



SIMPPLR BOX INTEGRATION

Simpplr to Box.com Integration
documentation

Abstract

This documentation provides high level details of integration flow between
Simpplr and Box.com platform.

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INTRODUCTION

Simplr has added Box.com integration which enables users to access their files stored in their Box.com account in Simplr only and even collaborate with other users in their organization with all security provided by the Box.com platform.

To enable the integration to work smoothly we require app manager/ system administrator to connect a box account with admin privileges at the application level. This account is only used to manage user groups/ collaboration in box. This account should have permissions to manage all users/ groups/ collaboration for the enterprise. Each logged in user will have to connect/ authorize their own Box.com account to be able to view/ collaborate on their Box.com files from within Simplr. As all calls to box APIs are made using the credentials/ token, user only views/ accesses the data that they have permission to.

As of now only enterprise version of Box.com is supported for integration.

SITES COLLABORATION

Simpplr maintains permission synchronization between salesforce groups and Box.com groups. To maintain this synchronization Simplr perform below actions on events on a Simplr Site/ Salesforce group:

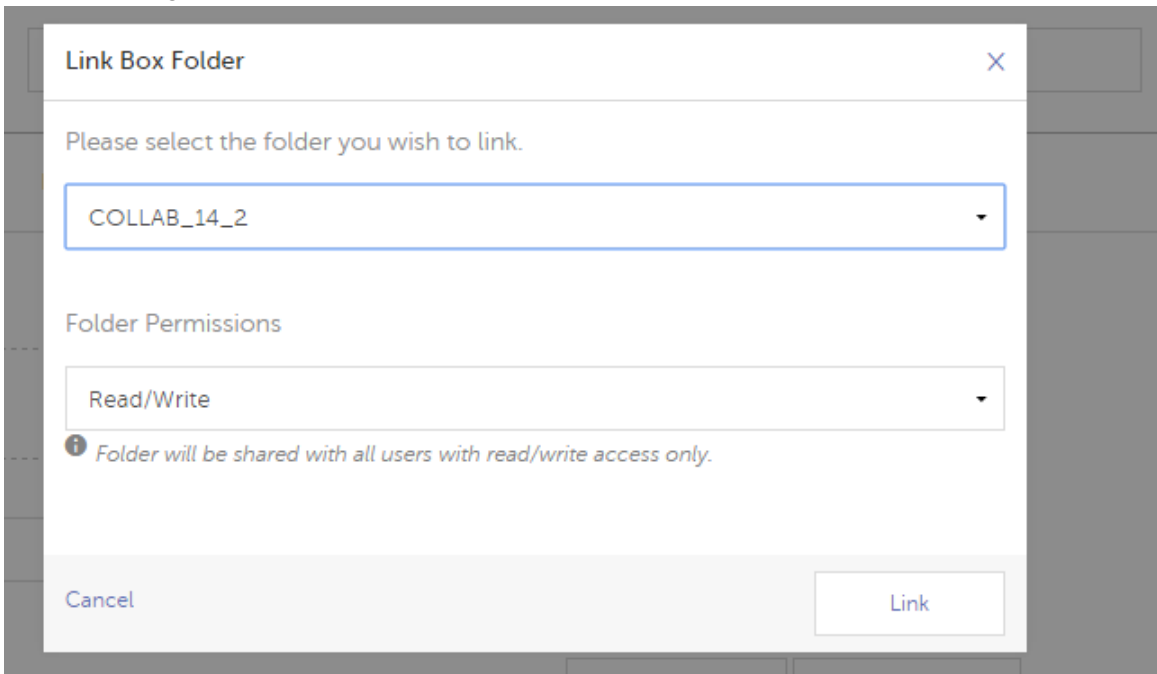
Salesforce event	Action taken by Simplr
Site/ Group creation	<ol style="list-style-type: none"> Create two user groups in Box.com <ul style="list-style-type: none"> Admin Group Member Group Provenance = salesforce Admin Group Name = SIMPPLR_<salesforce group name>_ADMIN Member Group Name = SIMPPLR_<salesforce group name>_MEMBER Site Managers will be added to both admin and member groups. Other site members will be added to the member group.
Add new member to the site/ group	<ol style="list-style-type: none"> Simpplr checks following things before any action <ul style="list-style-type: none"> Check if this new user has already connected his Box.com account with Simplr. Check if this user is manager for this site or standard member If first is true, then as per the user role add this user into corresponding Box.com group related with this salesforce group. If first check fails, this action will be performed whenever the user connects his/ her Box.com account with Simplr.
Update user role in salesforce	<ol style="list-style-type: none"> If user role is updated from manager to standard user then we remove this user from admin group in box created for this group. If member user role is updated to manager then we add this user into admin group.
Remove user from salesforce group	<ol style="list-style-type: none"> We remove user from all user groups related with this salesforce group in Box.com.

Note – Simplr sites are salesforce group hence if Simplr is connected with Box.com then every site has two corresponding Box.com Groups.

GROUP COLLABORATION

Simplr allows users to collaborate on their Box.com files within Simplr only. There are few restrictions in place which are important to know before proceed:

- Only Site manager or above can link an existing box folder or create a new Box folder for collaboration.
- Whenever a new folder is selected for collaboration, two collaboration entries will be created in box, one each for the admin and member group on Box.com related with this Simplr site (Salesforce group).
- Admin group will always have read/write access to these linked/ created folders.
- Member group will have read or read/write permission as per the user selection at the time of linking/ creation in the Simplr site like below:



The screenshot shows a dialog box titled "Link Box Folder" with a close button (X) in the top right corner. The main text inside the dialog reads "Please select the folder you wish to link." Below this is a dropdown menu with "COLLAB_14_2" selected. Underneath is a section titled "Folder Permissions" with a dropdown menu showing "Read/Write". Below the permissions dropdown is a blue information icon followed by the text "Folder will be shared with all users with read/write access only." At the bottom left is a "Cancel" button and at the bottom right is a "Link" button.

Anytime a user links an existing box folder to site, two collaboration entries are created in Box, one each for the corresponding admin and member user group in box for this site/ group. The admin user group is given read write access while the member groups is granted read or read/write access depending on the user selection.

If the site where this folder is linked/ created is a public site, a third collaboration entry is also created allowing all users in the organization read access to the folder.

- Read = previewer
- Read/write = editor

REMOVE FOLDER FROM COLLABORATION

Only a site manager or above can remove a folder from collaboration.

To remove a folder from collaboration with a Simpplr site user have to follow below steps:

1. Open the site
2. Click on Options drop down in front of the Box.com folder you want to remove from collaboration.
3. Select **Unlink Folder** options.
4. This process will only remove collaboration entries for this folder in Box.com created by Simpplr without touching any other permission applied to the folder.

NEW FOLDER CREATION

1. You can also create a new folder from Simpplr.
2. Only a site manager or above can create a new folder in box.com from Simpplr.
3. New folder will be automatically be linked to Simpplr and corresponding collaboration entries will be created in Box.com for this folder.
4. New folder will be created at root of box.com folder.
5. To create a new folder user will follow below steps:
 - a. Go the files tab for the site.
 - b. Click on **New Folder** button.
 - c. Provide the valid name.
 - d. Select the appropriate permission.
 - e. Click on **create** button.

This process will create a new folder at root of the Box.com and will share this folder with other managers/ users of your group.

SEARCH BOX.COM CONTENT

- In Simpplr user can search Box.com content without having to leave Simpplr.
- All API calls are done using the token provided by the currently logged in user so only the content that the user has access to shows up.

OTHER ACTIONS AVAILABEL FOR BOX.COM FILES

From Simpplr site depending on the permissions they have, user can also perform following actions:

- Edit file description.
- Delete a file
- View all versions of a file
- Upload new version for an existing file.
- Share any file as link to Simpplr Feed.

CONNECT/ DISCONNECT YOUR BOX.COM ACCOUNT

As end user you need to connect your Box.com account to Simpplr to be able to view your Box.com files in Simpplr. Even to view files shared by other users, you need to connect your account as without that Simpplr has no way of knowing whether you have the required permission on those files/ folders or not.

When the user connects their Box.com account, Simpplr checks what all sites/ groups user is member/ manager of and adds this user to corresponding user groups in Box.com for each group/ site.

When user disconnects his/ her account, the user is removed from all the user groups in Box.com they had been earlier added to.