



## Box Essentials

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# Box Daily Essentials

## What is Box?

Box is our New Cloud storage system. You might say it is an upgraded version of Google Drive, OneDrive or iCloud. It allows secure collaboration, storage and editing of content from anywhere on any device.

## Two Ways to get to Box

**The Online Portal:** You can reach Box by going to <https://www.box.com> and logging in with your SOU credentials. This online **portal** has built-in features that track versions, automatically save, and allow online collaboration. These features aren't available in the Box Drive App.

**Box Drive:** Another way is to look for it in your Windows Explorer folder (this is known as **Box Drive** and is shown as "Box" in your drive structure. You use it just as you do with any of your drives and local files. Box Drive has the foundational features you are used to in Windows Explorer or Mac Finder, but lacks the advanced features found in the portal. You will appreciate that it is easy, convenient, and reliable.

## The Box Online Portal

**Login:** box is part of our SOU SSO (Single Sign On). If you start your day by logging into email or Inside SOU then you will automatically be signed into Box and it will only ask you to continue.

## Initial View

Though it is configurable, the default view will start with All Files as shown here. The navigation area on the left provides quick access to things just as it does in Windows Explorer or Mac Finder.



- **Note:** This is called "Box Search" for a reason, it does not search your PC, Windows Explorer, or Mac Finder.



## Populating Folders with Files

There are two ways to populate folders with files.

- Use **Upload** button (fig. 4)
- **Drag and Drop** – you can drag and drop between folders and even between Windows Explorer or Mac Finder and Box.

## Previewing Files

When you click to open a file from the Box Portal it will always open it in a **preview** window as shown below. **You cannot edit from here.** But you can preview all the pages on the left by clicking on them. In addition, notice **Version History** on the right. **V5** as an example, is the version we are on. It is the **Current Version**. Box tracks unlimited versions of your document and allow you to preview and choose which one is current. The **Open** button is used to edit the file and will open it in a variety of ways.



The first two options allow you to edit with automatic saving of the document. In addition, you can collaborate in real-time with other people and not worry about versions, or if you are using latest one.

Box will update the version number, who modified it, the date and time, and display that information in Version History the next time you go through the preview window.



## Collaboration

When you setup collaboration you “invite” people to use your folders and files. You manage the amount of control each person has, to manipulate your folder or data. At Right are the 7 permission levels and the Associated permissions for each level.

## How to “Invite” Someone to a Folder or File



There are several ways to invite someone to your folder or file. In this example we are using the **Share** button within Box Online to do the invite. Once you **click** on it the box in black appears and if you click the **“Invite as Viewer”** button you can choose the Level of Permissions you want to allow the user to have. You can also send them a message about the invitation.

Some things to Note:

- Other ways to reach Sharing are: Right-click the folder or file name and click the ellipses to the right of the folder or file name.
- As an Owner or Editor, can change permission levels at any time through the Share button/ Shared with/ Manage All.
- You should always give the least level of permission needed to accomplish the job.
- Permissions “Waterfall”, meaning that whatever permission you give to one folder, it will fall to all folders beneath. (More on this later).
- If your folder was a Personal or Private folder, it was Yellow. Once you add other people, it becomes Blue with two silhouettes on the folder.

## What is Sharing a Link?

Another way to allow users to access your data is through Link Sharing. There are number of choices for security, availability, and access through the general as well as Link settings.

## How to Share a Link

Use any of the previous methods to select **Share**. The following window is displayed. Do not “Invite People”. Instead at the greyed out Share Link slider, slide it to “**Enable shared link.**”

This Creates a Shared link that you can Copy and email to people.

You can use the drop-down arrows at the bottom of the window to determine who is allowed access and what their access permissions are.



Also note that clicking on **Link Settings** will open the bottom window below, allowing you to set an expiration date, a password, a public URL, and allow the ability to download the data not just view it.



Allowing Download means you no longer have control of the data and it can be edited and given to anyone else, even if the data has been changed or updated.

## Waterfall

## Permissions

When you give permissions to folders and files they will cascade as a waterfall would to everything below. Notice in the diagram below that if I am added as an editor of the Vendors folder then my permission as Editor will cascade down through all the folders. However, if I want to share only the Target folders with a Target employee then I would begin sharing at the Target folder and they would have access to everything in Target. They would not have access to anything having to do with Wally's.



Notes:

- Changes or edits show up in purple (as shown above) so even if you are away for a while and then return, you can easily see edits that have occurred while you were gone.
- Features also include tables making it easy to layout columns and rows.
- Box Notes also include version history and permissions.

## Box Drive

This great downloadable (<https://www.box.com/resources/downloads/drive>) tool will make your use of Box seamless. Your box drive will show up in Windows Explorer or your Mac Finder as another drive. As shown below you will know that your files are updated when the blue cloud outline icon appears next to them.



Although this is a convenient way to work with your files and data, it does not replace the Box.com portal which has much more functionality and many extra features. What you will have, is the ability to work with cloud-based files (your files by default are not stored on your local hard drive) and open them in their native programs, Word, Excel, Adobe, etc.

### **A few important points should be kept in mind, however:**

1. If you do not have an Internet connection, you cannot reach your files. In this case you can right-click a folder and choose “**Make Available Off-line**” to download the **folders** you need to work on. When you reconnect, they will automatically sync with Box. You may have to manually sync data if other people have made changes to the file while you had it off-line and were editing it yourself.
2. While working with Box Drive you do not have the ability to collaborate with other users. Your files will be opening on your local programs and not online.
3. You will also want to “lock” your file when you open locally so that others do

not make changes to your file that will not be synchronized. Just right click the file (instead of double-clicking it) and choose “**Lock File**” before opening it.

4. When using Box Drive from Windows Explorer be sure to remember the Search box in Windows Explorer doesn't search Box. Use **Ctrl+Alt+Shift+B** to get a search box for Box.

## Other Resources for Learning Box

Box provides numerous educational webinars, videos, and documentation on their website. Some of my favorite research areas are the Box Community where you can ask questions of knowledgeable users, and Box's on-demand and live webinars. You can find these resources at:

<https://community.box.com/>

<https://www.box.com/events/webinars>