New Customer Digital Vault

Premium Deployment Guide

Virtual StrongBox, Inc.

Welcome to Virtual StrongBox

This **Premium Digital Vault Deployment Guide** will introduce you to the secure digital vault platform your Organization is deploying and walk you through the steps to set up Virtual StrongBox ("VSB") within your Organization. The guide is designed to move your digital vault implementation from the initial setup to the training stage. There is a separate guide to move your Organization from the training stage to launch.

The FAQ Knowledge Base, located inside the Administration Console, has all of the information in this guide and more. Please use that as a resource if you have questions that this guide may not cover.

What to Expect (AKA Getting Started)

Your Project Team will be working with our Implementation Team and your Account Manager during the deployment process. During the initial stages of the deployment, you'll be making decisions on various implementation forms to help them understand how your Organization wants to use the platform. This will help us configure your digital vault instance so we can deliver on your vision.

The implementation timeline depends on the number of external systems your Organization wants to integrate with, how you plan on using the platform and your internal project management and training processes. The launch date depends on your Organization.

Section 1	**Configuring Your Organization's Digital Vault Instance**
Section 2	**New Organization Information Sheet**
Section 3	**Digital Vault Project Implementation Tracking Report**
Section 4	**Digital Vault Implementation Configuration Questionnaire**
Section 5	**Internal User Registration and Configuration**
Section 6	**Frequently Asked Questions**
Section 7	**Support, Guides and Self-Help**

Section 1: Configuring Your Organization's Digital Vault Instance

Thank you for the opportunity to work with your Organization. Several documents will be used in your implementation. Decision points from your Organization will be highlighted on the forms in Yellow.

New Organization Information Sheet (See Exhibit 1)

This form is sent to your Organization shortly after your purchase order and provides your key contact information for the implementation project. Some of the answers on this form will be completed from the purchase order, while others need to be completed by your Organization.

Digital Vault Project Implementation Tracking Report (see Exhibit 2)

This form is sent to your Project Manager shortly after returning the New Org Info Sheet. Some of the answers on this form will be completed from the purchase order, while others need to be completed by your Organization.

Digital Vault Implementation Configuration Questionnaire (see Exhibit 3)

This form is completed based on the interview process during the first few project meetings and decisions made on the Implementation Tracking Report items. It's used to communicate your desired configuration to our Implementation Team. Some of the answers on this form will be completed from the purchase order or the use case(s), while others need to be completed by your Organization.

Internal User Registration and Configuration (see Exhibit 4)

This form is part of the final stages of the implementation project. We use this form to help you set up the initial Internal User Licenses and their roles for your Organization. It's also used for training the individuals assigned the User Role functions so they can manage users going forward. The VSB Implementation Team will help you determine which roles your Internal Users need to have based on what you would like them to do. Your Organization will need to provide the full name and email address of each Internal User you'd like to set up.

Section 2: Complete the New Organization Information Sheet

On this form, there are key pieces of information you will have to provide your VSB Account Manager to get things started. Some of the answers on this form will be completed from the purchase order, while others need to be completed by your Organization. Decisions and information needed from the project team include:

- ☐ Completing the New Organization Information Sheet with contact info
- ☐ What are the top two or three use cases?
- ☐ Sending your Logo (Read Requirements)
- ☐ How will customers log in to their digital vaults?

Log-in Options: Customer-facing user experience

Option #1: The majority of the premium vault deployments have the customer-facing log-in via single sign-on (SSO) inside online banking and/or mobile banking. If SSO is the case for your deployment, you will not use the customer-facing direct log-in page mentioned below. The Implementation Team will work with the Project Team and your vendor to have SSO enabled inside the applications. Once in place, your customers will select Virtual StrongBox inside the application, and the SSO will sign them into their dashboard without having to enter their credentials.

Option #2: Direct Login Page at the link below. If your Organization **is not** deploying your customer-facing digital vault inside online banking and mobile banking, you will use a direct log-in page for their access.

https://apps.myvirtualstrongbox.com/

The direct log-in form **requires** MFA in the customer-facing log-in authentication**

Log-in: Internal User Experience

Below is the direct log-in page link that your Internal Users will need to log in to your digital vault administration Console.

https://apps.myvirtualstrongbox.com/admin

The direct log-in form **requires** MFA in the log-in authentication**

** How to set up MFA is covered in the Training Guide.

Section 3: Digital Vault Project Implementation Tracking Report

This report tracks the tasks involved in your digital vault implementation, who is responsible for completing the task and the status. The task list is fluid, and changes as the project moves forward, especially as the joint project team answers questions and new ones arise. Some of the answers on this form will be completed from the purchase order, while others need to be decided by your Organization. We'll use this list in each meeting to explain the task, answer any questions and track the desired configuration.

Key decisions and information needed from the project team include:

- ☐ Change the default size of the customer-facing digital vault?
- ☐ Change the default size of the Internal User's digital vault?
- ☐ Change the default folders that are automatically created with each new digital vault?
- ☐ Set up groups during the implementation process? Or later by the System Admin?
- ☐ Allow customers to exchange folders and files from their digital vault with the Organization's digital vault or Groups in the Organization?

1) Change the default size of the Customer-facing digital vault?

The customer digital vault default size is 100MB as a placeholder. Customer digital vault space at existing VSB clients ranges from 10MB to 1GB per customer. The average space for premium clients is 100MB for the customer-facing digital vault. Your Organization can increase (or decrease) at implementation or any time in the future if needed as the program matures.

2) Change the default size of the Internal User digital vault?

The digital vault default size is set at 250MB as a placeholder. Internal User space at existing VSB clients ranges from 250MB to 1GB per user, depending on the types & size of files being exchanged or stored in the vault. Your Organization can increase (or decrease) at implementation or any time in the future if needed as the program matures.

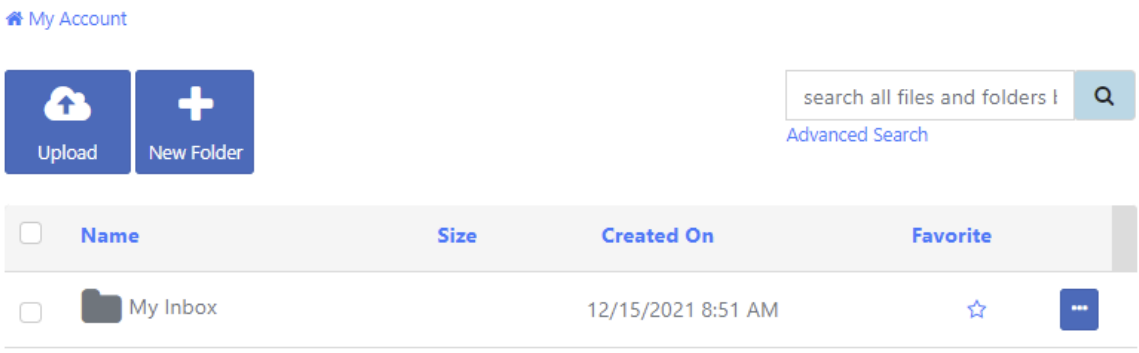
3) Change the default folders that are automatically created with each new digital vault?

The digital vault folder structure is set to Option #1 below as a placeholder. The "My Inbox" folder is automatically created in every new digital vault. The "My Inbox" folder is required and cannot be deleted by the Organization or the Customer. This folder is where documents added by Internal Users to customer digital vaults will reside. Files inside the "My Inbox" folder do not use the customer's space and can be deleted by the customer.

Option #1 (default setting)

Only the "My Inbox" folder is created in new digital vaults. Customers can add new folders to their digital vault and name them anything.

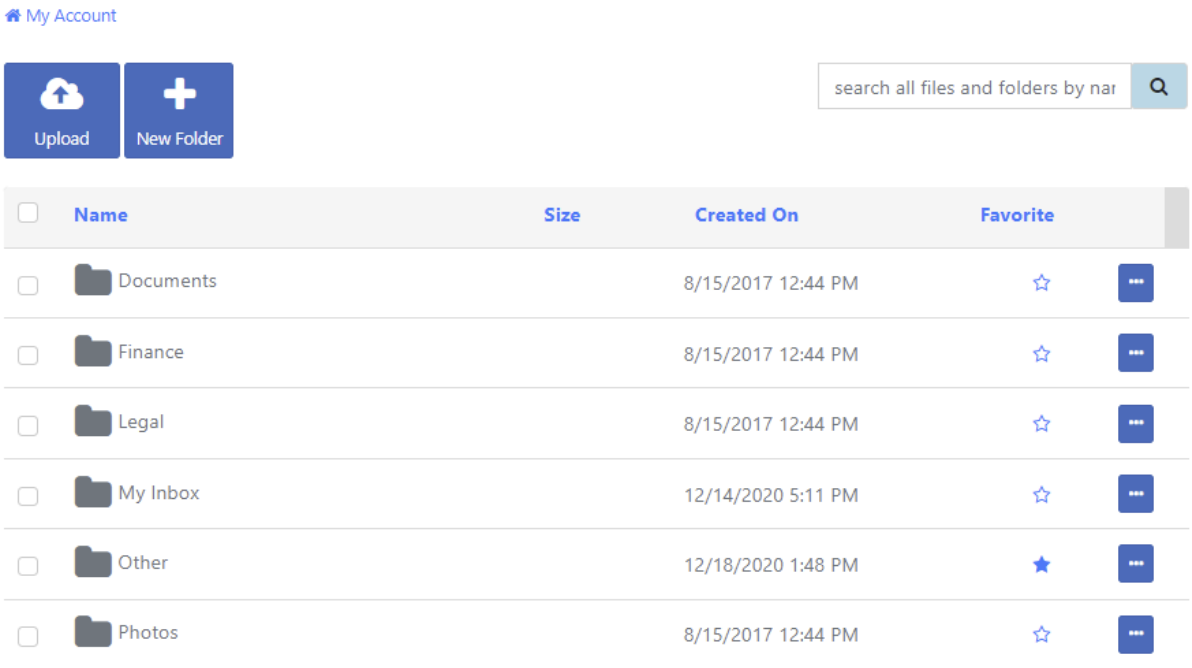
Below is the default view with only the "My Inbox" folder



Option #2

A default folder structure where the "My Inbox" folder is created along with five folders named Documents, Finance, Legal, Photos and Other. Digital vault users can delete or rename the additional five folders and add new folders as they use their digital vault and name them anything they like.

Below is the default view with the "My Inbox" and five folders



Option #3

A default folder structure where the "My Inbox" folder is created and one to five other folders are created as determined by the Organization. For example, only three of the folders in Option #2 are created.

4) Set up Groups during the implementation process? Or later by the System Admin?

Premium digital vault clients have the option to create different digital vault groups within VSB for workflow, communication, etc. Please click below to learn more about this option or ask your account manager how this works.

5) Allow customers to exchange folders and files from their digital vault with the Organization or Groups in the Organization?

What is the difference between sharing a file and exchanging a file?

Your digital vault has two ways to share information - ShareLinks and Exchanges. ShareLinks are links that a user creates to collect or share files and folders with **external third parties**. Users must email or text the secure ShareLink to the third party to access the encrypted information inside a digital vault. The third party is not required to have a digital vault account to access the shared documents. The third party only needs to have access to the ShareLink and knowledge of the security settings users have added to the ShareLink, such as a pin code if one is set.

Examples are emailing your CPA a ShareLink to your tax return folder to upload your completed tax returns or texting a ShareLink to your lawyer to download a copy of your most recent Will or Power of Attorney document.

Exchanges are an **internal** feature that not all digital vaults have. An Exchange grants access to another **internal digital vault** to move a copy of the authorized document or folder to the other user's digital vault. The most common example is exchanging documents and folders with the financial institution providing the digital vault product. The recipient(s) of the exchange (service provider, group) must have a digital vault account to access the exchanged documents.

File Type Restriction protocols can be added to ShareLinks and Exchanges by the Organization. During the implementation, the various options will be covered in detail with your Organization's Network or Security team.

Section 4: Digital Vault Implementation Configuration Questionnaire

This form is completed by your Account Manager based on the interview process during the first few project meetings and decisions made on items on the Implementation Tracking report. It's used to communicate your desired configuration to our Implementation Team. Some of the answers on this form will be completed from the purchase order or the use case(s), while others need to be completed by your Organization. Any remaining decision points will be highlighted on the forms in Yellow. Once the form is complete, the VSB Implementation Team can begin configuring your instance.

Section 5: Internal User Registration and Configuration

Before getting started, you need to understand the difference between Internal and External Users.

Internal Users are individuals who are given organization-owned licenses to manage the Organization's Administration Console and a larger "organization-owned" digital vault to use for company business. The number of licenses for internal users is determined in your purchase order. The number of licenses is tracked in the User Management module found in the Administration Console under "Users" in the left-hand menu.

External Users are usually the end-user (consumer, customer, member, small business, etc.) using the platform provided by your Organization and individuals that might receive ShareLinks to documents and folders inside someone else's digital vault. Your Organization's purchase order included an unlimited number of external users.

There are three ways External User (customer, consumer, member) accounts are created:

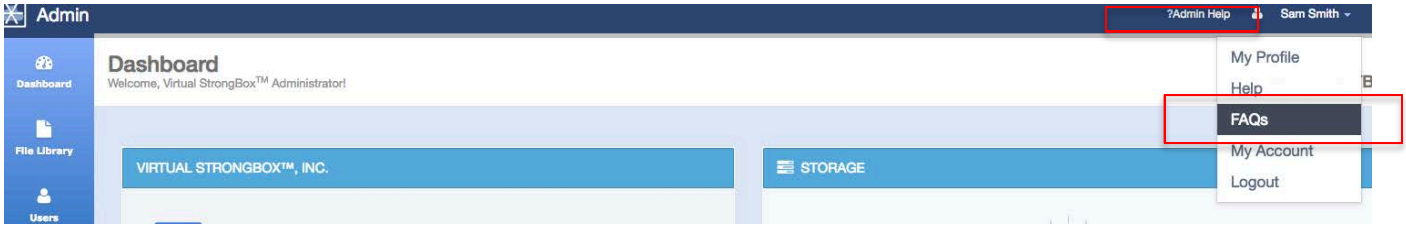
1) Accounts will be created automatically if your Organization's instance is integrated with Single Sign-On (SSO) from online banking, mobile banking vendors or other authentication systems. The SSO string passes over user information and creates a digital vault account if one does not exist in the system already.

2) External user accounts will be created if your Organization uses the VSB online enrollment form. When the user completes the registration form and clicks "submit," the platform creates a new account in their name and sends a link to the email address entered on the form for the external user to create a username and password for the account. This username and password will be needed on the VSB direct log-on page to access their account.

3) Internal Users with the "User Editor" role can add internal and external users one at a time by selecting the "Users" tab on the left menu and selecting "Add User" from the menu.

Section 6: Frequently Asked Questions

This section provides a quick list of the top FAQs that new clients and external users ask for. Access to the entire FAQ Knowledge Base is found in the drop-down menu under the profile menu for external users. Access to the FAQs is also inside the Administration Console under the drop-down menu (see below).



KEY EXTERNAL USER FUNCTIONALITY FAQs

Follow the links to see videos about the Customer-facing functionality:

- Add File/Folder (click here to learn more)
- Share file/folder via a secure link (click here to learn more)
- Receive a file via a secure link (clicker here to learn more)
- Send/receive files with one collaborative, secure link (click here to learn more)
- Exchange a file/folder (click here to learn more)
- Download/Store a file exchanged from the Organization (click here to learn more)
- Purchase more Storage Space (click here to learn more)
- Add Multi-Factor Authentication (click here to learn more)

KEY INTERNAL USER FUNCTIONALITY FAQs

If you do not have access to any of the following functionality, your Organization's Administrator can give you access by adding the application roles to your user account.

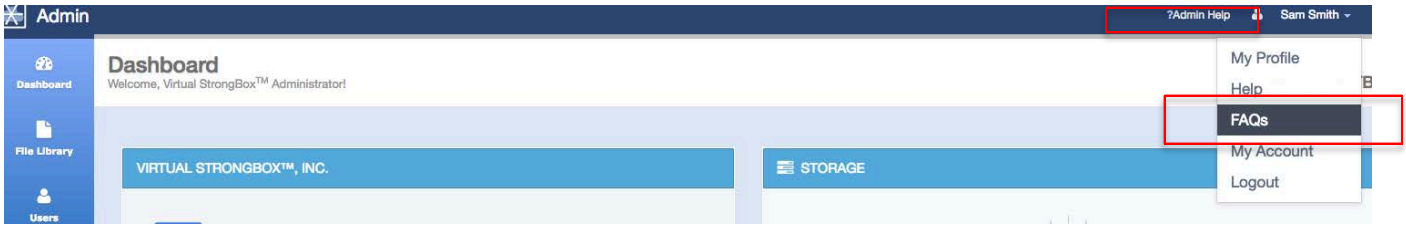
Follow the links to see videos about the Internal User functionality:

- Adding/Editing a User (click here to learn more)
- Adding a Group (click here to learn more)
- File Exchange: Share a File with a User (click here to learn more)
- File Exchange: Edit an Exchange (click here to learn more)
- File Exchange: Retrieving a File from a User (click here to learn more)
- Add-on Tool |File Exchange: File Delivery Confirmation (click here to learn more)
- Upgrade User Storage Space (click here to learn more)
- User Reports (click here to learn more)
- Payments for Upgrades (click here to learn more)
- View Logs (click here for more information)
- View Pending Registrations (click here to learn more)

Section 7: Support, Guides and Self-Help

Here's how to find answers to questions and reach our support group.

1. FAQ Knowledge Base is available inside external user digital vaults on the top bar under their profile and in the Administration Console under the drop-down menu (see below).



2. Current client page and VSB Academy on our website at www.virtualstrongbox.com/currentclient

3. Support@virtualstrongbox.com opens a support ticket sent to the VSB support team.

4. Accountservices@virtualstrongbox.com sends an email to the account management group, and your account manager

5. Our "How To" FAQ video library is another great resource that has short videos on key FAQs

Exhibit 1
New Organization Information Sheet

Thank you for the opportunity to work with your Organization. Please complete the information below so we can begin communicating with and forwarding implementation materials to your team members.

Please describe how you plan to use Virtual StrongBox within your Organization?

_____

_____

How will your customers access their digital vaults?

____ Single sign-on _____ Direct Login Screen

	Name	**Title**	**Email**
Project Manager			
System Administrator			
Training Contact			
Marketing			
IT Contact			
Security Contact			
Billing Contact			
Impl. Team Member			
Impl. Team Member			
Impl. Team Member			
Impl. Team Member			

Please provide your estimated launch/live date _____

Who are the primary contacts for your organization during implementation?

_____

Who are the primary contacts for your organization after program launch?

_____

Exhibit 2
Digital Vault Project Implementation Tracking Report
Projected Live Date _____

Client – First Steps	Comments	Status
Complete and return New Org Sheet	**Exhibit 1 in Deployment Guide**	
Provide VSB with Logos		
Use Case #1:	Confirm and define workflow	
Use Case #2:	Confirm and define workflow	
Use Case #3:	Confirm and define workflow	
Provide System Admin Contact		
VSB – First Steps		
Send New Org Sheet to Client		
Send Deployment Guide to Project Manager		
Set Kick-off Call		
Provide access to VSB Academy		
Implementation Configuration Questionnaire	**See Exhibit 3 in the Deployment Guide**	
Change Customer-facing default space	Default is 100MB but can be changed	
Change Internal User default space	Default is 250MB but can be changed	
Change default folder structure in addition to the "My Inbox" folder	Default is Option #1 but can be changed	
Allow customers to Exchange folders with Organization's digital vault(s)	Decision Needed	
Allow customers to Exchange files with Organization's digital vault(s)	Decision Needed	
Are Groups needed for Internal Users and Exchange?	Decision Needed	
Send Questionnaire to Implementation Team		
Adding Internal Users and Roles	**See Exhibit 4 in the Deployment Guide**	
Provide a list of Internal Users		
Determine the Roles each user should have		
Grant Recycle Bin Access Role to any Internal Users	Decision Needed Do you want any Internal Users to be able to delete files in the Organization's workspace permanently	
VSB – Implementation & Setup	**See Exhibit 3 in the Deployment Guide**	
Configure instance based on Questionnaire		
Connect Online Banking SSO		
Connect Mobile Banking SSO		
System Admin Training		
Client IT Build Phase		
Technical support	support@virtualstrongbox.com	
Set File type restrictions		
Issue Authorized Recycle Bin delete role		
Optional IP Restrictions Module		

Testing		
Project Team testing		
Internal Team test	Test from the customer-facing side	
Tasks – Post Implementation		
Client – Branding and Marketing		
Marketing page with info, a link to the log-in screen and a link to the enrollment page		
Consumer Awareness Campaigns		
VSB– Branding and Marketing		
TBD		
Tasks - Training		
Train-the-trainer	Access Admin Console; switch between accounts; add users, add docs	
Train-the-trainer	Use Cases	
Internal User Help and Support	FAQs & Videos	
Technical support	support@virtualstrongbox.com	
Tasks – Post Launch		
TBD		

Exhibit 3
Digital Vault Implementation Questions

Features and Functionality	Yes	No	Comments
GENERAL SETTINGS			
Change Default Folder Structure			Decision Needed
Enable Location Setting			Decision Needed
Allow Upgrade of Storage	XXX		
Upgrade Storage Payment Options			
Credit/Debit Card			
Enable the "My Inbox" feature			From Purchase Order
Allow Help	XXX		
Separate FAQ Library		XXX	
Allow White Labeling	XXX		
Allow Folder Favorites	XXX		
Allow Multi-File Download	XXX		
Display Dashboard	XXX		
Enable Notifications	XXX		
Display Suggested Items Page (Checklist)		XXX	
Account Group and Rewards Module	XXX		Decision Needed
Index Documents (Advanced Search)	XXX		
STRONGBOX SETTINGS			
Individual StrongBox On	XXX		
Organization Collaboration StrongBox On			
Enable Multiple Account Access	XXX		
EXCHANGE/SHARE SETTINGS			
Exchange Functionality Disabled for Entire Organization			Decision Needed Do you want Customers to exchange with the Organization's digital vault or internal groups?
Allow Users to Exchange Files			Decision Needed
Allow Users to Exchange Folders			Decision Needed
Allow Users to Exchange Files or Folders to a Group			Decision Needed
Share Feature Disabled for the Entire Organization		XXX	
Allow External Sharing by users	XXX		
Require Share Link Expiration Date		XXX	
Maximum # of Days for Expiration Date		N/A	
Require Share Link Pin Code		XXX	
Minimum Pin Code Length		N/A	
Require ShareLink Pin Code Complexity		N/A	
SECURITY SETTINGS			
Allow multi-factor authentication	XXX		Required on all Direct Login Pages
Enable IP Address Restrictions		XXX	
File Type Restrictions set at Org Level	XXX		Decision Needed
Grant Recycle Bin Access Role to all internal users			Decision Needed Do you want all internal users able to delete files in the Organization's digital vault

Exhibit 4
Internal User Account Configuration
_____ Internal Users and ____ System Admin(s)

Internal License #	First Name	Last Name	Email	Administration Role(s)
1				System Admin
2				
3				
4				
5				
6				
7				
8				
9				
10				
11				
12				
13				
14				
15				
16				
17				
18				
19				
20				

The num. ber of Internal License lines will be based on your purchase order.