



## 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.



## Types of folders

Easily tell which folders are Internal and External. (*refer to fig. 1*)

- **Blue** (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** - This folder was shared with you by an external source (another company).


## Favorites

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

- Good candidates for favorites are folders or files that are buried in a sub-folder below the root
- 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 (see **fig. 3**)
- This filter doesn’t use extensions but groups according to type: audio, document, drawing, etc. 
- **Note:** This is called “Box Search” for a reason, it does not search your PC, Windows Explorer, or Mac Finder.



## 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.



## 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.



## Opening Files

Before you begin working with files in the Box Portal, I recommend adding two Box apps to your arsenal. **Box Tools** (which includes Box Edit), and **Box Drive** (we will cover that one later). You'll find these downloads at:

<https://www.box.com/resources/downloads> .

## Box Tools

This app allows you to edit using Office Online, or Google Docs so that you can collaborate with others in real-time. It also will allow you to open documents locally with your desktop program if you prefer.

## The Open Button

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 it is a Microsoft Office file.

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



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.



## 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.

## Sharing - Collaboration and Shared Links



### 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.



*Simplified Diagram of*

## **Waterfall Permissions**

Important Considerations:

- 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.

## Folder Structure

Keep in mind that you only see folders which are private (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.



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>