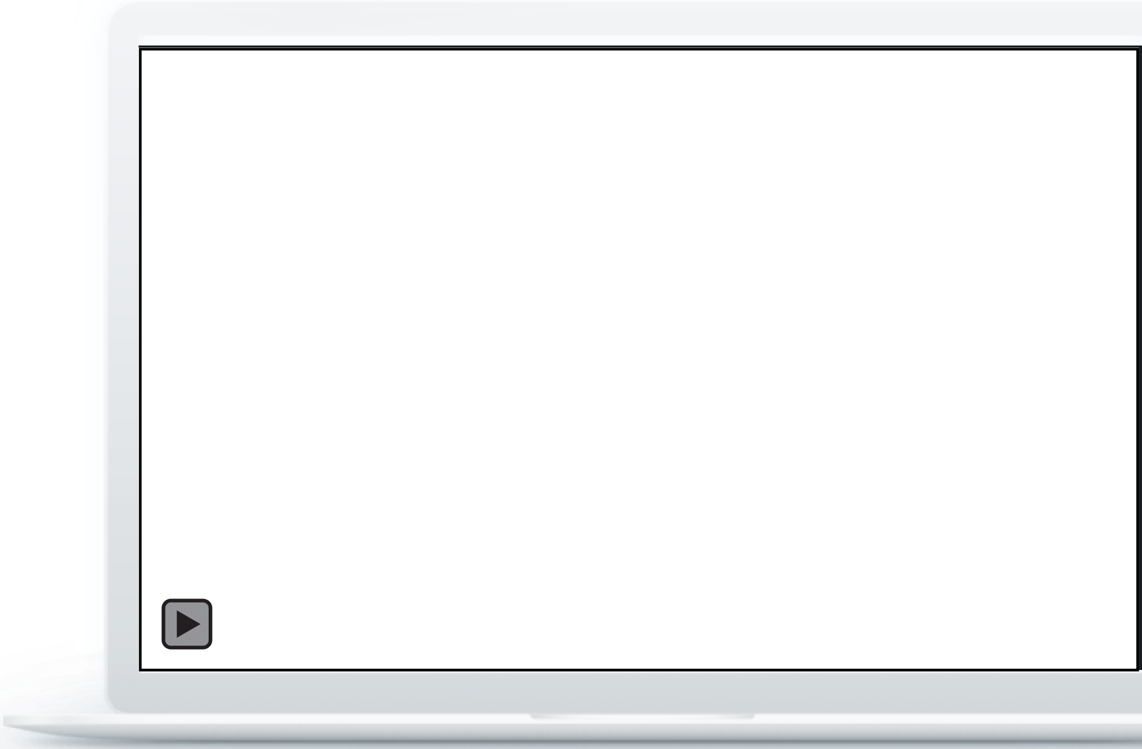
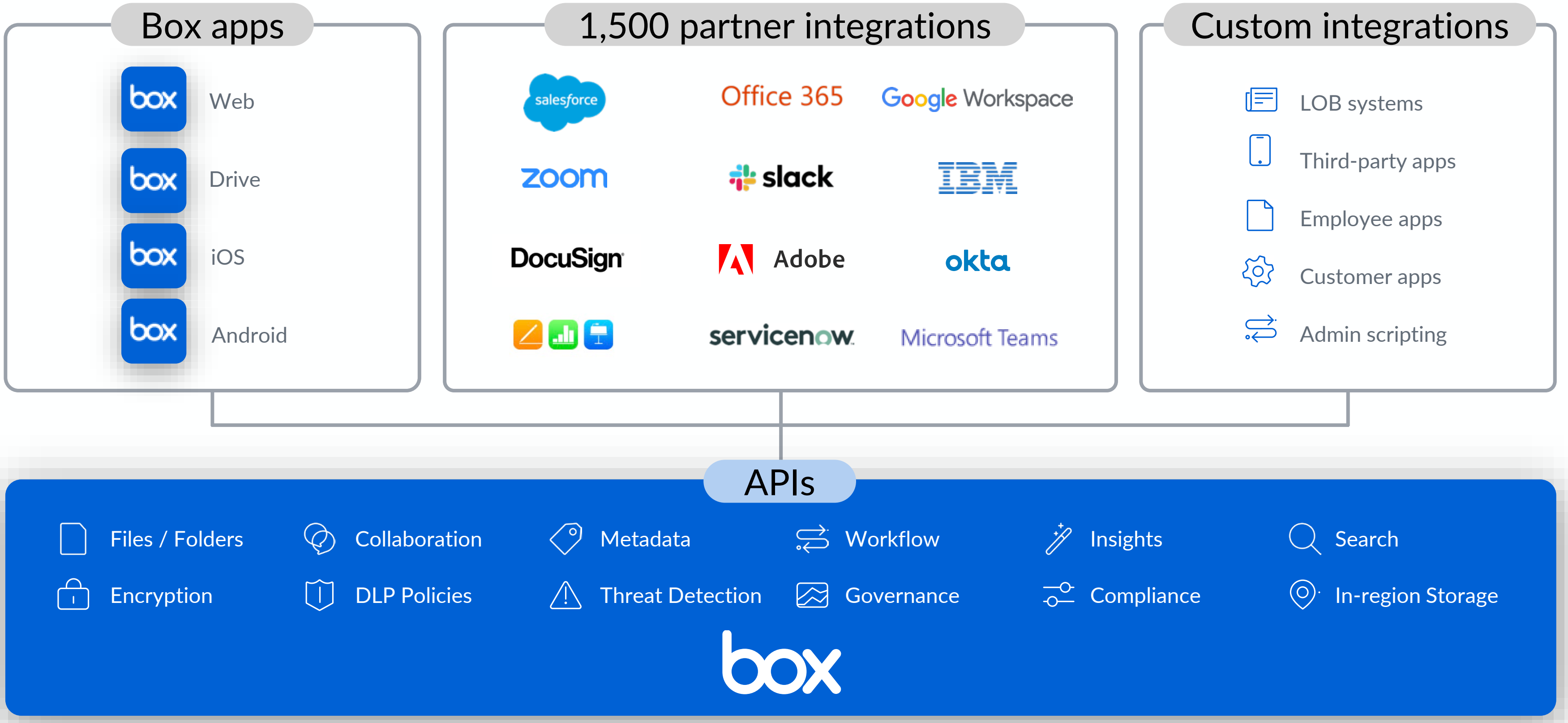
# Using Box at UNMC

Getting started / refresher, advanced tips & Q&A

8/10/2022

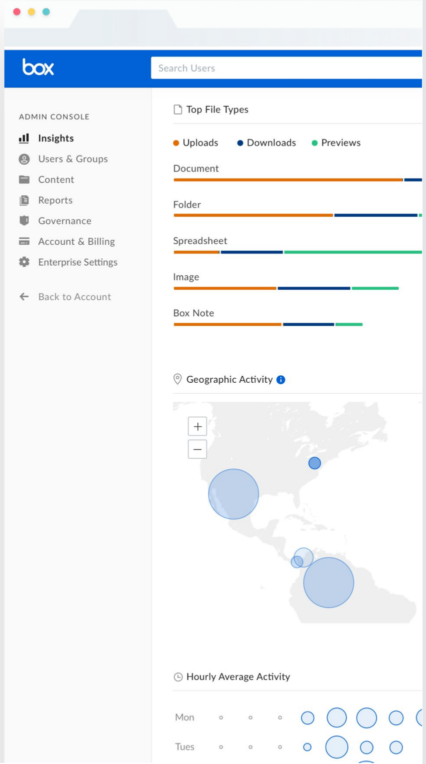


# One platform that works securely with any app, on any device



# Infrastructure

# Capabilities




# Compliance

AICPA SOC

ISO/IEC 27001 Information Security Management

ISO/IEC 27018 Protection of Personally Identifiable Information

PCI DSS CERTIFIED

BCRs

C5

GDPR

FedRAMP

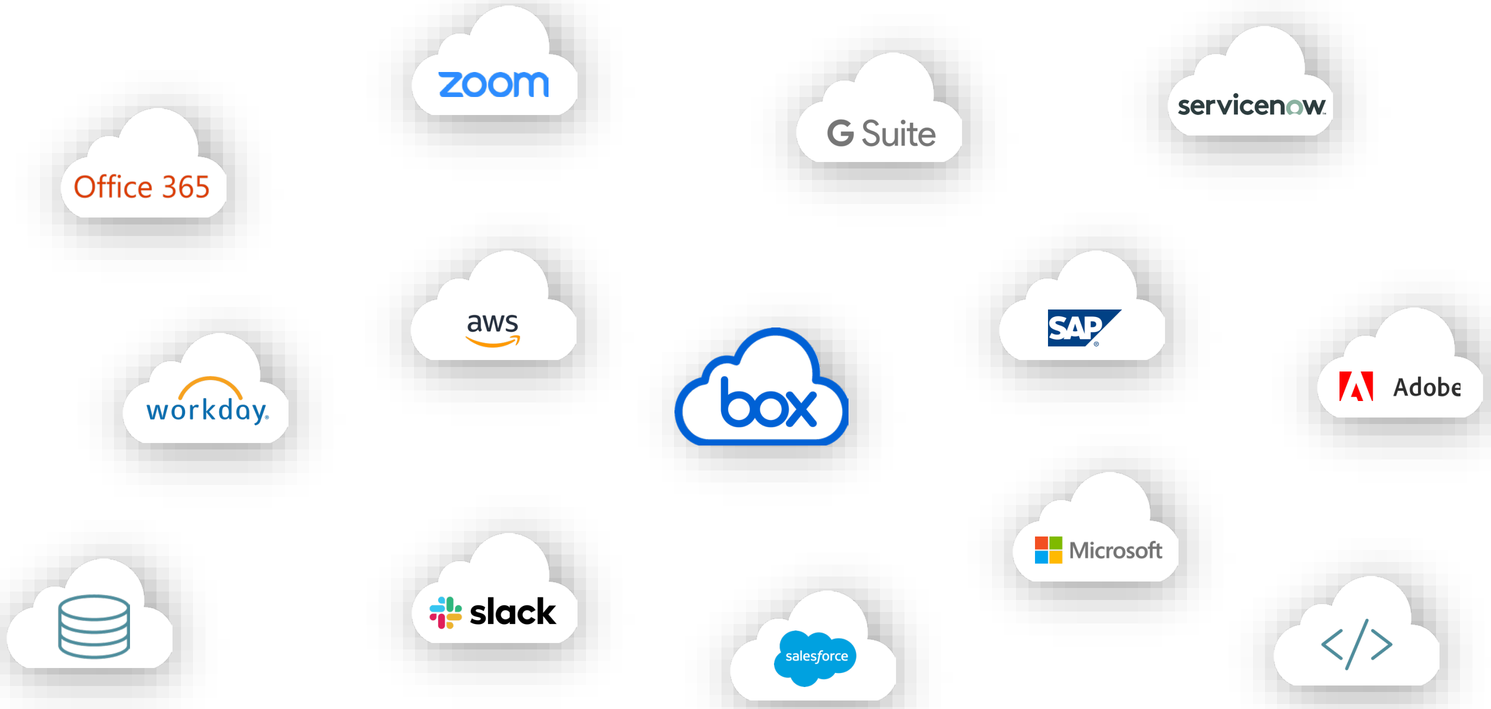
GxP

HIPAA

# Partners

aws, paloalto networks, okta, CODE GREEN NETWORKS, IBM MaaS360, CipherCloud, onelogin, DELL, sumologic, Symantec, Centrify, Ping Identity, Microsoft, netskope, MobileIron, splunk>, MICRO FOCUS, McAfee, vmware airwatch

# Our business processes now extend to many clouds



# Box is the only platform that unifies content across your apps and systems

## Productivity suites

Office 365

G Suite

## Team communication

## LOB and specialized applications

salesforce

PEGA

ORACLE NETSUITE

nintex

DocuSign

Adobe

servicenow

## Security and data protection

okta

McAfee Together is power.

vmware

paloalto

Microsoft

Symantec

IBM

splunk

## Custom-built applications

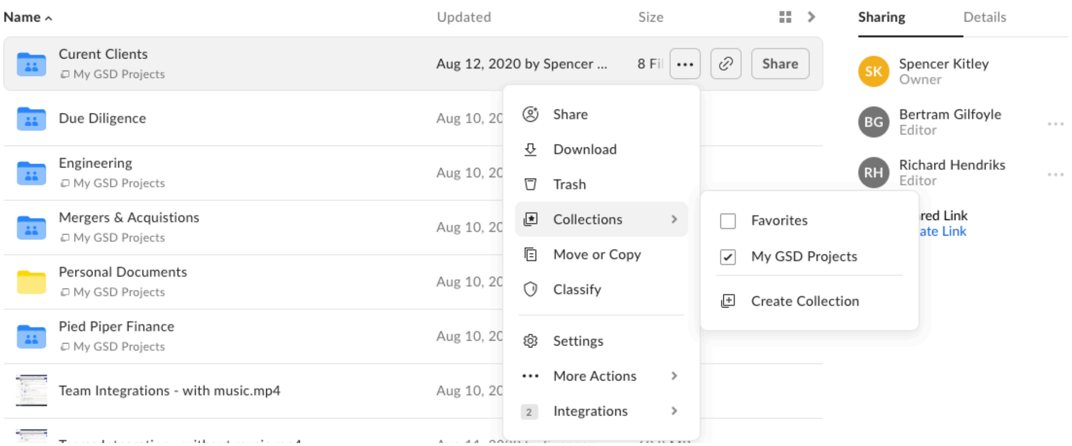
- Back office and LOB systems
- Third-party apps
- Employee/ Customer/ Partner apps
- Admin automations and scripting

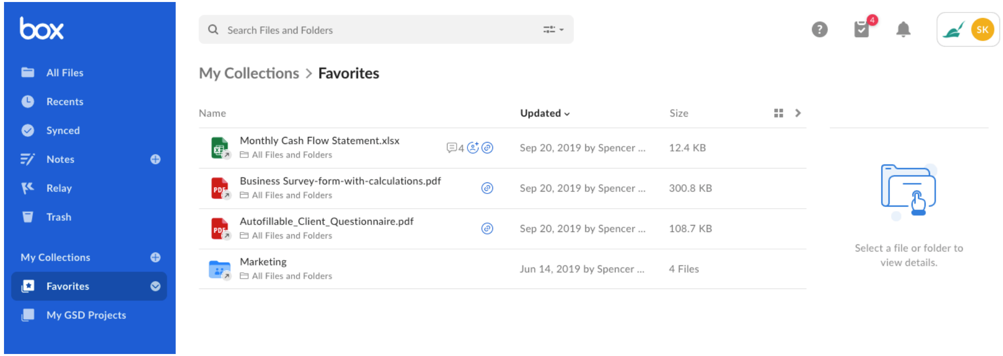
box

# General

# Favorites & Collections

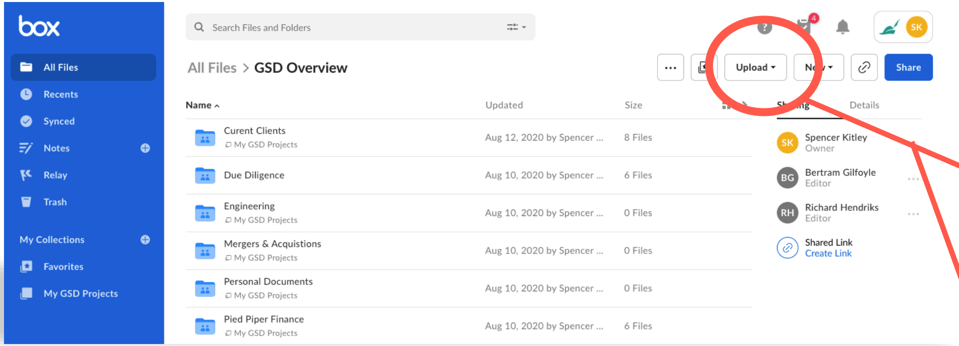
- Create shortcuts to commonly used files to avoid the need to search or navigate through folders
- Create Collections to group content in the way you prefer

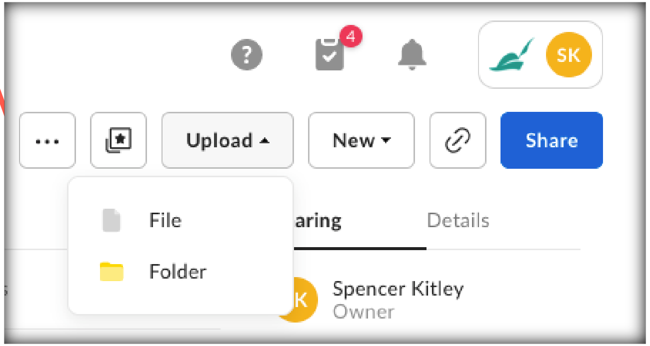


# How to use Box

## Upload to Box with the file browser




1. Click **Upload** in the upper-right hand corner.
2. Select **Files** or **Folders,** depending on what you'd like to upload.
3. Select the file(s) or folder you'd like to upload.
4. You can select multiple files for upload by holding the **Command** or **Control** key (Mac or Windows) while selecting files. You can only select one folder at a time for upload.
5. Click Open or Upload.

# Folder Structure Best Practices

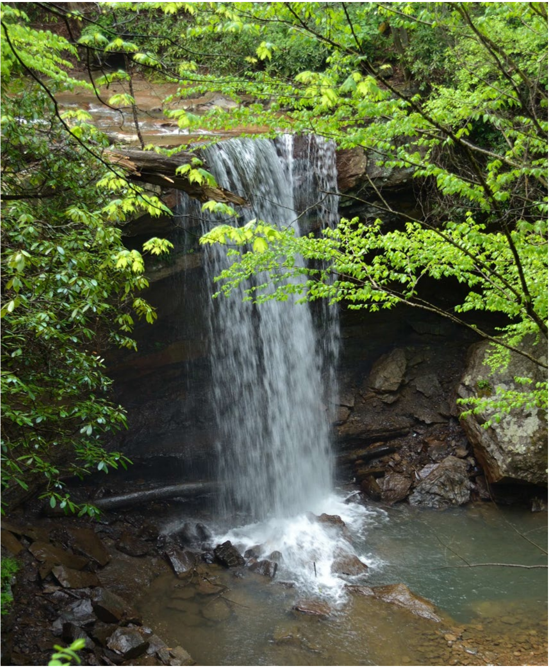
# Box Folder Structure Basics

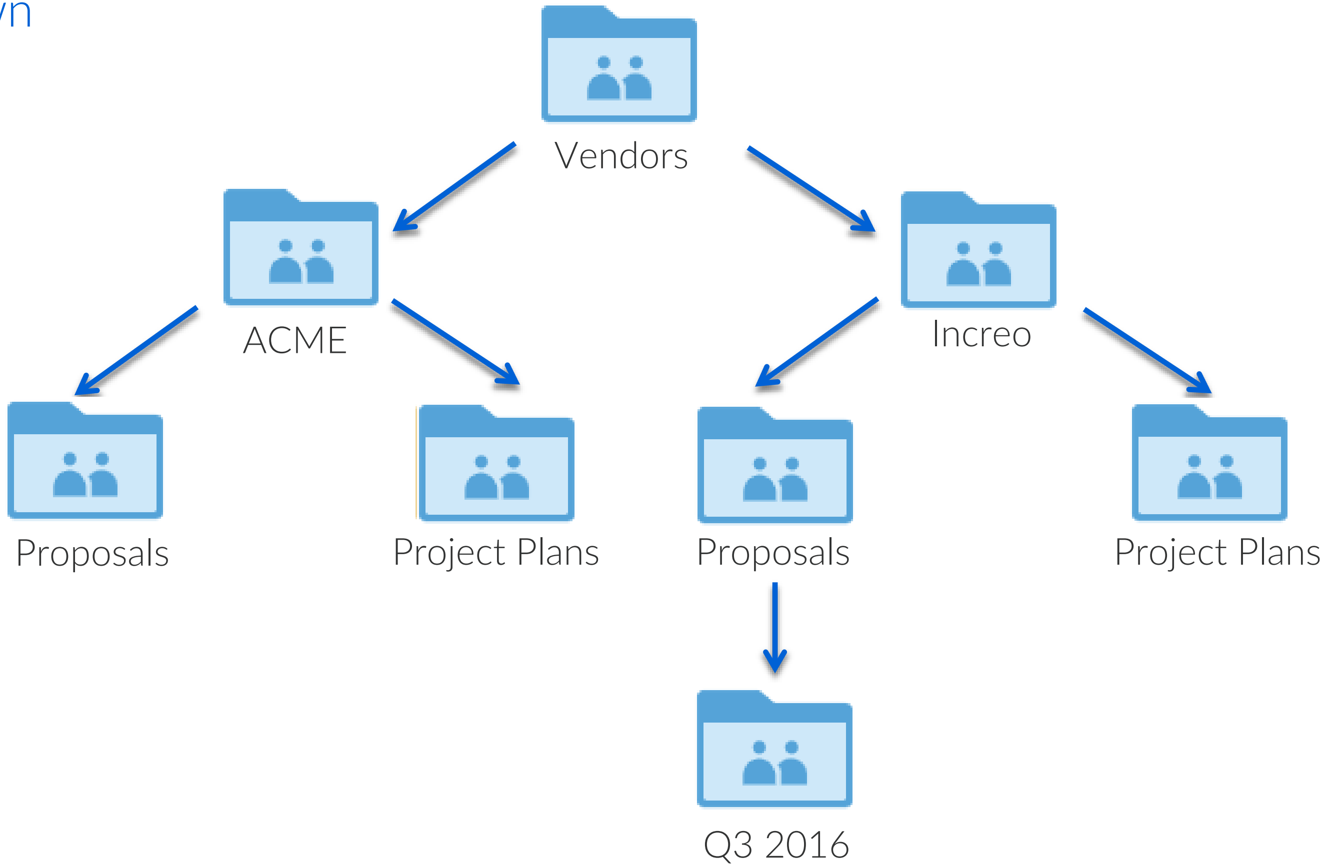
## Functionality Review

| | |
|---|---|
| Content Ownership | • Content in Box is owned by one user account<br>• Whichever account owns a top level root folder owns all the content in that folder |
| Access Control | • Users are granted access to content by being added as a collaborator to a folder – this applies for internal as well as external users<br>• Every end user's "All Files" or "Root" view of Box will look different |
| Waterfall Permissioning | • The permissions you grant a user will trickle down from the point of invitation to all folders and content beneath |

# Waterfall Permissions

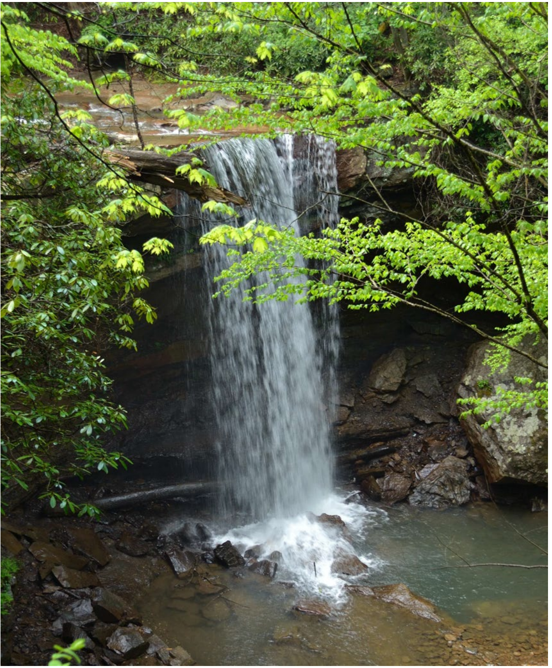
## Access Trickles Down

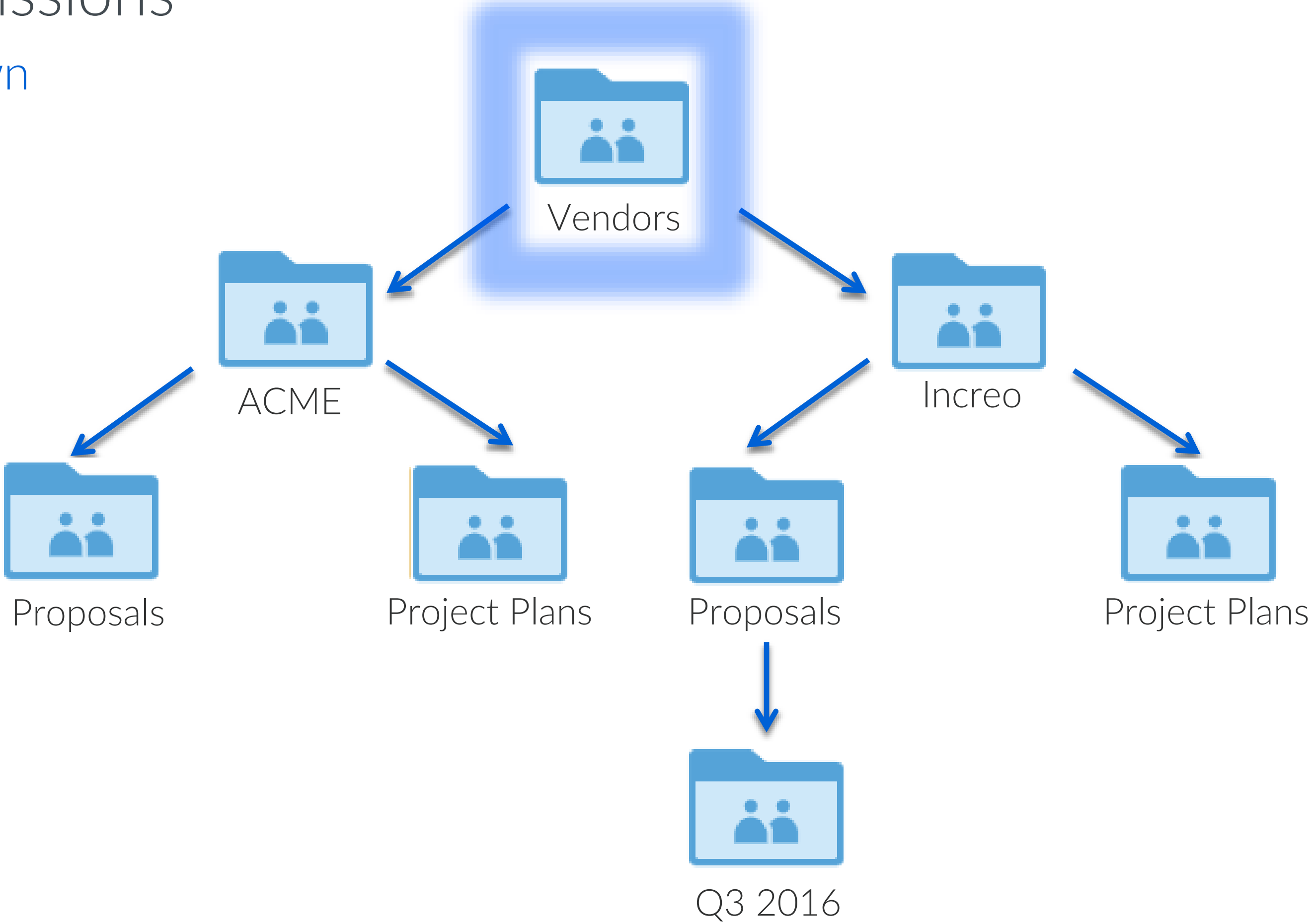




# Waterfall Permissions

## Access Trickles Down





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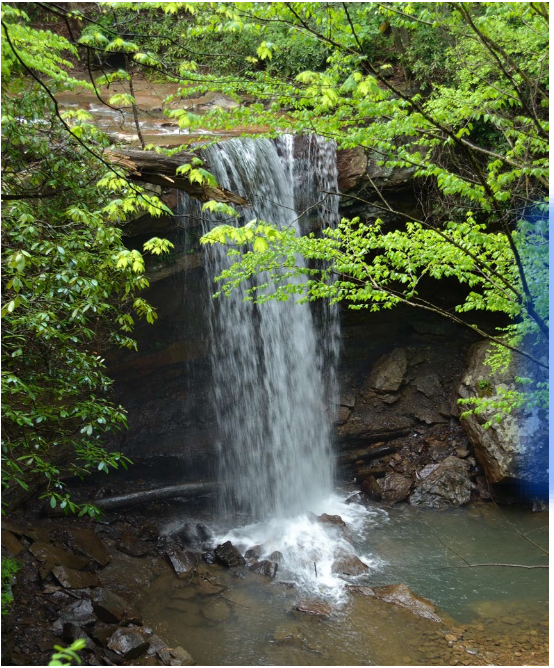

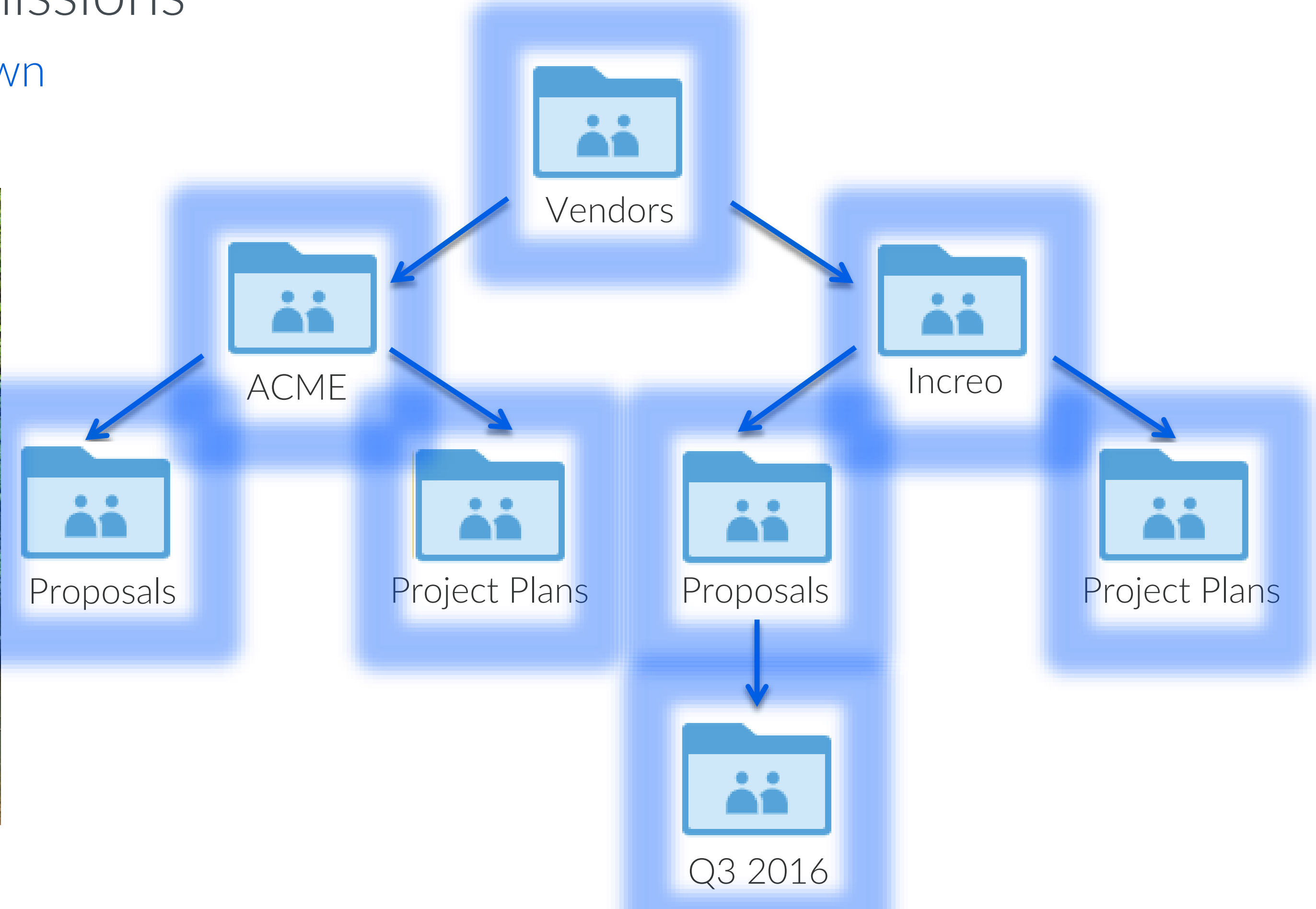

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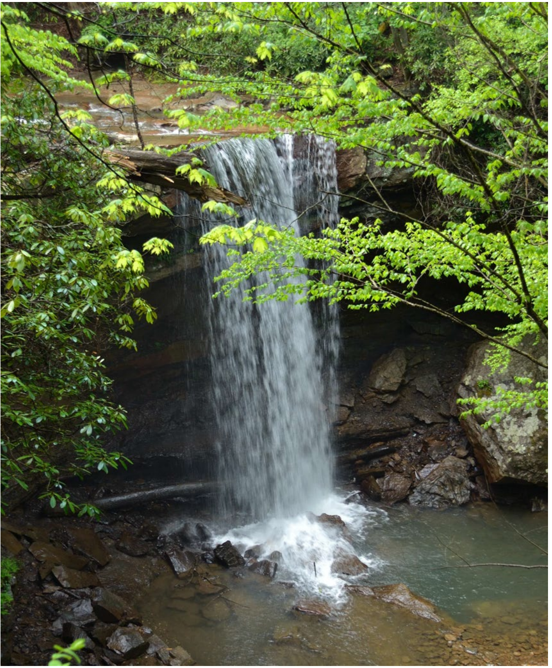

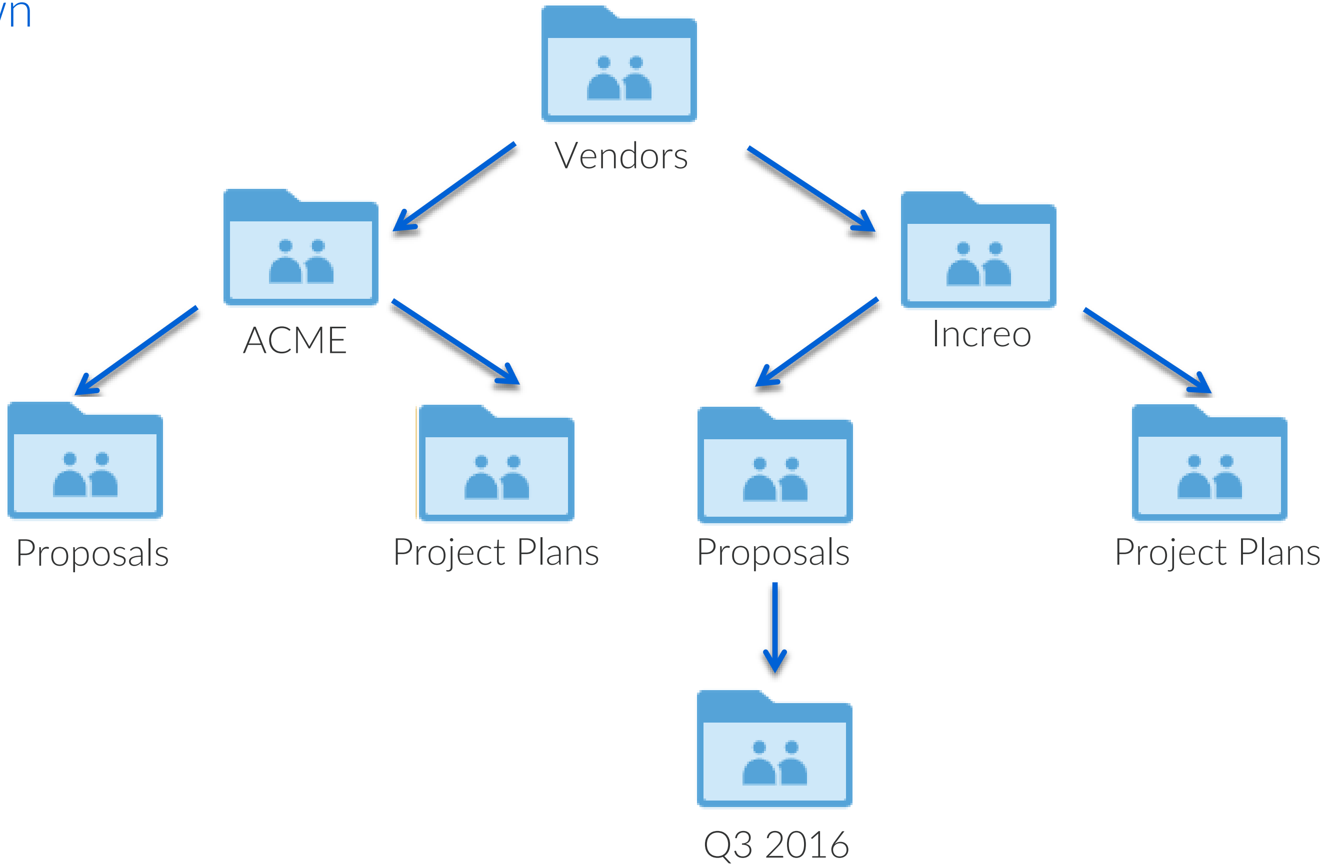

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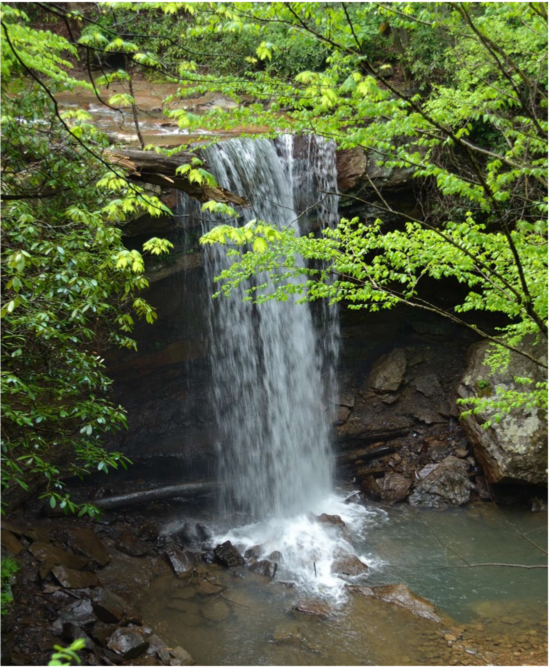


box

# Waterfall Permissions

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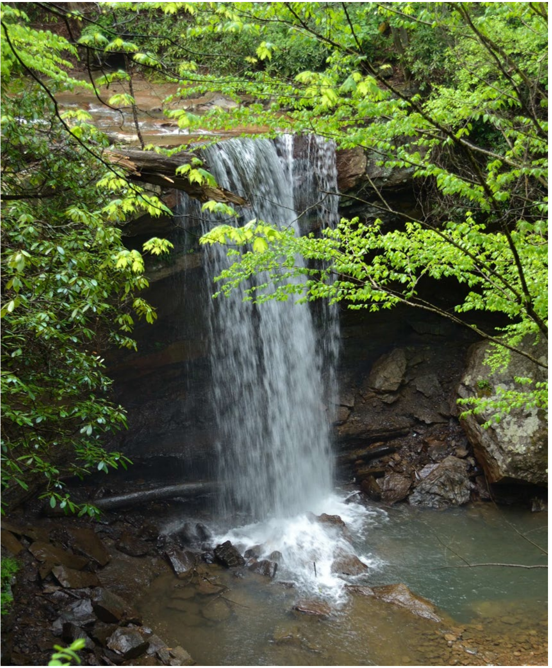
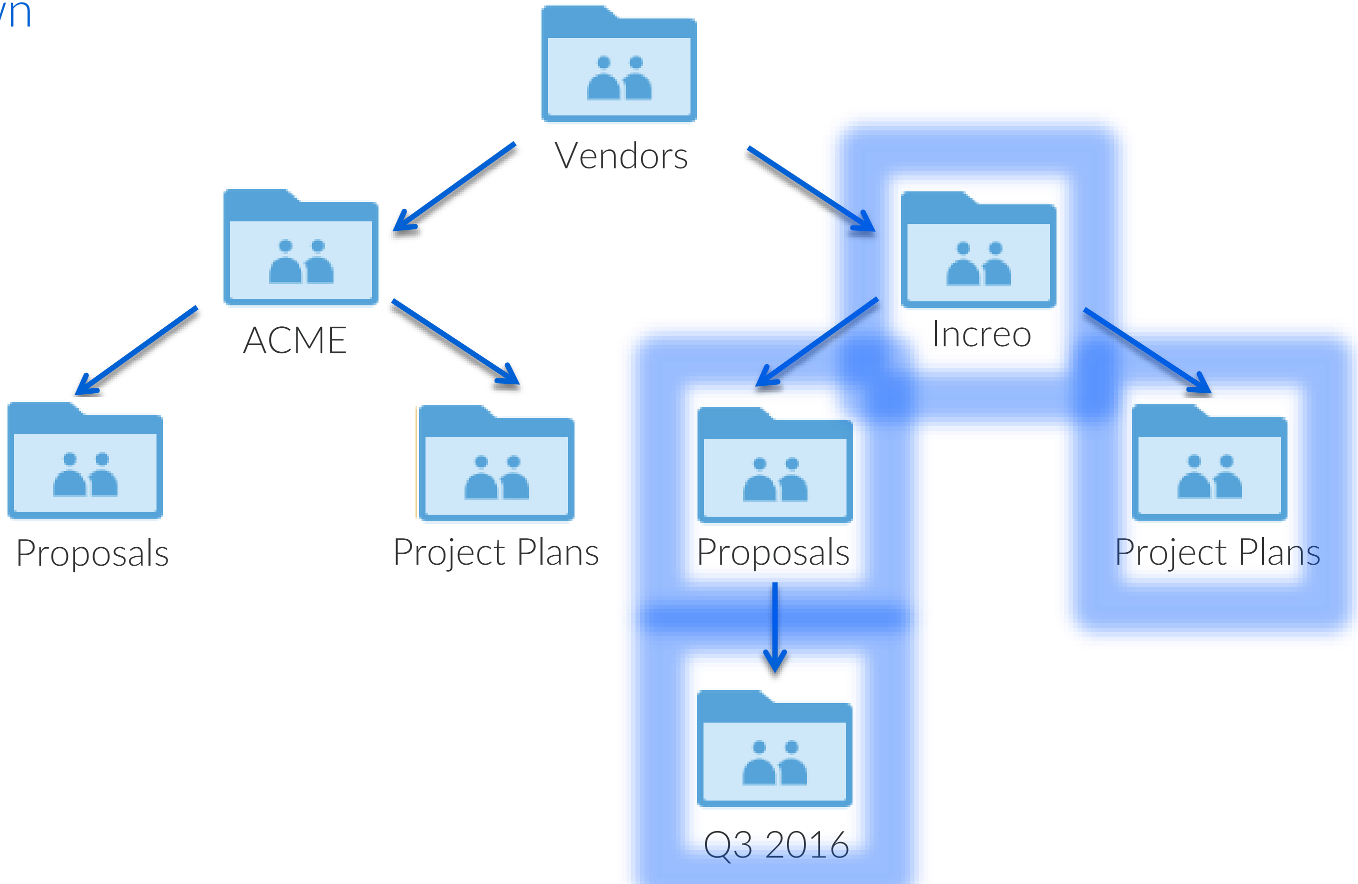




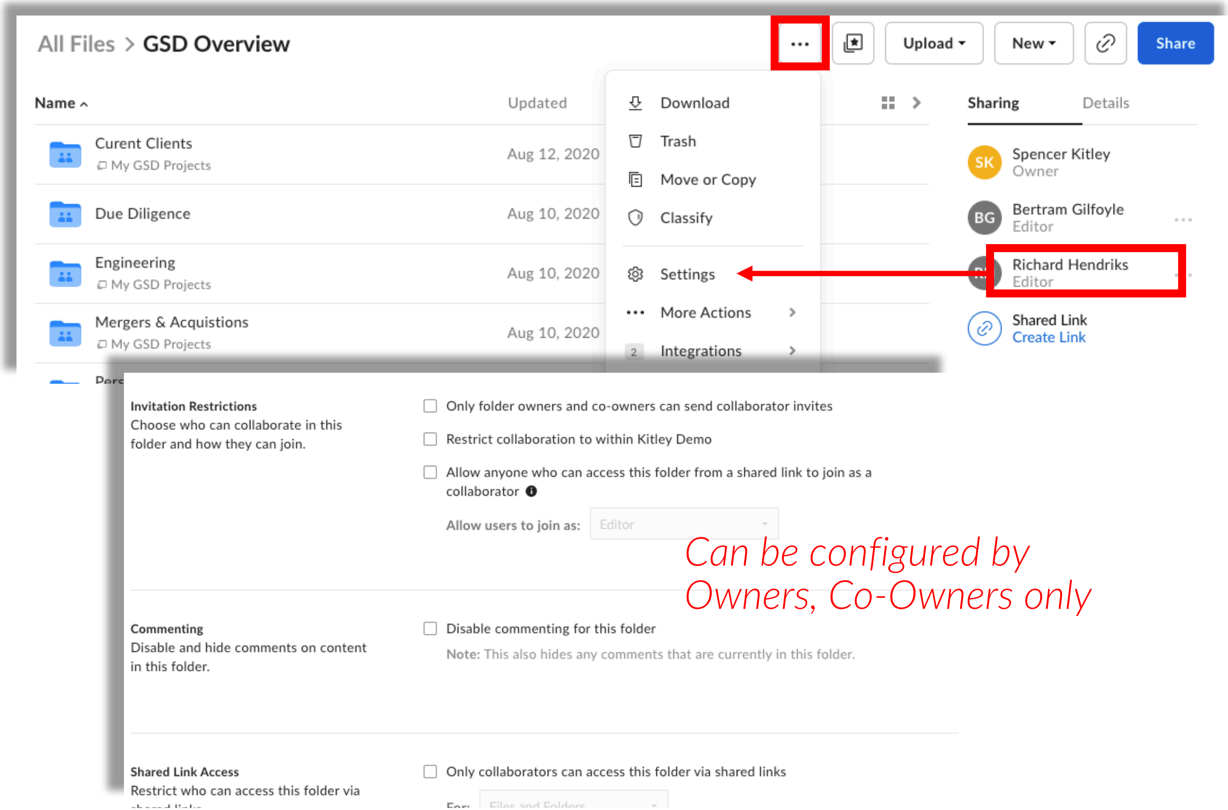
# Folder Structure Best Practices

- **Ensure naming conventions are extremely clear**
  - Users will be invited into all of these folders at different points
- **Keep the structure as flat as possible**
  - No more than 4 layers deep
- **Everyone's root will look different**
  - Reduce the number of folders users are invited into individually
- **Private vs Public content, Internal vs External content**

# Folder Level Security Settings

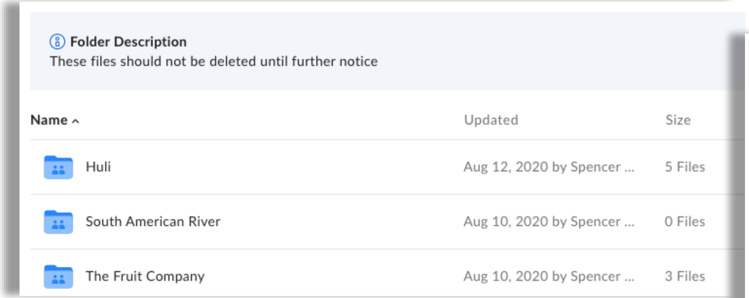
## Locking things down at a more granular level

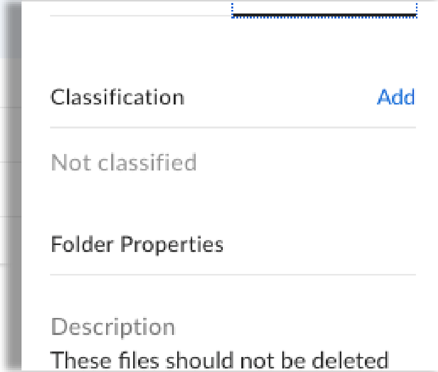
- Folder security settings only managed by folder owner/co-owner
- Security settings “trickle down” to subfolders
- Watermarking
- Restricting or limiting sharing

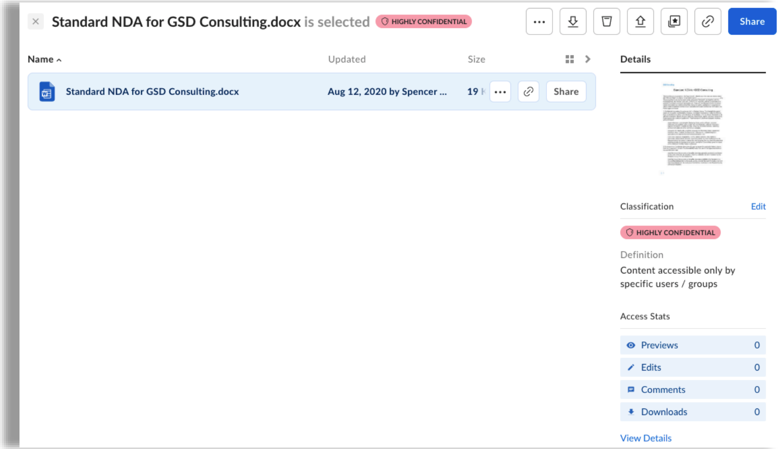


# Folder and File Descriptions

- Add text to provide instructions to users on folder usage guidelines or general information
- Provide a description on individual files to give alerts or high level information
- Possible other policies or classifications

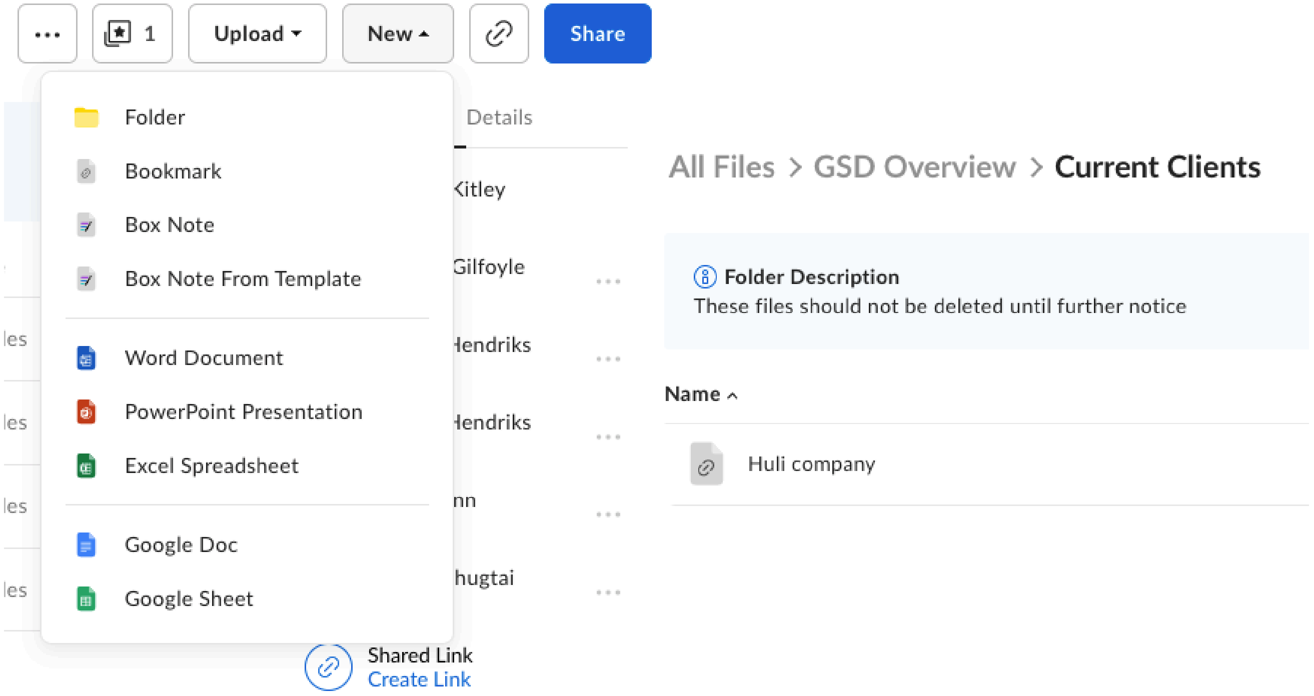


# Bookmarks

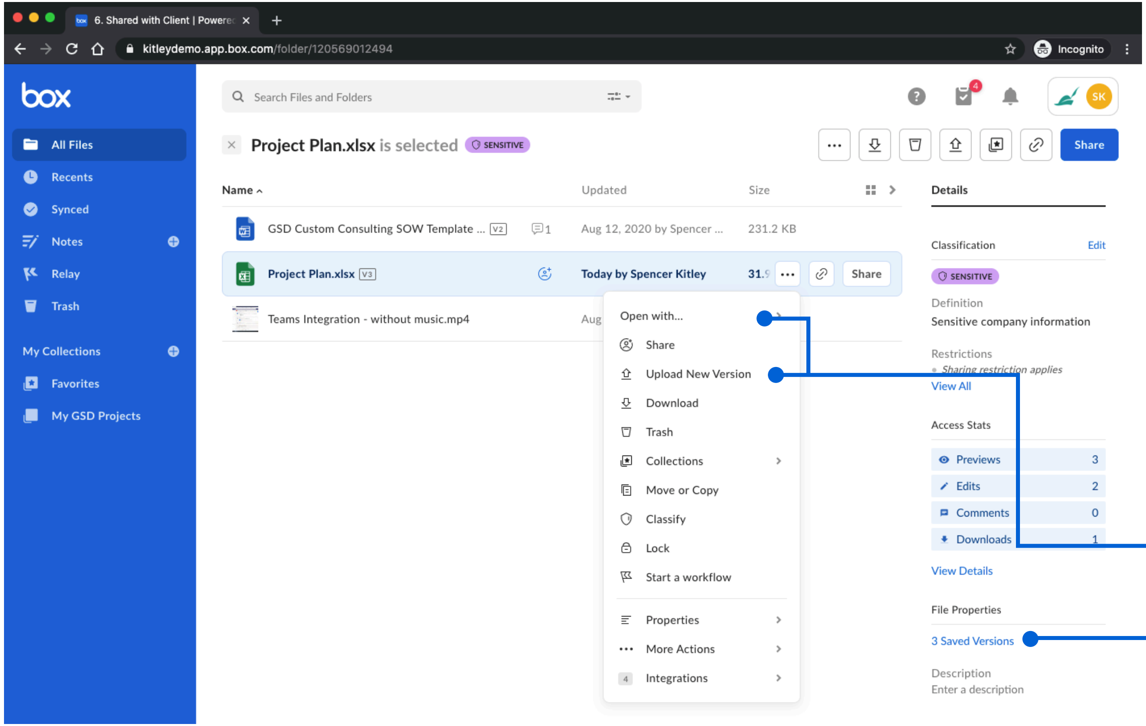
- Take favorites a step further – create bookmarked links directly to files or sites!
- Keep a single source of truth document with file version history and link it in additional areas



# Sharing Simply & Securely

# How to use Box

## Edit a file & track version history

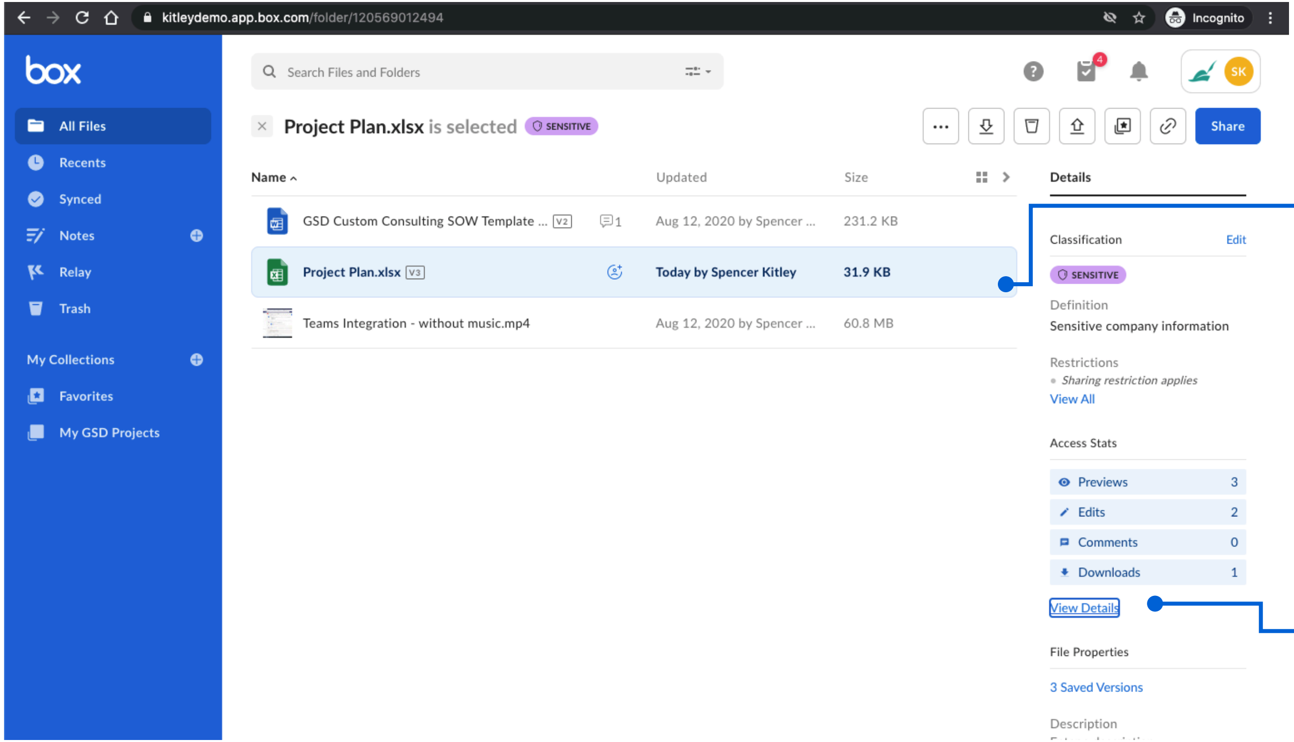



**Version History**
View previous versions of a file

**Edit**
Use 'Open with' to edit a file or upload a new version

# How to use Box

## Share a link to a file or folder – no more email attachments!

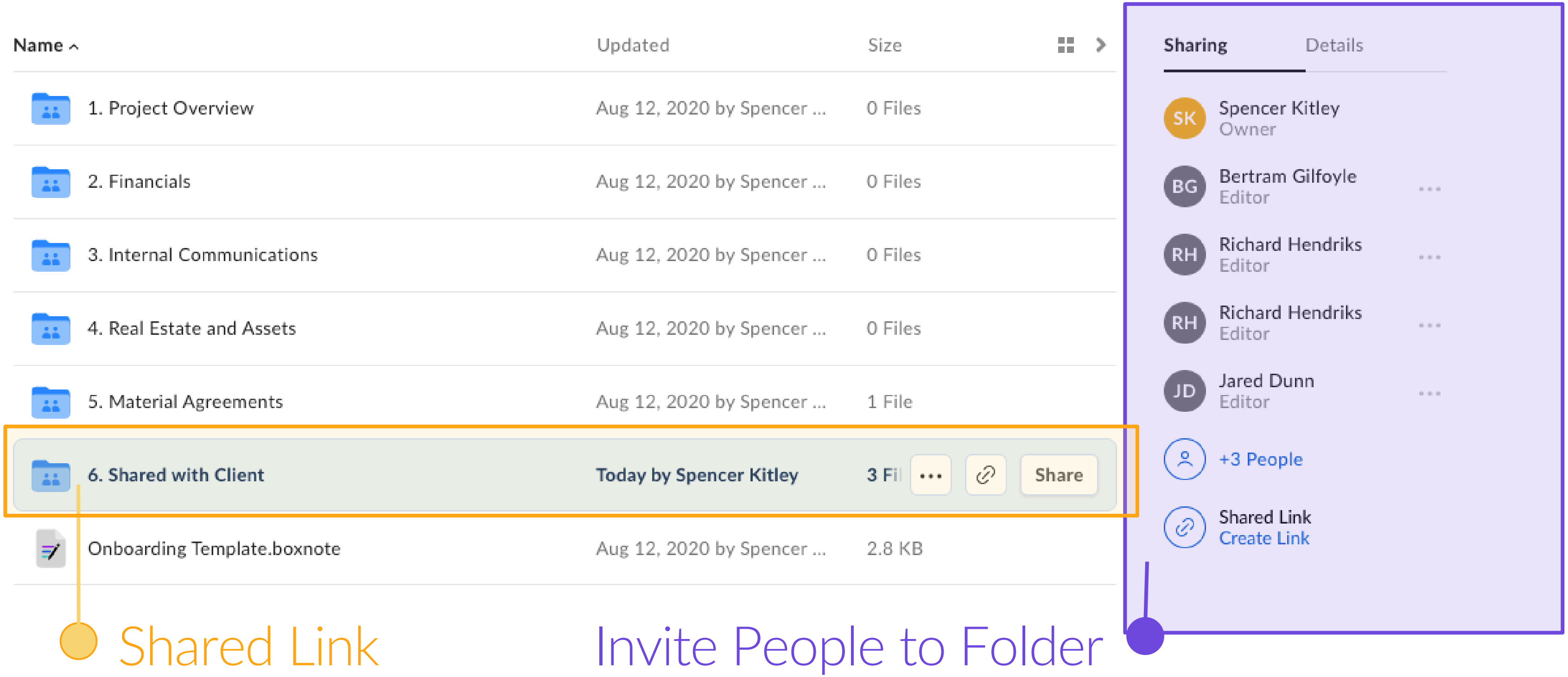



**Share a file**
Send a collaborator a shared link to ensure they're always accessing the latest file version

**File Access Stats**
View details on who has previewed or downloaded a file

# Sharing with Box

## Sharing Two Ways



# Choose the best method of Sharing

## **T.A.P.** – **T**ime **A**ccount **P**ermission

### TIME

How long do they need access?

### ACCOUNT

Do they have an account?

### PERMISSION

What do they need to be able to do?

# Choose the best method of Sharing

## T.A.P.

| | Shared Link | Invite to Folder |
|---|---|---|
| **Time** | Short Term | |
| **Account** | No Account Needed | |
| **Permission** | Preview, Download | |

# Choose the best method of Sharing

## T.A.P.

| | Shared Link | Invite to Folder |
|---|---|---|
| **Time** | Short Term | Long Term |
| **Account** | No Account Needed | Account Needed |
| **Permission** | Preview, Download | Upload, Edit, Delete, Preview, Download |

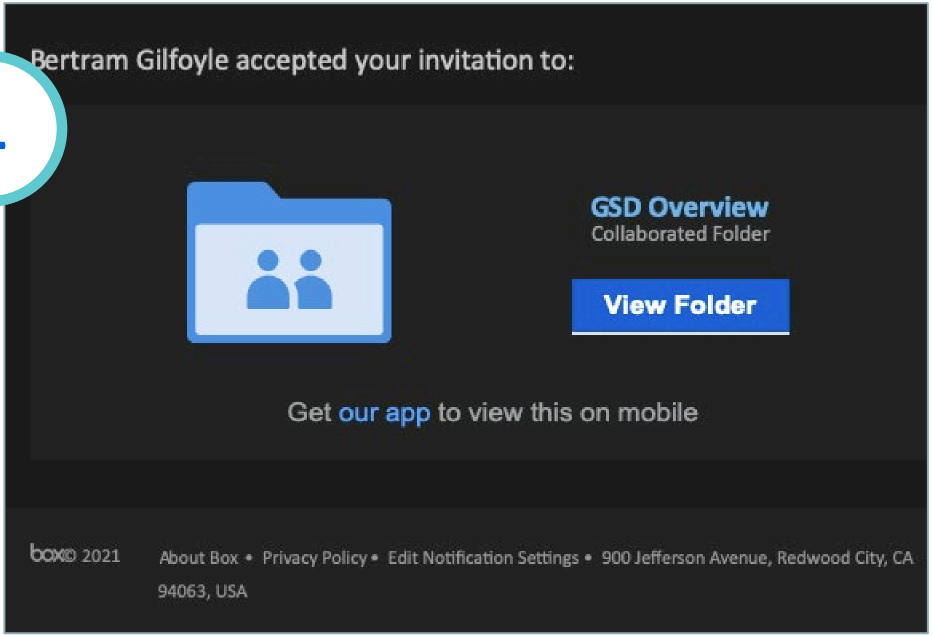
# Collaboration Roles and Permissions

- In any given folder, collaborators will have a "role" assigned to them and role remains the same in all subfolders.
- A user must have *at least* '**Editor**' access or above (Owner, Co-Owner) to be able to invite collaborators. (This can be further restricted at the folder level for sensitive folders such as Finance or HR)

| Roles | Upload | Download | Preview | Get Link | Edit | Delete | Owner Permissions |
|---|---|---|---|---|---|---|---|
| Co-Owner | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ |
| Editor | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | |
| Viewer Uploader | ✓ | ✓ | ✓ | ✓ | ✓ | | |
| Previewer Uploader | ✓ | | ✓ | | | | |
| Viewer | | ✓ | ✓ | ✓ | | | |
| Previewer | | | ✓ | | | | |
| Uploader | ✓ | | | | | | |

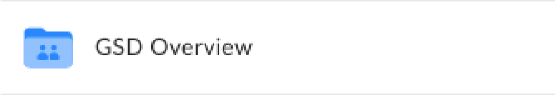
# What happens once you’re invited to the folder?

1




Email Notification

2



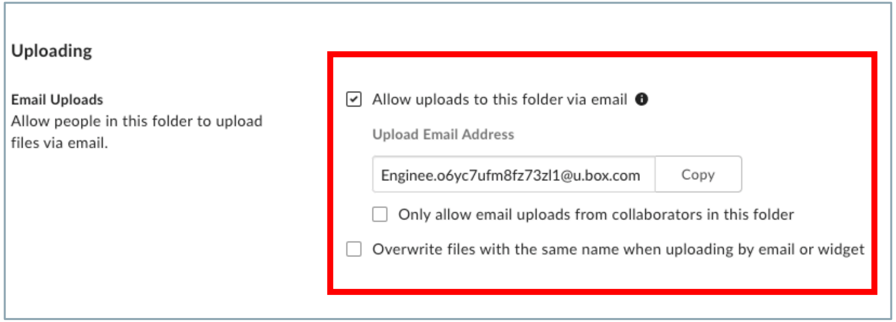

See Folder in Box

# How to use Box

## Upload to Box through email

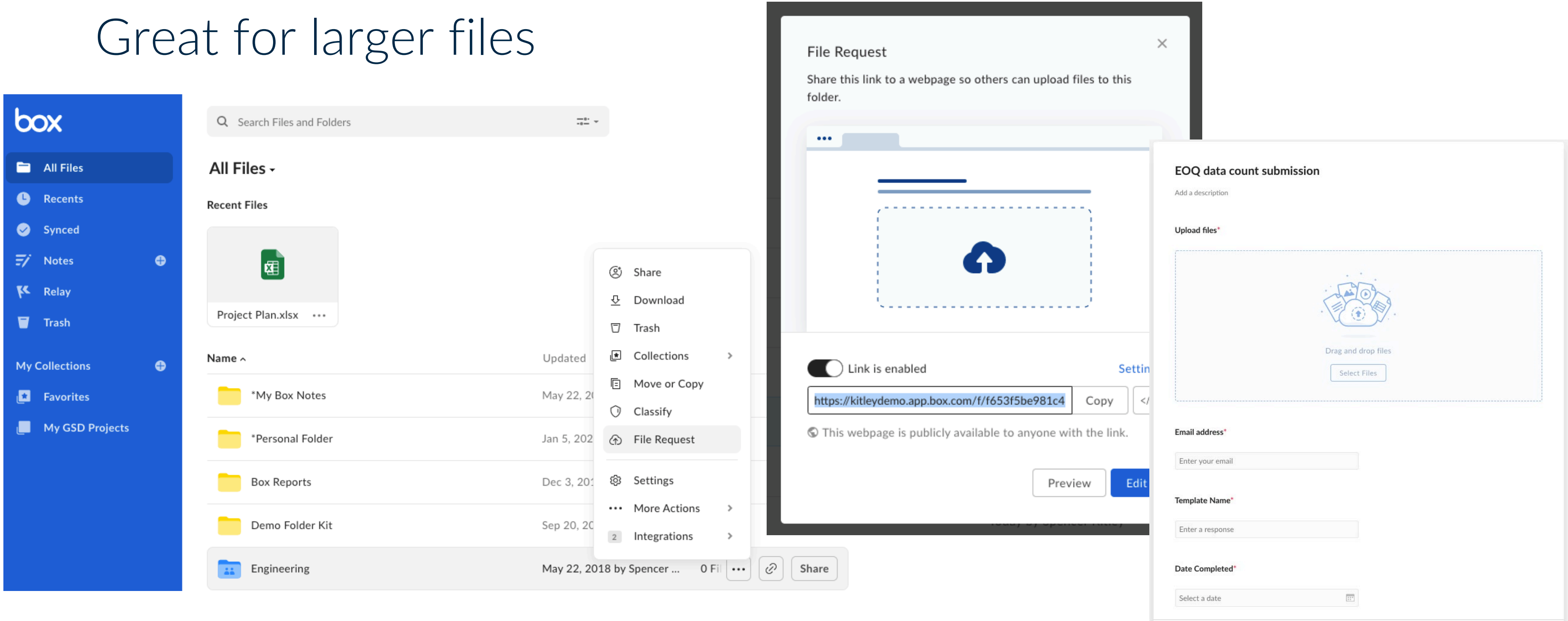
You can easily upload files or send attachments to a specific Box folder by email when you enable **Allow uploads to this folder via email** option. To enable:

- Right-click (or click the "...") the folder in which you would like to enable email uploads, and click **Settings**.
- On the Folder Settings page, under **Uploading > Email Uploads**, check the box next to "**Allow uploads to this folder via email**"



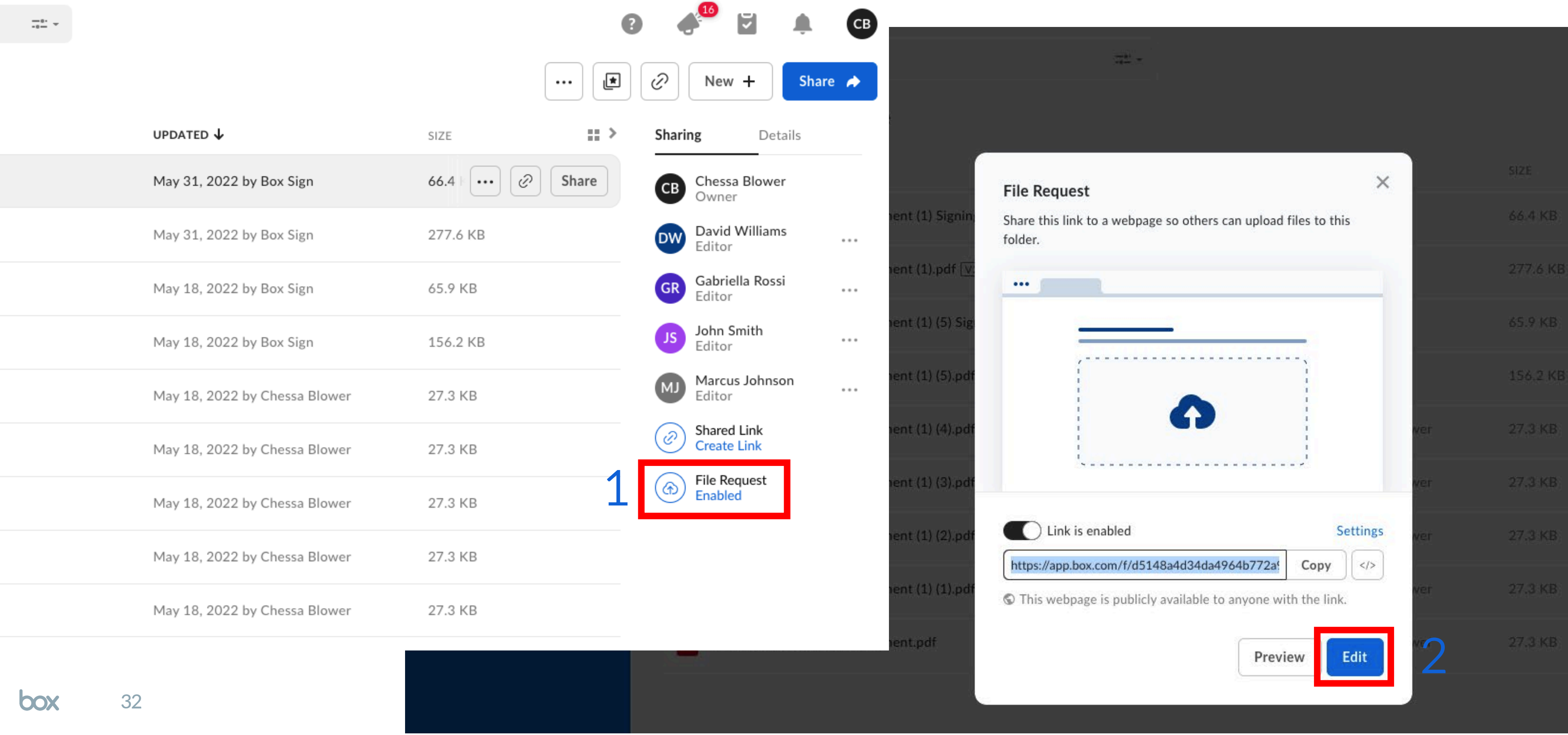
# File Request Link feature

## Great for larger files

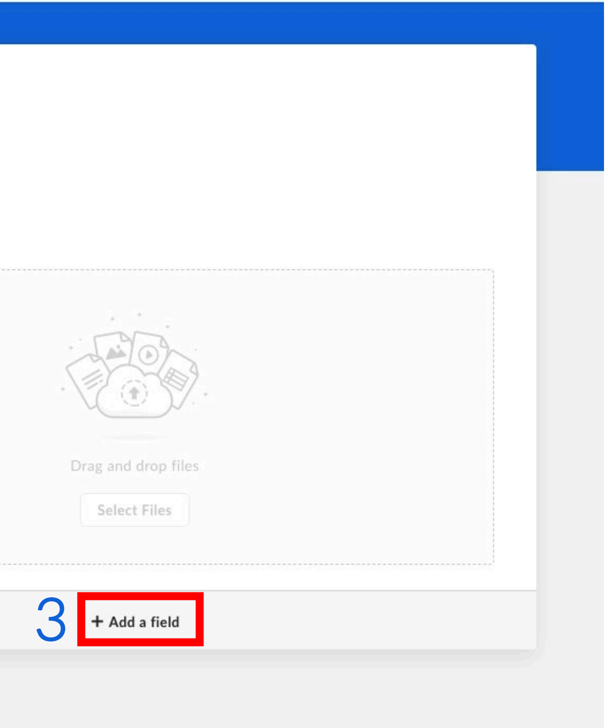


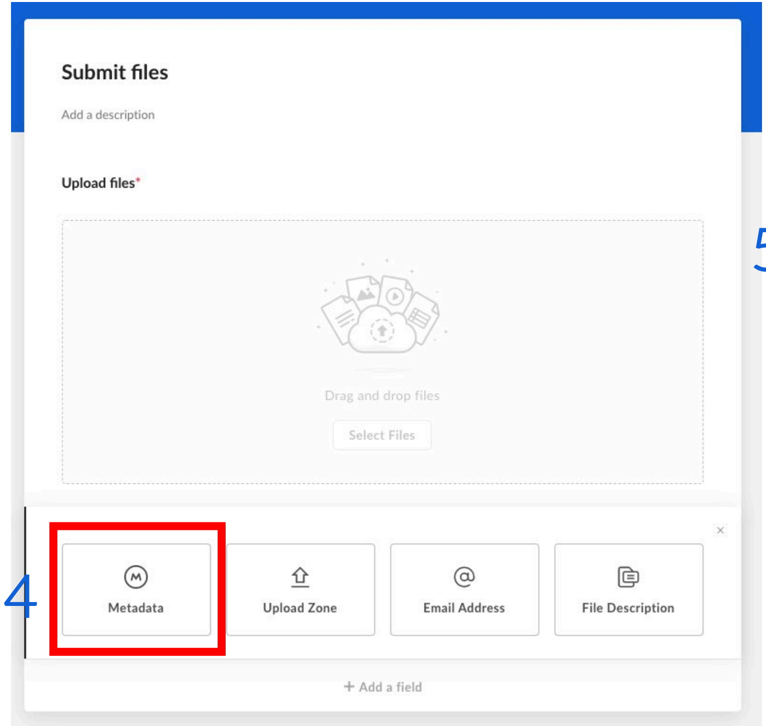

*No account needed

# Using Metadata in File Request Forms



# Using Metadata in File Request Forms (cont.)

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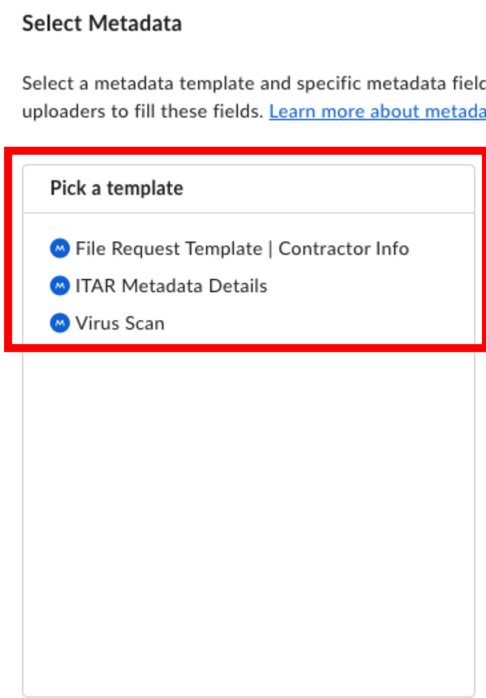
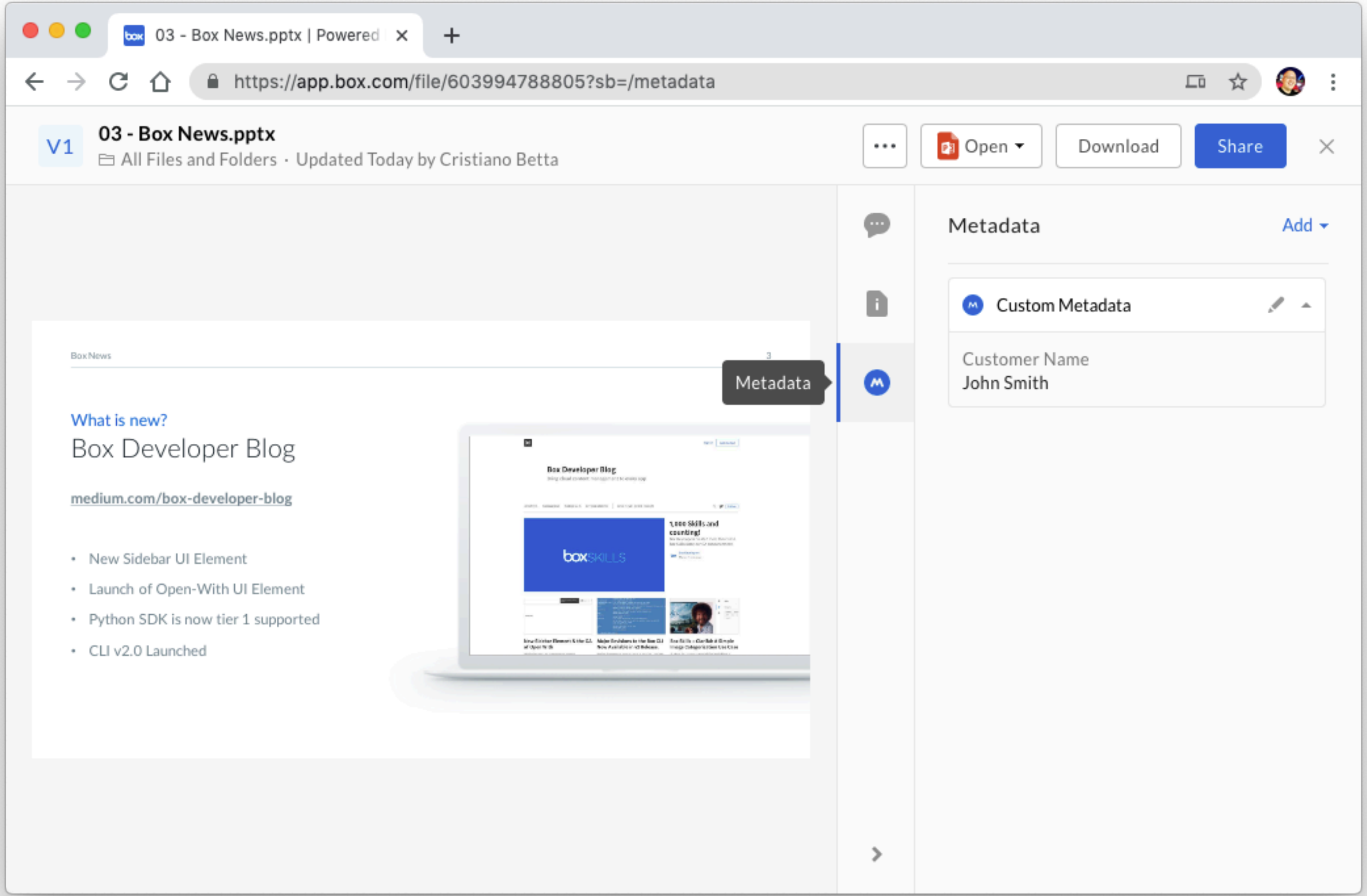


# End Result of Metadata Ingestion



# Box Relay

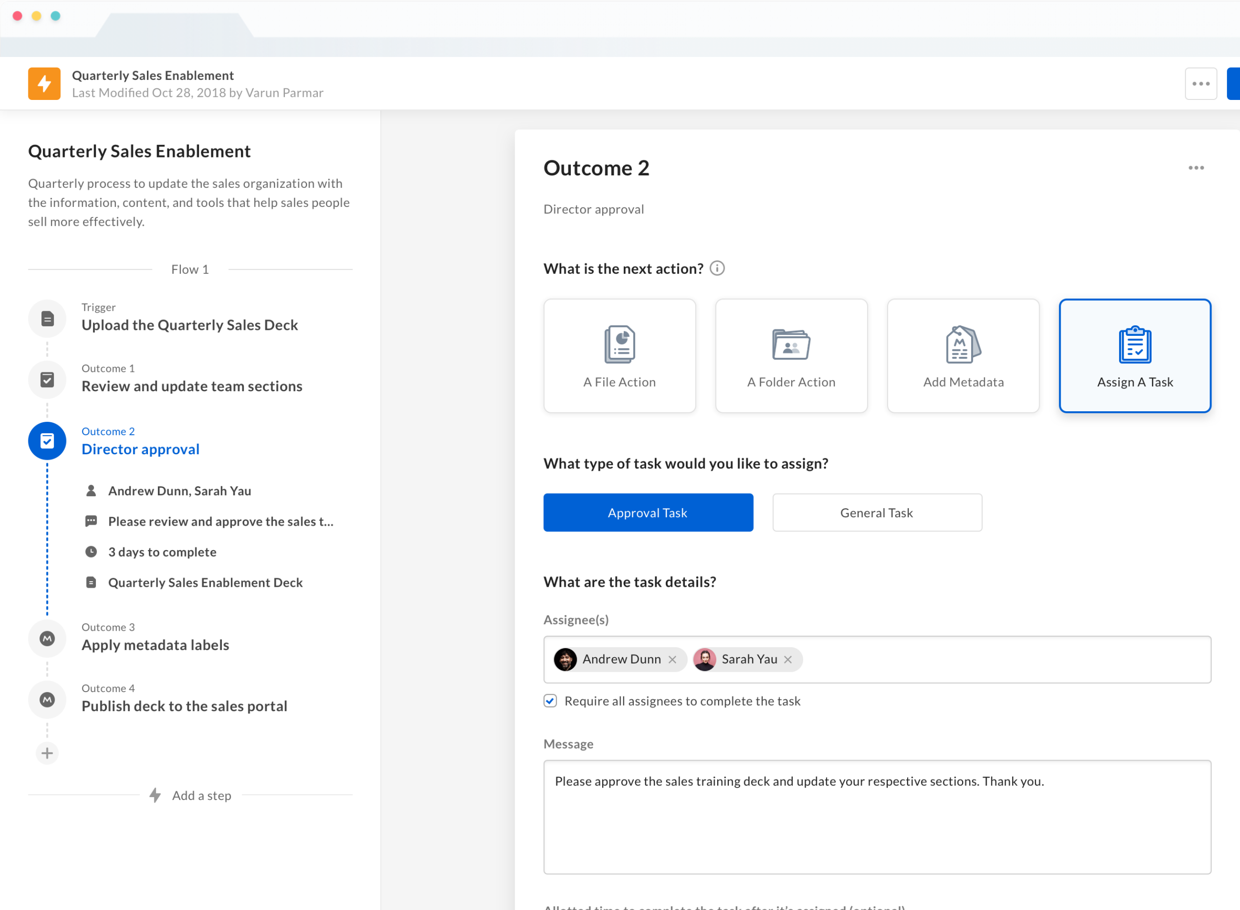
# Box Relay

## Empower automation across the business

- No-code, intuitive ‘IFTTT’ automation builder for all users
- Summary view to drive process improvement
- Designed for business users to implement in minutes

## Accelerate core business processes

- Range of trigger and outcome options, including metadata
- Automate sequential and parallel processes
- Runs alongside the native collaborative capabilities of Box



# Box Relay

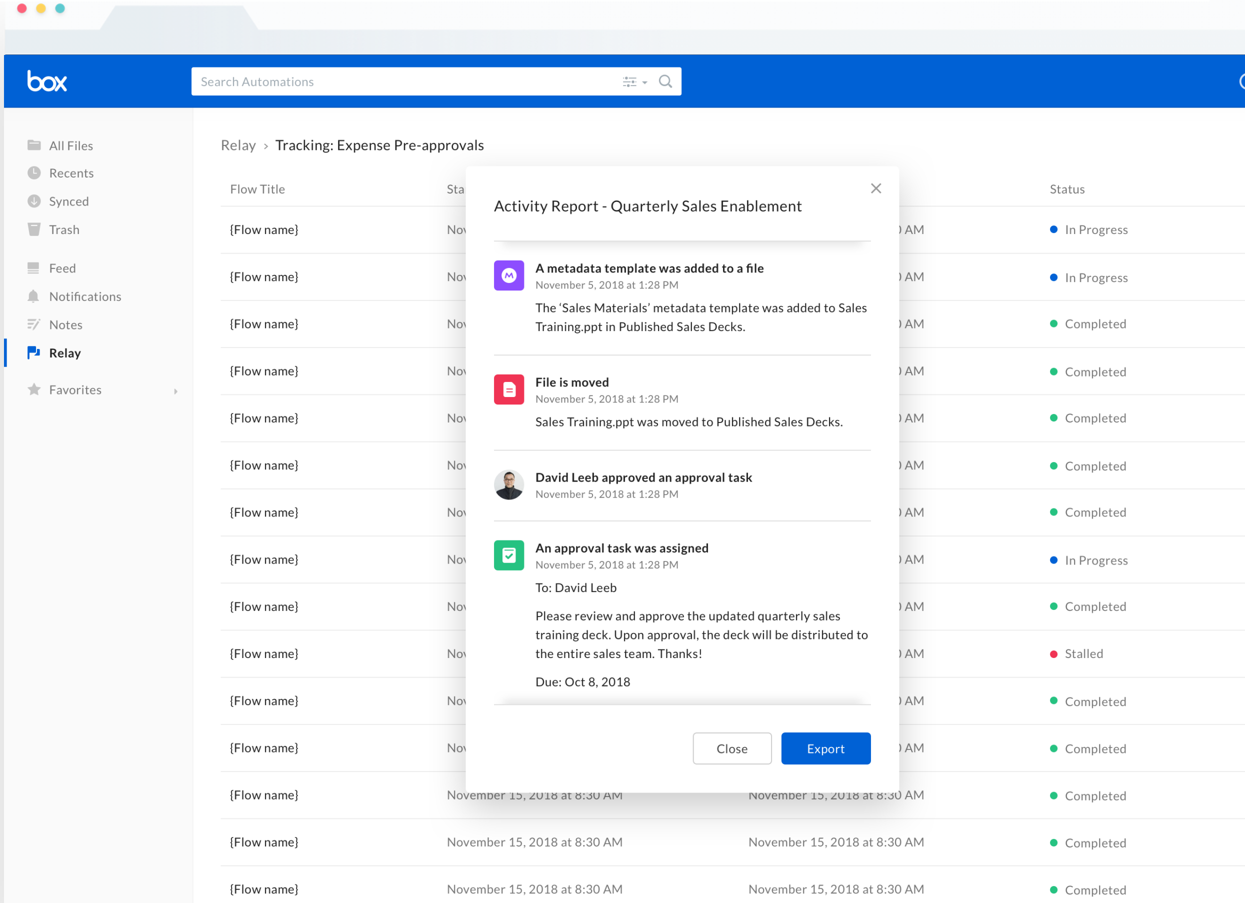
## Integrated with Tasks capabilities

- One-step review and approvals
- Dedicated task inbox, ensuring no to-do's fall through the cracks
- Push notifications to complete tasks on mobile

# Box Relay

## Track and report on progress

- View progress on every running workflow
- View details about who created, updated or deleted workflows
- Exportable audit history
- Inherit power of Box security and compliance



# Relay workflow **triggers**

## File Events

- Upload / Download
- Move
- Copy
- Share (Add collaborator)
- Delete
- Preview
- Lock / Unlock
- Apply / Remove watermark

## Folder Events

- Create / Download
- Move
- Copy
- Share (Add collaborator)
- Delete

## Tasks

- Completed
- Approved
- Rejected

## Metadata

- Metadata applied
- Attribute value changed

## Manual Start

- Specify task assignees
- Specify collaborators

## File Request

- File(s) submission
- Metadata conditions

## Scheduled Event

## Sign Event

- Completed
- Expired
- Cancelled
- Declined

# Relay workflow **outcomes**

## File Action

- Move
- Copy
- Share (Add collaborator)
- Delete
- Lock / Unlock
- Apply / Remove watermark
- Apply classification

## Folder Action

- Create / Delete
- Move
- Copy
- Share (Add collaborator)
- Rename / restore
- Apply classification

## Metadata

- Metadata Action
  - Add template
- Attribute Action
  - Add value

## Tasks & Notifs

- Create general task
- Create approval task
- Notification

# Realize the benefits of automating business processes

## Accelerate cycle times

Identify redundancies, speed up processes and track status in real-time

**30% time saved**

## Improve user & IT productivity

Allow staff and management to focus on value-added projects

**25% productivity improved**

## Standardize key processes

Eliminate circumvention of business rules, reduce rework & risk of improper process

**35% errors reduced**

## Improve compliance

Ensure consistent data protection & improve compliance with audit trails

**23% risk reduced**

*IDC Research

# What process is a good candidate for Relay?

## Content-centric

Tied to content on Box

## Collaborative

Involves multiple individuals, internal or external to the organization

## Routine

Doesn't require significant modification per execution

## Frequent

Runs often – hourly / daily / weekly / monthly

IDEXX & box

## Lab change control process

Regulated process to control and manage laboratory equipment change requests

### Stakeholders

- Requestor
- Department Manager
- Implementor
- Quality Manager
- Project Manager

### Process

- Change Request form submission
- Review and approval
- Archival

Review and approvals

# Customer Story: IDEXX

## Lab Equipment Change Control Process

Change Request Originator creates & submits docs for lab equipment update → Admin reviews & approves the change request submitted → 2 ”Signers” must sign to approve change → Implement the change to lab equipment → Archive documentation

**Before Relay**

- Confusion of where it was in the process
- Had to spend significant FTE hours to manage process

**After Relay**

- Streamlined process and reduced approval time
- Transparent Compliance - exportable logs of requested changes and approvals

# Box Sign

# Introducing Box Sign

Secure, seamless e-signatures where your content lives

## Natively integrated e-signatures

As part of the content journey in the Box Content Cloud, and extensible via APIs

## Included in Box subscription*

E-signatures for the entire org, no matter the line-of-business or industry vertical

## Secure and compliant

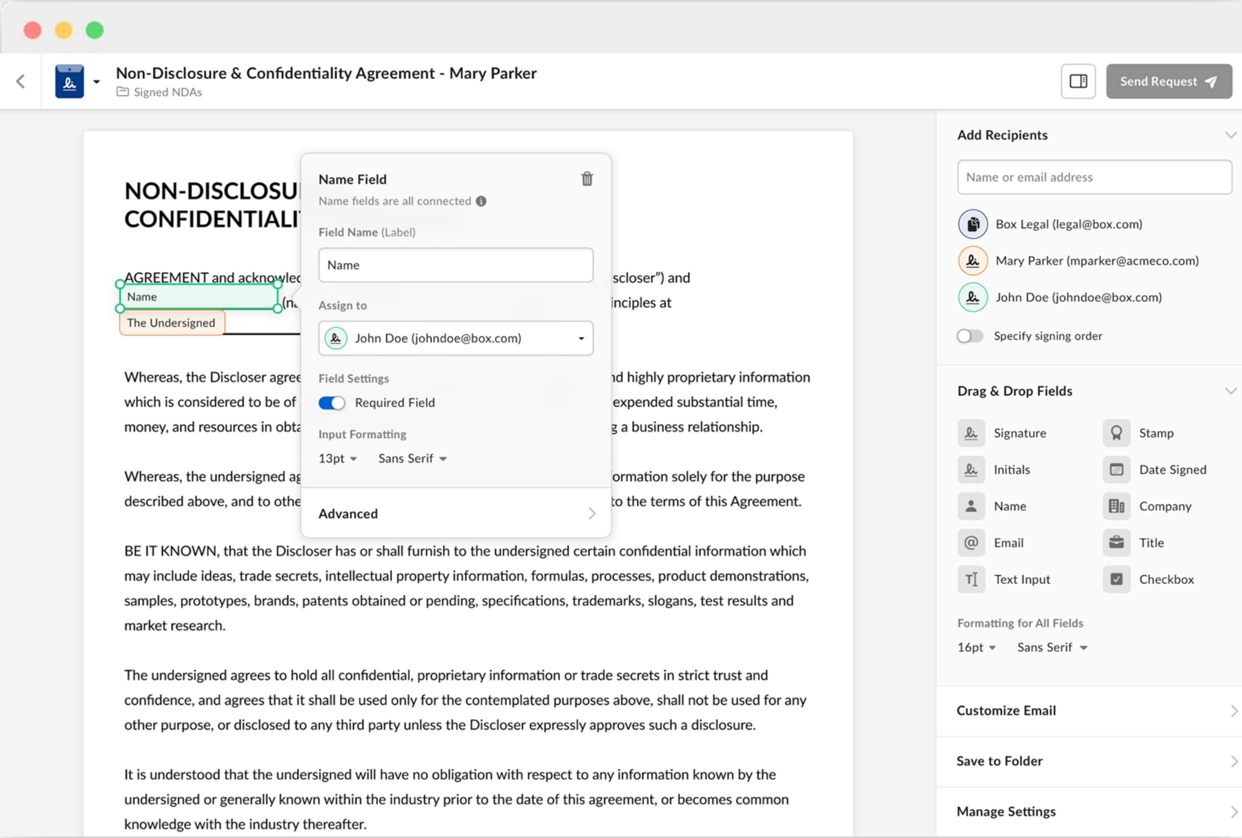
Industry-leading Box security and compliance baked in

* Feature set varies by plan

# Native e-signatures

## Seamless sender experience right within Box

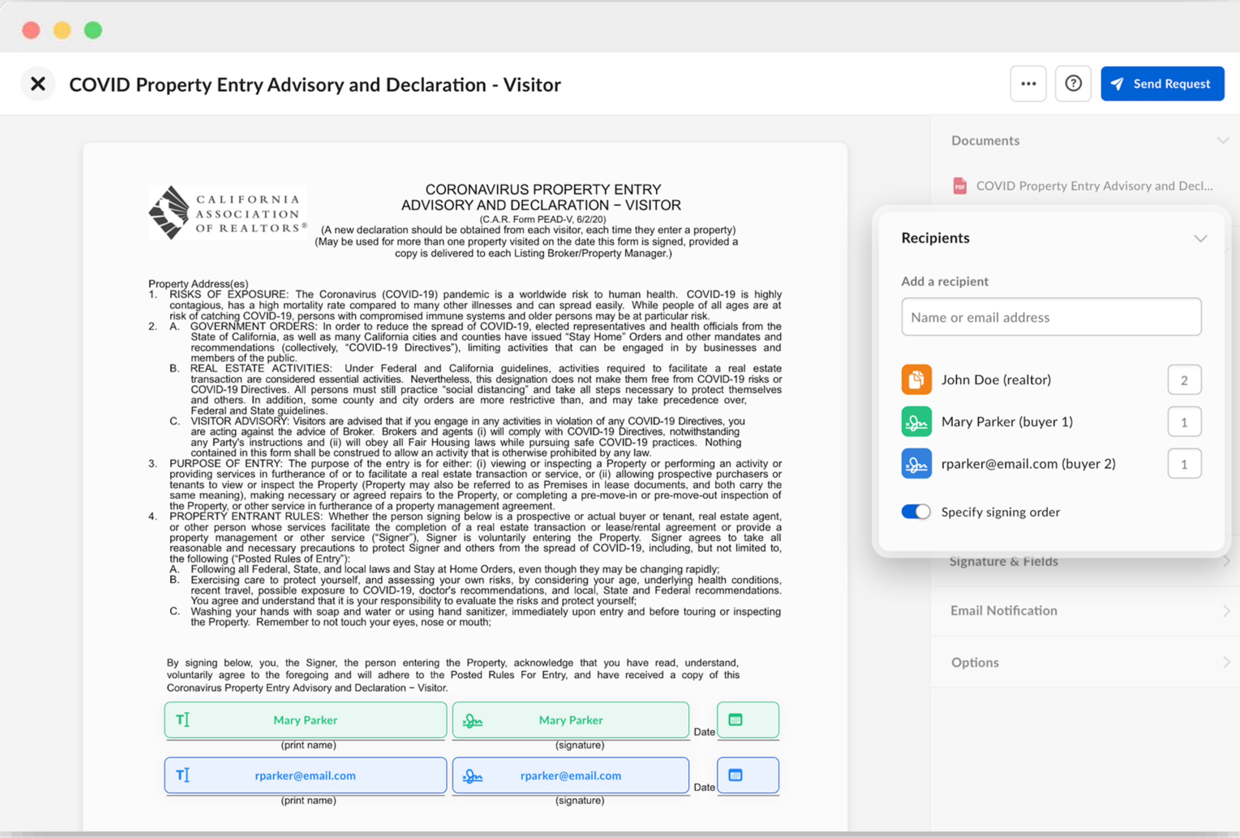
- All major file types (incl. PDF, Office, images)
- 10 standard fields: signature, initials, stamp, date, checkbox, text, name, title, company and email
- Self-sign or request for one/many signatures on a document
- Reusable templates with ability to lock fields



# E-sign workflows

## Flexible options to address your e-signature flow needs

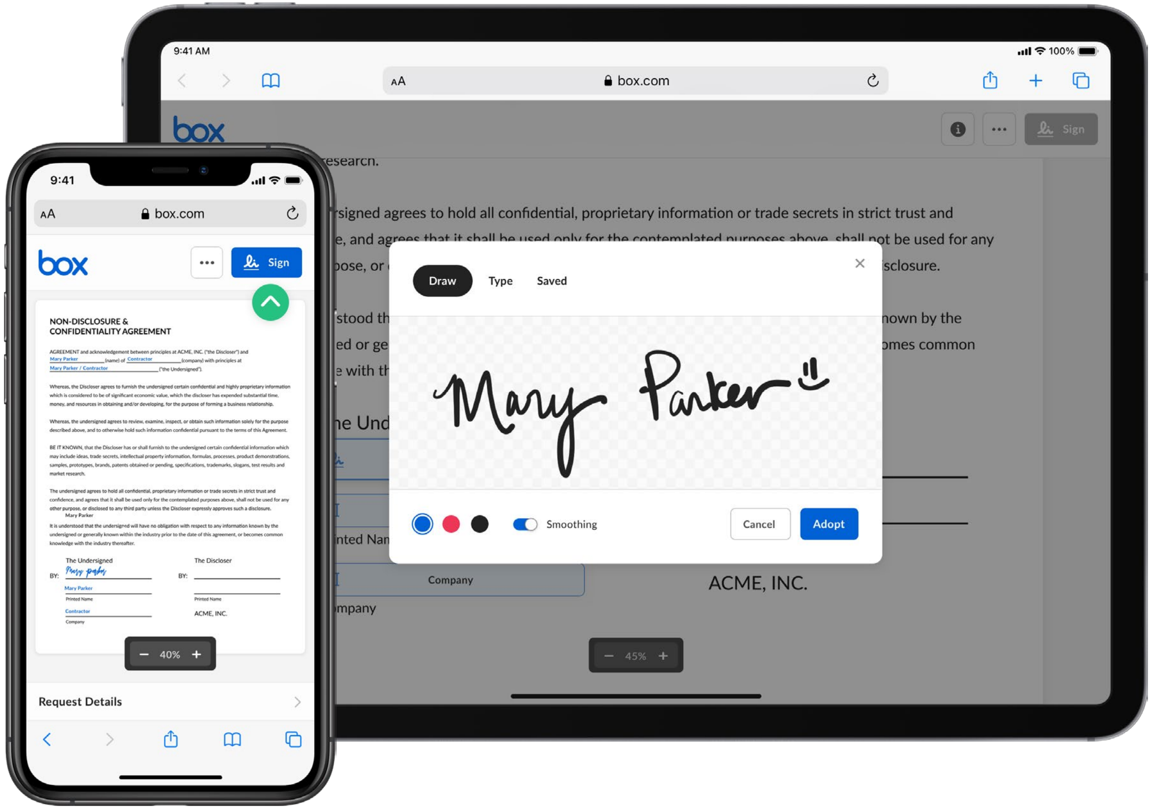
- Support for serial/parallel routing, or a combination
- Recipient permissions: sign, approve, copy, and in-person
- Email reminders and deadline notifications
- Send copy of signed documents to anyone



# Signer experience

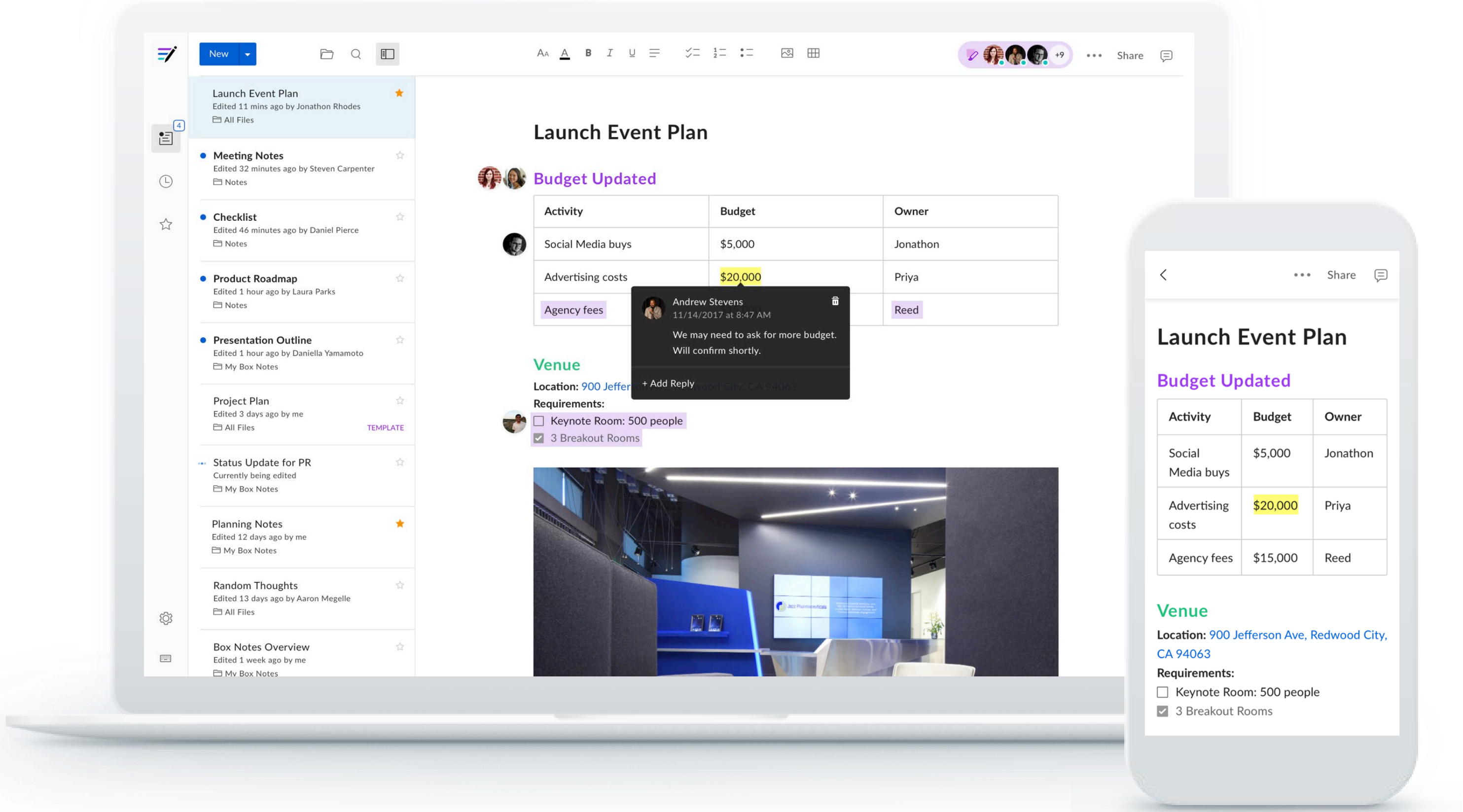
## Smooth and easy signing experience on any device

- Anyone can sign, even those without a Box account
- Sign on web or mobile
- Draw, type, or upload signatures
- Automatically receive copy of executed document



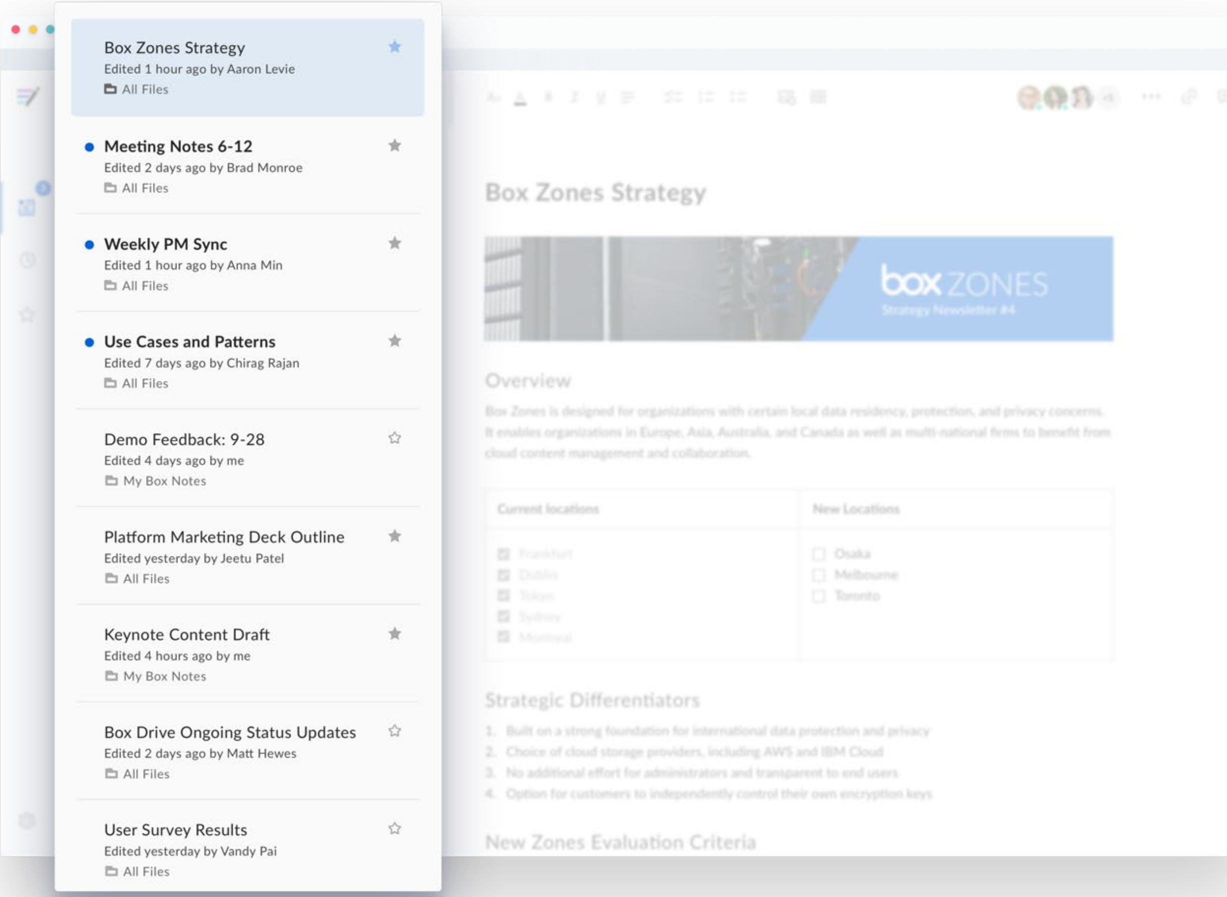
# Box Notes

# Collaborate in real-time with Box Notes



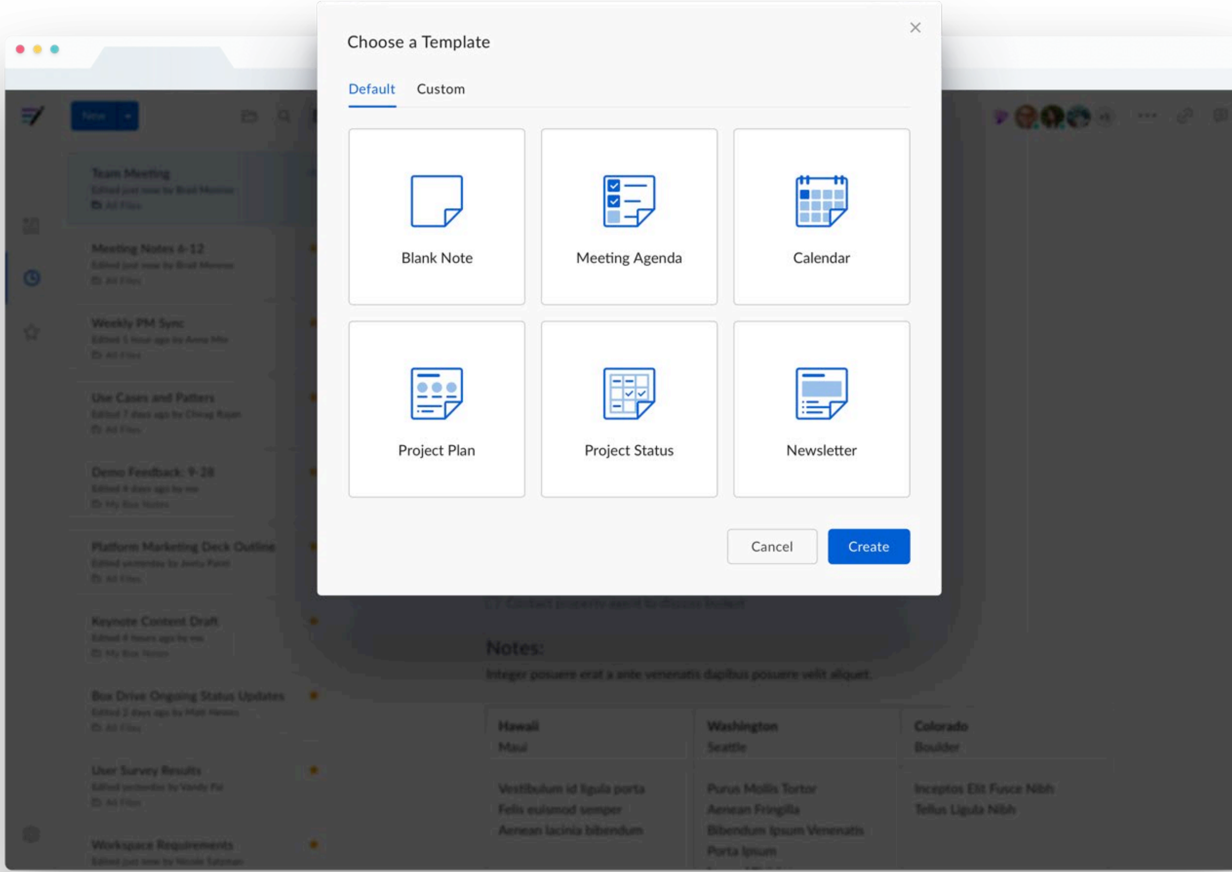
# Inbox

Quickly access the notes that have changed since you last viewed them



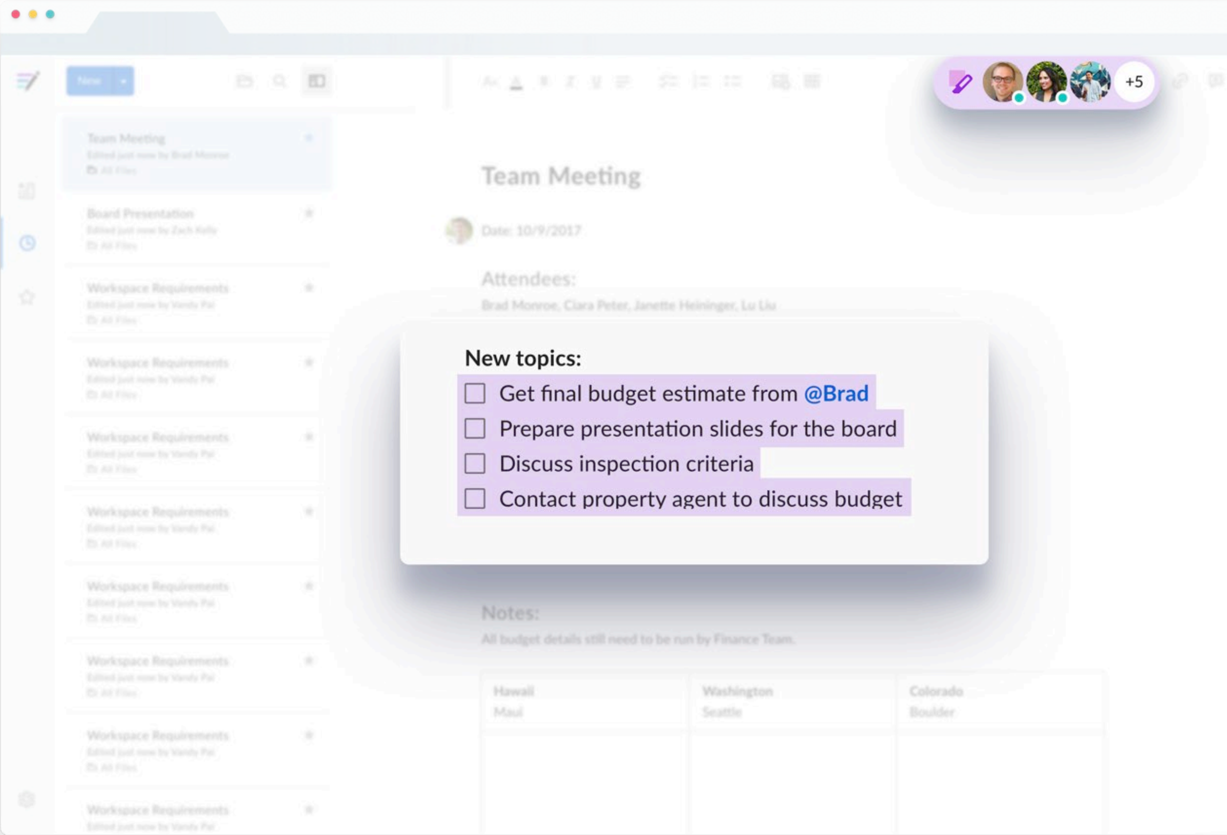
# Templates

Easily start a note from a library of common templates or custom ones you've saved (meeting agendas, to-do lists, planning documents, etc.)



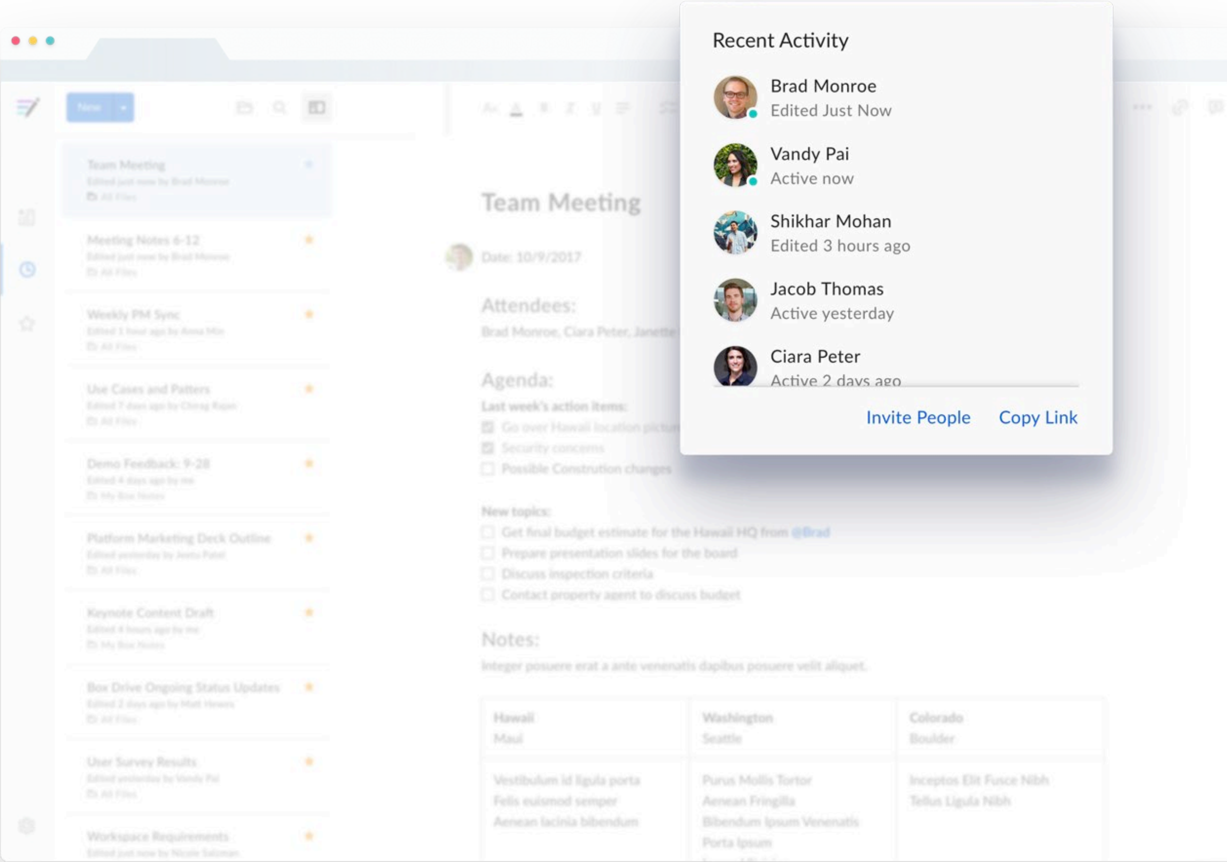
# Differences

See what's changed in the note itself since you last opened it

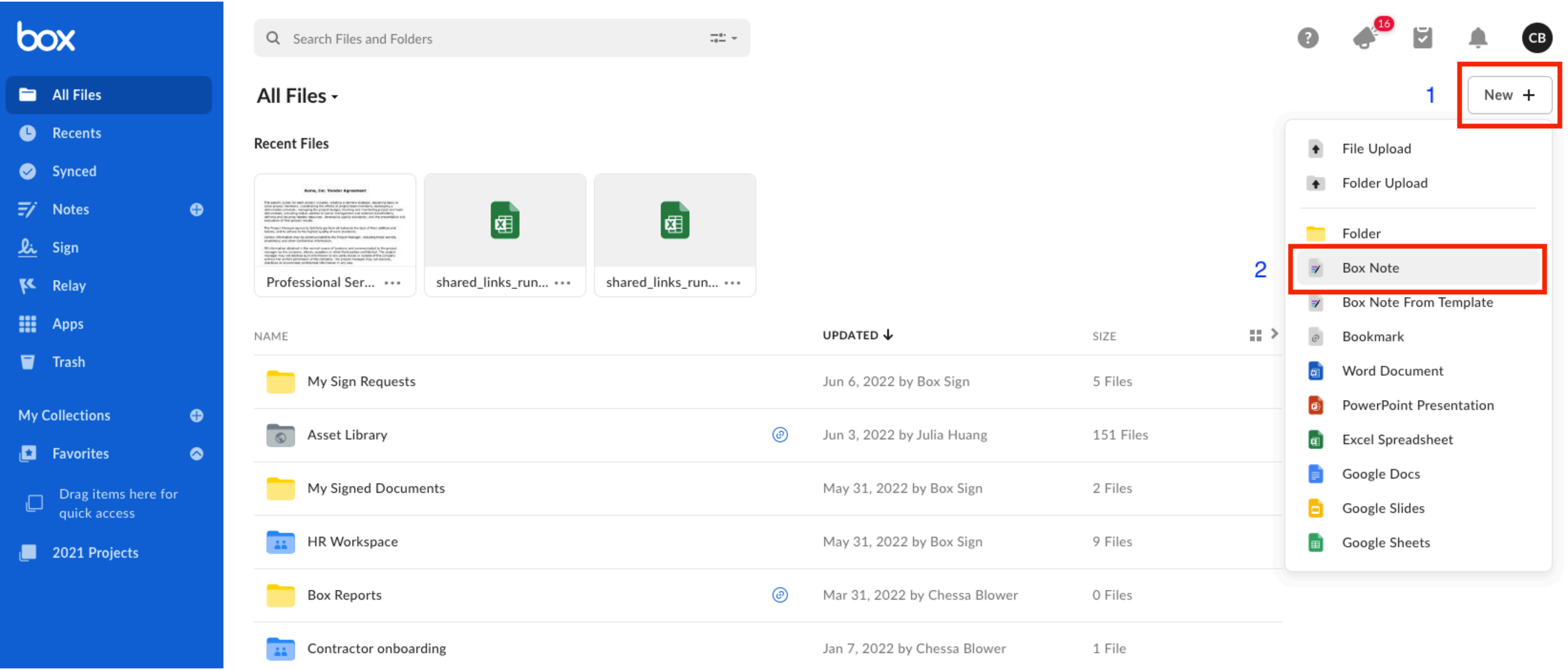


# Presence

See who's currently in your notes or has edited and viewed your notes in the past and when



# Getting started using notes



# Box Drive

# Box Core Applications

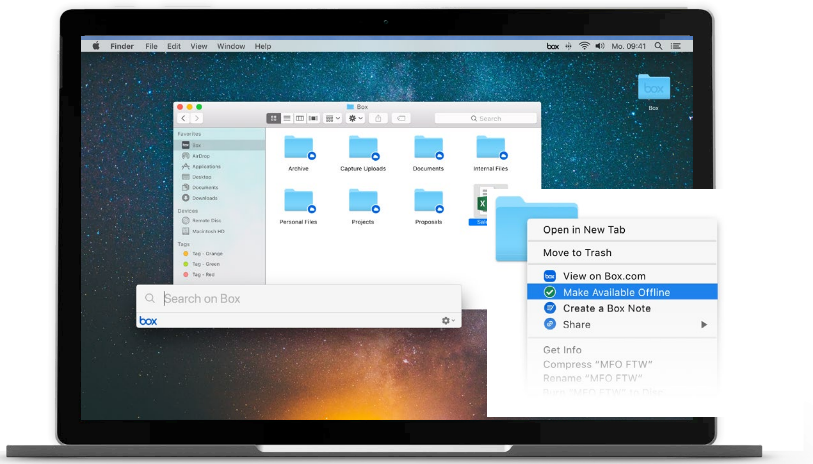
## Box Drive

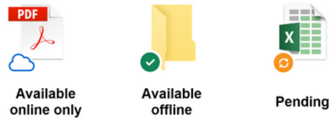
**With Box Drive, you can:**

- Search and view your entire Box folder tree from your desktop
- Upload content to and open files from any Box folder
- Work offline by marking specific folders or files for offline work and have them update on Box as soon as you reconnect to the internet

# Box Drive

## An unlimited cloud drive on the desktop

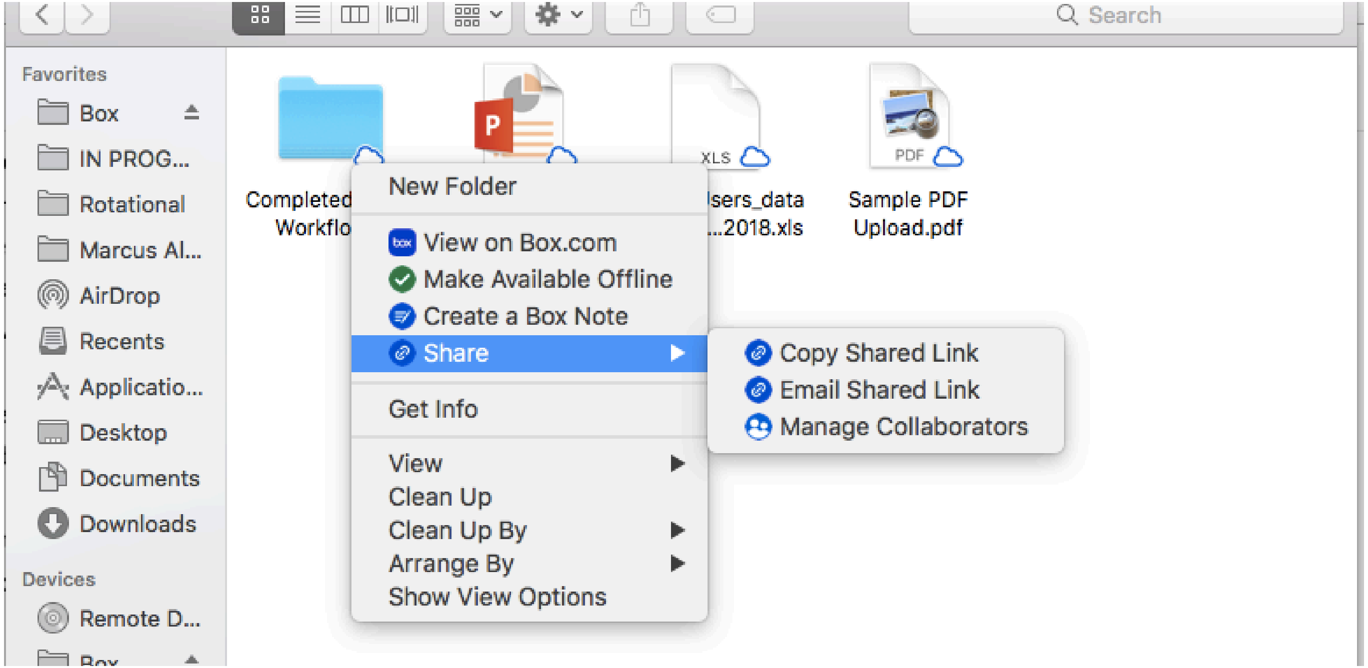



- **Stream your stuff, seamlessly work in the cloud**
  - With all your content streamed to your desktop, it's fast and easy to access your files.
- **Fits the way you work**
  - Box Drive is natively integrated into Windows Explorer and Mac Finder, so it is built into the way you work.
- **Easy to share your workspace**
  - Right click any folder to open on box.com and invite your team to collaborate.
- **Never lose a file again**
  - A stolen laptop or hard drive crash doesn't have to mean lost files. Safely store your work documents and projects in Box Drive.

# Box Drive

## Cloud functionality from the desktop



box

# Question and Answer

# Thank you!

Contact your UNMC IT team with further questions!