



Folder Structure Basics

Folder Structure Methodology



Content

- What **root level folders** make sense for your org?
- What are their sub folders?
- What content do you need in those folders?

Access

- Who needs access?
- Are different **access levels** needed or are **Groups** appropriate?
- Are there any particular **security needs** around any of your content?

Ownership

- Who **owns** and **maintains** your content?
- Who will need administrative access to your structure (Group or Co Admins)
- Migrate Content – How will your content get into your Box account?



Folder Structure Best Practices

- Waterfall Permissioning
 - More restricted content should live at a higher level
 - One type of access can trickle down
- 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



Type of Folder Structure

Open

An open folder structure means everyone will have the ability to create root level folders and files.

- Lowest level of admin overhead
 - Users are free to create what they need to get their work done
 - Can pre-load departmental or pre-defined collaboration workspaces prior to launch
- Allows for true personal workspace
- Higher user adoption due to less folder creation restriction.
- Increased chance of content sprawl/folder duplication (can be mitigated by training)



Type of Folder Structure

Closed

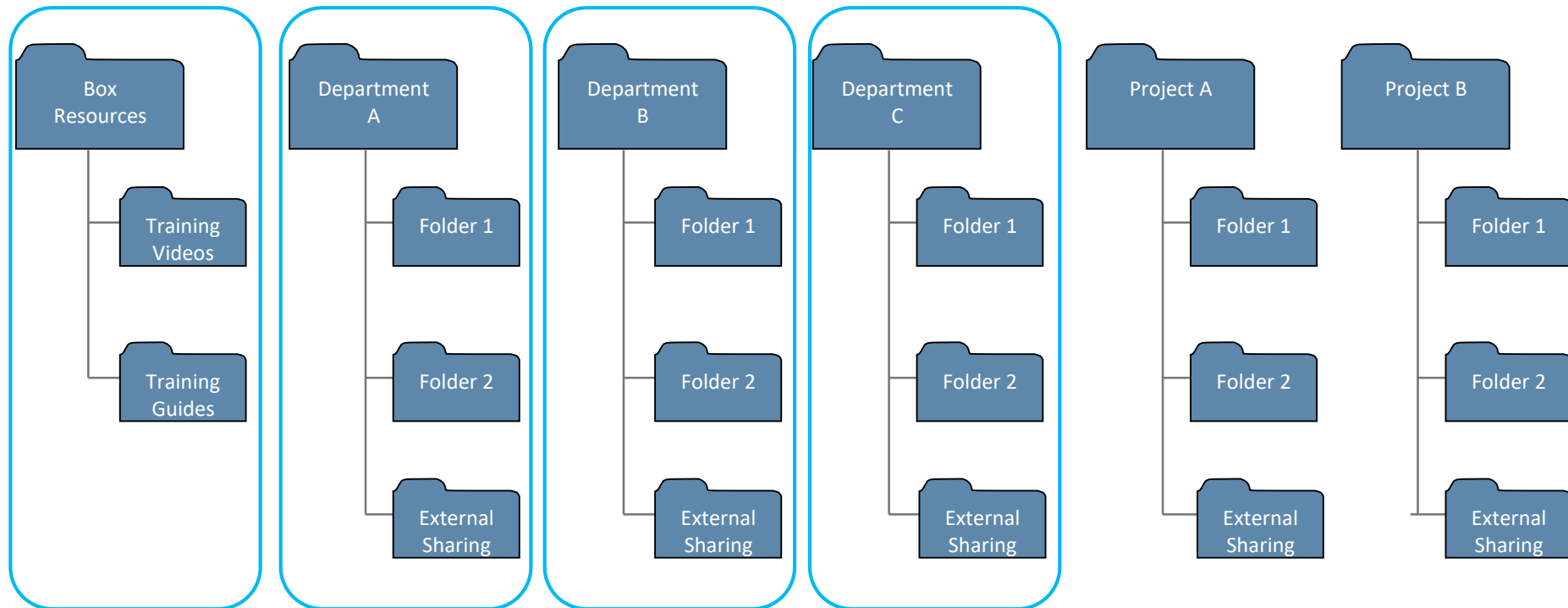
Admin has full control over the root level folders.

- Highest level of admin overhead
 - Admins must provision folder access to all users
 - Admins must manage folder properties for all folders (unless co-owner is designated)
- User experience drawbacks
 - Non-intuitive Box Sync experience
 - Users cannot create their own Personal Workspaces (Admins must do this)
 - Must work within pre-defined structure
- Minimizes risk of content sprawl
- Increased risk of lower user adoption



Folder Structure Discussion

Holistic View of Box Content



↑ ————— **Groups** ————— ↑

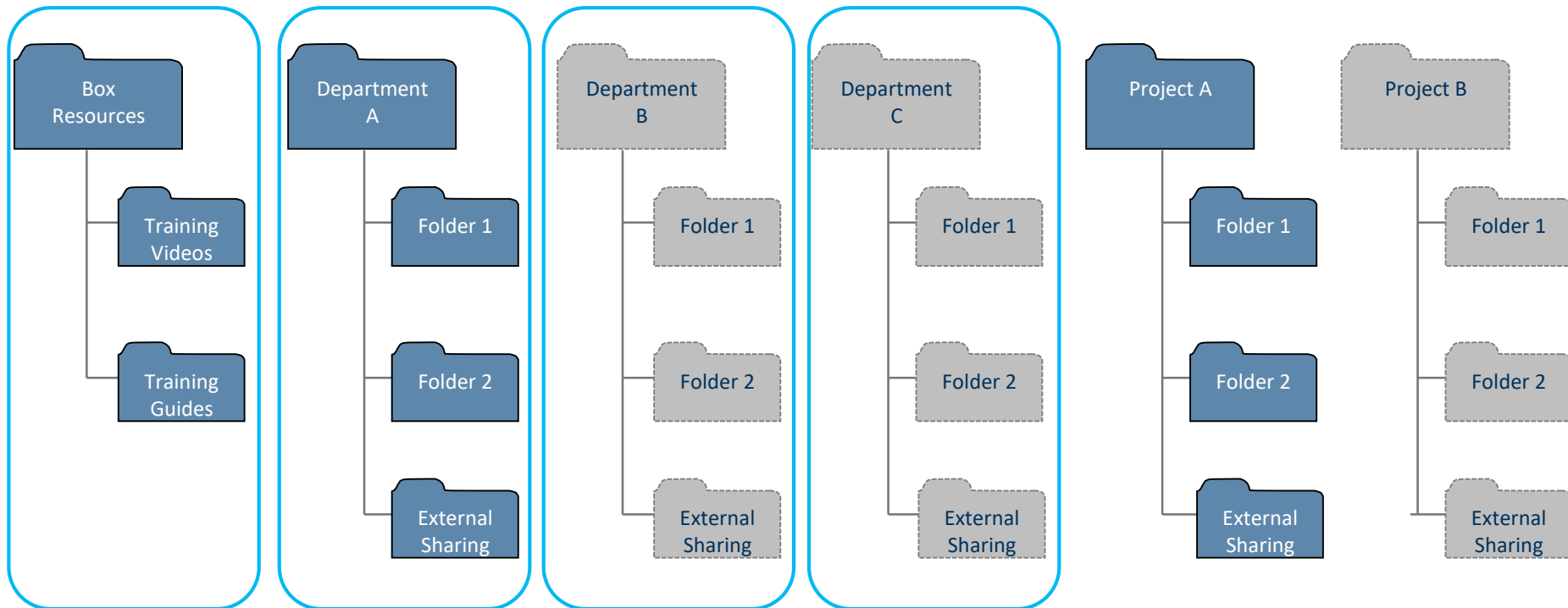
Considerations

- Use the Groups function to set folder access and permissions to a set of users
- Assign Group Admins to have administrative rights to a specific group



Folder Structure Discussion

A User is Invited Into Folders



↑ Groups ↑

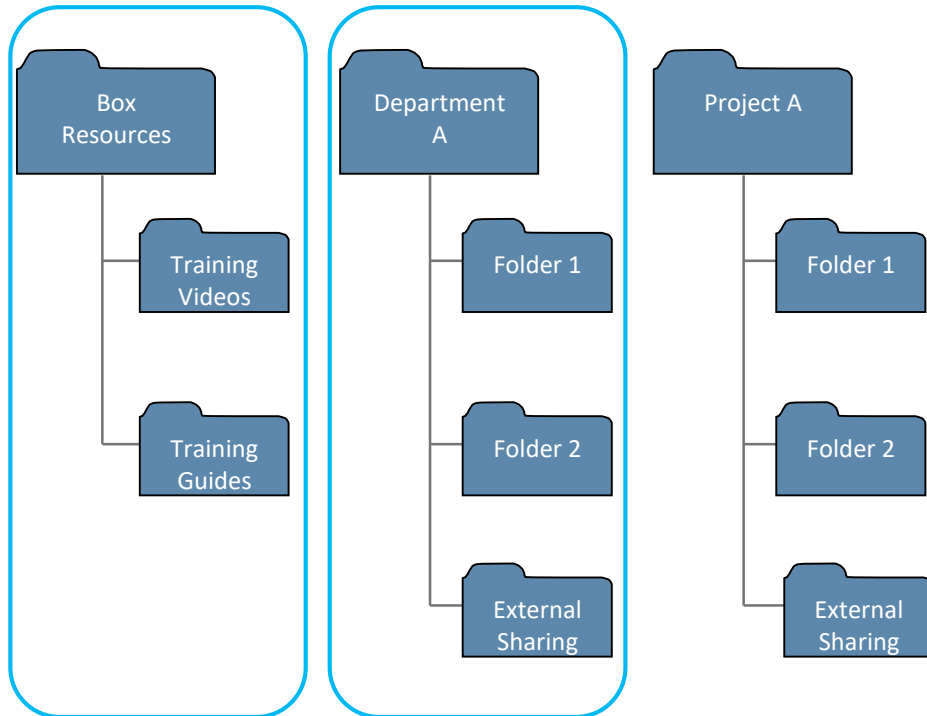
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Folder Structure Discussion

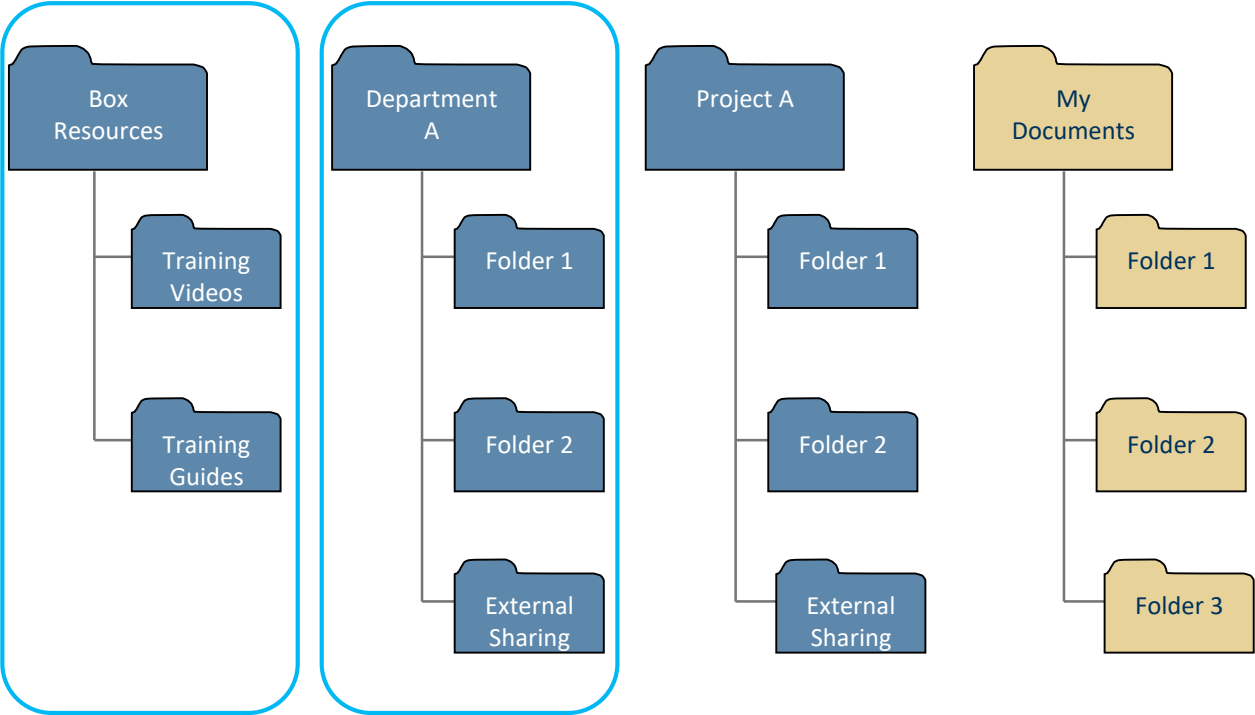
End User Perspective





Folder Structure Discussion

End User Perspective





Department Share

Waterfall Permissions + Folder Security

Collaboration Roles

- In any given folder, collaborators will have a “role” assigned to them
- Role remains the same in all subfolders beneath

General Box Collaboration Rule:

- 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

Folder-level Security Settings

- Folder security settings (shown to the right) are managed by folder owner/co-owner
- Security settings “trickle down” to subfolders

Collaboration

Invitation Restrictions

Choose who can collaborate in this folder and how they can join.

- ☐ Only Owners and Co-owners can send collaborator invites
- ☐ Restrict collaboration to within @company
- ☐ Hide collaborators ⓘ
- ☐ Allow people who can access this folder from a shared link to join ⓘ

Allow users to join as: Editor

Shared Links

Restrict who can access shared links for this folder.

- ☐ Restrict shared links in this folder to Collaborators Only

For: Files and Folders

Uploading

Email Uploads

Allow people in this folder to upload files via email.

- ☐ Allow uploads to this folder via email ⓘ
- ☐ Overwrite same-name files when uploading by email or widget

Automated Actions

Deletion and Unshare

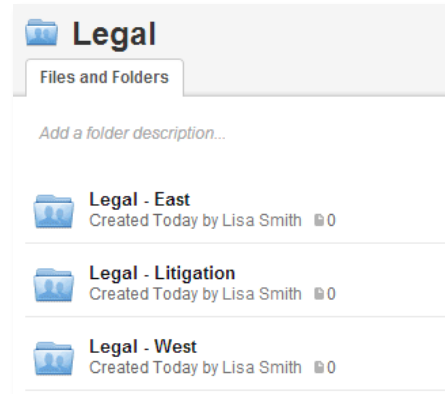
Select a date for automated deletion and un-sharing of this folder.

- ☐ Auto-delete this folder on a selected date
- ☐ Un-share this folder on a selected date

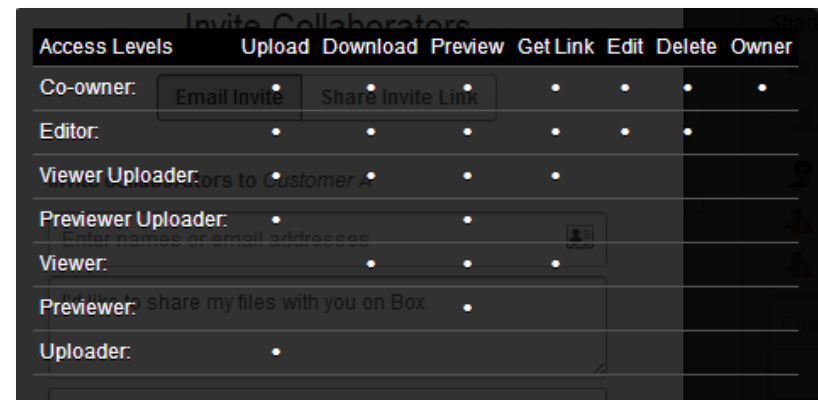
Cross Department Collaboration



- Ensure **naming conventions** are clear. Users are invited at different points:



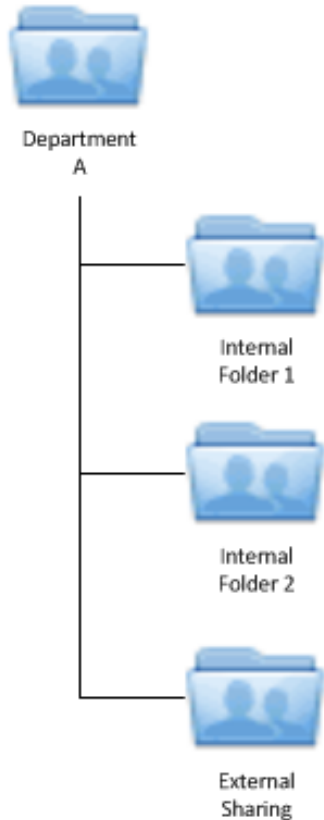
- **Collaboration access levels:**
 - Legal – East
 - Legal – East users: Editor
 - All other users: Viewer
 - Legal – West
 - Legal – West users: Editor
 - Legal – East leads: Viewer
 - Executives: Editor



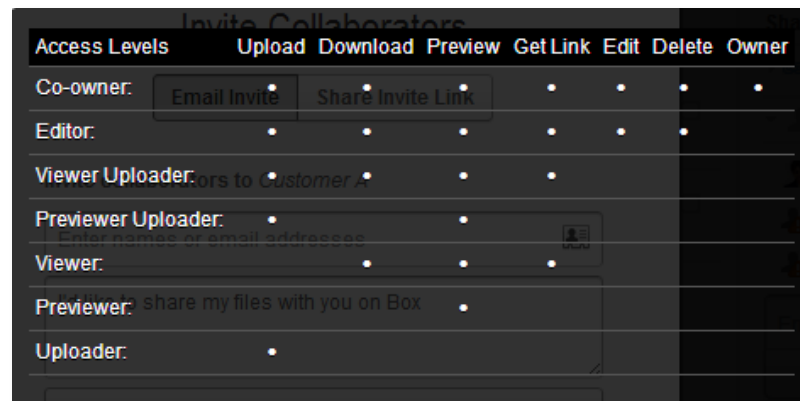


External Collaboration

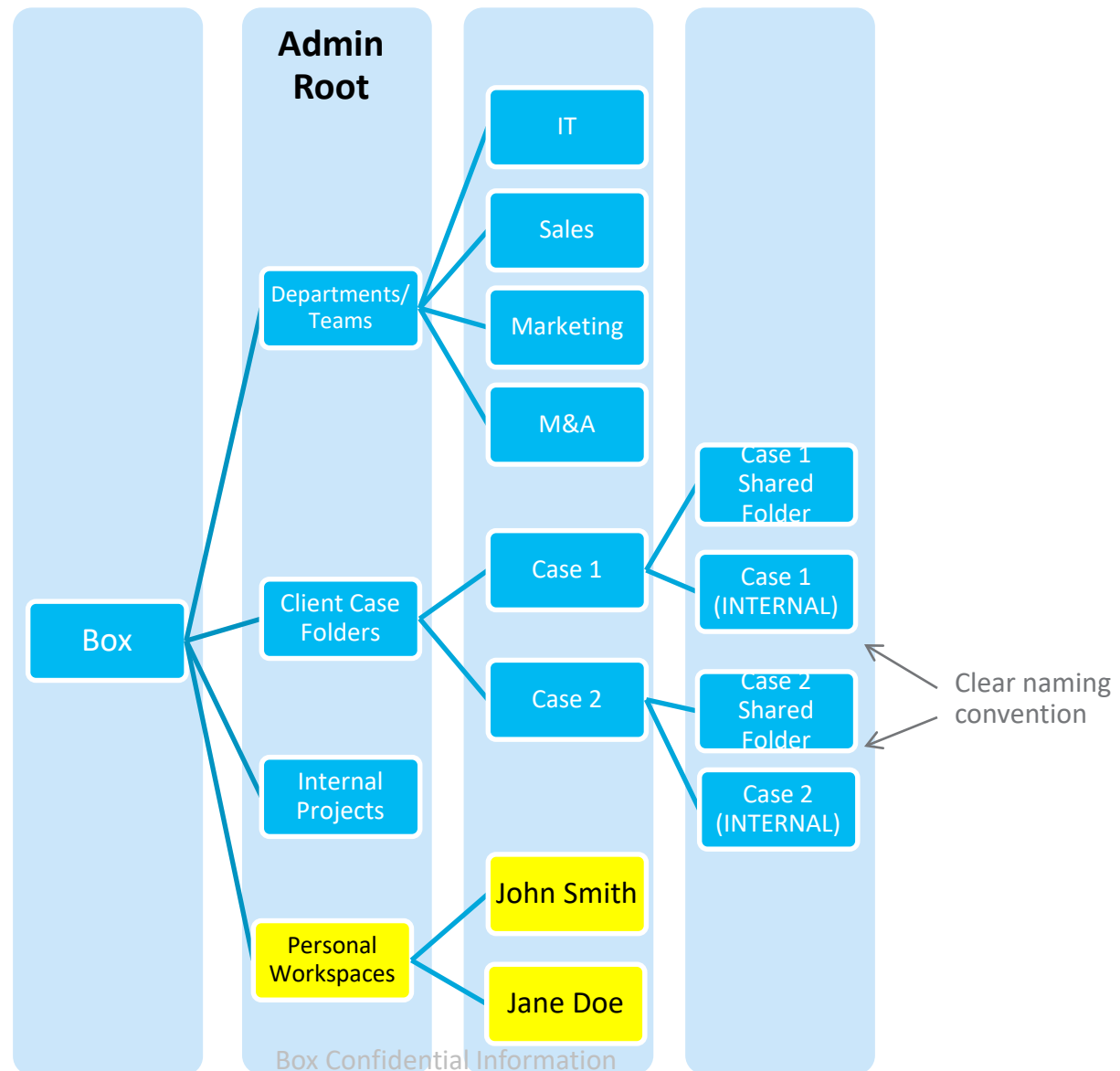
i.e. vendors, contractors, prospects



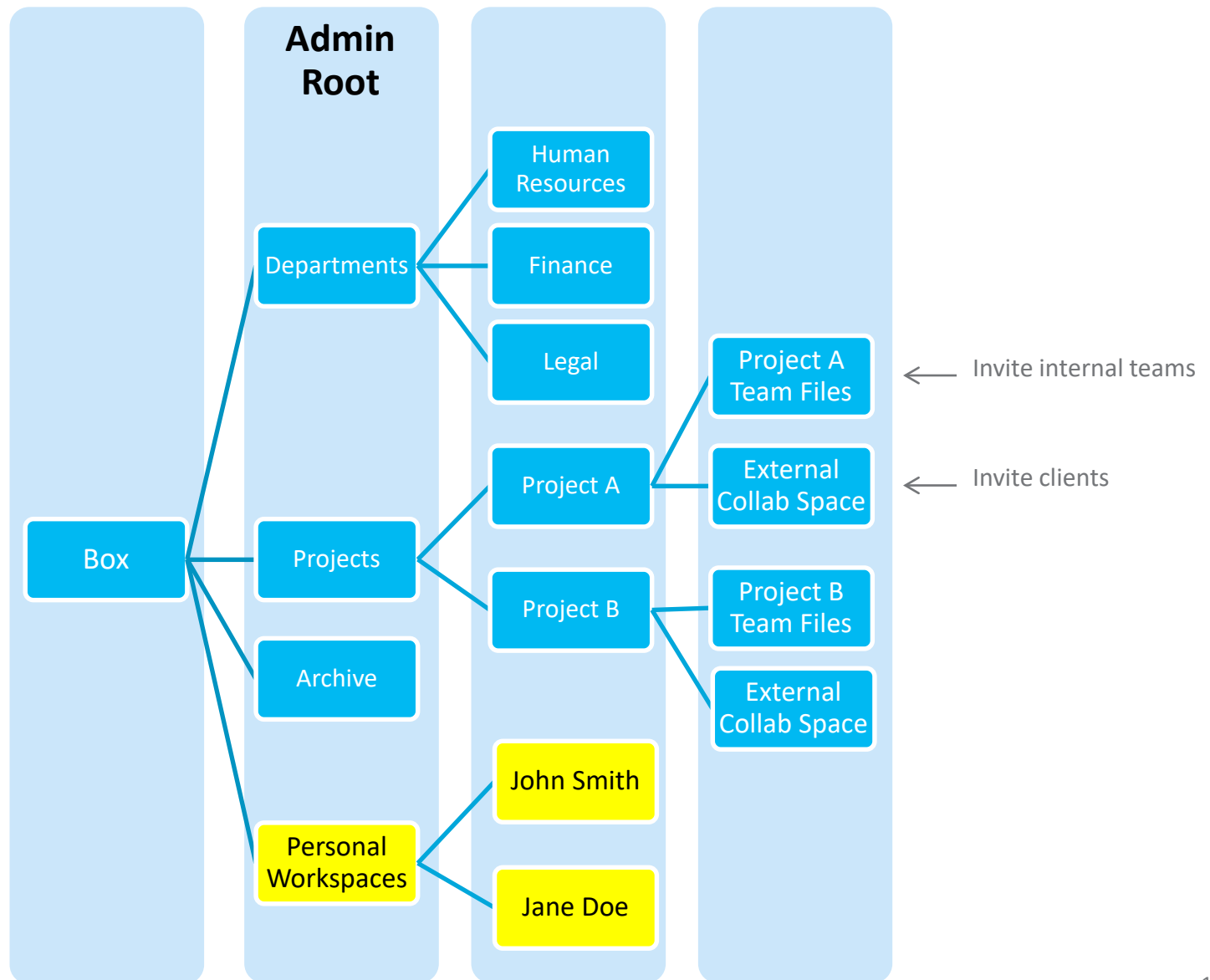
- Users invited at “Department A” will have the same permissions in all subfolders
- Create separate workspace for external collaboration:
 - Within Department Folder OR
 - Create separate root folder in root for External Collaboration



Sample Folder Structure



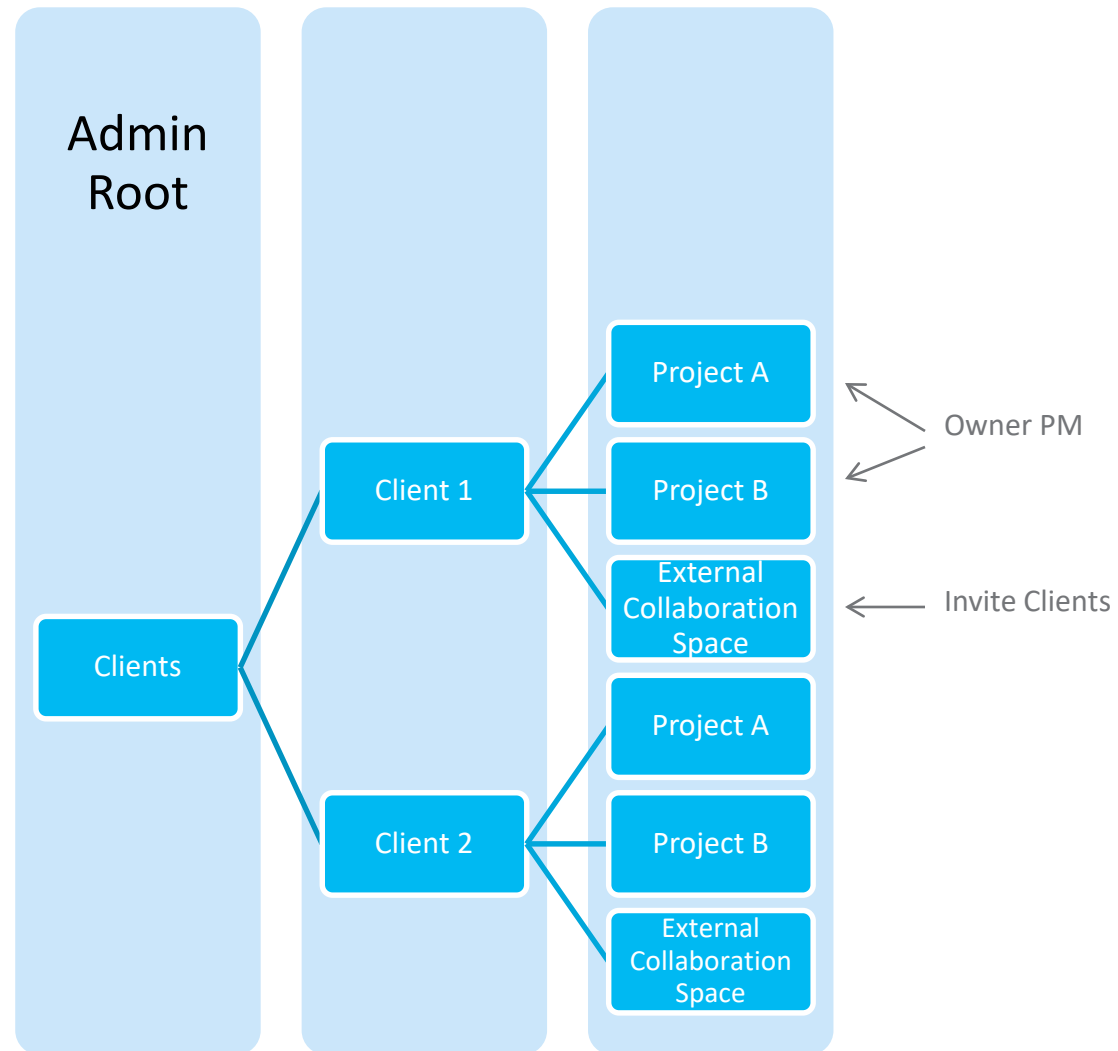
Sample Folder Structure Continued





Sample Folder Structure Continued

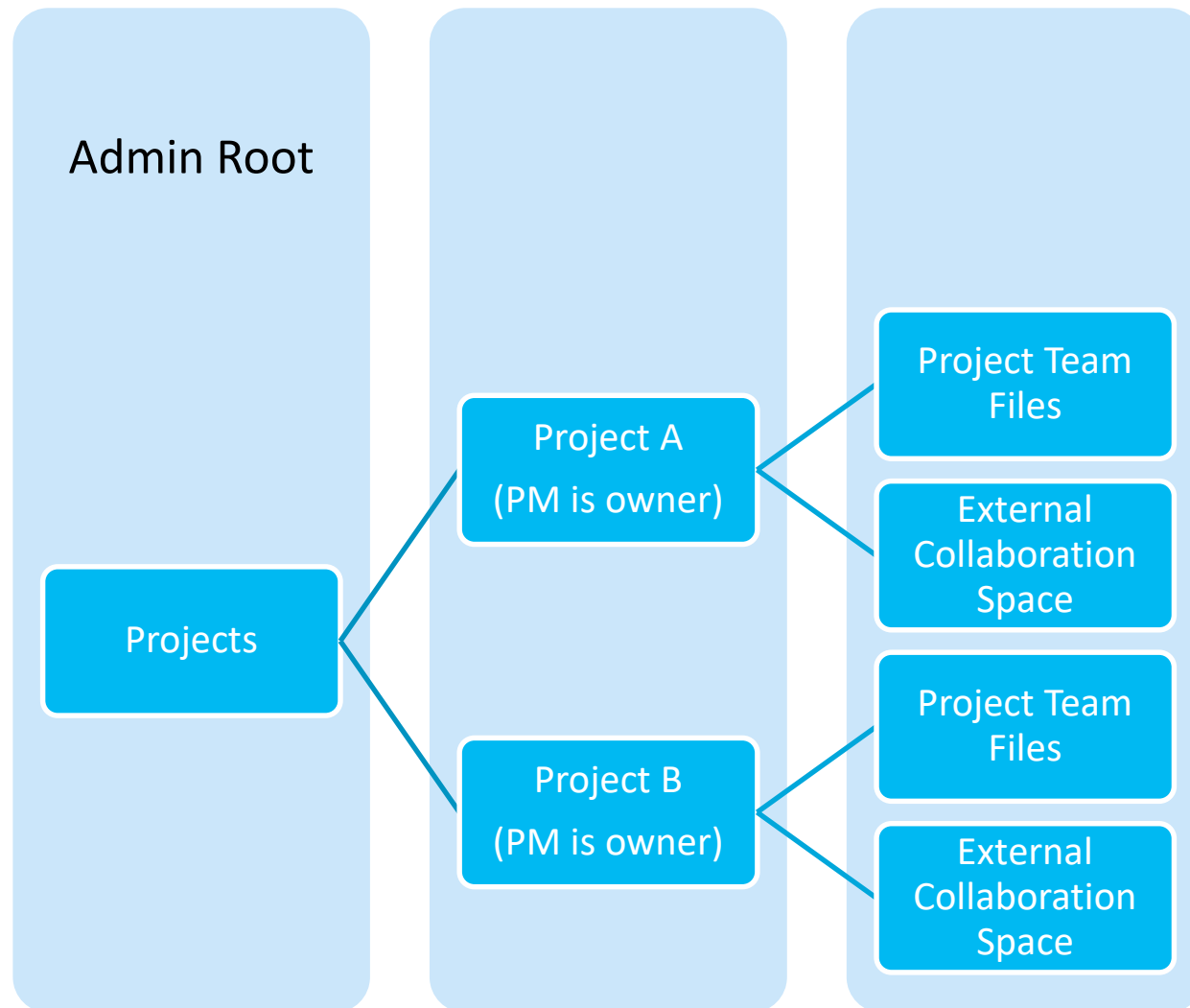
Project Management – Sort by Client





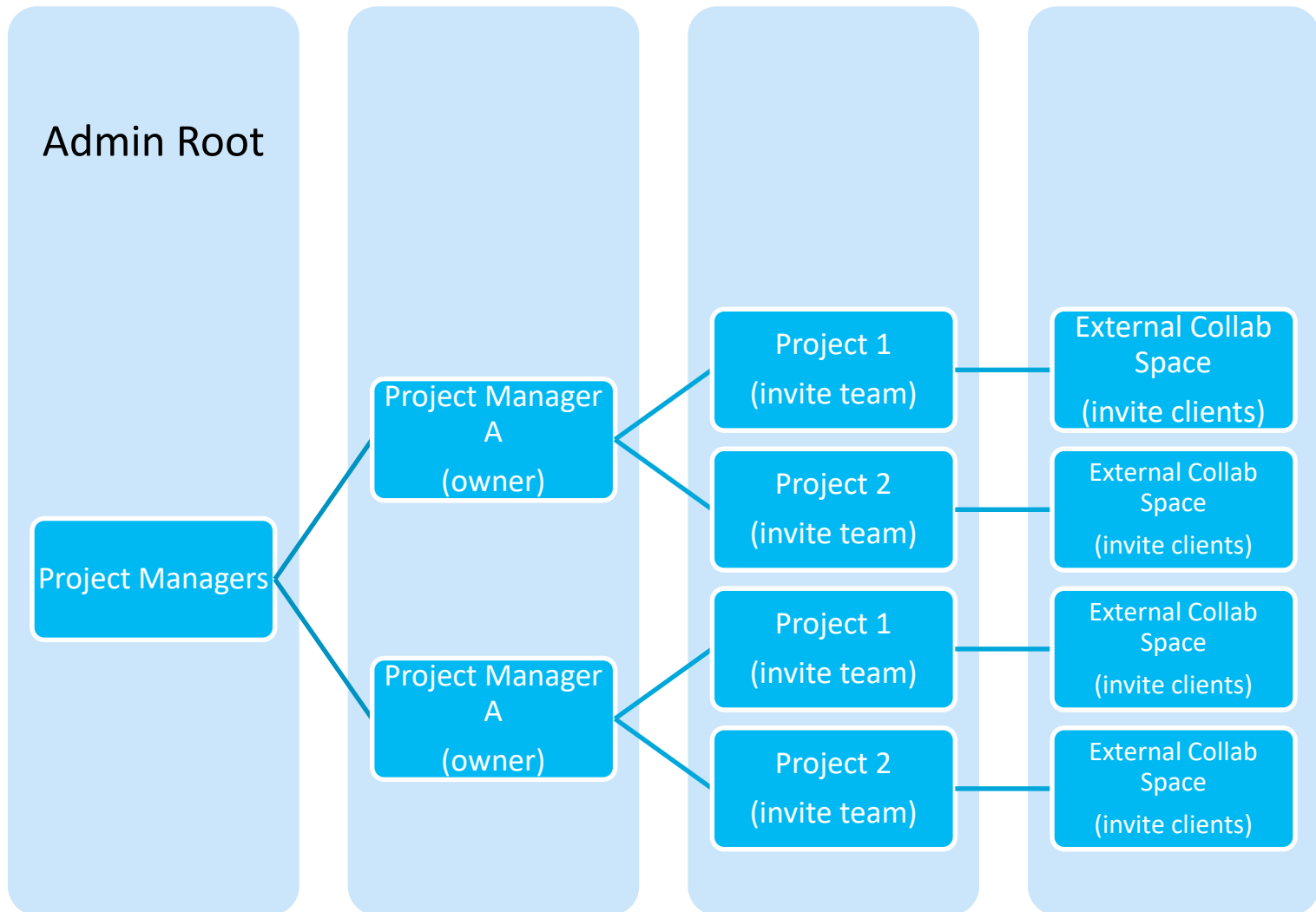
Sample Folder Structure Continued

Project Management – Sort by Project

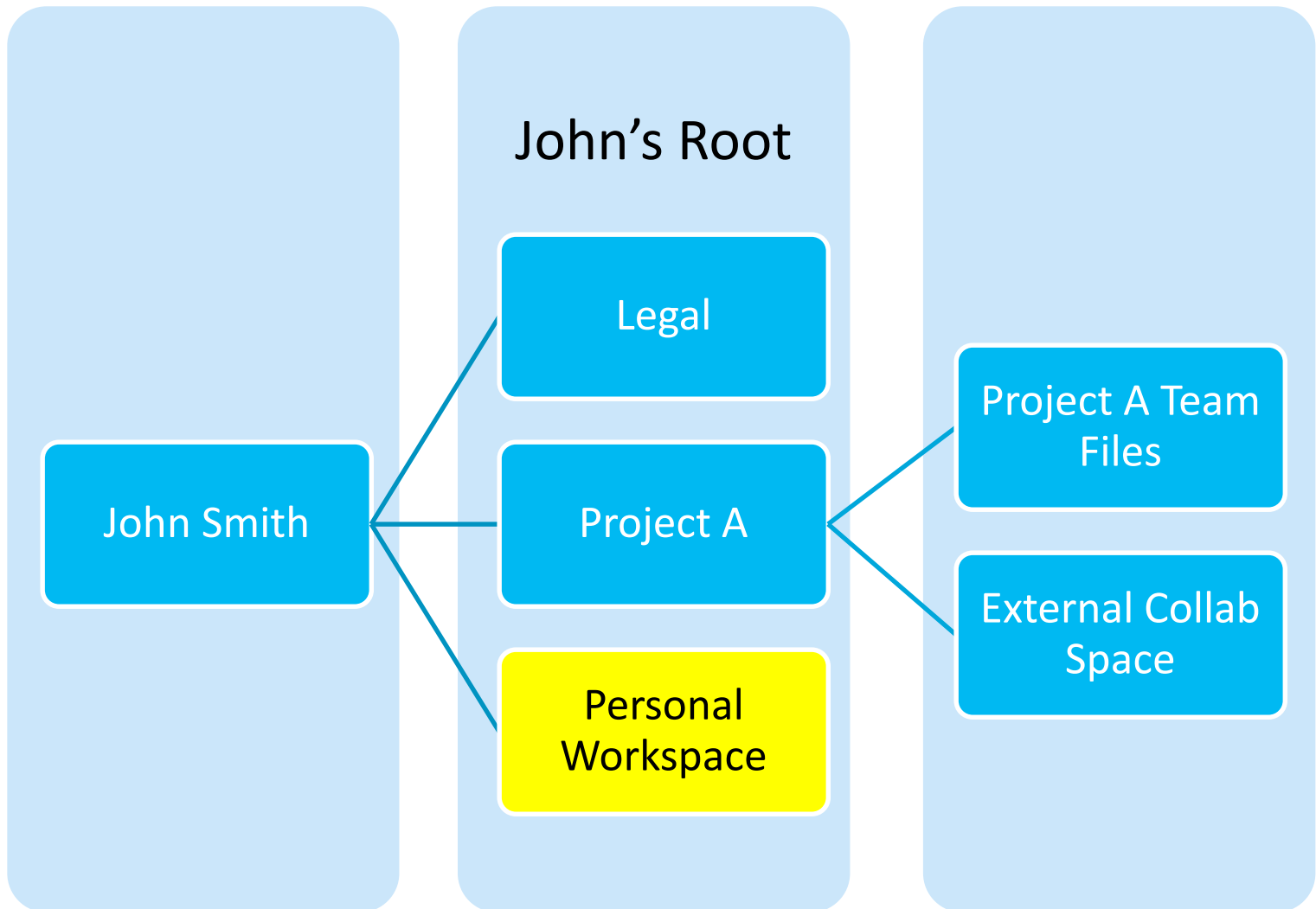


Sample Folder Structure Continued

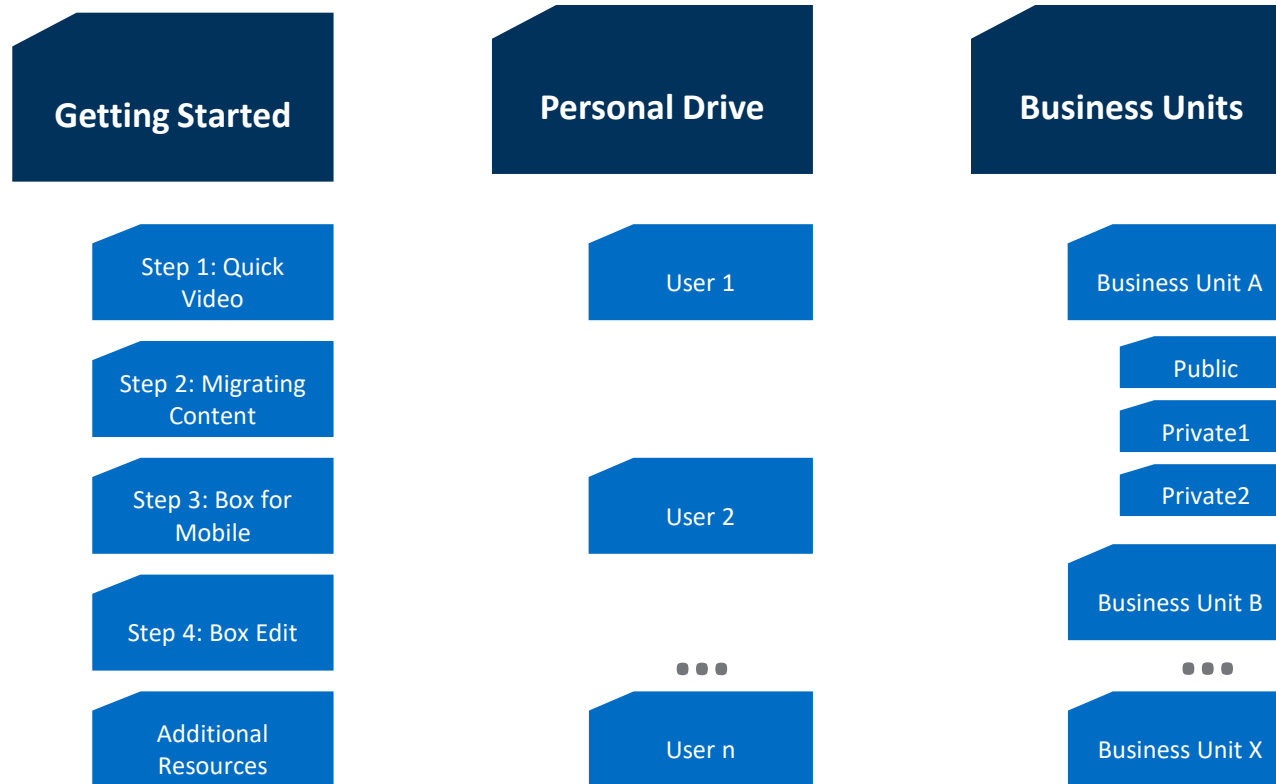
Project Management – Sort by Project Manager



Example: John Smith



Provisioning Folder Structure



Getting Started with Box



Getting Started

Step 1: Quick
Video

Step 2: Migrating
Content

Step 3: Box for
Mobile

Step 4: Box Edit

Additional
Resources

Purpose

- Each user will be provided access to “Getting Started with Box” resources folder upon first login. Users are provided training materials, tutorials, and other educative content on Box features and functionality, and procedures.

Folder Owner

- Primary Admin

Folder Properties

- Restrict collaboration to .com
- Hide collaborators
- Disable commenting for this folder
- Restrict shared links to collaborators only

Provisioning Plan

- Create “All Users” group in Box
- Set “All Users” group with “Viewer” access to “Getting Started” folder
- Invite all users to “All Users” group

Personal Drive



Personal Drive

User 1

User 2

...

User n

Purpose

- Each user will be provisioned access to a folder for personal work as it relates to corporate deliverables. The user will have full access and control over this folder and all subfolders. This folder will maintain a standard naming convention (ADname Personal Folder).

Folder Owner

- User OR Primary Admin

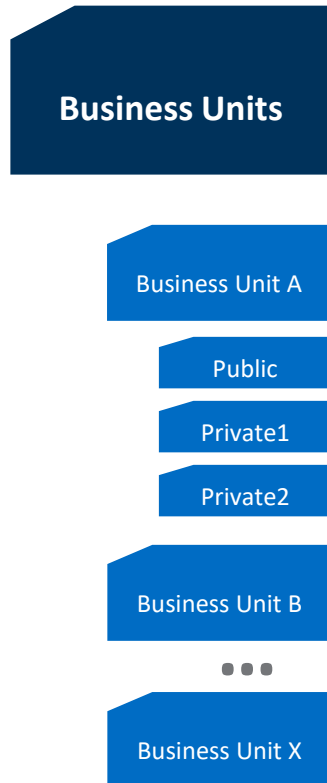
Folder Properties

- Default (Only Owners and Co-owners can send collaborator invites)

Provisioning Plan

- Have users create their own personal drive
- Manually create folders for personal drives and provision users in their respective personal folders
- Use Box API to automatically create the personal private folder each time a new user is created. The script will behave as follows:
 - Authenticate using Primary Admin account
 - Create personal folder with user name
 - Add collaborator (new user) to folder
 - Promote collaborator (new user) to “Folder Owner” or “Co-Owner”
 - OPTIONAL - Remove Primary Admin from folder

Business Unit Drive



Purpose

- Folders will be created by Business Unit to segment user base folder creation, and to provide a centralized location to create sub-workspaces for Business Unit members. In order to minimize administrative burden on Primary Admin, folder ownership will be distributed to key Business Unit admins to manage folder permissions.

Folder Owner

- Primary Admin

Folder Properties

- Default (Only Owners and Co-owners can send collaborator invites)

Provisioning Plan

- Prior to Groups being deployed through AD integration, Business Unit admins will gain “Co-owner” access to their appropriate department folder via invite through Primary Admin. General team members will be invited as “Editors” by Business Unit admins.
- Through AD integration, “SSO Groups” feature will be used to manage ongoing folder permissions

Set Up Business Unit Folder Structure



Method	Process	Pros	Cons
Admin driven (recommended)	<ul style="list-style-type: none">• Create Service Admin account• Invites service line champion as Co-Owner• Invites all users via SSO Groups or Bulk Add	<ul style="list-style-type: none">• Automated user management• Each team member will have access to department share	<ul style="list-style-type: none">• Admin overhead during set up phase
Service line champion driven	<ul style="list-style-type: none">• Admin provisions users via Bulk Add• Service line champion invites users into respective team share	<ul style="list-style-type: none">• No Admin overhead during set up phase	<ul style="list-style-type: none">• Not all team members may have access• Potential for duplication