

Maximize Content Management Efficiency with Panorama

Document & Metadata Management within Box and Beyond

Unlock the full potential of content management with Panorama, the innovative document and metadata management application designed to streamline the complexities of searching, reviewing, tagging, annotating, and reporting on content in Box. While Panorama is natively integrated within Box, enhancing security and efficiency, it also offers the flexibility to be embedded seamlessly into other applications in your technology ecosystem, such as Salesforce or other critical systems, ensuring a cohesive and user-centric experience across platforms.

With Panorama, effortlessly locate and tag documents while leveraging advanced features like generative

AI for document abstracts and seamless reporting capabilities. This integration not only facilitates a secure and efficient workflow within Box but also extends Panorama's powerful functionalities across your entire digital landscape. As businesses grapple with ever-increasing volumes of data, Panorama emerges as a strategic tool, proficiently addressing challenges such as swiftly locating the right documents and efficiently managing metadata updates.

Panorama provides a robust, no-code solution where simplicity meets functionality, enabling you to effortlessly navigate through vast content landscapes. Empower your decision-making with powerful analytical tools and real-time reporting capabilities, all within a platform that adapts to your business needs, fostering more informed decisions and enhanced operational efficiency.

Panorama Feature List

Feature	Description	Core Panorama	Advanced Panorama	Enhanced Viewer
Metadata-Based Search Capability 	Locate documents and folders quickly through metadata attributes	✓	✓	✓
Customizable Search Options	Save searches either publicly for team access or privately for individual use	✓	✓	✓
Dynamic Sorting	Reorder search results effortlessly by interacting with column headers	✓	✓	✓

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Flexible Text Search Parameters	Search by exact matches, Starts With, or Contains	✓	✓	✓
<u>Search Result Sharing</u> 	Distribute search outcomes via hyperlinks or URLs	✓	✓	✓
Create ZIP file from Results List	Quickly generate a zip file of all documents in your result list with a single click on the Share icon. The zip file is automatically saved to Box, ready for immediate download and sharing—streamlining your workflow and saving valuable time.	✓	✓	✓
<u>Dependent Metadata Selections</u> 	Conditional metadata options that update based on previous selections, enhancing data relevance and accuracy (e.g. choose a region in a pick list and another pick list shows the states in that region)	✓	✓	✓
Refined Search Criteria	Narrow down search results by adding more specific criteria directly from the result list	✓	✓	✓
Multi-value Field Search	Explore documents containing multiple values in a single field	✓	✓	✓
Advanced Metadata Management	Utilize Box AI to extract, tag metadata, and generate abstract summaries	✓	✓	✓
<u>Immediate Document Preview</u> 	Access the first document in search results via a direct hyperlink or URL	✓	✓	✓
Role-Based Search Types	Create search types that include metadata needed by a user role, and managed by Box groups	✓	✓	✓
Export Capabilities	Download search results into Excel for data manipulation and reporting	✓	✓	✓
	Create a zipfile of the result list	✓	✓	✓
Bulk Metadata Updates	Efficiently update metadata in bulk to maintain document consistency and accuracy	✓	✓	✓

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<u>Comprehensive Reporting Tools</u> 📊	Generate detailed reports including pie charts, bar charts, and statistical data	✓	✓	✓
<u>Integrated Salesforce Access</u> 🔗	Utilize the application directly from Salesforce with seamless integration	✓	✓	✓
<u>Clause Library</u> 📁	Create clauses from existing documents, store them in Box, and easily search and reuse these clauses	✓	✓	✓
<u>File Upload</u> 📁	Upload files to a specific folder and complete any required profiling of documents	✓	✓	✓
<u>Administrative Controls</u> 🛠️	Define and create specific search types	✓	✓	✓
	Manage displayed names of metadata fields	✓	✓	✓
	Control the order of fields displayed for users	✓	✓	✓
	Set mandatory fields for document profiling to ensure complete data entry	✓	✓	✓
	Configure direct hyperlinks for accessing documents in Box from the search results	✓	✓	✓
	Customize user group permissions to restrict or grant access to various search types	✓	✓	✓
	Choose different display options such as document list, gallery, or thumbnail views	✓	✓	✓
<u>Restricted Document Access</u>	View the metadata without accessing the document content itself, with options to request further access		✓	✓

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Customizable Document Actions	Perform specific actions such as triggering workflows, viewing retention rules, or generating PDF renditions directly from the search results		✓	✓
Additional Environments	Provide QA, Test and Dev Environments for testing custom actions and document behaviors outside the production environment		✓	✓
External Integrations	Implement custom integrations, for instance, linking document access with ArcGIS maps or displaying summary data for specific accounts		✓	✓
External Data Source Integration	Populate pick lists directly from external data sources		✓	✓
Secured Annotations	Implement security measures on document annotations to maintain confidentiality			✓
Enhanced Document Editing (including, but not limited to)	<u>Rotate and rearrange pages within documents</u> 🔄			✓
	<u>Generate redacted copies of documents to safeguard sensitive information</u> 📄			✓

Micro Strategies delivers tailored, integrated solutions designed specifically for Box users. Through its award-winning Business Process & Content Services practice, the company empowers businesses to streamline operations, boost productivity, and eliminate inefficiencies—all with a strategic, customer-focused approach. To learn more, visit microstrat.com.