Aspen Webster: Hello folks. My name is Aspen Webster. I am a BOX trainer and I’m excited today to talk to you about Qualtrics and BOX. So what we’re going to be going through today is a couple of things. I might be a BOX expert, but I am also here to help you with this new process of pushing our survey results into our BOX accounts. So what I’ll be doing today is, I’ll be walking through some of the more basic pieces of BOX just to make sure we feel comfortable in that BOX space. Take a little bit of a tour and navigating it especially if you haven’t maybe had the opportunity to get some BOX trainings or if you have, this could be a refresher for you.

But we’re going to go through some step-by-step kind of processes around that Qualtrics integration, make sure it works best for you. We’ll have resources for you, so also don’t worry if I moving through this and you’re like, oh, I didn’t catch that. It’s also this Qualtrics integration is not yet available, but this is to set you up for success. So we’ll talk about that integration. We’ll talk about how to. And then we’re going to dive into fun pieces of okay, we’ll now that that information is in BOX, it’s been pushed to BOX through this nifty integration, what can I do with it now that it is in BOX? How can I share that? What does sharing look like in BOX? And then we’ll just head into a couple of next steps and of course just like Parker mentioned, we’ll hit that Q&A.

So I’m going to go ahead. I’m going to dive right in and get us started. Just of course like has been already mentioned, there is a Q&A pod if you need to drop your questions into that space, so we can address them later. So just note that with your WebEx screen. So I’m going to start with some benefits around BOX. And of course this might be something that you’ve seen or know, but hopefully this can be reminder to you to kind of set the stage of why BOX is the tool where we’ll be housings information, what it even is. So I’ll go ahead, I’ll get us started here to kind of start with the question, what is BOX? We are just setting the stage right now.

So BOX specifically, it’s one platform for secure content management which is probably what we all really know. We know that it is cloud content. We know it’s storing our information. We know it’s nice and secure there. We’re able to get that information quickly. It’s up there in the cloud secure. But it’s also for workflow and collaboration. And those are those elements I’m going to get into when I start talking about sharing and those different kind of abilities that we have within BOX. And of in this case and especially what we’re talking about today, it’s used to securely house this Qualtrics culture survey data. And again, I’ll just keep saying secure because I think in this day and age, secure probably the most important thing we want to think about. So again, housing, it but also part of this collaboration workflow process.

I’m going to go through some of the benefits here of BOX. The first of course is that we have this unlimited storage, so that is that first element. Of course, we could put as many surveys as we wanted in there. In fact, man you could just have just thousands and thousands of surveys. You’re just getting lots of information. We can put it all inside of BOX. And I like to think this idea this unlimited storage of files up to 150 GB. A little bit like if you’re an Indiana Jones fan. At the end of Indiana Jones in Raiders of the Lost Ark, there’s that giant warehouse and it is full of all of those boxes. And so just imagine that warehouse is just infinite and forever, and then those crates that are all housing the information and those pieces that might be dangerous such as the Ark of the Covenant, imagine they themselves could be up to 150 GB in size. So unlimited storage that crates the files themselves up to 150 GB in size. So just note that in terms of our benefit there.

And then we’re going to talk about again this internally and external secure sharing. There’s some processes here with external sharing, but we’ll go over that make sure you have those resources for you. And then kind of the core of this Qualtrics piece here is that, BOX integrates with a number of tools. And so this integration that has been built for you is very much integrated into BOX in a way that is most beneficial to you to try to make your life easier in terms of gaining our survey information, getting it in the BOX real fast. And then of course because BOX is housed in the cloud, we can access it through our browser as long as we’re from a VA approved device, we can access it from anywhere. So they don’t have to have just our kind of server where we’re on site. Or what that looks like in this case, we can access it right from the internet.

So let’s get into the BOX itself. Kind of understanding BOX structure and purpose. So I’m going to actually pull over here to my BOX account. My VA BOX account. And the way that I got here was, I logged in. Again, this is a VA approved and there’s some kind of specifics around that, some kind of nuance. But we would go to veteransaffairs.box.com. And if you’re just to kind of come to it just on your browser of choice, you would come to this page. You would see there is a continue button that you can press continue. You would enter your credentials. You pop right in. So just note that that is a way that you can get into it from your browser. So I’m to come in and let’s say I’ve now logged in. I’m now into the space. I landed on my all files page. So as you might be familiar already, from your files page in BOX, this is where I’m going to see all the information that has been shared with me. And what that means is that, the folders here are folders that are owned typically by admins or other folks that have been shared with me.

An important piece to note here is, from this all files page, I can’t actually create any new folders. I can’t upload any documents specifically to the all files page. I can only do it inside of folders that have already been created for me and shared with me. So as an example here, we’ve got a VA group 1 folder. If I click this little select button, it’s going to pull up the sharing pane over here on the right hand side. And this is actually where all of our kind of great important information is—I love to kind of come over here, the sharing and the details pane and see what we have to say. So in this case, Taryn is the admin for the Veterans Affairs account in general. So it is owned at that the admin level but has been shared with me and I am an editor in this space. So that’s my permission level.

I’m going to get a little more into some specifics around permissions when I talk a little bit about collaboration. But just note that these permission levels, they determine what we’re able to do in these spaces. So as an editor, I can come in edit documents that might be inside of this folder. If I click in, we can see there are subfolders. From here is where I could create new folders. And that’s just a note. I can create subfolders inside of these folders that have been shared with me. So I could come in, make some new ones, I see, come into the space, there’s all my documents. And this is where I could kind of interact, collaborate just as needed.

So pretty straightforward, but just a thing to note with the folder structure, if we want to add content, we want to create information, it’s got to be inside one of these collaborated folders. And that’s what blue means. Blue is it’s a collaborated folder. And in fact, if I hover over this space, it’s actually going to pop-up. It’s going to say collaborative folder because BOX is like, are you curious? If you hover, I’ll let you know it’s a collaborated folder. That’s typically what you’re going to see. If you happened to see a gray folder, just note nothing is broken. That would be a folder that is owned outside of the VA and had been shared with you by someone with a BOX account. That might not happen as much due to some kind of security pieces, but if you just happened to see a gray folder, just throwing it out there, nothing is broken. It just happens to be that it’s been externally shared with you, so just note this.

Kind of a piece here, I also just call it out, you must login at least once every 90 days, because if you don’t, it might disable your account. So when we get into the survey data pieces, if your account is disabled with the survey collecting data, the person who owns that survey, you wouldn’t be able to enter. But that data will still live here in this space. But just remember, try to login every 90 days and kind of keep that in mind as a piece to kind of just remember as we’re interacting because we want to keep interacting with this space. I highly encourage it just in general, because it’s more than just that content management. It’s also sharing, internal sharing just in those pieces in those ways that we interact with one another. So again just as a callout, remember here, the sharing pane I can see if I’m—in this case, I am a co-owner. We’re going to move actually and I’m going to show you a little bit of what that looks like here because we’re going to be talking about our surveys momentarily.

Just a couple of other pieces I do you want to call out just for kind of being able to organize your information efficiently. You can always sort these folders. I like to just kind of call this out that if I were to click name here, it would sort it alphabetically. If I click this again, it does it from the end of the alphabet upwards or backwards. You can also sort by updated or filed. If you sort it from this all files page, it’s going to kind of flow down. It’s going to sort it this way. So just note that if I come into this space and you can see the way it’s kind of consorted, that’s just a way to find your information quickly. And there a lot of other tools here as well, but if you have any questions more just kind of about BOX in general, we have a lot of resources available, and I do believe that there have been trainings that have been done on the VA site in general. But just let us know if you have any specific questions. And maybe during the Q&A if you’re, interested I can always dive into those a little bit more. But for the sake of time, I’ll now move into our Qualtrics integration piece.

Now about our Qualtrics integration, here is the relationship to BOX. So in this case as I’ve kind of mentioned and hinted at, when we’re working Qualtrics to create our surveys, to publish them, to push them out to the folks that they enter in their information, we’re trying to simplify this process. Make this as easy as possible so we can drop it right into our repository. So with integration that I’m about to show you in kind of a step-by-step process, the results are automatically pushed into BOX. So Qualtrics, I just showed you logging into our BOX accounts, but now we also want to look at what it looks like to log into our Qualtrics accounts. So what this will look like of course a pretty straightforward, we’re going to go to qualtrics.com, we’re going to sign in with our usernames and passwords, and then we’re going to be able to move into that space. So just again to king of show you, now I’m going to take you over to our Qualtrics page.

So I’ve logged in here. I’ve already got my project up and running. I’ll be clicking into this in a moment and I’m going to show you some on screen sort of slides of the how to of what we’re going to do with this process. But I do have my—if I were to come in just in general, I’m in my project space but I’ve logged in. If I come into just my general account space, so again, we’ll move into this in a moment. But no, of course, I’ve said it a couple times now, but I’ll say it again. The benefit here is that we’re pushing it into BOX, but when it goes in the BOX, we now have the ability to be more specific about what to do with it. And that is part of the reasoning here. So now let’s get into a how to around Qualtrics.

So what does this mean? And I’ll go through the step-by-step instructions. I’ve also got a couple of kind of caveats here we want to take into consideration. So we’ll just kind of be attentive to that. And again, this is being recorded and we’ll make sure that you have access to this presentation so you can also see if there as well. But the first thing we need to do so, we’ve got our BOX accounts. We’ve got our Qualtrics account. First the survey owner who is you, you have to be provisioned in VA BOX. So that’s internal VA users. You got to have that BOX account. You got to be able to login, you got to be provisioned, you got to be able to have that space in there.

The second thing you’re going to need is you’re going to need permission in Qualtrics to collaborate. And that is going to be granted by a Qualtrics administrator. So that’s our first piece. This is our setting the groundwork. We got to have these beginning pieces to even do any of these next steps. So first step, BOX account, be able to collaborate in Qualtrics. And I’ll give you a little bit of a visual of what that means in terms of collaboration. So this is the first step. We’re going to have our survey—and I’ll go into Qualtrics too to show you little bit what this looks like in real-time. But we have it right here in our screenshot. I’ve got my survey. Here we are. I’ll click into my BOX plus VA survey. I’ve got it. I’ve got my introduction. I’ve got all my different pieces that I want to do. I’m going to go first into tools, and then I’m going to click collaborate.

So here we are. We’ve got tools, collaborate from within our survey itself. So again, up on that survey tab, click tools. View the submenus. Select collaborate. So that’s our first step here. What we’re going to be doing and I’ll just kind of backup a touch before I go into the next step. We got to do all of this before publishing our survey to ensure that it gets pushed to BOX correctly. So when I say that, I’ve got all this, I got that publish button up here, we’re not publishing right now. We’ve just got to make sure our survey is good to go. We’re not even touching that yet because first, we got to do this process. So I’ve got my survey, it’s beautiful, I’ve asked all the questions I want. I’m very good at my survey questions, so we go through this process.

The second piece here is that A, the collaborate on project page is going to open. And within that piece here, we’re going to type in integration\_account. And then what’s going to pop up—you can also click this user and group address book and we can enter this integration account in the search field. So again, what that looks like here, was tools, collaborate, and it popped up here. So kind of looks like this. And we’d be able to type that in. Then what’s going to pop up here is we’re going to select integration account do not delete. So that is specifically been created. That’s going to be input here. We’re going to select that from the results. We’re going to click the add selected button and then we’re going to click save.

What’s going to happen after that is we’re going to have a collaborate page that’s going to open up for us. We don’t have to type anything; we just click invite. And you might want to kind of think about this in terms of, this collaboration is almost like we’re inviting these two tools to kind of talk to each other. That’s kind of what’s creating at this line. Maybe for you layman’s out there who aren’t as—layman sounds like—as I say that aloud, none’s layman. How aren't so maybe super techy. I like to think of it this way of, hey, we’re giving them a way to talk to each other. So that’s why it’s being kind of characterized as collaborate. So giving it kind of the pathway that now after we’ve invited it, it’s going to allow us then to move forward with these API settings to be able to have Qualtrics talk to BOX.

So after we’ve done that, all those collaboration permissions are going to be automatically checked. So all these pop up here, they’re automatically checked. Don’t make any changes, and then will click the save button. So I know, this is a whole kind of process here. As we move through this, we do have resources. You don’t have to memorize this especially as you make your new surveys, just know it will probably start to get a little bit more familiar to you. But you will have those step-by-step processes. You can always make sure you’re doing it with every single survey. I’ll come into tools. I go into collaborate. I type in. I select my option here. I click save. Make sure all the collaboration settings are checked. Invite, and we are good to go. But just note that right now, we’re not going to leave you out to dry. You don’t have to memorize that. You will have that information.

Again, some more caveats in here. Don’t start this process now. Don’t do it just yet. Once this workflow is totally in production, you should receive an email. Hopefully I’m not putting too much pressure on any administrators here, but if you don’t receive an email, you think you should, maybe something has happened. You can always reach out to an administrator. Don’t flood them. They are busy. But if you are in that space where you’re like, has this happened yet? Should we start doing this? But you will receive an email. So just note, you’re not doing anything wrong. You don’t have to pop in there start doing this already. When it is good to go, you will know it’s good to go. So this is more just to kind of get you ready, make sure you’re feeling confident, you’re here in the process. So that is how we get into the Qualtrics how to. Now they are connected to each other. And so to kind of think, how is that now interacting with BOX?

So after you’ve got this in place and I go in and I publish this, I publish my survey and it’s being pulled, it’s going to be pulled once a day. And then it’s going to be pushed into BOX. And the way it’s going to work is, it’s going to go into your individual BOX account. It’s going to go into an individual folder for the survey. And so what that means is, let’s go back to our BOX account here. so I’ve got my BOX plus VA survey here. There’s actually a folder up above this that I don’t see and I’m going to show you little bit more about what that means here shortly with kind of a visual. But that information is going to be pushed into this folder. So I come into this space, and I see there are my BOX survey results. It’s going to go into that individual folder. It’s going to come in as a CSV file.

Just a quick note, if I come in and I click CSV, this takes me into the preview page. You just kind of see the data here in this preview. It you’re kind of less familiar with BOX, when we click into our files inside of BOX, it takes us to a space where we can just take a look at. We could scroll down, we could see it, but I can’t make any changes from this space. I’ll give you a little bit of kind of tips of what we can do and interact in the space. But just kind of give you an idea that this is what you see, preview pages can be a little bit strange, especially for if you’re not used to it.

Typically when you click on a file, it just opens up the file. And would just open this up in Excel as a CSV, but first when I click into it, it actually takes me into this page to kind of look around. And then this is where we might be able to open it from if we were ever to make any edits. But we’re going to pause on that just shortly. Just wanted to show you how it comes in. How it is pushed in and what that means. And you can see it’s in my folder. So that is that Qualtrics piece. Those of the things we need to know. This is where I think we started to get into some fun pieces, because I wish I were a Qualtrics expert, but what I am is a BOX expert. So now that that information is in BOX, now that it’s in those folders like we’re seeing it, how do we share and organize that content? What can we do with it now that it’s in there?

So the first thing I want to talk about is the different ways that we share in BOX. So we have two primary ways and there’s two very different ways of sharing that kind of get us to different goals. But we have to do one of them to get to the other. So when we’re here in our BOX accounts. if we were to share a folder out, if we wanted to invite someone in to work in that folder, to be able to see things in that folder, to have certain permissions in there to work with us long-term, people with BOX accounts; we would invite them in as collaborators. So a collaborator is an individual who has been invited to a file or folder.

So think of this like we’re over here and we have our folder here and it’s our BOX plus VA survey folder. Imagine that is our office space and if I want someone, my esteemed colleague to come work with me on a long-term basis in here, I got to invite them into my office first. So I might say hey, like a vampire. Please come in. You’re invited in. And so now you’re inside and you’re inside the office space. So I have to bring you in to be able to work on that. And maybe you have had BOX accounts, made you have to have a badge to come in. So you got to come in first, you got to have all the credentials to come into my office space. A shared link is this way that now that you’re in my space, I can actually just hand you a document. So in this case, a shared link is a unique URL that gives the recipient access to a specific file or folder.

So again, you are in my office space, and I’ve got my survey data and I’m looking through it out and I’m like, oh. And I’m just going to hand it right over to you. I’m going to say, hey, Parker. Take a look at this. Could you tell me, could you review this, tell me what you think about it. So that’s the point of a shared link. So in this case, we invite someone into our office as a collaborator, and then we can use this tool to get them that information quickly instead of saying hey, go find it down here in the folder or instead of say attaching it to an email. We don’t want to attach any of our information emails, because that means it’s now outside of BOX. It’s may not be secure anymore or maybe we sent it to the wrong person. We don’t want to do that. We want to keep it all inside of BOX. And so I’m giving this idea kind of conceptually, but I’m going to show you what this looks like in real-time.

The first thing I do want to talk about though again as you might expect is because we got to invite folks in first is inviting collaborators. And what does that mean inside of this? So first question we want to ask yourselves before we invite a collaborator is, where do we invite them? So I just hinted toward this about saying hey, there’s actually a folder up above my BOX plus VA survey folder. So the way that folder access works in BOX is it follows something called Waterfall Permissions. And simply, that just means that access trickles downward. So everything that’s happening kind of its top part, so if I were given access at that Qualtrics reports top folder level, I’d have access to all the folders, and subfolders content underneath that top folder level.

So you can imagine I got my coworker over here Mya, my colleague she’s got her own survey results that she’s going through. Those are hers. It’s being pushed specifically to her folder. This exists over here on her All Files page, so I really don’t want to have access to that. So instead, I am granted automatically access to my folder at that BOX plus VA survey, that survey folder level and then I have access to the survey results inside of it, any subfolders I want to make inside of it and nothing else. Just those two. I don’t see these other folders anymore. And that’s true here right? I saw this BOX plus VA survey, there’s actually folder up here. From the admin level, that folder can be seen. We don’t see that folder. We just see exactly what has been shared with us.

If again I select here, we can see so its owned. That’s a Qualtrics and then I’m given access at this BOX plus VA Survey level, and now I can see everything underneath it. Whereas my colleague Mya, she’s going to see her surveys that are pushed to her specifically. And that’s an important thing just for you to know in general. So when I started and I said hey, where on our All files page and we only see the access that have been granted and provided to us, that’s what I meant. I don’t see that Qualtrics reports folder. I only see these folders that have been shared with me. That can be files too. So again, I’ve been invited into the office space that is.

And this is something to think about when we’re thinking if we’re going to invite anyone else in to take a look at our information. Where do I want to invite them at? Do I want to invite them in down here at the survey results if there’s a subfolder in here that I’ve me that is specific for them? We get to decide and then just know because of Waterfall Permissions that access is going to trickle downward. Like a waterfall, it can’t go upward unfortunately because of gravity. It can’t go laterally because it’s not a cool waterfall. It’s just a downward waterfall. So again, from here everything is going to flow downward. So that’s the first question we want to ask yourselves about, what do I have access to and what do I want to give people access to?

And then the second question is, we want to think one, what permission levels do I have? And two, if I’m inviting someone in, what permission level do I want to give them? So to invite a collaborator first thing is, I actually have to have a co-owner permission level. So I have a co-owner permissions to be able to even invite anyone into my office space to work with me. And that’s kind of what this owner permissions piece refers to here. Just for general context, there’s actually a lot of kind of permissions associated with these. This is kind of just the summary that kind of gives you the basics of what folks can do. There’s seven granular permission levels in BOX, which can be super helpful because it gets to help us decide exactly what permission we want folks to have.

So if I’m an editor, I can’t do my collaborators. I can’t really—there’s some things I can’t do, but I could still edit files inside of BOX. I could still delete. I could get link. I could upload information, download information everything I need to do. If were a reviewer/uploader, I could do all these things but I can’t delete for instance. Or a preview uploader can just upload and preview just like what its name says. So it we’re thinking about the kinds of permissions we give people, we get to decide exactly what we want them to be able to do. I have definitely invited folks in where I just like, you know what? No, I don’t want you added. So you get to be a viewer. It’s view only for you. So you’re just a viewer or I do need you to edit, but I don’t want you to delete anything. No thank you. So now you’re a viewer/uploader. So that’s the way we get to think about it in terms of those permissions.

So I’m going to hop back and I’m going to show you what this looks like. So remember just kind of as a review with those Waterfall Permissions, we got that landing folder for our survey information from Qualtrics. It’s that Qualtrics report which gets pushed into my folder that’s personal to me, my survey name so BOX plus VA Survey. And then the survey results themselves, so those folders, they’re automatically created by the system. If I didn’t want to make a new folder and here, I’ll just show you what that looks like just because we have a little bit of time. There’s a new button up here inside of this folder that’s been granted to me. Maybe I do want to set a specific folder in here where I’m going to say for external sharing.

Let’s say as an example. And I’ll go into some external rules. It’s the worst thing in the world to type while people are looking at you. Because then you’re like, can I spell? And the answer is no. You can’t spell Aspen. So I’ve now created a folder survey results for external sharing just by way of kind of an example. So I get to kind of decide where do I want to invite someone in. And maybe what I want to do is I want to invite them in at that folder level. And I can move those results in there if I want to or maybe I make some edits to this, and I’ve got some final pieces in here. So if I click into this folder, you can see I’m a co-owner, so I can invite a collaborator.

And the way to invite a collaborator in is from which ever level you want it to be at to click that big share button at the top. And it’s going to pop up with invite people. So I’ll invite Mya my coworker and another one. Kamala too. So I’ve invited in my coworkers. These are VA folks. They have BOX VA accounts. This little drop down here is where I get to decide what access I want them to have. Again, I can do this because I’m a co-owner. Couldn’t if I were an editor. So maybe for Mya and Kamala I just need them to take a look at this, so maybe I will give them viewer access for instance. I don’t really need them to edit anything. This is good to go. But this is where you kind of get to decide and BOX gives you kind of the run down just as a reminder for you. So I’ll click send, and now they pop up there in my sharing pane.

So super helpful. I can see them in the space. If I wanted to change that access level. I can always come to the three little dots here and maybe I make Mya viewer/uploader. So now she can actually edit if she needs to. So that’s really helpful for me. Or I could if I needed to, maybe someone is no longer on this project anymore. I don’t need them to be in this space. I kick them out of my office as it were. I could click remove and got remove collaborator. So when I invite them in, they’re going to see this folder and they’re not going to see the BOX plus VA Survey folder. So you see Mya’s name is not in here, but she is going to see this and any information that’s inside of this folder. So that’s one thing to know. What level am I inviting folks in at.

Now I do want to point out some specific external collaborator sharing instructions. See how excited I am about external collaboration. What a real nerd. So Mya was part of the VA right? Let’s say this is a survey results or external sharing. I have an extra colleague outside of the VA, but I want to share information with. Now in this case, external users have to get provisioned first. So they have to submit a request to the VA team. There’s a Salesforce form that we have a link to because if you have a large number of external users, you can email. There’s a templated user spreadsheet. So in this case, they have to be provisioned first. This is a security thing. We’re not just going to willy-nilly go out and add folks.

So let’s say someone is provisioned, we’ve got that good to go. If I invited in an external colleague, so we’ll do let’s say \_\_\_\_\_ [00:31:53] and I decided I’m going to make him an editor. I click send. We can see that because he is external, he’s got a little globe next to his name. So that means that he is from outside of my company. Now currently, he says pending. Likely you won’t see this because if someone is provisioned first, then it’s not going to say pending. But pending comes up if you’ve invited someone who doesn’t have a BOX account.

So just note, if you see pending, that person doesn’t have a BOX account. It’s like they don’t have a badge to enter my office, so they can’t come in until they got that BOX account because I want them to be able to do specific things in here. If I were to—I’ll just my regular as an example because I do have a BOX account. You can see it now invited—I am in here just as an editor, but I have the same thing. We’ve got that little globe. This Aspen is outside of the company. So that’s what it’s going to—it’s what you’re going to see if someone is an external collaborator and external user. So just note that difference and what that could look like.

So we’ve invited folks in, they’re inside of our space. Fabulous. Right now in this folder, I actually don’t have any information. So we’ve got that BOX survey results, let’s say maybe I want to actually move it into that subfolder, I can actually just kind of pull it right up and move it. If I wanted to copy it, I could also—let’s see. If I select—we’ve got a few new things up here. I can go to move or copy. So I could go ahead, I could click in here and I could let’s say I just want to copy that information in there. And now it’s going to be available because I have external collaborators in there so just kind of some ways to know. So there’s just some other fun tricks you can do inside the BOX. Again, you can move it in there or if I just wanted to make this accessible to folks, I could always just invite a collaborator in just to a file. But in this case, I know I got my information inside of that external sharing folder. All these folks can see it my internal and external colleagues. So it’s in here and now we’re going to do that next piece, which is the shared link, that unique URL.

So instead of me being like Mya, can you go into the survey—can you go into that folder and find that? Or again like I said before, instead of taking this downloading it, attaching it to an email, which is let’s not do that. Instead what I can do is I can come over and hover over the space. I got BOX survey results here. I get this little link in the chain here and I click that. That is going to pull up a shared link and it’s going to automatically toggle it on for me. This is fabulous. When I click that, you remember this? This was the invite people. We’re going to ignore that. BOX just kind of has the pop up together. We don’t have to do this. This is that welcome to my office piece. This is the hey, I got my survey results here. I’m going to hand them over to you. Take a look at them. So it is automatically toggled on a shared link.

And this link here is persistent. So once I turns on, I can actually move this file into another folder. It can be somewhere else entirely. But as long as people still have access to it, this link is going to persist. And we’ll note here when I toggle this now, it’s only accessible to these people here in the sharing pane. Only people inside this folder can see this link. So in fact if I were to send this link over to you right now, you wouldn’t be able to open it because you are not inside of this folder. But because I am for instance when I do put that link in, it’s going to take me to the preview page. Remember the preview page we were on. So it just takes someone, and it directs them right to that file. It takes right to preview page they can start reviewing it, taking a look, and kind of moving forward with it.

And just to kind of point out, there’s some link settings you could say put in a link expiration. Let’s say I want it to expire on Friday for instance, you can kind of even narrow it down even more. Or if you wanted to send that here, you can put an email instead of maybe—I will often take shared links and I’ll put them inside of emails themselves. I’ll direct. I’ll put in link URLs. Say hey, you can check out the survey results here and then I’ll put that URL inside of my email or internal chat systems whatever works for you. But again, you have to be logged into your BOX account and you have to be invited to the space to view this link.

So while we’re in this shared—kind of this preview page and we still got a little bit of time; I do want to note just a couple of fun things we can do in this space. If I did want to open it, I could come up to the open button here and let’s say I did want to—if I did want to make any changes, if I click open, I’m to be opening this up natively to my desktop. So I could always lock this file first if I wanted to make sure no one else is editing it. I don’t want them to have any conflicting edits with me, so I click lock. Now you can see it’s locked. Someone could come in here and they can’t make changes while I do. And it’s open. It came up in Excel. And \_\_\_\_\_ [00:37:08], so we’ll see what kind of changes I can make. But if I did want to make edits, I always could in here and it would save right back to BOX. In fact, let’s see if we can make this a little bit bigger as a change. Perfect. And now we’ll click save and close. Yeah.

Taryn Brice: Just need to clarify something for folks real fast. As far as what we’re capable of on the VA BOX in terms of folks who do not have BOX accounts, we do not allow the preview for anybody who does not have a BOX account. The only option we allow is for \_\_\_\_\_ [00:37:51] file request links. There is no access to see data without a BOX account.

Aspen Webster: Yes, exactly. Yes, thank you so much for that. To be able to see this, you have to have a BOX account. This guy cannot see it. Only these people in here can see this information. They have to have a BOX account to be able to see it, to be able to come and view it. Love that clarification. We can’t send this out to anyone. They won’t be able to see this preview unless they are in here with a BOX account, so exactly. So yeah, that’s a great clarification here that we’re coming in. We can see it. You have to have a BOX account and be provisioned with such. And just a couple things. If you do have the ability, you’re in here, you can see things; I just want to point out that there is some great collaboration tools on this preview page.

If you did want to just kind of interact this way you could always—let’s say I wanted to come in and @mention someone, I can @mention Mya and say, please review the data. And then she would know I’m interacting with her. I’m asking her hey, can you take a look at this for me? Can you review this? And she’ll get an email notifying her that I have @mentioned here and specifically asked her for some pieces. I could write general comments as well. I could also add tasks. So if there’s just a general task I want to add in, again, it could be that review of the data. I could assign that to Mya.

Or as an example, I can do an approval task. Maybe we’re working with this data, it’s good to go, and maybe I’ll make here again an assignee and I could say please, approve for distribution. Whatever you want to do with this data. And I’ll do save by Friday, and now I’ve got a task assigned where she could yes, this is good to go or not good to go. We need to do more editing on it. So they’re just tools inside of here that can be really helpful because if you’re like me and you’re like oh, my gosh. We’re going back and forth on email and losing track of all the comments, we can keep them right in here.

If you do have documents like this, if you are working with your survey data, you need to kind of move through this little bit more, you totally can. So just wanted to point that out as just an additional tool. But yeah, just to kind of drive that piece home one more time, there are very specific VA rules around the sharing. And there are rules around the external sharing. If I’m inviting in my internal VA collaborators, everyone has to have a BOX account to be invited in and to see these documents. No BOX account, you can’t see them. So that is a huge piece. Perfect. So I’m not going to move through—that’s the piece. Those are kind just our general BOX tools. I’ll just go into a few next steps into some additional resources. So there’s training reporting will be available. There’s also going to be another one. We’re going to do just kind of a general just kind of clean recording of this without any Q&A so that will also be available. And then be on the lookout when this integration is good to go for you.

And then if you’re just generally interested in BOX pieces, we do have a community BOX site, also support site where there’s some pieces where you can kind of—if you have any questions. Just note though, another caveat on this one, it’s just kind of generic BOX information. It’s not going to be specific to your case, which the VA BOX account has more security settings than are typical. But if you are curious about some things and want to learn some more, you can always pop in there and see what’s there. This hopefully is still true. If you have any specific integration questions, there’s the VA BOX team at va.gov and then Qualtrics specific questions, we have a couple of folks you can reach out to about the Qualtrics support specifically.

Asdique Ahmed: Aspen, I want to interrupt you for a second.

Aspen Webster: Please.

Asdique Ahmed: Yeah, so as far as the integration goes from Qualtrics to BOX, there are some VA security that we had to go through which is, we will not be doing immediate lead window responses in BOX. So right now, we are configuring it to do it every night, which we might be able to change it to every couple of hours.

Aspen Webster: Yes. So in this case—so yeah. What you’re starting to see there is, specifically that information as it’s pushed into that folder as I showed it is not going to be automatically just as soon as someone puts in responses. It’s going to be pushed during the night.

Asdique Ahmed: Yes, exactly. Immediately doing it will be you every night, but we are talking about possibly doing it every couple of hours.

Aspen Webster: Yes. Perfect. So every couple of hours will show up in that folder.

Asdique Ahmed: Yes.

Aspen Webster: Fantastic. Yeah, so now we have a Q&A. Yeah, are there any other clarifications too? I mean, we got the next 15 minutes for Q&A. Because I was sharing my screen, I didn’t see if any chats came up. So I imagine you were keeping track \_\_\_\_\_ [00:43:13].

Asdique Ahmed: So the chat is actually turned off in the webinar. Everything will come through the Q&A box. So if you’re all ready, well, I’m happy to bring them up.

Aspen Webster: Yeah. Any other pieces or \_\_\_\_\_ [00:43:24] that I didn’t catch?

Asdique Ahmed: You covered it all.

Aspen Webster: Perfect. Cool.

Taryn Brice: I think you did a great job. I think there’s one question that I see in the Q&A in terms of working with \_\_\_\_\_ [00:43:39].

Asdique Ahmed: We’re going to bring them up on the screen so everyone can see them.

Aspen Webster: Perfect.

Asdique Ahmed: And if someone from your team just read the question aloud for the transcript and for those who are calling in before answering that would be great.

Taryn Brice: Absolutely. I can take care of that. Will this work with BOX accounts from university affiliates? Non-VA BOX accounts. So you can work with folks in BOX that are at the university as external collaborators. You are not allowed to put data into the BOX \_\_\_\_\_ [00:44:19]. If the university has their own instance of BOX or a public BOX account or team, you are not allowed to use that. What would happen is, you would invite them to be external collaborators within the VA’s BOX \_\_\_\_\_ [00:44:35]. And that is how people typically share in that case.

Aspen Webster: And Taryn, just to just make sure I understand too from that. You mean, so if let’s say someone from—the university affiliate shares a folder with you, it shows up as gray, we don’t want to put anything in that folder. We want it to just be VA specific folders that we would share out with them.

Taryn Brice: We actually can’t have them—if they are using—no sorry. So if we’ve invited them to be an external collaborator and have an account within the external instance of the VA’s environment, that’s absolutely fine. We don’t care where the data is if it’s in a gray folder or not. The concern is that they may have their own BOX environment \_\_\_\_\_ [00:45:29] and we do not bridge the environments together.

Aspen Webster: Great. Yeah, I like to think of it like, we’ve got our house with our rules and they’ve got their house with their rules. So we want to stick in our space where we have our correct rules.

Taryn Brice: Exactly. Exactly. Our rules are typically—we’ve got the tougher field, so we need to abide by it.

Aspen Webster: In ours, we have to take of our shoes.

Asdique Ahmed: And just to add to that as well, the external collaborators, how would they sign in is through an id.me account. So if they don’t have one or they do have one—if they don’t have one they have to create it in order to sign into BOX just to piggyback off of Taryn.

Taryn Brice: Yes, that is absolutely correct. They will need id.me to use for single sign on to get onto the external VA BOX. I am seeing another question that’s come in \_\_\_\_\_ [00:46:29]. Perfect. There we go. Does BOX maintain an audit trail of \_\_\_\_\_ [00:46:33]? Yes, it does. As long as somebody is logged in—I mean, they have to be logged in. So it’ll show how uploaded the file, who downloaded the file so yes.

Aspen Webster: I can actually real quick steel screen share just to show.

Taryn Brice: Yeah, please Aspen.

Aspen Webster: I didn’t note this before, but we do have content insights. So if I click into a document here, up at the top, you can see these little two here. This will actually show me any details around anybody who’s previewed, who might’ve downloaded, or looked at it, or comments on it, or added anything into it. And you can see that too from the details pane as well. So I could see it—I’m going to click into the actual document itself and there’s details. So you can pop in here. And that’s kind of just like a simple way of getting some content analytics especially as folks kind of upload into spaces.

And if you are interested like let’s say you invited folks and their uploads either through file request or just into a space, a fun little trick is, from within your account, if you come to the more options part of whichever folder you want this to apply to and you go to settings, and if you scroll down you can have a notification sent to you every time someone say uploads information into a space. So that’s not so much about auditing, but if you are wanting to receive more specific emails around something versus just a notification within your BOX account, this could be the way to do it. And I click save changes and then I would get an email anytime anyone—if a collaborator uploads something into the space whenever I need. So that plus the content sites can kind of just give you some quick and easy ways to check.

Asdique Ahmed: And n for the moment, that is last question. I don’t know if you all want to give folks a minute or two if they have any other thoughts. I’ll just take this opportunity while anyone is thinking of a further question just to remind you all that you will see a post-webinar survey in your email wherever you have logged into this WebEx from. If you do have any other questions that you think of after, there will be an opportunity there to put them in and we’ll share that with the presenters. And just additionally to get your feedback on the experience here if it was helpful. We really do appreciate that information and we do look at it every time. I’m not seeing any other questions.

Aspen Webster: I do see one in the Q&A.

Asdique Ahmed: Interesting. Not showing up on mine.

Aspen Webster: Just what are the overall benefits to research teams storing Qualtrics data in BOX versus in Qualtrics? Is it primarily for sharing the files? And I can speak to this and if other folks here want to add in too that yes. It’s about secure storage first, so we’re able to have our VA BOX accounts which are themselves very secure in terms of access and in terms what we can do with it. And then yes, so then sharing that additional piece of, it’s itself secure so it can be shared with other colleagues in very specific ways. We can set aside exactly who sees that information. It is easily shared but is also protected at the same time. So that is the benefit of BOX specifically. And then also just in terms of its unlimited storage. So there is the content storage piece as well in those benefits.

Taryn: \_\_\_\_\_ [00:50:45] what Aspen was just saying in terms of the secure sharing. It is the only VA approved mechanism for sharing outside of the VA. So if you want to share with research partners to share your Qualtrics data, you have to move it through a BOX account. Or \_\_\_\_\_ [00:51:09] if you’re doing it with \_\_\_\_\_ [00:51:11] as an alternative to setting hard drives or mailing CDs. If you want to get online, you need to use BOX.

Aspen Webster: That definitely reinforces BOX. It’s the only one. Asdique, were you going to say something as well?

Asdique Ahmed: Taryn got that. But in addition to also, all your documents or content will be stored for retention policy in BOX for seven years. As far as I don’t know how Qualtrics keeps it for how long.

Aspen Webster: Perfect.

Unidentified Male: Here’s a new question on the screen here.

Aspen Webster: Is there a department budget tied up with requesting a BOX account for VA employee? Thanks. I don’t I can be able to speak to this one. Would anybody know about this one?

Taryn Brice: I can take that one. So the way that budgeting works for BOX as an enterprise contract, but it’s pay to play. So you actually will need to fund that yourself through your department. We take any color of money just cannot use \_\_\_\_\_ [00:52:37] cards.

Aspen Webster: I love any color of money. Great. And then, how quickly are external collaborators approved for BOX? I do have that form.

Taryn Brice: So we respond within—yep, the form you submit that request form, we’ll respond within 24 business hours requesting those external collaborators to fill out an acceptable use policy much like our internal users have to do. And depending on how long they take, we should have them within 24 hours of that point.

Aspen Webster: Excellent. And we can always send that out as well.

Unidentified Female: And just to piggyback on the budgeting part, for anybody that’s approved through the Office of Research Development, there is a link that you can complete to put in an approval letter. And if you are proved through that office, Dr. Cloak covers the cost of all BOX licenses for group research studies.

Aspen Webster: Sounds like a nice deal. Can we explain how we request a VA BOX account to begin with? This is also its own form as well. Taryn, did you want me to take this, or do you want me to or Amanda?

Taryn Brice: Absolutely. There are going to be links provided for all of these after this training wraps up, so just be aware that we will provide links. But to request a VA BOX account, if you are an OR&D—if you work with OR&D and have a study that you need BOX account, you’ll initially go through ORD intake requests and get an approval from ORD. At the point in which you’ve received an approval, we’ll be notified, and we’ll reach out and request that you fill out a DTC intake. At that point our team will them reach out and we’ll get you scheduled. And that’s essentially the process we’ll go through. \_\_\_\_\_ [00:55:18] and there will be some mild light paperwork that we’ll fill out and need signatures on but it’s a fairly easy streamlined process at this point.

Aspen Webster: Excellent. I love the mild light paperwork.

Taryn Brice: You know. Just keep it real.

Aspen Webster: Fantastic.

Taryn Brice: Thanks. Is there an instruction sheet for having collaborators sign up for id.me/box? Yes, there absolutely is. And we will make sure that that is provided as well. That’ll also come after this chat. Unfortunately, we can’t use the chat functionality right now to share these links with you, but it will come via email.

Unidentified Male: And if you have those links in a PDF or Word file, we’d be happy to post them in our webinar archive too, so when folks are coming to look back on this presentation they’ll have it right there.

Taryn Brice: Absolutely. We can make that happen.

Aspen Webster: Those are fabulous questions. So we still got about two minutes.

Taryn Brice: Any more?

Aspen Webster: Everyone’s an expert so they’re feeling great.

Taryn Brice: You’ve done such a great job Aspen. If have other the questions, of course guys if you guys as we’re coming to an end if you think of anything else, there’s always the VA BOX team at va.gov that you can email and ask additional questions too.

Aspen Webster: Absolutely. Great.

Unidentified Male: Thank you to our panelists for being here and a great presentation. And thank you to the audience for joining us as well. And I hope everyone enjoys there afternoon.

Aspen Webster: Thank you everybody.

Unidentified Male: Thank you.