We don't have to download, push in, pull in. We're automatically, and coming into Box.

In fact, it's automatically generating a folder for us, so we just cut out all those middle steps, and we're efficiently working. We know exactly where our information is. So in this case, Box functions as a storage piece, but also then, a second step for a sharing piece.

So this is the Qualtrics element. We've logged into it. I've come into the Box survey that I'm interested in. I've got some of my questions here. I have not published it yet. I have not distributed it yet. That is good. Because now, we're going to shift over into that Qualtrics how-to. So in this case, we want to figure out how we're going to automatically copy those survey responses into that Box account. So in this case, there is a step by step process, and these resources will be available for you.

I will not be able to take you through this in a demonstration aspect, but I can show you it piece by piece. And this will be available. You'll be able to refer back to this as you're moving through this, especially as you're first starting the process, and you're not as used to going through it. But let's imagine now;; we have our Box account. Because what do I need to do first? I need to have a Box account. I need to be provisioned in a VA Box account.

I do know that I have permissions in my Qualtrics account to collaborate. And that is something that's going to be granted by a Qualtrics administrator. So those are the first things, First things first, I need to know that these aspects are in place. So if I know this to be true, I'm gonna think to myself, okay, I'm coming into Qualtrics. I'm starting my survey. I've got it all completed before I launch it.

Okay. I want to figure out how I' am going to set it up so that it will go into Box. And here are our steps. So before we launch our survey, I've got all these reminders in here for you. Because I'm the kind of person who has to write, record training on a piece, on a Post-It note, and stick it on my computer before I start – so, just some reminders in here.

So the first piece of what we'll do, is we're going to set that survey to collaborate. We've navigated into our survey, and there is a "Tools" button at the top of that survey. From that tools button, we're going to select collaborate. So how does it look over here? Here I am in my survey "Tools," selecting "Collaborate." And now, that's gonna pull up this box.

In this box we're going to enter integration underscore account. So we'll put in this integration underscore Acct, and a text field. Or we can click on the User And Group Address Book option. And then we can enter that into the search field. So third step here, enter 'integration\_account' in the Collaborate on Project page that popped up for us.

Now, our next step is we're going to select the 'integration\_account do not delete.' So this is going to generate for you. And again, remember, we're going through this now. You're probably looking at and you're saying, "Okay, I I guess I believe you," but you'll see this in your account when we're provisioned, when you reset as such.

So you type it in. That's what's going to pop up. We're going to click "Add Selected," and then we're going to click the "Save" button. This is great. This is our first piece of it as we've put it into place. After we've done that, the quote, Invite to Collaborate page is going to open. It's going to pop up for us.

In this case all we have to do is just click that "Invite" button. We don't have to put in a custom message. We don't do this. We're sharing this project with integration accounts, effectively, so we just click "Invite" at this point. And then just so we know, we want to make sure that we're setting that account, that API settings associated with it.

So all collaboration permissions are going to be automatically checked. So this is what's going to pop up for you. You're going to see these, these are all checked here. Don't make any changes. Just click, "Save." Now, maybe for you, again, you're may be looking at this feeling it's a little techie. I'm saying, for me it's a little techie. I did not create this, though the wonderful Booz Allen Hamilton folks have created this integration for you.

But this, this step by step structure is available to you. And remember, we do this all before we launch our survey. So in this case, just a reminder, we're coming back in. I'm gonna come back over to my survey. I'd be putting in an integration\_account here, moving through those spaces. That just gets us all good to go. When we have it, we've collaborated. It's effective.

That's when we can come in, you know, we can preview. We can publish as needed, distribute that survey so folks can start giving us information. So we've moved through that. And I'm sure, there will be some questions about that, so that is absolutely wonderful.

So if we've done that all correctly, and we've launched our survey, we've gotten our responses. And we want to now think, it's going to now go into our Box account. So the first question is where is it in our Box account? And now, what can we do with it now that it's in a Box account? And this is, I like to think, the fun part. So coming into Box, I will pop back into the space.

I have my Box plus a VA survey folder here. Now, because I set up my system to push my results directly into Box, it pushed them here. And what it did, was it created my own individual folder inside of my Box account. And the survey results popped up inside of this Box account as a CSV file. So this is very fabulous.

This is the thing, it cut out all those middlemen steps, pushed it right into Box for me. And it generated that folder. And so you can see, again, this is just the admin account. Because everything has to, kind of, live at the top, and then be shared with me. And I'm in here as a co-owner, which we'll dive into here in a moment.

And my survey results are right inside of here. Box, if I click into a file, I can view a preview of that file. You can see here, this is just some fake data. Can't you tell, it just says data. But I can see this, if it were all my survey results and they were inside of here. I could take a look at it. I could preview it as needed. So and I can even open it to my computer in this case.

And if I had clicked "Open," this would actually pop up within my native editing tools, within my Excel tools. And so I would be able to open it up. And if I needed to review here, and make changes as needed, this is how we could do it from Box. And I can dive into a little bit more of those details here.

But what I want to get into, specifically, is our sharing pieces. So again, that All Files page, it has generated its own Box folder for me under the name of my – the name of that survey. It has deposited my survey results inside of here. And you can see, I've also got another survey up here because I've got a few. They all show up as Box folders.

Now, come back over to this sharing pane, the admin owns this. But you can see, I am the only person inside of here besides that admin. Now, the way – this is going to require a little bit of understanding – the way that Box works. And understanding, what does it mean to be shared? What does it mean to be a collaborator in this space?

So for us at Box, there are two different ways, primarily, that we share information. So if you can see that Box + VA survey piece here? If I hovered over it, there is one, there's a link here that I could have clicked. And there is a "Share" button here. That "Share" button corresponds to collaborators. So I am a collaborator in that space as a co-owner.

It is owned by the admin who's a collaborator. If I want someone to be able to view my information to work with me long-term in this folder; let's say, for instance, I have a colleague that I work with at the VA who I'm working with on this survey. Together we need to look at this information together.

We need to, maybe add comments, interact with one another, understand this information. I want to invite that colleague in as a collaborator. So that person will come in, and they will have various permissions there inside of my folder. Over here, and I'll get to this one shortly, we have this other way. And the reason I include them here is because they, kind of, pop up next to each other.

So if you're ever confused, this is the differentiation. A shared link is a unique URL that's going to give the recipient access to a specific file. So these are two different ways, inviting the collaborate is a little bit like inviting someone into your home. So imagine my folder is my home, and this is my survey home. I've got my rules inside of this house. I've got, you know, you have to take off your shoes before you come in.

We have different settings inside of here. I've got all of my documents spread out all over my table because I'm messy. So we're inside my home. Whereas as a shared link is you're now inside of my home. I've got a document I need you to review. I'm now going to hand you that document. So if you're a visual type of person, imagine it that way. But I'm going to show you what this means in practice.

So part of the question of, okay, I want to invite someone in, a colleague to work with me inside of this folder now that it's in Box with me. I need to understand the way that Box folders and folder structure works. So part of it is, we'll pop back over here, remember how I said we can't add folders to this top level. That's why we have to, if I have access to a folder here, I can add folders inside of it. And I can work inside of it, and every subfolder that exists inside of a folder that I have access to.

So if we imagine this top folder that Qualtrics – let's say there is a top folder we're not even seeing. It's a Qualtrics Report folder. It has a root folder, and its subfolders are my colleague Maya's, her survey information. And over here is my survey information with their respective survey results or any subfolders underneath it.

If we had access at this top level of a folder, we would be given access to every subfolder underneath Qualtrics Reports. So you can imagine, if I had been in there as a co-owner under Qualtrics Reports, then I could see every other file, every other folder of all the survey results. So I don't want that.

In this case, I am just given access to my information, my survey results. And if I wanted to invite in a colleague or if I were working, say, with external folks, external collaborators outside of the VA, just as an example, I would want to decide exactly what access I want to give them.

So if I give them access at my folder level, they're just going to see that folder, every subfolder underneath it, and every file, and only that. They're not going to see these pieces over here. They're just going to see these. So this is one of those things where it's just a little bit different in the way that we do it at Box. Some other folder structures, you have access to all of the folders.

In this way, we are keeping information safe. We're preserving it all in one space. So from this our first question might be, okay, if I'm inviting someone in to look at my information, where do I want to invite them in at? I want to invite them in at this level so we can see this.

Or maybe I only want to invite them in at a subfolder level. But whatever the case, whatever folder I invite them in at, because of waterfall permissions, they're going to see that folder, and all the folders underneath it. Because access trickles downward.

So imagine, if the waterfalls here, we flow down, and it's like every folder or file is, like, a rock, kind of. And it, kind of, comes and cascades down. So just imagine that, waterfall permissions access flows down. So that's the first question, where do I want to invite folks in? Where do I need them to be in with me in Box?

And then the second question we want to ask ourselves is what access do I want to give people? So you might have noticed, I said I was a co-owner. We'll come back to my folder here, to my survey results folder. You can see over here, I am a co-owner inside of this space. It is owned, again, by the admin.

Here I am as a co-owner. So co-owners have the most permissions available to them. And we have seven different granular permission levels in Box. So I get to decide, what level of access I want folks to have when I invite them into a folder with me?

So let's say for instance, I want them to be able to edit content with me. So I could, as you can notice here, invite them in as an editor. They would be able to upload, download, preview, link, edit, and delete. They can also invite other collaborators as needed. There are a lot of different permissions associated with these.

This is just, kind of, the summary piece to, kind of, help you out. Let's say I wanted to invite them in to edit but I don't want them to have the ability to delete, for instance. So I could invite them in at that case as a viewer, uploader. Or maybe I just need this person to view the information. I've got the survey results. I sent.

I I want you to be able to see them, just go ahead, and view. So I can put them in as a viewer. So we get to decide based on this, what level we want to invite folks in at. So let's now see what that looks like in action.

I navigate to the VA Survey folder that, again, has been created for me with my survey data already inside of it. Thank you so much, integration, for making my life easier. Here I am inside of the folder. Here's who is part of the folder. If I want to now share this with a colleague or perhaps an external colleague, I would come up to this "Share" button at the top, click "Share."

Alternatively, alternatively, just in case you see this, and you get a little confused, there is also, when I'm at this folder level here, a "Share" button here. That will share out the whole folder, just in case that comes up for you. In this case, I've navigated inside of the folder. I've got a "Share" button here. I'll click share.

And I can invite folks into this space. So in this case, let's say I want to invite in my coworker, Kamala, so she's part of Veterans Affairs. Let's say I also want to invite in an external collaborator. So in this case, maybe I want to invite in, I'm going to invite in someone named Mark Jones at Increo. That's, maybe, a company I'm working with, and I'm collaborating with.

They're outside of Veterans Affairs. So I type in their name here into the Invite People box. And then I've got Invite as Editor here. And then I toggle that down, and this is where we get those options of deciding what permissions I want them to have. So in this case, just like we talked about before, maybe I want them to edit with me. But that's good.

And we'll just say editor right now, that seems fine for me. So I've said editor, great. I could send them a message if I want. I don't have to, that's optional. I could click, "Send," and now their names are going to pop up here on, underneath that sharing pane. A couple of things to note, Mark has a little globe next to his name.

And what that means is he' is from outside of the VA. So in this case, anytime you invite someone from outside of your VA domain, it's going to show up as being an external collaborator. And that really just is for your site, just so that you know. As long as you are giving that person permissions.

If you were giving them permission to come in here and edit, they're able to do so. It's just that whatever settings are available on your site are going to be – he is going to be subject to on his side. Because he is coming into your home with your rules. You got to take off your shoes. This is what it looks like in here. You might also note, it says pending here.

The reason it says pending is because Mark Jones, unfortunately, does not have a Box account. So what this, what is going to happen is these folks are going to get in their e-mail – and don't have this here. They're going to get in their e-mail, a message saying, hey, you've been invited into this folder by Aspen. She wants you to come in and work with her inside of this. So that's what Kamala is going to get.

And so Kamala is going to come right into my folder, say, "Great I'm here. I'm ready to work." Mark is going to an e-mail that says, "Aspen wants to work with you inside this folder." To work with her you have to create a free Box account. So just note that you have to have a Box account, and to be invited into Box as a collaborator.

So it's, kind of, like, before you come into my house, I'm, like, "You need to have a specific type of slipper." Let's just put it that way. So to come in, those are the rules around it. So Mark is going to create a free account likely, which is just, it's free. That he gets ten gigabytes of space. He's now able to work inside this, this account with me. Or maybe he convinces his company to get Box, and then we're all happy and we all work together.

So we've all got great settings and lots of storage. So in that case, as soon as he decides, "Okay, I've got a Box account," his name will pop up as editor, and we'll be good to go. For Kamala, just as an example, let's say I've got her here. I like that she's an editor with me.

I actually need to, kind of, downgrade her a bit. I don't really need her to be inviting in collaborators or deleting. So in this case I can always change the levels. So maybe I want to set her down to a viewer, uploader. So now, if she has a a few, she's still got the ability maybe to edit, to upload, but I've now changed her to a lower level.

So this is that first piece here. I've invited folks in. They can now come in as needed. They can view multiple files in here. We could come, and we can edit as needed, whatever we need to do. The next thing that I can do in Box, is we go back to that shared link. So if this is inviting folks into my house; imagine, we're going about our days. We're all very busy people. And I've got that survey data. And I'm, like, "I need Kamala to take a look at that." So I imagine, perhaps in the past, what you might have done is you could have attached that CSV file, or an Excel file to your e-mails, sent it over that way.

Or maybe, there is another secured service that you use where you'd have to put something in there. Whatever the case, inbox, I have a perfect, helpful way to be able to share this information with my colleagues fast. So I'm not going to say, "Hey, Kamala go into the Box's VA Survey folder, go in and find that document."

What I'm actually going to do, is I'm going to hover over that space. And they're going to see that link. I click on that link. And then, it automatically generates a a shared link for me. And if we remember, I'm going to come back to it over here so we see it. A shared link is a unique URL that gives the recipient access to a specific file or folder.

So this has generated a URL for me. It automatically even copied it to my clipboard. I could come up. I could just send this. However I needed to, I could send this in an e-mail. I could send this through a chat service. And when she takes a look at that, and she puts it in; let's say I clicked on it, it's going to take me directly to that information. And she'll be able to view it here.

So this is a very easy way to just get people quick access to your data. But here is the thing. The only option available for you is for only collaborators. So I could only send this to Kamala, or to the admin, or to Mark Jones whenever he gets his, he gets it together, and and gets a Box account. So only invited people, only collaborators can see this link.

So again, that is another security element, another security piece just to keep everything in line, especially if this is data with personal information. I don't want it to just get out there, and so anybody to be able to see it. So it should be scattered. In this way, you have to be invited into my home first, and then I hand you the document for you to review.

But I can easily direct you to that information, very much in an efficient way, so you can come right to it, and view it as needed. There is also a link settings piece here that I'll just, I can, I can point out here. You could set a link expiration, if you don't want folks to access it, say, by the end of next week. You could disable that link.

There's also, you can create a non-private, custom URL. So but in that case, let's, we don't use that as much. Link expiration is a pretty helpful tool, though. And if I click, "Save," that's going to show me that expiration. And no matter what changes I make, this link, unless I toggle it off, is going to persist. So you could send this link again, it would be the same link every single time. It's that unique URL, and it stays the same.

And it always directs us to our space. So while we're in here, just to point out again, we could always chat with each other inside of this space. We can, kind of, keep all of our information within that, this, what we call the Box Preview page. So if you wanted to add information inside of here, I could come into this activity pane.

And here, I might say I could mention Kamala because she is in here with me. And I could say, "Please review data on line 23," or whatever it might look like. And I could post that. And she would get an e-mail that said, "Aspen is asking you a question. Can you come in, look at this, review this data with her?"

I could add a task as needed. I could come in, and maybe I want to get full approval for the survey data before I send it out as needed, whatever that might look like for you. Or I could set a general task. Again, we'll do Kamala, and I'll just pick on her. I need her to confirm data. Can you tell? How to use data.

I click "Create," and then she will also get a notification that says, "Hey, you've got a task that you need to attend to," and please do so. And when it's done ,I'll see that it's done. So these are all just these great ways that we can stay collaborating in this space together.

We don't have to, maybe, have e-mails going back and forth, especially if there is specific, I know, personal data inside of here. We want to keep it all inside of Box, and you're very easily able to at mention, and to send e-mails to get notifications, add tasks as needed.

And again, just the review, you can, you can edit from within Box. So if I click this "Open" button, this is a, kind of, a best practice here. If you're working on information alone, and you don't want to have conflicting edits, you lock your file. But I can come in here, make my changes as needed. Maybe we'll make this the date and information. Let's just make this a little bit bigger. I make my changes as needed, click "Save." And then when I close it, this is going to all flow back up to Box, the changes that I have made.

And it's going to all preserve it here together underneath my version history. So you can even see, the changes that I make flow back to box. You can't really tell us much because I think with CSVs, our preview is a little bit more limited. But you can see the different versions that I have available, and the different changes that I've made, my date, my information.

So so that would be how that we could, kind of, happily collaborate inside of Box now that that survey data is inside of it. And there is plenty more wonderful things that you can do in box. Of course, there are other trainings available. We don't have as much time to dig into them today. But just note that that, just as an idea of how to share information, that is available to you.

So just the next steps, just like I just said, if there are any trainings that are coming up, Qualtrics specific trainings – because I know that there is an element there of having to know two different systems. And just know that learning these different systems, there is always going to be a learning curve. So you are in great hands with these. And then, of course, any Box trainings provided as well to really get into even more Box functionality.

And then if you are just, kind of, curious about Box, we have a Community dot Box dot com site. That's our support site. Also, in your All Files page, there is a little question mark here, and you can get help. You could send feedback as needed. Maybe you want to say, "Hey, Box, Aspen is such a great, such a great trainer, give her, give her a good sign." No don't say that.

You could come into that space just to learn more, or get some videos, some guides, tutorials. It's really fabulous work there. And if you need help, for VA Box Qualtrics integration questions, or just general Box questions, you can always contact the VA Box team at VA dot gov. For Qualtrics specific questions, contact this Michael Harris.

And again, this will be available to you, this is the person. So if you have anything that's specific to Qualtrics, not the Box integration, just Qualtrics, we want this contact. If it's VA specific, it's the Vaboxteam at VA dot gov.

So fantastic, so we do have time for that Q&A now. I already started seeing some questions coming in through the chat. And I think it's going to be a great time. We do have 20 minutes to run through any questions that might have come up for you.

Parker Cunneen: Thank you, Aspen. Yes. Well, we're, are gonna pull those up now. And just as we are entering that period, and I, I think anytime we have a ton of questions, we always get by e-mail, where can we get the recordings, and where can we get the slides?

So I just want to remind everyone now, the recording, and the slides will be available on the ORPP&E webinar archive page. It should be up sometime tomorrow. And I know it's a Friday. In worst case, it will be up there Monday. So that is where you will be able to find this recording and those slides. But feel free to take those questions away.

Aspen Webster: So I think this first question, fabulous. I think other folks, perhaps from the VA side, can specifically answer if this is true about this approved device. So but, I can answer the second piece. So it does allow collaboration with people who are outside of the VA. So, yeah.

Parker Cunneen: And as we, would you mind just reading the question aloud just for folks –?

Aspen Webster: Yes.

Parker Cunneen: – Who have called in?

Aspen Webster: Absolutely. I think, I think we might have switched to a second question, but it's very similar.

Parker Cunneen: Brandon, can we go back one?

Aspen Webster: Do not – I don't understand why a login by a, via approved, VA approved device. I thought that Box allows collaboration with people who are outside of the VA and they would not have a VA approved device. Thanks. So, first one, yeah, I'll put \_\_\_\_\_ [00:39:13]. Yes?

Herbert Ackermann: Like, you, you want me to answer that?

Aspen Webster: Yeah the VA approved device, and then I can answer the second piece about collaboration.

Herbert Ackermann: Yeah, so actually, I can just, just say it outright. So if you have a VA dot gov e-mail, you will need to procure Box license and Qualtrics license. If you are collaborating with Dr. Smith from University of Maryland, that's when they would use the external collaborators authentication tool, which is ID.me. And that doesn't cost you, us anything.

So as long as you have a VA backed license, if you want to collaborate with a hundred doctors outside the VA, my team can provision those doctors, or whoever is external collaborators with ID.me and not costs. But if you have a VA dot gov e-mail, you will need to procure licenses, if you want to use Box.

Aspen Webster: Fabulous, yeah, so yeah, that obviously, that, that's, so in that example of Mark Jones, you would need to have as, as you just said, Herb, their specific external sharing instructions. And and I wonder if we can make that available too, as a, kind of, a go to, and unless you already have, of, "Hey, this is the steps," if I'm talking to someone, yeah, outside of VA – this is what I need to do.

But when they do have approval, I can share with them. And it's very much approved for that, for external. It's very much able to have external collaboration.

Herbert Ackermann: And and guests, too, right. When you guys come to my team, the VA Box team, and you procure your licenses, you will receive an enablement training on how to use Box besides this integration training. And we will go through on creating your folders, and explaining you how to use, and invite external people to collaborate.

Aspen Webster: [00:40:58] [00:40:58]. I believe the second question here is, yeah, but could you please reiterate what makes a device VA approved? I understand that isn't necessarily GFE. A researcher wants to use their personal device to log into Box. Can this be a VA approved device? And I think, perhaps, that would also be better answered by you, Herbert.

Parker Cunneen: Herbert, if you were speaking, you were just on mute.

Herbert Ackermann: Yeah I just got dropped and disconnected really quick, so let me read it. Could you please reiterates …. Device VA approved – I understand that isn't necessarily GFE, \_\_\_\_\_ [00:41:41] a researcher wants to their…. So if if you, you will know if it's approved or not because it actually will allow you to login into SSOi, SSOe.

If if you're using your university computer, you wouldn't be able to actually, like, they, the system wouldn't even allow you to, to, to wait. So rule of time is your approved device is your GFE or Citrix if you're using that. And everything else that is provided to you by the VA.

Again, it's SSOi, SSOe, login which is what we, we shared at the beginning on how do you get into Box that's not available for you. And that probably means that you're not on an approved device.

Aspen Webster: Perfect. So if your account is disabled due to lack of logon, can it be re-enabled? So, this is –

Herbert Ackermann: If you have those issues, yes, send an e-mail to Vabox dot com. I'm sorry,. Vabox – or VA dot gov, I'm sorry. And we'll, we'll take care of reactivating. Let's just, as, as as a best practice, let's make sure that we are logging in every 90 days, so we don't get to the point. But we understand that sometimes it happens. So yes, reach out to us and we'll, we'll \_\_\_\_\_ [00:43:06].

Aspen Webster: So does Box remind you via e-mail, maybe when you're almost at 90 days since you last logged in?

Herbert Ackermann: I don't think we have that option. Anybody from my team can tell me here? Kyle, are you here? I'm thinking maybe they're not able to actually answer because they're not panelists.

Aspen Webster: I'm not sure, no.

Herbert Ackermann: Yeah I must…Okay.

Amanda Ross: Kyle is here I will, I'll ask him on the side. I don't think he can actually –

Herbert Ackermann: Yeah.

Amanda Ross: – Chime in.

Herbert Ackermann: So he is, he's mute. And, yeah, we do not get – you don't get an e-mail ----- [00:43:47]. You just got to do it over 90 days. Kyle, can you please send me on on chat, if what I reply here is correct or not?

Kyle: So it may be smart just to add a calendar reminder to your calendar, so you're, kind of, prompted to log in in.

Aspen Webster: Great.

Herbert Ackermann: And I was just told that it is correct. There is no notifications that we are aware of. So please, I think that Joe Holtzen [PH] here is offering his, probably this idea. You just set up a reminder if you're using your Box within this 90 days.

Aspen Webster: Perfect. Can Qualtrics output be easily put into VA REDCap? That sounds like it could be a great question, perhaps for a lawyer or someone else from that team.

Unidentified Male: So I am not exactly sure. I will have to get with Bonnie Parris to see what formats REDCap takes. Qualtrics can export into pretty much any format, Excel, comma delimited files, and those types of things. But I'll have to ask Bonnie Parris, who's the manager of VA REDCap to see what formats are supported.

Aspen Webster: Fabulous,

Herbert Ackermann: Amanda, every outstanding issue, questions that were not answered, please make sure you're taking notes so that we can follow up with the, the answer.

Amanda Ross: Will do.

Aspen Webster: And a question here about Qualtrics, do you have to log into Qualtrics every 90 days as well? My, my assumption here is, is no, since this is a different type of service, but I'll defer.

Unidentified Male: So based on, based on Qualtrics is security posture, or our policies. It is important that you use Qualtrics regularly, not only because of the ATO documentation requirements, it's associated with login, and use, and deactivation of inactive accounts. But we continuously look for users who are not active in Qualtrics simply because there's high demand in the field, and we want to be able to provide licenses to those who really do need the account.

So we audit the accounts regularly. And if you haven't used them, we will deactivate them, and require you to go through a, a request process to get that reactivated.

Dan McFarland: And my name is Dan McFarland. And, yes, it is a 90-day, and your account will lock after 90 days. Yes.

Aspen Webster: For Qualtrics? Okay.

Dan McFarland: Yes. It's for Qualtrics.

Aspen Webster: So it sounds like this is another one of those, putting it into your calendar, and making sure that you're utilizing it as much as possible. It's a great best practice. So okay, what is the intended use case for this? Is it intended to be accessed by patients or only research staff?

And my question should be focused on the survey part of the discussion and what the uses, cases for that capability. So for the specific Qualtrics piece in what the surveys you were doing and pushing them into Box. I think if other folks, especially from the VA side, or the, the, those who are interacting most with survey folks, maybe if they have an answer to that question?

Herbert Ackermann: Yeah, so so the goal of this integration is, and and, and where it comes to, like, the the actual integration, right, not only Qualtrics, or Box, but the integration here is to provide the research team a, a a tool that allows them to collaborate externally and as internally, right.

So so that the integration point here is that it allows you to have your data, your researches, even your externals, right, into a platform where you can not only collaborate internal, and external, but you, it also allows you to receive, and send files, right.

We know that one of the main issues in the VA is that the file is too big, how do I send it? Right, the e-mail doesn't let me, encryption takes too much. Buying a hard drive, I'm hand delivering, and it's just very complicated. So the tool is, the goal here is to provide you guys with a tool that automates, and allows you guys to participate on, on on groundbreaking researches that will, in turn, positively affect the Veterans.

Aspen Webster: And so, per this question, is that then directed mostly to research staff as utilizing it?

Herbert Ackermann: So the training that we're offering, it is for research staff because research is paying for their licenses and training. However, the integration was enabled at an enterprise level, right. So if you are outside research and you own Qualtrics license, and a Box license, and you want to be able to leverage that integration tool, you are also allowed to do that. But if you're getting your money from research, then, yeah, you need to go through the research process first.

Aspen Webster: Fabulous. What if I've already launched or published a survey in Qualtrics, can I still add the integration account collaboration, integrate the survey with Box? I believe this is another, this is, I don't want to misspeak on this one, since very much a part of this is doing it beforehand.

My understanding, and everybody keep me honest on here, is that no, it will not. But you could still get your information into Box. It's, it's, you could still upload it as needed, create, say, subfolders if you need to. And then move your information into Box manually. But others, though, I would love if you wanted to keep me honest on that one.

Lorri Glover: Aspen, hi, this is Lorri. The own, the risk of publishing or adding the collaboration for the integration account after you've launched a survey, the only risks would be if you say you had 25 responses come in, and then you turn it on with the integration. If you get response number 26. When that comes in, it will gather all 26 responses and put it in your Box account. But if you don't get that 26th response, you've missed. It, it doesn't go out, and seek, and pull the the original 25.

Aspen Webster: Perfect.

Lorri Glover: That's why it's always best practice to just, before you launch the survey, make sure that you set it up with the integration account.

Aspen Webster: How do you create folders in Box or request a folder be created since it needs to be created by the Box admin?

Herbert Ackermann: Yep so I can take that. The way it works is, if you, if you don't have a Box license, there is a Box intake URL that Amanda, if you can just please drop here on the chat somewhere? So you click on that intake, then that activates my team. My team will reach out to you.

And I won't go from A to Z, but I will tell you, not only how to request or create folders, but will give you everything that you need, so that you leave that, when you start using your, your Box license \_\_\_\_\_ [00:52:03] the knowledge that you need. But also, when you buy a Box license, you're actually buying dedicated support.

So you e-mail the team, and we will also do all of your technical issues, concerns. If you forgot something, if you don't know how to do something, that's what we're there for. There is no need for you guys to go to myIT or anything like that, and create a ticket. Come to us, and we'll take care of it right away.

Aspen Webster: I can also, if you, I can take back sharing real quick to show how one can create a subfolder within Box. So because you do have access to your folder, so if I have access, say, to – we'll say this VA project folder number two. If I come into this space, you can see here that the new button is not grayed out. So I am able to create a folder with a subfolder within one.

So if you had a team folder you could create it as needed. You'd come to "New," create a folder, and we could say, team projects. And then that is how you would create a folder within this space. And if you did need to upload information into a specific folder, that's what the "New" button is here for as well, uploading files and folders.

And also, you can drag and drop into the space as needed. So, but again, that is for folders where you already have access, you can make your subfolders. From this top level, you would have to go through the request for access.

Herbert Ackermann: Are there any more questions on the slides?

Parker Cunneen: There's plenty more. We are just bringing them up now.

Herbert Ackermann: I'm sorry. Thank you.

Aspen Webster: If one already has a Box account with the university, will one need to create a separate Box account for a VA Box?

Herbert Ackermann: Yes.

Aspen Webster: So yes, yes yeah.

Herbert Ackermann: And the, and the, and the reason being is because their Box university accounts do, are not necessarily \_\_\_\_\_ [00:54:02] at the FedRAMP [PH] or federal requirements on security wise levels. So that's why you need to go into our instance within the VA to use VA Box. You should not be putting any VA owned data, not only PII, or PHI, but anything that is owned by the VA, outside, any tool that is not approved by the VA. And in this case BOX, the only approved BOX for VA data is VA Box.

Aspen Webster: Perfect. What are the processes policies around who has the ability to grant other VA users access to a VA Box space? What about external organizations granting a VA user access to their Box space? There's some systems that require approval and proof of specific training to obtain – for example, to be a SharePoint admin, VA has various ways of doing that. Would it be the responsibility of any Box user? Would it be the responsibility of the users local ADPAC?

So I can tell you from a Box perspective, and I imagine there are very much specifics here on the VA as well to, to elaborate. But your ability to grant access to your space is based on those permissions that I offered. So if you are a, a co-owner, you can invite other folks in as collaborators. So in that case, yeah, so if you have co-owner space, so if you're in that sharing pane, and it says co-owner, you can invite someone in.

If you don't have that, you cannot invite them in as a collaborator, those internal or external. And then in terms of external, unless there are additional policies, if someone else – so let's say, let's go back to that example of folks who had – if you have a university Box account, that is a separate, kind of, world over there with your own settings.

And if they shared information with you, their settings are going to apply to you, just like your specific VA settings will apply to them. So you have your rules around your Box accounts. They're going to have their rules that they share with you. So we're, kind of, subject to each other for working externally.

Herbert Ackermann: And with that said, thank you very much, Aspen. I think that at this point, I, I'm sorry, I forgot who's sharing. But \_\_\_\_\_ [00:56:14] sharing, another \_\_\_\_\_ [00:56:12] question says, "Is there any way that you can maybe e-mail us those questions so that I can have my team answer and then provide answers via e-mail to everybody? Will they be doing that?

Parker Cunneen: Absolutely.

Herbert Ackermann: Thank you so much. And we'll, we'll work as fast as we can to bring it back to you as soon as possible, Aspen.

Aspen Webster: Perfect. Yeah so since we're about out of time, so just for a quick clarification, did you want to go ahead and, kind of, preserve the rest to be answered offline?

Herbert Ackermann: Yeah.

Aspen Webster: Okay.

Herbert Ackermann: Yeah.

Aspen Webster: Excellent.

Parker Cunneen: Alright, fantastic. I mean, do you guys have anything, any final words you'd like to share with anyone?

Aspen Webster: I just want to say thank you. These questions are fabulous. I'm learning so much about your system. And I just really appreciate your time and attention.

Parker Cunneen: Well, we, we appreciate all the, the presentation, and the questions from our panelists, and thank the audience for being here as well. As a reminder to everyone, I saw this question pop up a couple of times. We will not be sending out the slides to everyone, but they will be available on the ORPP&E webinar archive. I posted it a couple of times in the chat.

But like I mentioned in the beginning, a simple search on Google, ORPP&E webinar archive, and it will pop up. Those should be posted tomorrow afternoon or Monday at the latest. And finally, as mentioned before, we do a post-webinar survey.

We do appreciate it any feedback from you all. And just an opportunity to to hear some of your feedback. So please take a minute to fill that out. And with that, and thank everybody very much. And have a great afternoon.

[END OF TAPE]