Content Management and Collaboration

Using Box Online

Benefits of Box

- ✓ **Free Cloud Service for** RPI Students, Faculty and Staff
- ✓ **Online Storage** (50gb storage, 15gb max file size)
- ✓ **Secure File Sharing** (https://itssc.rpi.edu/hc/en-us/articles/360004772212-Box-RPI-Security-Privacy)
- ✓ **Version History** (can retrieve earlier versions of a document)
- ✓ **Permission Controls** (allows you to control exactly who has access to your files)
- ✓ **Box Mobile App** (access all your files from any of your devices)
- ✓ **Box for Office** (save to Box from office applications)
- ✓ **File Sharing for External Collaborators** (recipient can request a free Box Account at Box.com)
- ✓ Box is a **secure cloud storage provider**. As always, use your own judgement when sharing sensitive information such as financial and Health information as well as Personal Identifiable information like SSN. ****REVIEW**** **Data Classification Policy** for RPI http://policy.rpi.edu/policy/Information_Classification_Policy

☐ Request a Box Account

The first step is to **request a Box @RPI Account**: https://itssc.rpi.edu/hc/en-us/articles/360004829931-Requesting-a-Box-RPI-Account

> **First time users:**
> Register
> *Student, faculty, and staff can activate their accounts instantly*

☐ Logging into Box

1. Open a browser and type **https://RPI.box.com**

2. When the "Part of Rensselaer Polytechnic Institute?" box appears click "**Continue**"

3. Then type your **RCS username and password** and then click "**Login**"

☐ Box Home Page

The Box Home page opens to the "**All Files**" area where you will see **two default folders** that are automatically created, the "**Documents**" folder and the "**My Outlook Attachments**"

**IMPORTANT- DO NOT RENAME these folders, as they are route folders.

What is a route folder? Consider a route folder as the Main folder and the folders/files as Sub folders. **NOTE**: **If you give someone full access to the Main folder, all the folders and files under the Main folder will be accessible to that person**.

☐ Opening a Folder

1. Click once on the folder name.

☐ How to Create a Folder

NOTE: The New folder option is not available on the "All Files" view.

1. Open a folder, i.e. "**My Documents**"

2. Click "**New**" and then select "**Folder**"

3. Type a Folder Name

4. Add those who will have access to this folder by entering their email address into the "**Invite Additional People**" area (optional)

5. Change the permission

6. Click "**Create**"

☐ Renaming a Folder

1. With a folder open, click the "**…**" in the upper right corner of the box

2. Choose **Rename**

3. Rename the folder

4. Click **Save**

☐ Upload a File or Folder

1. While in Box, while uploading a file/folder, open the folder you would like the file/folder to be uploaded to, click "**Upload**" and then choose File or Folder.

2. **Locate the file or folder** from your computer and then click "**Open**"

☐ Share a Folder and Folder Permissions

NOTE: Box uses a 'waterfall' design to explain their permission levels in which individuals only have access to the folder they are invited into *and* any subfolders beneath it. Someone can also be invited to individual files.

1. Click **Share** located to the right of a folder.
2. **Invite People**- Start typing the person's name or email address (If they appear in the list below they have a Box account)

3. Choose **permission level** for the Invitee.
   ➢ **Editor -** full read/write access to a folder or file
   ➢ **Viewer -** has read access to a folder or file
   ➢ **Previewer -** has limited read access
   ➢ **Uploader -** limited write access
   ➢ **Viewer Uploader -** access level is combination of Viewer and Uploader
   ➢ **Previewer Uploader** - access level is a combination of Previewer and Uploader
   ➢ **Co-owner** - has all of the functional read/write access that an editor does and can change some advanced folder settings, but cannot change the owner of a folder)
4. Type a **Personal Message** (optional)
5. Click **Send Invites**

☐ Folder Settings - Email Notifications

1. While in your Documents folder, locate the folder you want to create an email notification for, and move your cursor over that folder and then click the ⋯ three dots located to the right of the folder.
2. Choose "**Settings**"
3. Scroll down until you see the "**Email and Notifications**" area. "**Use my default notification settings**" is the default, which indicates that an email notification is sent when a collaborator deletes or adds a comment to any of the documents in the folder.
4. Select other options and then click "**Save Changes**" located in the upper right corner of the screen.

☐ Opening a Document

5. Click once on a file name.

6. Click "**Download**" and the document appears at the bottom of the window above the taskbar.

7. Click once on the document and the document opens in the application it was created in.

8. Click "**Enable Editing**" if this appears at the top of the document to work in the document.

    a. Click the "**X**" located in the upper right corner of the box task bar to close the document.

☐ Sharing a Document

1. Click once on a document but not on the document name, and then click once on the Share button located in the upper right corner of the Box task bar.

2. This Link can now be copied by clicking the "Copy" button and pasted into an email or names can be added under "Email Shared Link" to email this to one person or to a group of people.

    NOTE: To add a person(s) to the "Email Shared Link" area, begin typing their name for those in your company. Type a person(s) outside email address if sharing outside of RPI.

3. Choose to share with "**People in your company**" or "**People with the link**" (outside RPI)

☐ Renaming a Document

1. Click once on the button with the three dots ⋯ located in the upper right corner of the Box task bar.

2. Choose **Rename**

3. **Type a new name** in the Name field

4. Click **Save**

☐ Deleting a Document

1. With the document closed, highlight the document you want to delete.

2. Click the Trash button located in the upper right corner of the Box task Bar

3. On the screen a dialog box appears asking "Are you sure you want to delete this item?" click **Okay** and the document is deleted.

☐ Adding a Document to Favorites (add frequently used folders/files)

1. Click once on the button with the three dots **...** located to the right of the document.
2. Choose **Add to Favorites**
3. A bar appears at the top stating **Item added to Favorites**
4. Under Favorites, click the "**X**" at the end of the folder/file name to remove from the Favorites area

☐ Move or Copy a Document viewed on the screen to a different folder

1. Click once on the button with the three dots **...** located in the upper right corner of the Box task bar.
2. Choose **Move or Copy**
3. Type the name of the folder on the search bar or use the scroll bar to locate the folder.
4. Click once in the circle to the right of the folder to select that folder.
5. Choose either the **Move** or **the Copy** button located at the bottom of this window.

☐ Printing a document while viewing in Box

1. Click once on the button with the three dots **...** located in the upper right corner of the Box task bar.
2. Choose **Print**
3. A separate tab opens with the printer settings. Make changes to these settings, and then click **Print**.

☐ Download a file to Edit

1. Click once on a document in Box, and then click once on the **Download button** located in the upper right corner of the Box task bar.
2. Click once on the document name and the document opens in the application on the screen.

☐ Working with Versions of a Document (open/make current/remove)

1. Click the version number to the right of the file name i.e. V4 to open the Version History area.

2. Scroll to locate the version (date/time) and choose "**Download**"

3. Click once on the file that appears at the bottom of the screen and the document opens.

4. Click "**Enable Editing**" if this appears at the top

5. Update and/or save your document with a different name.

☐ Comments

1. With your document opened in Box, click the comment icon located on the bar to the right of the document

2. To send a comment to all the collaborators, just beginning typing in the "Write a comment" area.

3. To send a comment to a specific collaborator type, "**@collaborators_name** in the comment box found in the lower right corner of the box window.

4. When the person's name appears, click once on their name to select them.

5. Type your comment

6. Click "**Post**"

☐ Tasks – (can only be assigned to existing collaborators in a folder)

1. With your document opened in Box, click the comment icon located on the bar to the right of the document

2. Click once in the "**Write a comment**" area in the lower right corner of the Box screen and the "Add Task" appears

3. Select "**Add Task**" and additional fields appear.

   a. Add a brief description of the task

   b. Enter the name of the collaborator the task is for

   c. Optional, add a "Due Date"

4. Click "**Post**"

☐ Modify, Remove or Hide Collaborators

Modify Access

1. Click to select the folder and view the collaborators on the right side of the Box window under the Sharing category

2. Click the three dots to the right of a collaborators name "..." and **choose a different access level**.

Remove Access

1. Click to select the folder and view the collaborators on the right under Sharing

2. Click the three dots to the right of a collaborators name "..." and choose **Remove**

Hide Collaborators

1. Click [...] by the folder you want to" Hide Collaborators"

2. Choose **Settings**

3. Select "Hide collaborators and their activity from non-owners" under Privacy and select "Only collaborators can access this folder via shared links? "under Shared Link Access.

4. Click "**Save Changes**" located in the upper right of the setting screen.

☐ Box Apps and Tools

Box for Office Integrations save documents and attachments from Microsoft Word, Excel, PowerPoint and Outlook directly into Box.

Box Tools allows you to use Box Edit to edit and save your document in Box web app. You can open, edit and save a file within Box.

https://itssc.rpi.edu/hc/en-us/articles/360004830851-Box-Apps

NOTE: If you do not have Administrator rights to download software, you will need to "**Submit a Request**" in the ITSSC to have these apps/tools installed by an Administrator.