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# Chapter 1. Box Secure Storage

*Box Secure Storage is a cloud and collaboration service configured to meet the University security standards for HIPAA data.*

**Table 1. Box Secure Storage**

| Feature         | Description  | Benefits  |
|-----------------|--|---|
| Encryption      | Box uses strong encryption to protect your data at rest and in transit.                                    | Enhanced data security.                           |
| Access Controls | Box allows you to define granular access controls, ensuring only authorized users can access your content. | Control over who can view and edit your data.     |
| Compliance      | Box complies with industry and regulatory standards to keep your data safe and compliant.                  | Meet legal and regulatory requirements with ease. |
| Versioning      | Box provides version control, enabling you to track changes and recover previous versions of your files.   | Easy file version management.                     |

## Chapter 2. Unify Tableau Connector

*The "Unify Tableau Connector" is a software tool that enables seamless integration between Tableau, a popular data visualization platform, and various data sources.*

The Unify Tableau Connector, also known as Unify BI, is a web data connector designed to empower Tableau users by enabling them to craft queries to UM Analytics subject areas and retrieve data for the purpose of crafting reports and visualizations in Tableau. In order to utilize the Unify Tableau Connector, it's imperative to possess Authoring access to one or more UM Analytics subject areas. It's important to note that Unify BI operates in accordance with an individual's UM Analytics security permissions; functional or departmental accounts are not suitable for Unify BI data extractions.

### **Unify Tableau Connector: About**

Unify BI is a valuable plugin designed to facilitate Tableau users' access to UM Analytics as a robust data source. This plugin enables seamless export of UM Analytics queries into Tableau for in-depth reporting and analysis. Unify BI boasts several noteworthy features, including:

1. **Reporting on Governed Data Sources:** With Unify BI, Tableau users can effortlessly create reports within Tableau using UM Analytics data sources, ensuring compliance with governance and data management standards.
2. **Utilizing Existing UM Analytics Reports:** Unify BI permits the incorporation of pre-existing UM Analytics reports directly into Tableau, streamlining the reporting process and leveraging the data that's already available.
3. **Performing Joins in Tableau:** Tableau users can harness Unify BI to perform data joins between two UM Analytics data sources, enhancing their ability to analyze and visualize data relationships effectively.

Unify BI serves as a bridge between UM Analytics and Tableau, empowering users to harness the full potential of their data for insightful reporting and visualizations

# Chapter 3. Data, Documents & Files

*Working within Files and Folder*

## **Box Secure Storage: Work with files and folders**

Box Secure Storage is a cloud-based storage and collaboration solution tailored to align with the University's stringent security standards, particularly those governing HIPAA data. To comply with UMN security requirements, specific features of Box have been either deactivated or fine-tuned to meet the stringent compliance criteria. This versatile platform can securely accommodate a wide range of sensitive data, such as PHI, SSN, and driver's license information, among others. However, please be aware that the Box Secure Storage service is not suitable for PCI data, particularly data associated with credit cardholders.

## **Get Started with Box**

To create a Box account and enable Duo Multi-Factor Authentication, follow these steps:

1. Visit the Box account creation page on the UMN website.
2. Follow the account setup instructions, providing the necessary information.
3. During the setup process, you will be prompted to enable Duo Multi-Factor Authentication. This added security layer is mandatory for accessing UMN Box Secure Storage.
4. Follow the prompts to configure and link your Duo account to your Box account.
5. Once activated, you'll be required to use Duo Multi-Factor Authentication in addition to your password for enhanced security during login.

By following these steps, you'll have a Box account with Duo Multi-Factor Authentication, ensuring an extra level of protection for your UMN Box Secure Storage access.

## Google Drives and Folders

*Google Drives and Folders are core components of Google Workspace, providing cloud-based storage and organization of digital content.*

Google Drives and Folders are fundamental elements of Google Workspace, a cloud-based productivity and collaboration suite. They play a central role in managing and organizing digital content for individuals and teams.

## Google Drive

Google Drive is a cloud storage service offered by Google. It serves as a secure repository for various types of digital files, such as documents, images, videos, and more. Key features of Google Drive include:

- **File Storage:** Users can upload, store, and manage files of different formats in Google Drive.
- **Real-time Collaboration:** Google Drive supports real-time collaboration on documents, enabling multiple users to edit and comment simultaneously.
- **Integration:** It seamlessly integrates with other Google Workspace apps like Google Docs, Sheets, and Slides.
- **Access Control:** Users can control access to their files, sharing them with specific individuals or making them publicly accessible.
- **Sync:** Google Drive offers synchronization with local devices, making files accessible both online and offline.

## Google Folders

Google Folders, often referred to as Google Drive Folders, are organizational containers within Google Drive. They are used to structure and categorize files, providing an efficient way to manage and locate content. Key features of Google Folders include:

- **Organization:** Folders allow users to group related files together, creating a logical structure for their content.
- **Access Control:** Folder-level permissions can be set, ensuring that only authorized users can view or edit the folder's contents.
- **Collaboration:** Folders can be shared with others, facilitating collaborative work on a set of documents within the folder.
- **Search and Navigation:** Folders aid in easy searching and navigation within Google Drive, improving content discoverability.
- **Drag-and-Drop:** Users can drag and drop files into folders, simplifying the process of file organization.

## Conclusion

In summary, Google Drives and Folders are integral components of Google Workspace, enhancing productivity and content management. Google Drive offers cloud storage and collaboration capabilities, while Google Folders provide a structured way to organize and categorize digital content. Understanding how to effectively utilize Google Drives and Folders is essential for efficient digital asset management and collaborative work in the cloud.

## Google Drive

### *Google Drive: Work with Files and Folders*

The self-help guide for Google Drive offers step-by-step instructions for various common tasks. These include organizing and locating files and folders, collaborating and co-editing documents, and downloading and printing files.

### **Getting Started: What is Google Drive?**

Google Drive is a versatile document creation, management, and collaborative tool accessible to University of Minnesota students, faculty, staff, and alumni, made available through Google Workspace for Education Plus.



## Chapter 4. Jadu CXM Workflows

*Jadu CXM is a customer experience management platform designed to help organizations deliver exceptional and personalized customer experiences.*

This self-help guide provides a step-by-step walkthrough for establishing workflows for Jadu XFP forms. It comprehensively outlines the steps involved in collecting the necessary information, generating the case in CXM, and subsequently linking your XFP form to the CXM system.

### **What is CXM?**

Jadu CXM, the workflow component, is employed in tandem with Jadu XFP forms to facilitate the creation and oversight of form routing and approval processes. CXM harnesses the power of a business engine, constructing its workflow functionality through the implementation of business rules and logical criteria. This synergy between CXM and XFP streamlines and automates the handling of form-related processes within your organization.

## Jadu XFP Online Forms Step by Step

### *Creating Online Forms*

This self-help guide takes you through the process of creating a form, setting up the page elements (such as text fields, drop downs check boxes) and the corresponding properties, and managing the submitted forms. Jadu XFP is also known as Jadu XForms Professional and Jadu XForms Pro.

1. Accessing Jadu XFP: Log in to your Jadu XFP account or access the XFP platform through your organization's designated portal.
2. Creating a New Form: Once logged in, find the option to create a new form. This is typically located in the dashboard or similar menu.
3. Form Configuration: Configure your form's settings. This includes specifying a form title, description, and any additional information you want to provide to form users.
4. Adding Form Fields: Choose the type of fields you want to include in your form (text fields, checkboxes, radio buttons, dropdowns, etc) Add thes fields to your form, and configure their labels, options, and validation settings as needed.