



Dropbox Integration
Summer 18

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Dropbox Integration

Integration with cloud-based file sharing platforms has always been an important part of Simpplr's product strategy. This helps employees easily search, update, and securely share your most important files. It also helps keep your intranet's documentation fresh and current. In addition to our existing Google Drive, Box, and Salesforce integrations, we're excited to announce a comparable integration with Dropbox. Dropbox is among the fastest growing file sharing platforms and is gaining momentum after their recent IPO.

Site Owners/Managers can quickly connect files and folders to their Sites, where they can be organized to make them easily navigable. Permission levels can easily be set to control who can view or edit individual files and folders.

Files in Public Sites are accessible to all employees, but can only be edited by Site members (depending on the Read/Write permission settings). Files in Private Sites are only accessible and editable (again, depending on the Read/Write permissions settings) by Site members. The Site Owner will need to connect to Dropbox before the Site can be connected.

Dropbox files are searchable in a variety of ways throughout Simpplr:-

- The global search, accessed through the header search box, will search for all Dropbox files attached to Sites that you have access to (all Public Sites and any Private Sites that you are a member of).
- Searching through **My Profile > Files** will show all of the Dropbox files that you have access to whether they are in your Dropbox, or attached to Sites that you have access to.
- When adding Dropbox files to Content or Feed Posts you can search using the File Manager which allows a range of filters and search options.

Setup

Remote Site Settings

Prior to connecting to Dropbox through Simplr, a System Admin must update the Remote Site Settings.

Go to **Salesforce > Setup > Installed Packages > Simplr > Post Install Instruction**

Package Details
Simplr (Managed)
[Back to List: Installed Package](#)

Installed Package Detail [Uninstall](#) [View Components](#) [Manage Licenses](#) [Become Primary Contact](#) [View Dependencies](#)

Package Name	Simplr	Version Number	1,238.1
Language	English	First Installed Version Number	1.142
Version Name	Spring 2018, v1.238.1	Package Type	Managed
Namespace Prefix	Simplr	Allowed Licenses	25
Publisher	Simplr Inc.	Used Licenses	20
Status	Active	Modified By	Simplr, 5/10/2018 3:47 AM
Expiration Date	3/30/2019		
Description	Simplr release package.		
Post Install Instructions	View		
Installed By	Tori Miller, 9/4/2017 6:59 AM		

Count Towards Limits **Apps** 1 **Tabs** 2 **Objects** 80

This will take you to the Post Install Setup Pages.

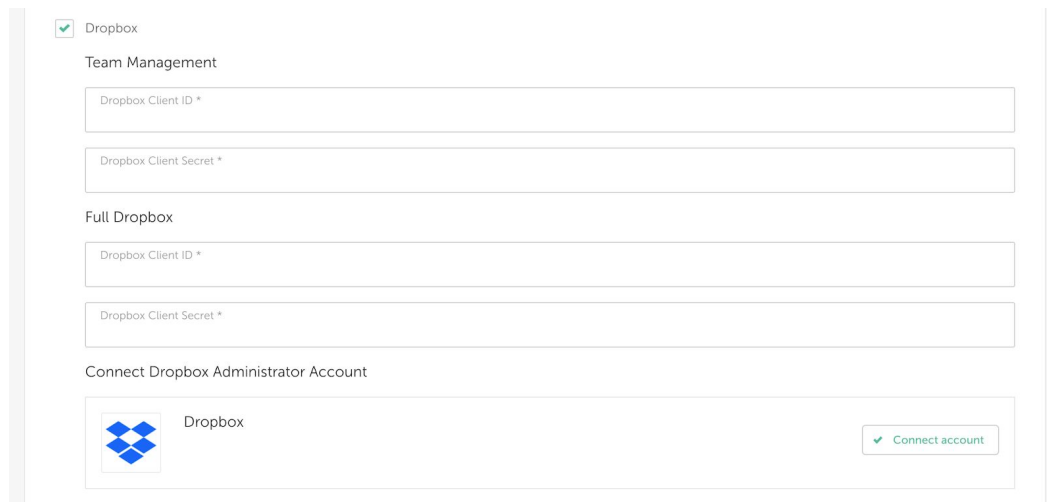
Dropbox

- [Click here](#) to add following URL to Remote Site Settings, if it is not done already.
Remote Site Name - Dropbox_Account
Remote Site URL - https://www.dropbox.com
Disable Protocol Security - Unchecked
Description - Used to initiate Dropbox OAuth and Token workflow
Active - Checked
- [Click here](#) to add following URL to Remote Site Settings, if it is not done already.
Remote Site Name - Dropbox_API
Remote Site URL - https://api.dropboxapi.com
Disable Protocol Security - Unchecked
Description - Used to get Dropbox file and folder information
Active - Checked

In the Dropbox section select 'Click here' for point 1 and then 'Save' on the Remote Site Edit form. Then do the same for point 2.

App Manager Setup

To integrate Dropbox firstly the App Manager must connect their service account to Simpplr on an App Level. This can be done by going to **Manage Application > Integrations**.



The screenshot shows the 'Dropbox' integration setup page. At the top, there is a checked checkbox next to the word 'Dropbox'. Below this, the page is divided into three sections: 'Team Management', 'Full Dropbox', and 'Connect Dropbox Administrator Account'. The 'Team Management' section contains two input fields: 'Dropbox Client ID *' and 'Dropbox Client Secret *'. The 'Full Dropbox' section also contains two input fields: 'Dropbox Client ID *' and 'Dropbox Client Secret *'. The 'Connect Dropbox Administrator Account' section features the Dropbox logo on the left, the text 'Dropbox' in the middle, and a green button with a checkmark and the text 'Connect account' on the right.

The App Manager must enter our Dropbox Client ID and Secret. Please contact our Support team by emailing support@simpplr.com to request our Client ID and Secret and provide your Home Dashboard URL.

Once you have done the above, go to **Manage Application > Integrations**, click “Connect” next to “Dropbox”, and login to your Dropbox service account.

Once the App Manager has connected to Dropbox an Application Root Folder and an All Company Group will be created.

Changing Service account

Before you can change the Dropbox service account you have to disconnect the old account and connect with new account.

Application Root Folder

- When the App is connected to Dropbox an Application Root Folder will be created in the Dropbox service account.
- The folder will be named in the format “*appname* Root”.
- This folder will be accessible through the Dropbox service account
- We use this folder to define our search result parameters when searching for Dropbox folders/files that have been attached to Simplr

All Company Group

- When the App is connected to Dropbox an All Company Group will be created in the Dropbox service account.
- This is also used to define our search parameters when searching for Dropbox folders/files that have been attached to Simplr
- As individual employees connect to Dropbox they will be added to this All Company Group
- Once a employee is added to the All Company Group they will be able to access all Dropbox folders/files that have been added/linked to Public Sites.
- To access the Dropbox folders/files that have been added/linked to Private Sites you must be a member of the Site as well as being in the All Company Group.

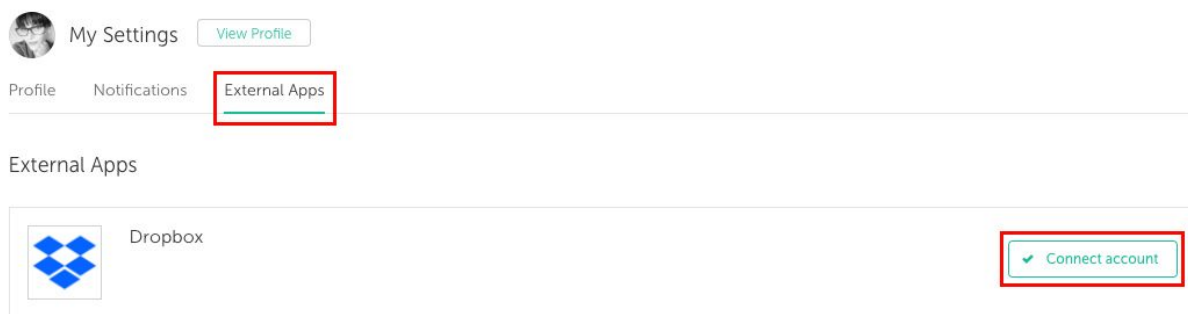
Multiple File Storage Integrations?

It is worth noting that at a given time, only one File Storage integration will be allowed within the application (App Level).

To switch between the File Storage Integrations, an App Manager has to first disconnect the existing integration on an app level and then connect with the other File Storage integration provider.

Employee Setup

Each individual employee needs to connect to their Dropbox account to start using the integration. This can be done by going to **My Settings > External Apps**.



Once an employee connects their Dropbox account they will be added to the All Company Group, and therefore will be able to access all Dropbox folders/files that have been added/linked to Public Sites. Dropbox folders/files in Private Sites are only accessible to Site members.

employees will also now be able to access their own Dropbox folders/files by going to **My Profile > Files** (please see the [My Files](#) section below for more details on this).

Deleted/Deactivated Dropbox account

If an employee's Dropbox account is Deleted or Deactivated it is the admin's responsibility to move any folders from the inactive account. This will not be done within the app.

Site Storage

Once the Site Owner connects to Dropbox, they will have the choice to connect each individual Site that they own to Dropbox by going to **Manage Site > Setup** and selecting 'Dropbox' in the File Storage section.

The screenshot displays the 'Setup' page for a site named 'All Good Co'. At the top, there is a site header with the name 'All Good Co', a star icon, and a 'View Site' button. Below the header is a navigation menu with tabs for 'Setup', 'Members', 'Content', 'Governance', 'Subscriptions', and 'External Apps'. The 'Setup' tab is active. The main content area includes a 'Site name' field with the value 'All Good Co'. Below this is an image upload area with a dashed border and the text 'Drop image here or [Select from computer](#)'. There is an 'About' text area. A 'Category' dropdown menu is set to 'Uncategorized'. The 'File Storage' section is expanded, showing a 'Storage Provider' dropdown set to 'Dropbox Files' and a 'Dropbox root folder permission' dropdown set to 'Read only'. The 'Dropbox root folder permission' dropdown menu is open, showing three options: 'Read only', 'Read and Write', and 'Read and Write'.

The Site owner can set whether the root folder is 'Read Only' or 'Read & Write' at this point. However this can also be changed in the Files tab of the Site.

All Good Co ★ Manage Site
Uncategorized

Dashboard Feed Pages Events Albums **Files** About

Search Site Files... Created, newest ▾

+ Add Files (Drag and drop here)

+ New Folder

Name	Type	Owner	Edited	Options
Dropbox Files	SYSTEM FOLDER	App Manager	May 8, 2018	▾
Content Files	SYSTEM FOLDER	App Manager	Mar 13, 2018	Set Permissions

Set Folder Permissions ✕

Permissions level *
Read and Write ▾

Read only

Read and Write

Cancel Update

- A Root Folder will then be created in their Dropbox for that Site. The Root Folder will have the same name as the Site.
- Dropbox folders/files can then be added to that Site.
- If the Site is Public every employee who has connected to Dropbox will have access to the Dropbox folders/file that are added/linked to the Site.
- If the Site is Private only members of the Site who have connected to Dropbox will have access to the Dropbox folders/file that are added/linked to the Site.
- Once a Site has been connected to Dropbox and a Site Root Folder has been created, a Site Group will be created consisting of all of the members of that Site, this is because folder permissions can be different for Site members and non-members (please see the [Folders Permissions](#) section below for more details on this).

Site Root Folder

From Simpplr

- The Site Root Folder lives in the Site Owner's Dropbox
- When viewed in the Site Owner's Dropbox the folder will have the same name as the Site. When viewed in the Files section of the Site this folder will be named 'Dropbox Files'
- It cannot be deleted by anyone
- Folders/files can be uploaded to the Site Root Folder
- You can only link Dropbox folders to the Site Root Folder
- You cannot move folders/files from any non Dropbox folder to the Site Root Folder
- You can add new folders to the Site Root Folder and subfolders
- You can move files from the Site Root Folder into subfolders
- You can move files between subfolders
- You cannot move files from other System folders into the Site Root Folder
- If you change the name of your Site in Simpplr the name of the Site Root Folder will change in the Site Owner's Dropbox
- If the Site is deactivated in Simpplr, the Site Root Folder remains in the Site Owner's Dropbox with no changes to it. If the Site is then re-activated, there are also no changes to the location or behaviour of the Site Root Folder.

From Dropbox

- The Site Root Folder can be changed in any way that Dropbox normally allows folders to be changed
- You can change the name of the Site Root Folder in Dropbox and it will not affect the behaviour of the folder within Simpplr, however the name will appear changed within the Simpplr Site which could lead to confusion for employees.
- **Caution is advised when making any changes to the Site Root Folder from Dropbox**
- Any changes made to the Site Root Folder can have an affect on its behaviour in Simpplr.

Folder Permissions

When a Site Owner/Manager sets Dropbox as above they can set the permission to either Read/Write or Read.

- Public and Private Sites - members of the Site will inherit the folder permissions set by the Owner/Manager.
- Public Sites - For non-members all folders are Read only.
- Private Sites - Non-members cannot access Dropbox folders.

Examples:-

Public Site-

- employee A is a member
- employee B is not a member
- Owner adds Read/Write folder to Dropbox
- employee A has Read/Write access
- employee B has Read access

Private Site-

- employee A is a member
- employee B is not a member
- Owner adds Read/Write folder to Dropbox
- employee A has Read/Write access
- employee B has no access to the Site.

When a folder is unlinked from a Site it is removed from the Site Root Folder, and the permissions are separated from the Site Group. The unlinked folder's permissions will revert to those of it's parent folder.

New folder

- Site Owners and Managers can add new folders to the Site Root Folder.

The screenshot shows a website management interface. At the top, there is a navigation bar with a profile picture, the name 'Sales', a star icon, and a 'Manage Site' button. Below this is a menu with 'Dashboard', 'Feed', 'Pages', 'Events', 'Albums', 'Files', and 'About'. The 'Files' tab is highlighted with a red box. Below the menu is a search bar labeled 'Search Site Files...'. A dashed box contains a '+ Add Files' button and the text '(Drag and drop here)'. Below this is a breadcrumb trail 'Site Files > Dropbox Files' and a '+ New Dropbox Folder' button, also highlighted with a red box. A table below shows a list of files:

Name	Type	Owner	Edited	Options
Sales stats <small>READ AND WRITE</small>	FOLDER	Tori Miller	May 10, 2018	

The screenshot shows a dialog box titled 'New Dropbox Folder' with a close button (X) in the top right corner. It features a text input field labeled 'Folder name *'. At the bottom right, there are two buttons: 'Cancel' and 'Create'.

- The new folder will live in the Site Root Folder (or a subfolder of the Site Root Folder) in the Site Owner's Dropbox.

Moving Files

- It is possible to move files between Dropbox folders.

- It is not possible to move files from non Dropbox folders to Dropbox folders and vice versa.

Uploading Files

- Site Owners and Managers can upload files to Read and Read/Write folders of Sites they own/manage.
- Site members can upload files to Read/Write folders.
- Non Site members cannot upload files, all folders will appear as Read only to them.
- The newly uploaded file will live in the Site Root Folder (or a subfolder of the Site Root Folder) in the Site Owner's Dropbox.

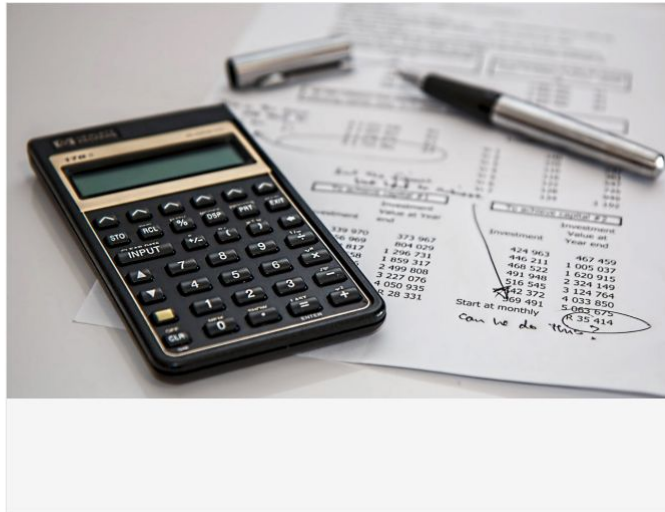
New Versions of Files

- It is not possible to create new versions of DropboxApplication Files (DropboxDocs, DropboxSheets, DropboxSlides etc...)
- It is possible to create new versions of Files (pdf, jpeg, png, tiff etc...). You can view a history of file versions from the file detail page.
- If a folder is set to Read/Write then all members (including Site Owners/Managers) of a Site can create new versions. If a folder is set to Read, only Site Owners/Managers can make new versions
- If an employee makes a new version of a file they do not take on ownership of that file, and the file remains within the Site Root Folder.

calculator-calculation-insurance-finance-53621.jpeg

Like Share

Modified By	Sean Casey
Type	JPEG
Size	84.36 KB
	Download
Location	Dropbox Files >
	View on Dropbox
Edited	2018-05-10 02:56:50
Version	1
	Version History
	Add New Version
	Delete File



Sharing Files

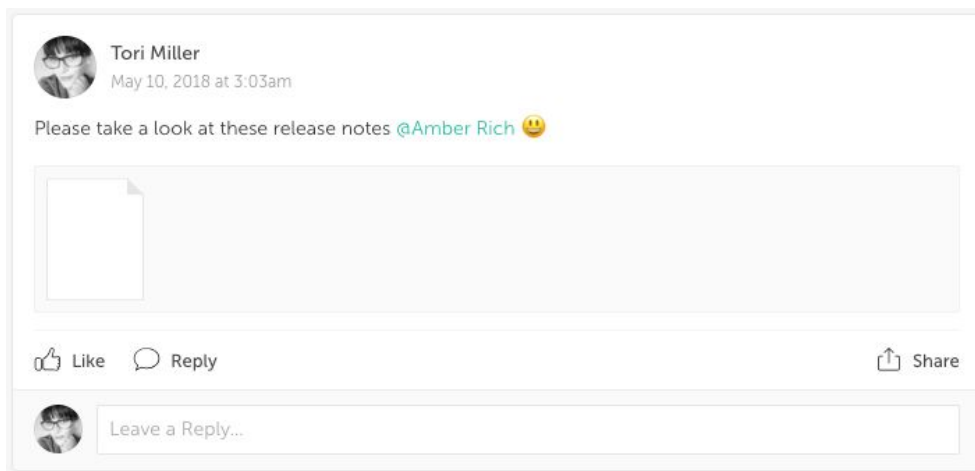
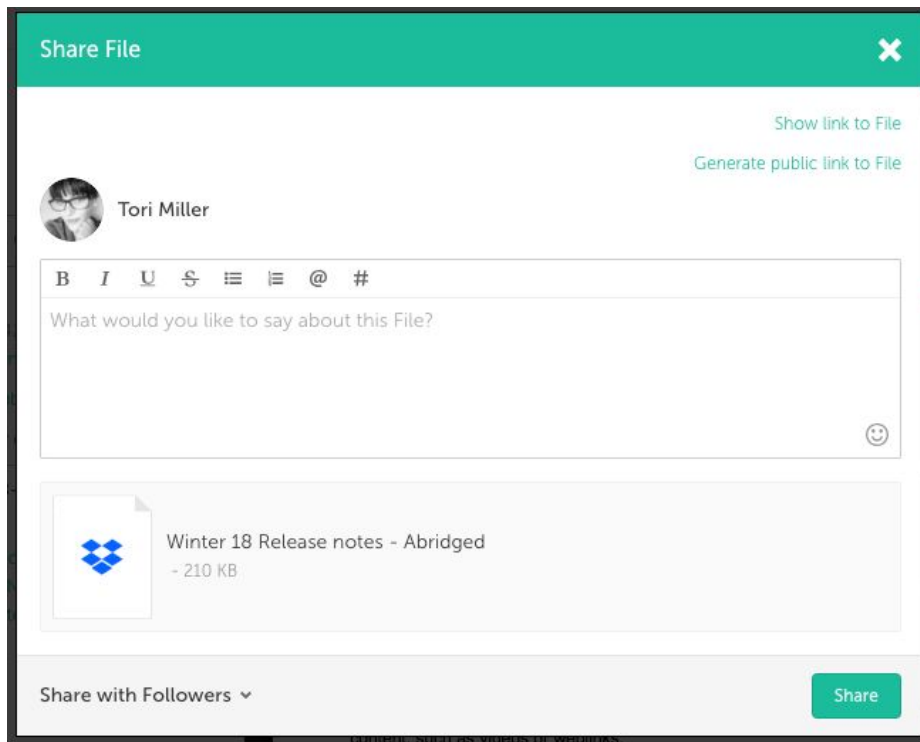
- Dropbox files can be shared into the Feed from the file detail page. Dropbox files from Public Sites can be shared with all employees and on all Sites. Dropbox files from Private Sites can only be shared into the feed of that Site.

calculator-calculation-insurance-finance-53621.jpeg

Like **Share**

Modified By	Sean Casey
Type	JPEG
Size	84.36 KB
	Download
Location	Dropbox Files >
	View on Dropbox
Edited	2018-05-10 02:56:50
Version	1
	Version History
	Add New Version
	Delete File





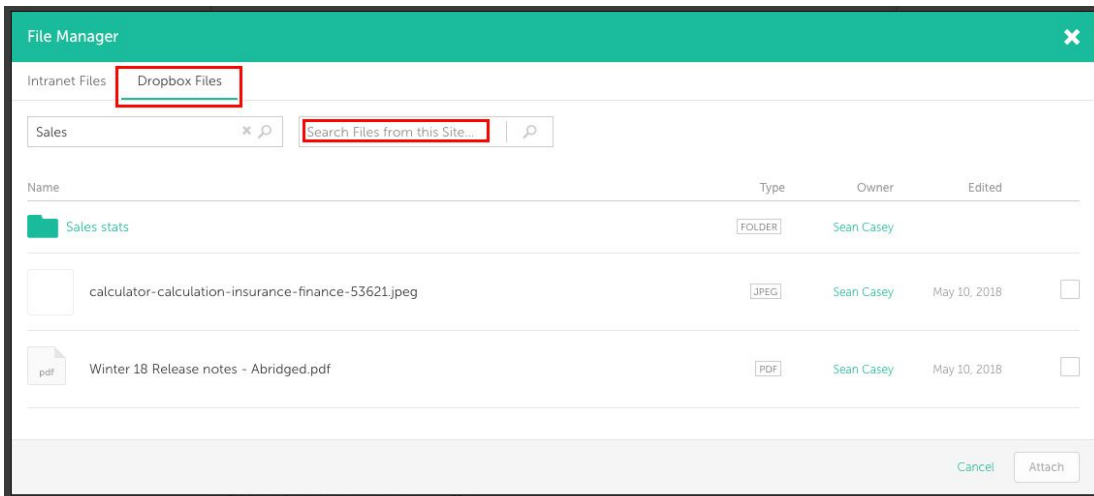
Adding Files to Content

- Dropbox files can be added to Content if the Site is connected to Dropbox and you have connected to Dropbox. Dropbox files from Private Sites can only be added to Content within the Private Site.

Files & Attachments



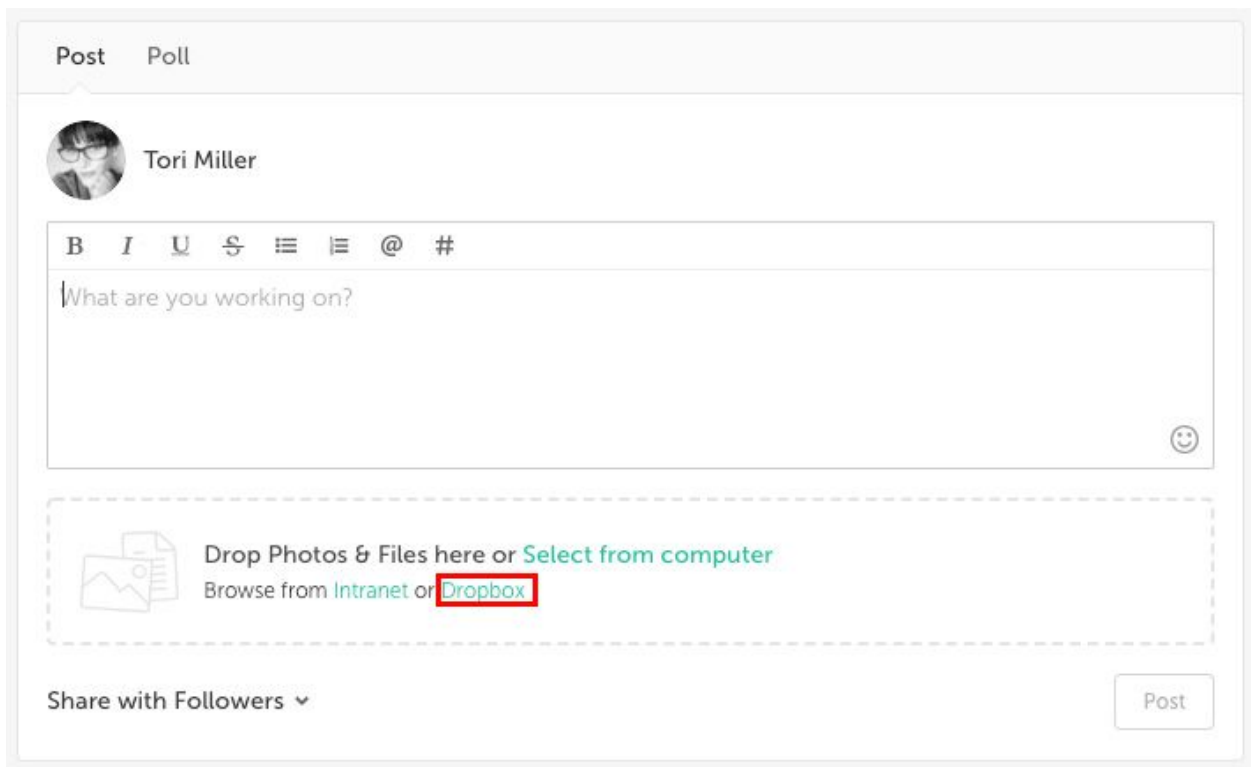
- Adding Dropbox files to Content is done through the File manager.



- When adding files to Content, by default the File Manager will search for files within the Site that you are adding Content to.
- If you remove the name of the Site from the search box, you will see all of the Dropbox files that you have access to. This will not include Dropbox files within Private Sites that you are not a member of.
- You can also search for a specific Site to limit your search to.
- Results can be filtered by 'All', 'This Week', 'Last Week' and 'This Month', and by 'All Owners' or 'Owned by Me'.

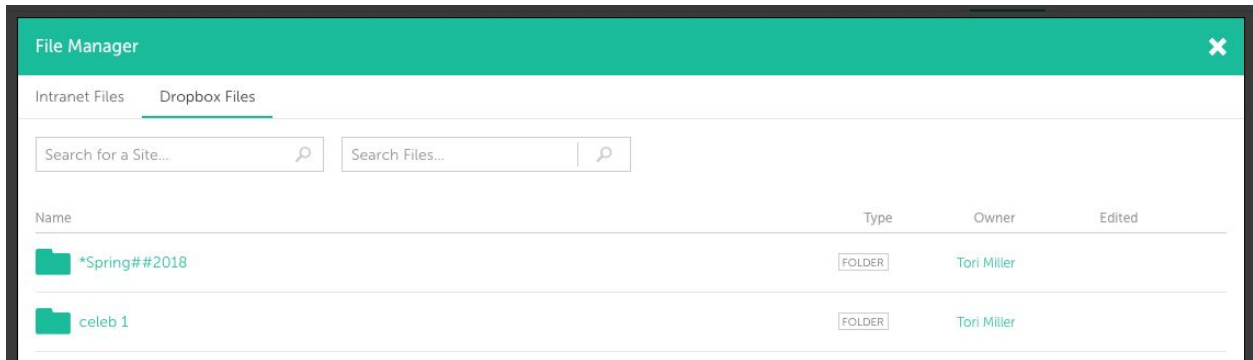
Adding Files to Feed Posts

- Any Dropbox files that you have access to can be added to Feed Posts.
- This is also done through the File Manager.



The screenshot shows a social media post creation interface. At the top, there are tabs for "Post" and "Poll". Below the tabs is a profile picture and the name "Tori Miller". A text input field contains the placeholder text "What are you working on?". Above the text field is a toolbar with icons for bold (B), italic (I), underline (U), link (S), list (≡), list (≡), mention (@), and hashtag (#). Below the text field is a dashed box containing a file upload icon and the text "Drop Photos & Files here or [Select from computer](#)". Below this text are two options: "Browse from [Intranet](#) or [Dropbox](#)". The "Dropbox" link is highlighted with a red box. At the bottom left, there is a dropdown menu labeled "Share with Followers" with a downward arrow. At the bottom right, there is a "Post" button.

- When adding files on your Home Feed, by default the File Manager will search for all of the Dropbox files that you have access to.

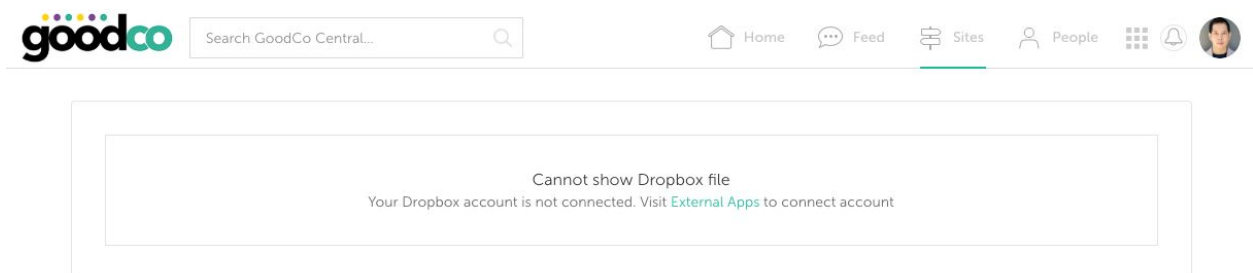


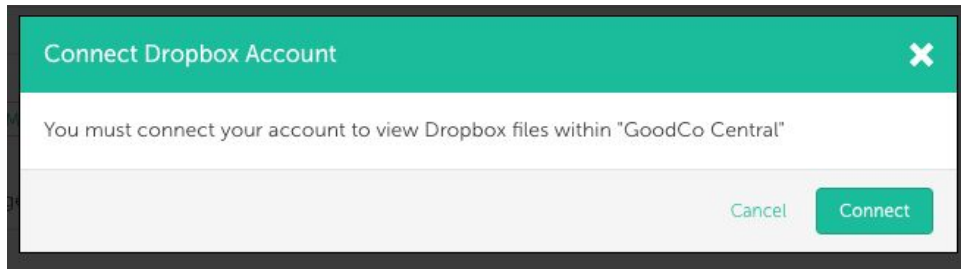
- You can also search for a specific Site to limit your search to.
- Results can be filtered by 'All', 'This Week', 'Last Week' and 'This Month', and by 'All Owners' or 'Owned by Me'.

Viewing Files

Once you have connected to Dropbox you are able to view your own Dropbox folders/files and the Dropbox folders/files of any Sites that you have access to.

- If you have not connected to Dropbox and try to view a Dropbox folder/file you will receive a prompt advising you that you must connect to Dropbox before being able to view the folder/file.





The File Detail page shows the name of the last employee to modify the File (rather than the File owner, as with other Files within Simpplr).

Site Transfer

- If Ownership of the Site is transferred to a new employee then the Site Root Folder will automatically be transferred to the new owner, as long as the new owner is connected to Dropbox.
- The Site Root Folder's location will then be changed to their My Drive and they will take over ownership of the folder. All of the files and folders within the Site Root Folder will also be moved to the new location.
- If the new Site Owner has not connected to Dropbox a warning message will be displayed to advise them that the Site Root Folder will be lost, they then have the option to cancel the transfer, connect to Dropbox and then start the transfer process again.

My Files

Once you have connected to Dropbox you can view all of the files in your Dropbox. These can be viewed by going to **My Profile > Files**.

From **My Profile > Files** you can:-

- Add new folders
- Upload files
- Delete folders/files
- Create new versions of files
- Share files to your Feed
- View your files within Dropbox
- Like files

Searching

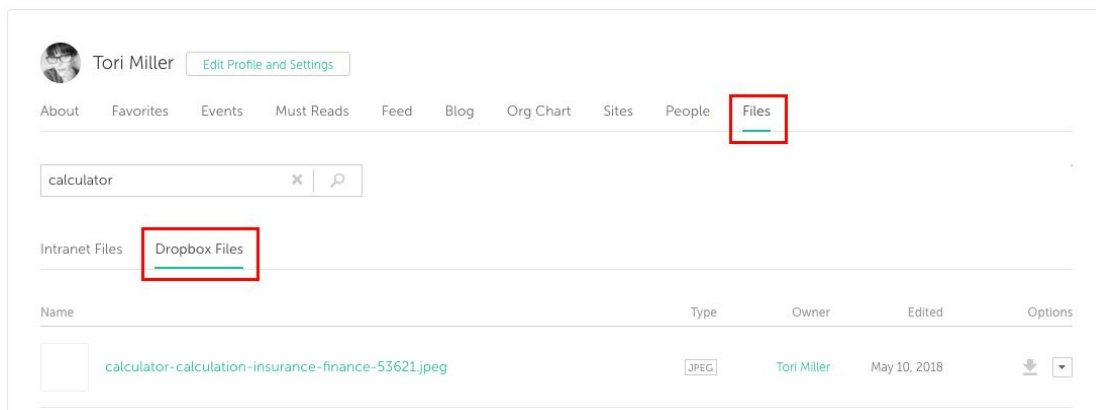
Global Search

The global search, made from the header search box, will search for all Dropbox folders/files that in Sites that you have access to.

The screenshot displays the Goodco global search interface. At the top left is the Goodco logo. A search bar contains the text 'calculator' and a magnifying glass icon. To the right of the search bar are navigation icons for Home, Feed, Sites, People, and a user profile picture. Below the search bar, the results are categorized by source: Top, Dropbox Files (1), Intranet Files (1), and Feed. A message states: 'We've not been able to find any results for you. Try searching the Feed.' On the right side, there are two result sections. The first is 'Dropbox Files (1)' with a red border around the result: 'calculator-calculation-insurance-finance-53621.jpeg' located in 'Sales'. The second is 'Intranet Files (1)' with a result: 'IRS Publication 969.pdf' located in 'Human Resources'.

My Files Search

Searching within **My Profile > Files** will search all of the Dropbox folders/files that you have access to.



Notifications

In order to stop receiving email notifications regarding Dropbox Files, you will need to unsubscribe from notifications within Dropbox. To update your notifications, please:

1. Sign in to <https://www.dropbox.com>
2. Click on your name or avatar at the top of the page

3. Click on 'Settings'
 4. Scroll down to 'Preferences'
 5. Select the notifications you would like to receive by checking/unchecking the square next to each notification type.
-