Box Essentials

Karen Ranum - 2025-04-16 - [Comments (0)](#) - [Box](#)

Box Daily Essentials

What is Box?

Box is our new cloud storage system. It is similar to Google Drive, OneDrive or iCloud. Yet, it allows secure collaboration, storage and editing of content from anywhere on any device.

Two Ways to get to Box

- **Box Drive**

Another way is to sign into the app called **Box Drive**, (using your **SOU** credentials,) and then look for it in your **Windows Explorer** folder.

Note

If you were not prompted to sign into the app when your logged into an **SOU** computer, you may search for it on the device.

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.

- **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.
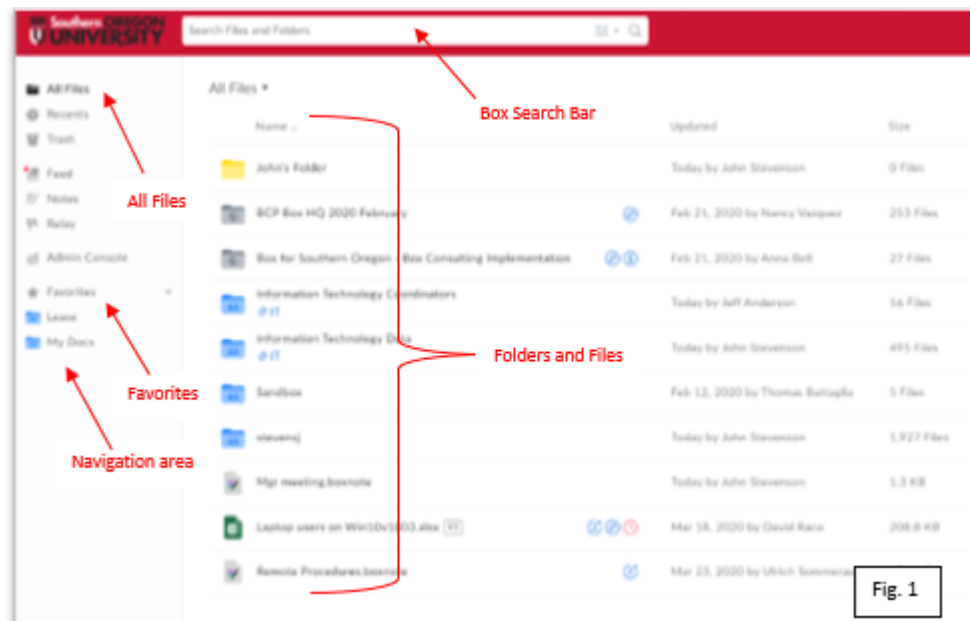
Note

Box is part of our **SOU SSO** (**S**ingle **S**ign **O**n). If you start your day by logging into email or **Okta Dashboard**, then you will automatically be signed into **Box** and it will only ask you to continue.

You can also get to **Box** through your **Okta Dashboard**. If you do not see it there you may have to add the app. If you are unsure on how to do that then please [click this link.](#)

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**.

Fig. 1

Types of folders

Note

- **Blue Folders** (with silhouettes of people) – a shared collaborative folder that was created in our domain.
  --Note that even your personal drive will show as shared because it is owned by the Box admin.--

- **Grey Folders** – This folder was shared with you by an external source (example: an email from a different company).

Favorites

Avoid having to navigate through **All Files** by putting any file or folder into **Favorites**. *(refer to fig. 1)*

- Folders or files located deep within sub-folders are great candidates to add to your **Favorites**.

  - This makes them easier to access without having to navigate through multiple levels each time.

- Just find the folder or file, and drag it to **Favorites**. Or **right-click** and choose "**Add to Favorites**".

- To remove one, hover over the **Favorite** and click the **x** to the right of it.

Box Search Bar

Typing into the "**Box Search Bar**" **(fig. 2)** provides quick results with previews of content within **Box**. Those previews show:

- Folders and Files with the search term highlighted

- If there is a vertical bar to the left of it, then the search words are inside the document.

- Filters show below the search bar helping you to specify criteria.

- One unusual filter is the **Type** filter

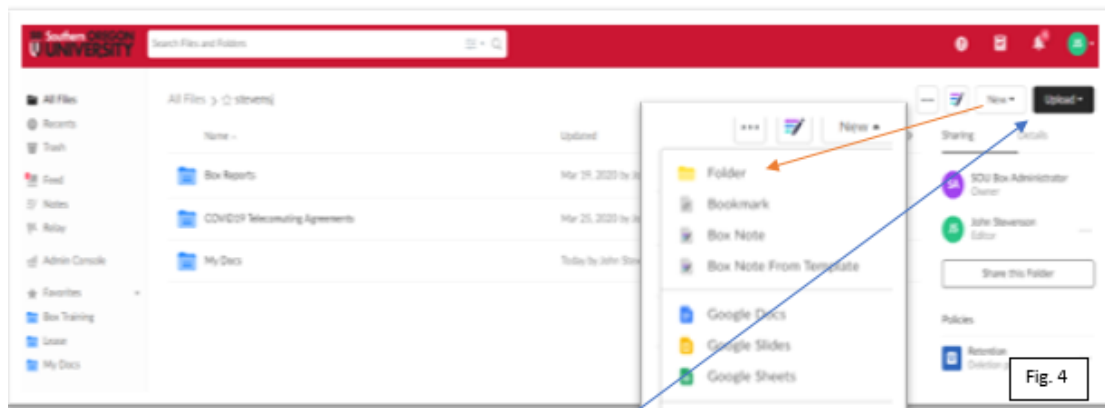- This filter doesn't use extensions but groups according to type: **audio**, **document**, **drawing**, etc.

Note

Using the **Box Search Bar** does not search your computer

Fig. 2
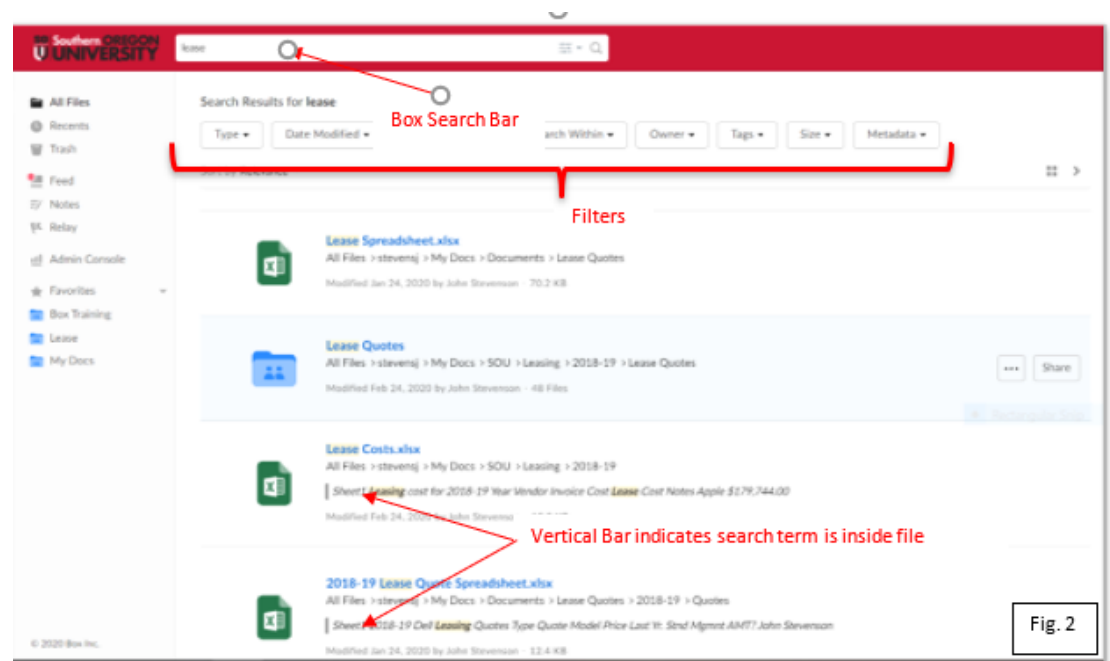
Creating a Folder or Sub-folder

- To create a folder or sub-folder use the **New** button (fig. 4) and choose **New Folder** from the resulting menu.

Fig. 4

Populating Folders with Files

There are two ways to populate folders with files.

- Click the **Upload** button (fig. 4) and select a file or folder to upload

- You can also ***drag and drop*** files or folders from your computer using a file management programs, (such as **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 the preview window.***

    - To edit it you will have to **Open** the file

        - You can find the **Open** button at the top right of the page

        - Below we shall write more on the intricacies on ***opening files***
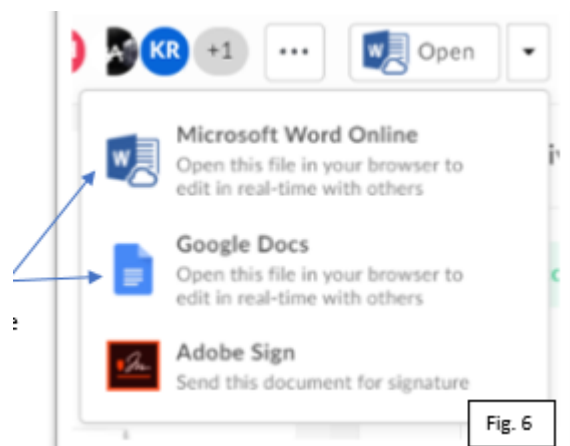
Note

You can open older versions of a file! The version history is on the right picture (**Fig.5**)

Box tracks unlimited versions of your document and allow you to preview and choose which one is current

Fig. 5

Opening Files

- When you click the **open** button, you will get a list of options for opening the file dependent on what type of file it is. In this case (**Fig.6**) it is a Microsoft Office file.

  - The options are to open it in **Word** online, **Google Docs** or **Adobe Sign** (because it knows **Adobe Pro** is installed on this machine).

Fig. 6

- The first two options (or programs) have some features that can be helpful (such as automatic saving and collaboration with others without the worry of versions.)

Note

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**.

Fig. 7
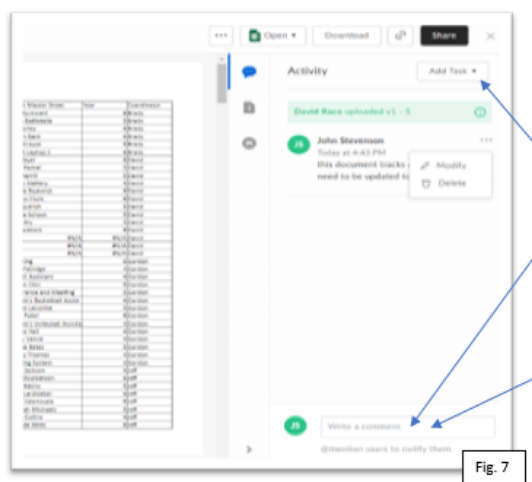
Comment

- Once you are back at the **Preview Window** you can add **Comments** to the file to inform others who are shared on the file. These **Comments** will be tracked but can be modified or deleted by clicking the **ellipsis**.

- **@Mention**

    - Sometimes you want to quickly bring someone's attention to changes you have made or inform them individually. This can be done from the **Preview Window Comment Box**. Type **@** and their **username**. It will populate with their email; let you add a message and then post it in the **Comment** area above.

Tasks

- Add a task for someone using the **Add Task** button. This can include multiple users, a message and expected completion date.


| Permission Levels	Upload	Download	Preview	Get Link	Edit	Delete	Owner
Co-owner	●	●	●	●	●	●	●
Editor	●	●	●	●	●	●	
Viewer Uploader	●	●	●	●	●		
Previewer Uploader	●		●				
Viewer		●	●	●			
Previewer			●				
Uploader	●						

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**.
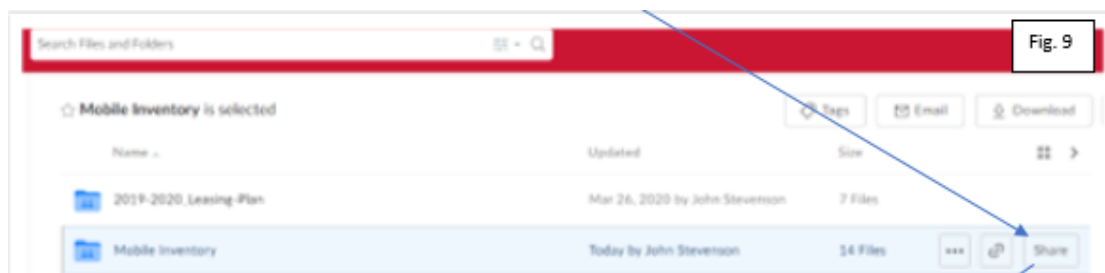
- Once you **click** on it the box in black appears and if you click the "**Invite as Viewer**" button you can choose the **Level of Permissions** you want to allow the user to have. You can also send them a message about the invitation.
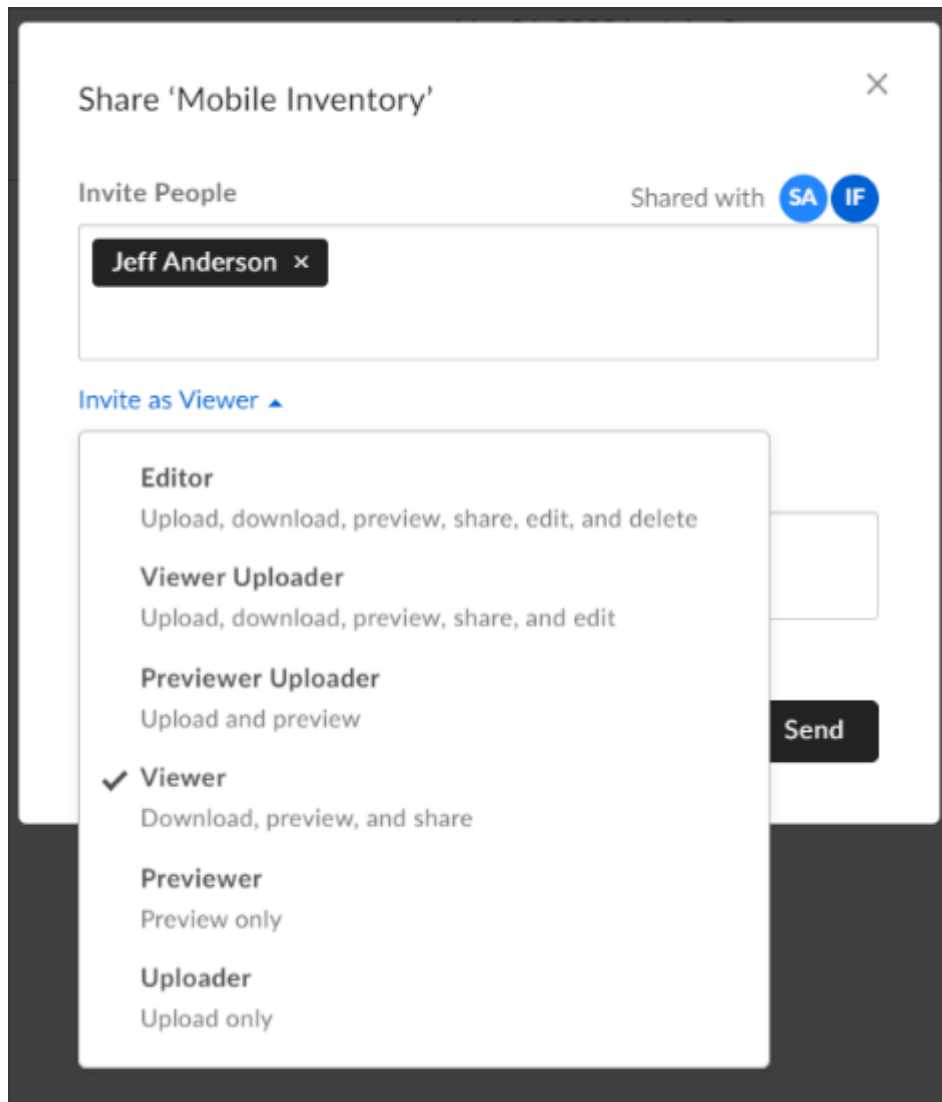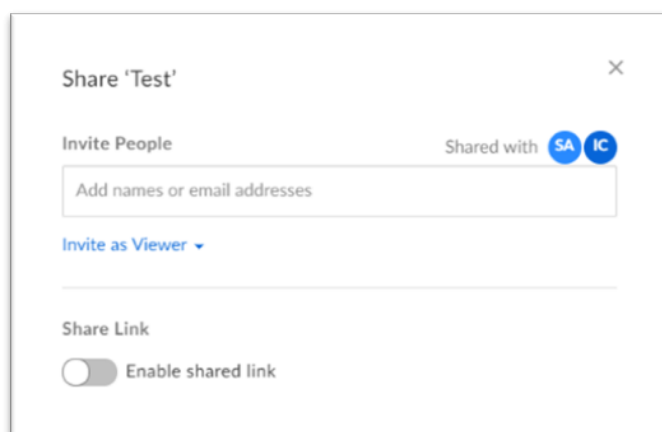
Note

- *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).

- 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**.

- A *yellow* folder means that the folder is **private**, (or personal.)

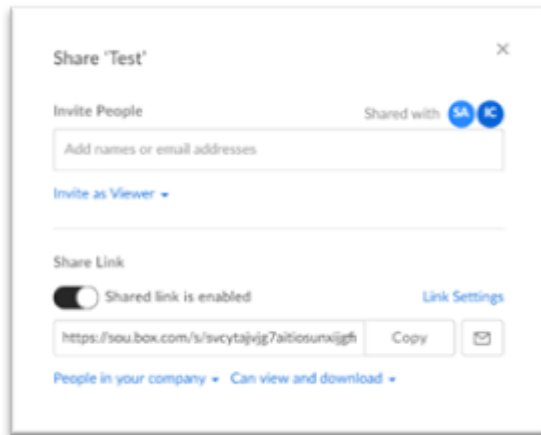   - Once other people are added, the folder becomes Blue with two silhouettes.

Would you like to just share a link?

- Another way to allow users to access your data is through **Link sharing**.

    - This is essentially giving specified **permissions** to interact with a file from box.

- There are number of choices for security, availability, and access through the general as well as **Link settings**.

    - This shall include things like giving people only access to *view a file* or if you want the ability to provide people with the ability to *edit a file* too

    - Note that you are giving *everybody* that has *access* to this link the *same* permissions.

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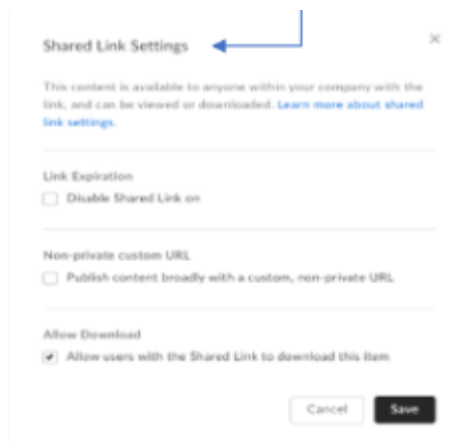
- Also note that clicking on **Link Settings** will open the bottom window below, allowing you to set an **expiration date**, a **password**, a **public URL**, and allow the ability to download the data not just view it.

Warning

 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.

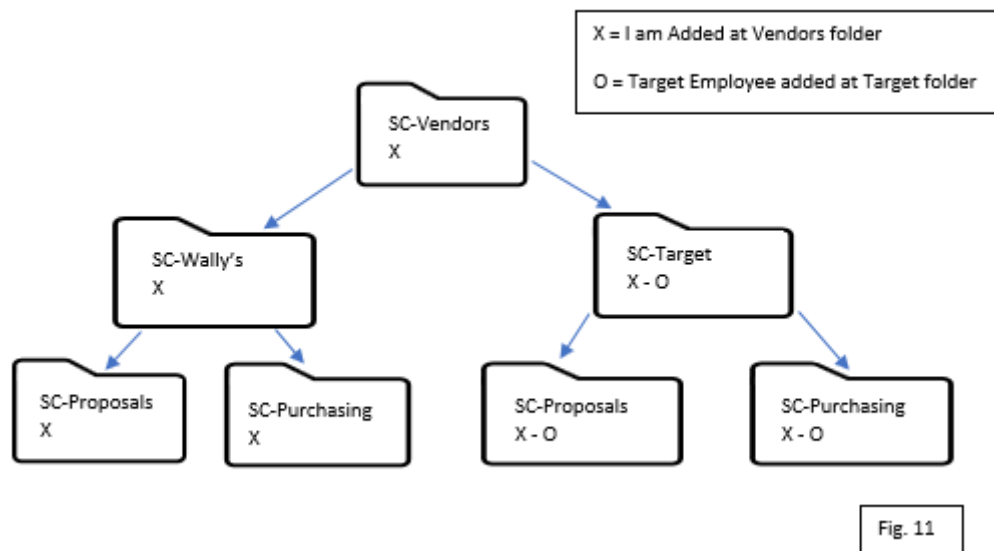## Waterfall Permissions

When you give permissions to folders and files they will cascade as a waterfall would to everything below.

- Notice in the diagram below

    - I am added as an **editor** of the **Vendors** folder then my **permission** as **editor** will cascade down through all the folders.

    - 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**.

X = I am Added at Vendors folder

O = Target Employee added at Target folder

SC-Vendors
X

SC-Wally's
X

SC-Target
X - O

SC-Proposals
X

SC-Purchasing
X

SC-Proposals
X - O

SC-Purchasing
X - O

Fig. 11

(Fig. 11) Simplified Diagram of Waterfall Permissions

Warning

- If I give someone access at **Vendors** as an **editor**, I cannot then give them lesser **permissions** on a cascaded folder. As an example, I cannot change that person to **Viewer permissions** in a folder under **Vendors** because they automatically get **editor** from the folder above.

- This means you should base **permissions** given on the need, at the folder nearest the bottom of the structure.

- **Permissions** can be changed at any time by anyone with **editor** permissions.

Note

Keep in mind that you only see folders which are **private** (that you created) or shared with you.

If you are not shared in a folder you will not see it. In the example above the **Target** employee would only see the three folders they were shared in. The rest won't show in the folder structure within their **Box** account.

Because of this, it is ***extremely important*** to use a folder **naming convention** that identifies the folders throughout the structure so people will not be confused with identical folder names.

Use the **Division**, **Department**, or **area** then a **dash** and **subject** to avoid confusion, as an example. In the above folder structure SC stands for **Service Center**, then a **dash** and **subject**.

Box Notes

With **Box Notes**, you can quickly take notes, share ideas, and collaborate in real-time with your team – all without leaving **Box**. It includes templates for meetings, project planning, project status and newsletters.

Create notes fast
Create a new note or choose from a library of common templates and custom templates you've saved.

Plan projects together
Work concurrently with your team in a note and make revisions together in real-time.

Share status updates
Securely share notes with anyone or invite teammates to collaborate.

Stay organized
Easily access recently edited notes and notes you've opened or marked as "Favorite."

Optimize brainstorming
Build on each other's ideas with annotations, tables, hyperlinks and images.

Keep track of changes
Easily see what's changed in a note since you've last opened it.

Note

- 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

You may want to utilize **Box Drive** which is installed on most **SOU** computers. It shall provide access to files you have on **Box**, the online site, but directly managed in your file management software (i.e. **File Explorer** or Mac **Finder**.)
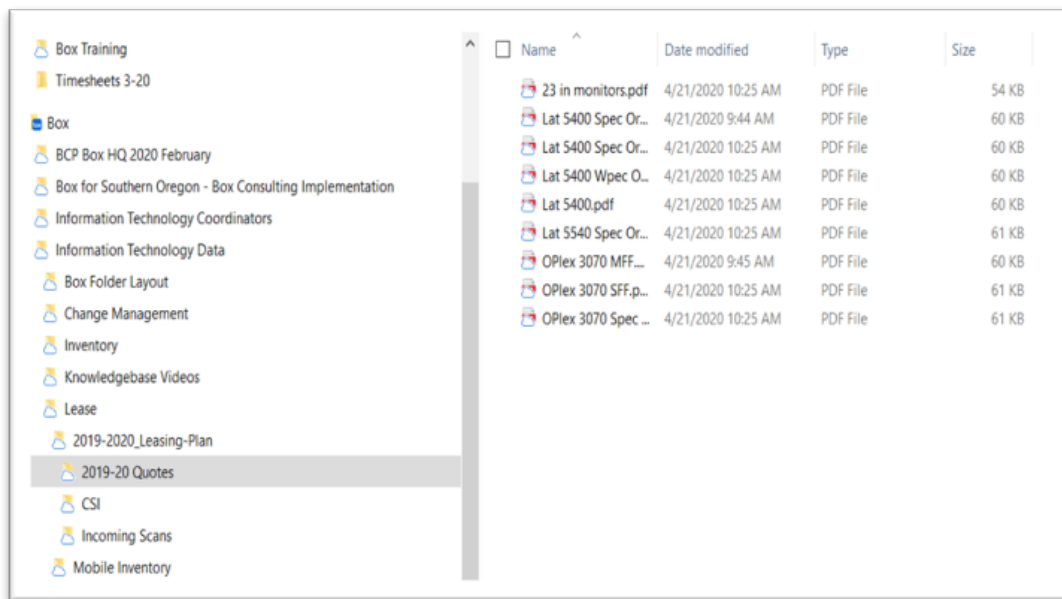
Although this is a convenient way to work with your files and data, it **_does not_** replace the [Box.com](Box.com) portal which has much more functionality and many extra features. What you will have, is the ability to work with cloud-based files (your files by default are not stored on your local hard drive) and open them in their native programs, **Word**, **Excel**, **Adobe**, etc.

If You Would Like to Download Box Drive for Your Personal Computer

This great downloadable (https://www.box.com/resources/downloads/drive) tool will make using **Box** more accessible. 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.

Warning

- 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.

- 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.

- 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.

- 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 recommended 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