Kary Storms: Good afternoon, everyone. My name is Kary Storms, and I am the VA lead for Box. I want to thank you all for being here as we explore an exciting collaboration that could revolutionize our research survey process at the VA. Our lineup today includes presentations from BOX.COM, Qualtrics, and also our DTC MuleSoft team and members of the VA Box team today. So today, we are going to provide a high-level overview of Box and Qualtrics, of their product benefits for the VA, and how they synergize together. We will also showcase a demonstration of the Box and Qualtrics integration. To start us off, let me first introduce Joe Boland from BOX.COM.

Joe Boland: Thank you, Kary. My name is Joe Boland. I run the Box federal team. I’m based here in Washington, D.C. I’ve worked at Box for over five years. I know the last year I’ve spent a lot of time working across the Department of Veterans Affairs as we’ve stood up our enterprise license agreement. We have an ATO, and we’ve been engaging a lot across VA Office of Research and Development, Acquisitions, and Financial HR. We’ve been used across a number of different use cases. I’d like to just share at a high level of what Box is, what it can be used for at the VA, and then we’ll certainly talk about the Box/Qualtrics integration.

In terms of what you can leverage Box for at the VA, if you look at the far left, we are certainly used across VA to collaborate internally and collaborate on unstructured content. That could be files, research studies, CT scans, MRIs—any sort of unstructured content. We support the store [PH], NR, cloud. You can create folders. One of the nice things that the VA folks are seeing is when contents are in Box, it’s very easy to search and preview the content. We move beyond just moving a file from one person to another. You can comment on that file, annotate it. There’s a chat feature built inside of Box so you can @ mention somebody you’re collaborating with and ask them to change something in the research study. Certainly any time you make a change in a piece of research content, it automatically saves so you always make sure you’re working on and sharing the correct version. Finally, in the last piece on the far left, one of the things a lot of the VA offices are starting to do with Box is automate some processes. For example, if you move a file into a folder and you know hey, this research study always gets sent to these three or four individuals, you can have that process automated so any time you drag a file in the box, it gets sent to these three researchers to review, look at the file, sign off on it, and then maybe pass it on to another point in the process. So again, moving beyond just moving a file from A to B.

When you look at the second pillar, one of the big use cases for Box is collaborating externally, so the ability to have all the features of Box in terms of sharing, commenting, versioning, search, and preview, and extending that externally to your external VA partners. I believe right now Box is the only approved external file-sharing tool.

When you look at the third pillar, we meet all the VA compliance and security, so we have built-in retention policies. We can manage all the \_\_\_\_\_ [00:03:36] moderate data. The nice thing about Box is any action taken in Box, you have a fully auditable event stream, so it gives the IT and security folks comfort that the content and the folks you’re sharing with, all of that is visible.

Finally on the right, another endeavor the VA team’s taking on is integrating Box and other applications, of which the one we’ll talk about today is Qualtrics. The nice thing is Box can store content from multiple different applications. Right now, they have Office 365 integrated, and then Qualtrics integration is what we’ll speak to today.

That’s just a very high level for Box and what it can be used for natively at the Department of Veterans Affairs. Next slide.

A lot of folks ask us okay, why integrate Box and Qualtrics? Again, with Box being that content repository where you can store content and share it externally, Box can manage those survey files. When you look at the far left, you have a VA employee who creates a survey and shares that externally. Those surveys can then be stored in Box; it can act as a secure content repository; and then those surveys can be shared internally and externally to other research partners, Veterans, or other VA employees. It takes the power of Qualtrics in the surveys and provides that platform that you can share internally and externally.

This feature is available for the internal VA users. Again, sharing in Box is very simple. It’s as simple as right-clicking on a file, creating a link. The nice thing about Box and the security we have built in is you can select hey, I want this individual just to view the data. Maybe you want them as an editor. Or maybe you want to invite somebody in just as an uploader. Again, it’s a very easy way to collaborate on your content but, again, set the right security and guardrails.

That’s all I have from a Box perspective.

Kary Storms: Thank you so much, Joe, for that overview. For the Qualtrics overview, I’m going to be handing it over to Ashley Murch.

Ashley Murch: Thank you. Hi, everybody. My name is Ashley. I’m the account lead for the VA with Qualtrics. I’m also a Marine Corps and OIF Veteran, so being able to partner with you all is not only my job but it’s also very personal to me too. I, along with my colleague, Steven Gethard, am going to just rapid-fire through the Qualtrics portion. Again, a high-level overview, but please don’t hesitate to reach out to either of us to discuss any needs that you have after this time we have here together. We can go on to the next slide and get started.

Steven Gethard: Perfect. Hey, everyone. My name’s Steven Gethard. I’m a solution engineer here with Qualtrics. To give you a quick sense of the platform, we enable teams of researchers to stand up nimble research studies quickly. Our surveys are digital forms—they’re entirely configurable—which includes the questions and the contents but also the look and feel and the branding and the color codes and fonts. We aim to make these forms as accessible as possible so they scale down natively on mobile devices, we can translate them into any number of languages, and we can also meet web content accessibility guidelines. Over the last twenty years, we’ve actually developed well over one hundred varieties of question types, and this goes far beyond your typical multiple choice or text entry. It includes things like matrix tables and file uploads and heat maps, evaluating contents, and even video feedback. Because of this, we can be used for all sorts of projects, everything from service satisfaction to needs assessments to program evaluations or training evaluations, employee pulses, or even just general data capture. We also aim to make these forms personalized and relevant to maximize a strong response rate, and in the same line, they can be distributed across a variety of different channels, including email, text messages, QR codes, even within digital properties.

Hopping to the next slide, one of the things that people like most about Qualtrics is that it’s easy to use. When setting up projects, you don’t need a technical background or a research background. Everything is configured for this easy-to-use point-and-click, drag-and-drop interface. We have all sorts of prebuilt content and solutions to expedite this, including question libraries, and this will drive standardization and also accelerate the research. Qualtrics can also use machine-learning powered recommendations to evaluate the effectiveness of a survey as someone is building it, providing guidance for users before they actually publish and then distribute it.

On the next slide, probably the most important piece here is analysis. It’s where we save organizations a lot of time and also hopefully help you uncover some new things in your data as well. Our analysis tools range to match all levels of research sophistication. Organizations own their data, meaning that they can view the raw responses and edit and cleanse and code their data or export it to any number of common file formats or even destinations like Box for external sharing. In the platform, we offer visualization tools and librarial-based dashboards that can be used to surface key metrics and trends and segments and more. You can see we can also understand unstructured data like the comments someone might leave in a survey response. And we can use natural language processing and understanding actually to pull out the topics and the sentiments and the effort and the emotion that was in that comment, I think you would agree saving folks a lot of time from reading those manually. For those who are more statistically inclined, we also have a full stats package—you can see some of that there on the right—where users can describe variables and even run bivariate or multivariate tests.

That’s just a quick three-slide look at Qualtrics there and how we make it easy for teams to run their research projects and then analyze data and act upon those results.

Kary Storms: Thank you so much, Steven, for that overview. Next, we have the DTC MuleSoft team. They’re going to show the Box/Qualtrics integration and how to use it.

Sasi Vallikkat: Thank you, Kary. Hello, everyone. My name is Sasi Vallikkat, a manager in DTC Integrations. With me, I have Sateesh of MuleSoft \_\_\_\_\_ [00:10:14] and Swathi of \_\_\_\_\_ [00:10:16] and also joined by Helen Mondesire, our DTC Lead. We just want to give you a quick overview of what we do before I get into this process. So what we do. You have seen the Qualtrics side and the Box side, and I should say we do the magic. We want the data in the Qualtrics side as well as in the Box side to integrate seamlessly. Have you all heard about APIs, short form for Application Programming Interfaces? Let’s say they are connectors. They help the different software systems team up, or each of them has digital helpers, making sure information is shared smoothly and tasks get done seamlessly. Today, we are going to showcase a SAS to SAS—SAS stands for Software \_\_\_\_\_ [00:11:11] Service—data flow involving Qualtrics and Box, which you have heard about by these two gentleman based on what is Qualtrics and Box and how that integration happens. This would be powered by IPaaS. IPaaS stands for Integration Platform as a Service, and our integration platform of choice is MuleSoft.

So let me walk you through what that process will be. As a VA person, the first and foremost thing they will do is they log on to the Qualtrics interface, which I will show you in a while. They create a survey, and then once the survey is created, it needs to be collaborated. They send out that survey to the customers, and they capture the survey results. The survey results will be residing in the Qualtrics side of it, so we will have an integration platform that will be running every two hours or one hour, depending on how it is configured. It will be a background process where if you go and fetch the survey from Qualtrics, it will do all those transformation translations required for the end system. So here, the end system is Box, so we will do this transformation, and we’ll do the transfer protocol as well and upload into the Box systems. Now once that is done, the Box collaborator or collaboration team will get the notification. They will come into the Box interface that is in a UI, so they will log into their Box interface, they can see the survey results, and they can download it and then work on that. I will do a quick demo. Let’s go to the next slide. Maybe I can walk you through what the demo will be.

The demo will be we will simulate logging into Qualtrics. We will create a project or a survey. We will make sure that it is collaborated with Box so that the integration engine can pick it up. Then what we’ll do is, since customers are not there, we will simulate that results are coming in. Then in the background, we will run our indication process. Once the indication process is done behind the scenes, Sateesh and Swathi will take a look at it and then let me know back that it’s good to go. Then we will log into Box environment and the Box interface, and then we’ll see how the surveys are up.

So give me a minute. I’m going to share my screen. I’ll make sure that everything is logged in. Okay, start sharing. Can everyone see my screen?

Unidentified Male: No, we can’t.

Sasi Vallikkat: Oh, pardon. One moment.

Unidentified Male: There we go. It’s coming up. Perfect.

Sasi Vallikkat: Thank you. Make sure that I minimize things from Webex and anything blocking the screen. Are we good?

Kerry Storms: We are good.

Sasi Vallikkat: Okay, good. This is the Qualtrics interface, so the first thing I should do is let me create a project, correct? As I mentioned, what kind of a project? I’m going to hit create a project. This is going to be a survey project. Let’s get started. Now I’m going to give a demo. So VA ORD Demo, and today’s the 17th. Okay, I’m going to \_\_\_\_\_ [00:15:28]. Now what other options for how to create a project? We can create a project from a blank, from scratch, or we could import a QSF file, or we could clone it from an existing project or a survey in our library. For this demo, to make it a little easy, I’m going to clone it based out of a survey. I have a survey, which is a VA Survey Template. What we are going to do is we are going to create a VA ORD Demo with a date that will be based out of a VA Survey Template. Hit create template. Okay, so the template already has six questions. It has mainly radio buttons. Some have two options, some have five options, and a free-text format. There is an option to go and add a question as well. Depending on how people configure their projects, this is how they create a survey.

Now what do we have to do? Once we create a survey, we have to make sure that this survey is not just managed in Qualtrics; this needs to be collaborated with Box, correct?. First, I need to set up this collaboration. There are some service icons. For now, we are going to collaborate within our test environment. I’m going to say add selected and save it. Okay. Now the survey is good to go. It’s collaborated. Now let me publish it. Okay, so we published this. As the next step, it can copy this and collaborate with the customer community.

Now what we’ll do is we’ll simulate that I received some surveys. What I’ll do is within the Qualtrics environment, you could generate some test responses, so I’ll go ahead and say that I had a survey that says from five people, so I’m going to hit generate button. Now it’s ready for the back-end system to bring up that thing. While that is happening, are there any questions regarding the Qualtrics project, publishing, setting it up, and all those things? We have Qualtrics experts on the line as well, so feel free to ask if you have any questions around this Qualtrics interface.

Unidentified Female: Sasi, I’ll quickly do one that’s in the Q&A. What is the maximum number of respondents that Qualtrics can send to at once?

Sasi Vallikkat: Someone from Qualtrics can answer that?

Steven Gethard: Across government, we’ve launched research studies that go out to millions and millions of Americans, so there typically isn’t a restriction or limit. Typically, the only limit that we do see is around deliverability guidelines, and that’s sometimes case by case just to make sure that we don’t flag any email distribution errors as they go out.

Sasi Vallikkat: Thank you. Any other questions? If not, I can go into Box interface. Kary, is that fine?

Kary Storms: Yes, that’s fine. You can move on.

Sasi Vallikkat: Okay. Typically, those who have access to Box, they will log in and they’ll see their interface. I do have more projects and collaboration, and that’s why you see a lot of files. But typically for us logging into Box with Qualtrics collaboration, they will see this folder, Qualtrics Exports. If I click on that, I will see what are the surveys and the \_\_\_\_\_ [00:19:38]. You can see there are a lot of surveys I’ve participated with or worked with for the demo. Here, this is the survey we created. We can double-check here. This is VA ORD Demo 081723. I have this VA ORD Demo 081723, so let’s click on that. Okay, so I see a survey response. It’s coming in a CSV file \_\_\_\_\_ [00:20:05] separated values. Clicking on that, you are seeing some metadata or respondent data. And then if you scroll to your right, you will see the questions are captured, so questions Q1 to Q5 here. And again, this is this is the test data that is being generated, so let me go back. This is a yes and no question, and this is a radio button, and then it’s a free-form text. If I go back here, it’s a yes and no, and they have captured that as well as some free-form information that is being captured. What else is there? There is some respondent information as well. Again, that’s all our generated one, but the actual value will be different.

What else can I see? Let’s look at the metadata, data about data. It talks about what’s the survey name, what’s the survey ID, what time I exported, and export end time, and all this information is there. This is what we simulated. What I will do is I’ll go back and I’ll just simulate that I received some more information. Let me go back and generate some more data. Now behind the scenes, integration engine will be bringing that data. Let me go to the Box interface. Does anyone have any questions around the Box interface? We have the Box SMEs on the line.

Unidentified Female: I don’t see any questions in the chat right now, Sasi.

Sasi Vallikkat: Okay, so I will wait for the go-ahead from the integration team that the data is up for. Okay, let’s go to Qualtrics Exports. Again, there’s no change here. And now you see…can anyone spot what really changed? Okay. Now if you see closely, we have a version two. Initially, we didn’t have that version, now we have the version two, so clicking that, we see five responses more being added. If I look at the metadata, you will see that data has been updated. And we could also look at the version history, and there I can see what was the version five minutes before and then what is the version currently. What’s happening \_\_\_\_\_ [00:22:58], we collect the data, and for that particular survey, how many surveys are coming in every time before we gather the data, and we’ll append it to this. You will have all different versions to say that. Any questions around this? I should scroll to my right just to make sure that all this data is captured. I can close my screen. If there are no questions, Kary, I yield back to you.

Kary Storms: No, I don’t see any questions on that. We can get to the other Q&A once we get towards the end. Thank you.

Sasi Vallikkat: I will stop sharing my screen.

Kary Storms: Okay, great. I’m going to go back and share my screen. Thank you for that demo. Can you all see my screen?

Unidentified Male: Yes, we can.

Kary Storms: Okay, great. For the next steps, please refer to the Box/Qualtrics Integration Training video on the link provided in the slides. Please note that we will send out a follow-up email after this demo providing all the links that are mentioned in this slide deck as well as with the slide deck. We are always here to help, so please reach out to the VA Box team for Box-related questions or issues, and on here as well is the contact information for Qualtrics-related issues or questions. Before we move to the Q&A, I just wanted to quick note that any questions that we are not able to answer on this call, if we have to go back for any reason within our team, we will make sure that they are answered in the follow-up email.

So now we will move on to questions from the Q&A.

Taryn Roland: Great, thanks Kary. The first question I have that I can see, Sasi, I think this one is going to be for you. Is the REST API being utilized for the integration between VA, Qualtrics, and Box?

Sasi Vallikkat: \_\_\_\_\_ [00:25:59 – cross talk] Box APIs for the metadata as well as uploading the actual data. We use that on the Box side, and then the REST APIs are there on the Qualtrics side as well.

Taryn Roland: Perfect. Steven, this next question is for you. Can you please speak to the Qualtrics capacity with regard to longitudinal studies? Oh, it looks like he answered it in the chat, but if you wouldn’t mind speaking for the larger group too, I think it’s a good question.

Steven Gethard: Yes, thanks for submitting that one, Laura. Yes, agreed. We can absolutely do longitudinal studies. Maybe it’s pulsing a set of respondents over time as they engage in a program or service. The nice thing is that all the responses when they’re collected can be mapped into those visualization tools like dashboards to show how those perceptions are changing over time with trend lines or whatever else you might have in mind. Happy to talk more about what you are thinking through.

Taryn Roland: Or feel free to put additional information into the chat or Q&A if you want additional information on that, and we can dig a little deeper. The next question is from \_\_\_\_\_ [00:26:41]...oh, we have actually covered this one already. Kary asked this earlier. We have two questions from Michelle Bovin [PH]. The first is for you, Steven. Is it possible to have participants opt in or out in the Qualtrics interface? For example, the participant receives an email, clicks on a QR code, or is taken to a place where they can say whether or not they want to participate in the survey, yes or no. If they say no, the survey then ends, and the team would be informed that they chose not to participate, and Qualtrics would no longer continue to contact them during additional followup. Can you speak to those two questions?

Steven Gethard: Yes, happy to. On the distributions and opting out, yes, absolutely. When we send something out, say, over text message or email, all of our distributions will include some messaging and a link to opt out. That user clicks it, and they can remove themselves from being eligible for future research studies. Similarly, you can also create forms where people can opt in and be added to a list for future research. Then to the second part of your question, yes, you can also use questions to filter some folks out, almost like a screener question of sorts. If you want to have the first question of your survey be hey, do you want to participate, yes or no, or have you used this program in the past, yes or no, depending on how they answer that, we can route them to different parts of the survey or just skip them all the way towards the end if they’re not eligible.

Taryn Roland: Awesome. All right, the next question is also going to be for you. Looks like you already have it queued up. For a paid survey, is there a way to pay survey respondents through Qualtrics after they complete the survey?

Steven Gethard: There are, yes. In the realm of incentives and rewards, we do work with some partners in that space, so if you have a little bit more information of what you’re looking to do, if you’re happy to connect with Ashley and me, we can get you set up in the right direction.

Taryn Roland: Wonderful. So Michelle’s next question was does Qualtrics for the VA allow two-way texting or emailing with Veteran participants?

Steven Gethard: On the text message, the SMS side of things we can. There are two ways of doing those. The first is sending a distribution over text message with a link that they can click, and then they’ll open the survey in their browser. The second is more of what you’re describing here, the two-way text, where we can actually text a question to somebody, and it will show up hey, how satisfied are you, one through five, and they can actually just respond and say I’m a one, and then we can conditionally have another question follow up over text. So you have some options there.

Taryn Roland: Great. Okay. For the next question, this is going to be for Sasi. Is the integration between the two systems only limited to the CSV output?

Sasi Vallikkat: This is how the data is coming maybe from Qualtrics team is that any configuration in your end where other than CSV could be configured and we can get it.

Steven Gethard: We might want to talk about that one a little bit more. You can export Qualtrics raw response data in a number of file formats, but I’m not sure what’s in scope or out of scope for the integration itself. Good question there.

Taryn Roland: So Sasi, could you speak to what it does currently, just to lay that out?

Sasi Vallikkat: Yes. So today, we are getting the data in a CSV format. That is how we are shipping the data to the Box. But if anybody wants to have a different platform, I’m happy to look into it. We can do a conversion within the integration layer, or we could consume the \_\_\_\_\_ [00:30:36] conversion in the Qualtrics side.

Taryn Roland: Great.

Sasi Vallikkat: So I did get something from \_\_\_\_\_ [00:30:51], so yes, there’s like \_\_\_\_\_ [00:30:34]. Google Drive uses submitted files. All these things are possible. Qualtrics supports all these data formats.

Taryn Roland: But for the current system, the way it would export, that would have to be something that we would have to develop moving forward, correct?

Sasi Vallikkat: Exactly.

Taryn Roland: Okay, great. Just want to make sure we’re managing expectations. All right, so for the next question, this one is going to be for Joe, most likely. We’re currently manually exporting Excel files from VA Qualtrics and importing to a Microsoft Access database. Is it possible to operate Microsoft Access within Box or to have an Access database outside of Box read directly from a data file in Box?

Joe Boland: It’s definitely not possible to operate Microsoft Access within Box. In terms of accessing a database outside Box READ directly, I would have to look into that. It wouldn’t be just a simple out-of-the-box integration for us.

Taryn Roland: Okay.

Joe Boland: From Box’s, we’re all unstructured content, right? We don’t file videos, so we don’t operate a database inside of Box. The answer to the first one is definitely no, we can’t operate Access in Box. But whether we make a connection to Microsoft Access database, I’d have to look into that before definitively answering.

Taryn Roland: Okay. To clarify, though, that first question. You would be saying that that’s not going to be a part of the Microsoft 365 integration that exists, so they couldn’t use it on the web interface. However, an Access file could be stored within Box, downloaded, opened, run, or used within Box Drive.

Joe Boland: Yes, absolutely. We can store different file formats as relates to that. If you could unmute Theodora, she’s from Box. She was actually trying to answer. Let me see if I can find a way to do it. Theodora Lemberos. Is someone able to unmute her? I think she \_\_\_\_\_ [00:33:22 – cross talk].

Taryn Roland: I’m looking right now. I’m not actually sure I have that capacity.

Parker Cunneen: I’ve just added her as a panelist, so she should be able to answer now.

Theodora Lemberos: Hi, everyone. Sorry about that. When it comes to exporting the files and moving them into the Access database like Joe says, since Box is primarily focused on unstructured content, it’s not going to be as smooth to employ it from within Box. If we do one to facilitate the transfer between the two, that’s definitely something we’ve done with other customers. However, to the VA’s teams and managing expectations, that would be something that would have to be a little bit more custom-built. I would say if it’s a big priority, we can work with your team; but otherwise, we can explore other options for you all.

Taryn Roland: Sounds good. I have a few more questions, it looks like, Parker. Just to clarify, and moving forward on that one, Erin, if you have any additional questions, you can always just email VABoxTeam@va.gov about that, and we can do a little bit of more help to connect you with the OAM Box team to discuss an integration.

All right, so there was a question within…oh, another one just popped up, but I guess you got it. Qualtrics offers many dashboard reports and analytics reports out of the box or customized in PDF that users can download. Can those be shared through Box to the most current integration? Sasi, I think this would be you.

Sasi Vallikkat: Yes, we can look into it so integration platform we are able to consume PDF formats and we will be able to upload it. So it will be a little bit of custom development integration, but we can definitely take a look at it if that’s the use-case requirement.

Unidentified Female: I’m not an expert on the Qualtrics side of it, but I know based off of the demonstration showed today where we’re storing the analytics inside of Box, once it’s inside of Box, assuming you have the right permissions, you can then share the information from Box.

Taryn Roland: Got it. In this particular scenario, it sounds like in terms of the current integration, there would need to be additional development. This would be another one where I would recommend reaching out to VABoxTeam@va.gov to start a discussion with our team about it. Okay, so the final question that I see right now out of our chat is coming from Erica. I know there is a request portal for Box and one for Qualtrics, but how does someone request access to both? Are they two different request processes? This is going to be a question for Kary.

Kary Storms: Yes, so currently if you need access to Box—which you know you go into the intake request to do so, the same with Qualtrics—I would recommend doing an intake request as well for the integration piece of it. We are still working through the process of that integration, how it’s going to go to our sales force to track all of our integrations, but that would be a good step to start at. You can also email our VA Box support that Taryn was stating earlier that we’ll send out in the followup to let us know so we can help walk you through that process.

Taryn Roland: Fantastic. I’m checking one last time to see if there’s anything else coming through. I don’t see any other additional questions, so I’m going to send it back to you, Parker.

Parker Cunneen: Great. Is that the end of your team’s content?

Kary Storms: Yes, Parker. We are all completed on our demo for today.

Parker Cunneen: Perfect. Well thank you all for doing that presentation and demonstration. As they have mentioned, there will be a way to get in contact after, and this recording will be posted on the ORPP&E Webinar archive. If you guys have any other questions that you’re just thinking of as we close off, there is an opportunity to add those in the post-evaluation survey, so feel free to add those there and we will make sure they get to our panelists. And with that, I will let everyone out a bit early, and I hope you all have a great afternoon. Thank you.

Kary Storms: Thank you all for coming.