



[Image from google search – Box OneCloud third-party sync solutions – betanews.com]

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# BOX AT RPI

## WHAT IS BOX?

Box is a free cloud service for file sharing, like Dropbox, Google Drive, or Microsoft OneDrive that provides the ability to access files with any Internet-capable device from almost any location. Those with a Box account can grant access privileges to others allowing them to share files with co-workers, students, administrators, and colleagues around the world.

<https://itssc.rpi.edu/hc/en-us/articles/360004742212-Box-Overview>

## FEATURES AND 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)
- ✓ **Keep Email quota down** (save attachments in emails to Box, send Box link to file)
- ✓ **File Sharing for External Collaborators** (recipient can request 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](http://policy.rpi.edu/policy/Information_Classification_Policy)

## REQUEST FOR A PERSONAL BOX ACCOUNT

The first step is to register for a Box account:

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

## REQUEST A SHARED BOX SPACE

The difference between a personal box space and a shared box space is that a Shared Box @RPI space is available for departments, research projects, and clubs and allows files to stay within those groups, even when individuals leave RPI.

Shared Box @RPI space is set up with a standard folder that is initially shared to co-owners. The standard shared folder appears in the co-owners' individual Box @RPI accounts, allowing co-owners to manage it without a separate login. (Quoted from article in ITSSC called "Box @RPI Shared Space")



You can request a shared box space at: <https://itssc.rpi.edu/hc/en-us/articles/360004771432-Box-RPI-Shared-Space> and then click on **Shared Space Request Form**.

## LOGGING INTO BOX

- **Registered users:**

- **Login**

- *You must be registered with Box in order to log in*

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**”

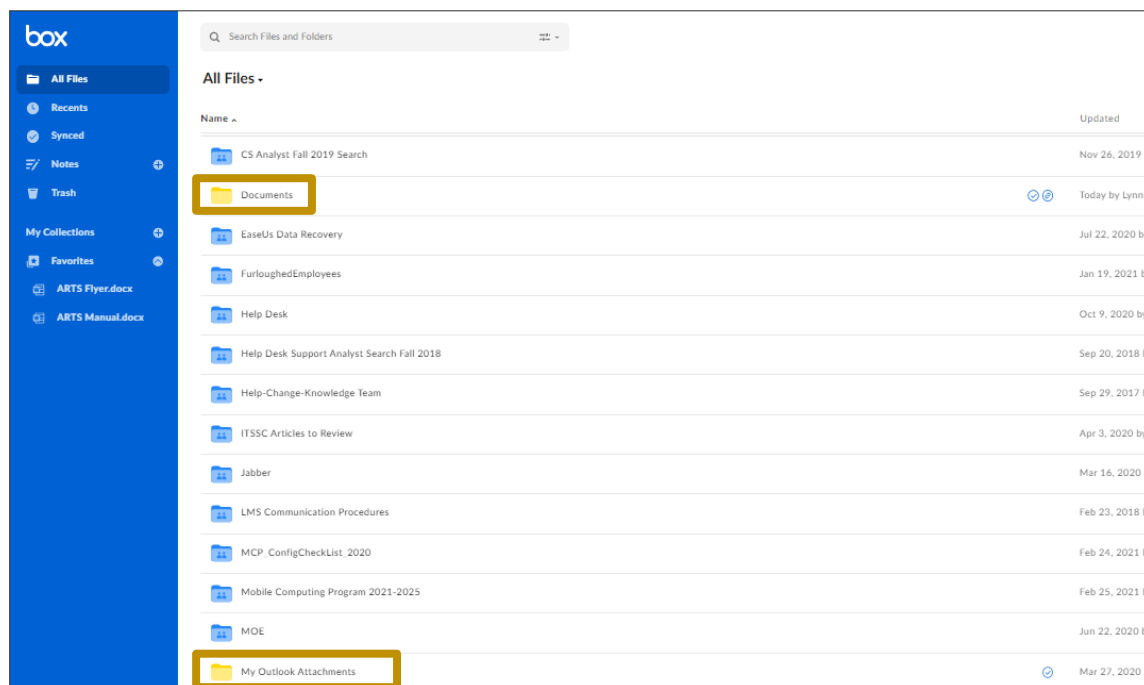
**IMPORTANT** - **DO NOT RENAME these folders**, as they are route folders.

### ***What is a route folder?***

Consider a route folder as the Main folder and the folders/files as Sub folders.

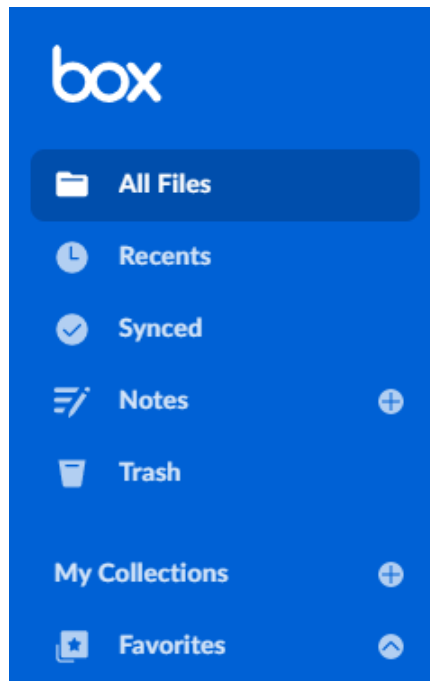
**NOTE:** If you **give someone full access** to the Main folder “**Documents**” or “**My Outlook Attachments**”, all the folders and files under those Main folders will be accessible to that person.

**NOTE:** The **New → Folder** option is only available by first opening a route folder.



## NAVIGATION BAR

The Navigation bar is located on the left side of the Box home page.



**All Files:** Shows all the folders you have access to. Open these folders to see your files.

**Recents:** Shows the last 1000 files you have accessed, with the most recent files at the top along with files you viewed from a shared link that someone sent you.

**Synced:** Shows recently synced folders and documents.

**Notes:** You can take notes, share ideas and collaborate in real-time with your team all within Box.

**Trash:** Shows recently deleted

**My Collections:** A way to organize your files and folders that you own or share. <https://support.box.com/hc/en-us/articles/360048730094-Using-Collections>

<https://support.box.com/hc/en-us/articles/360049489913-Collections-FAQ>

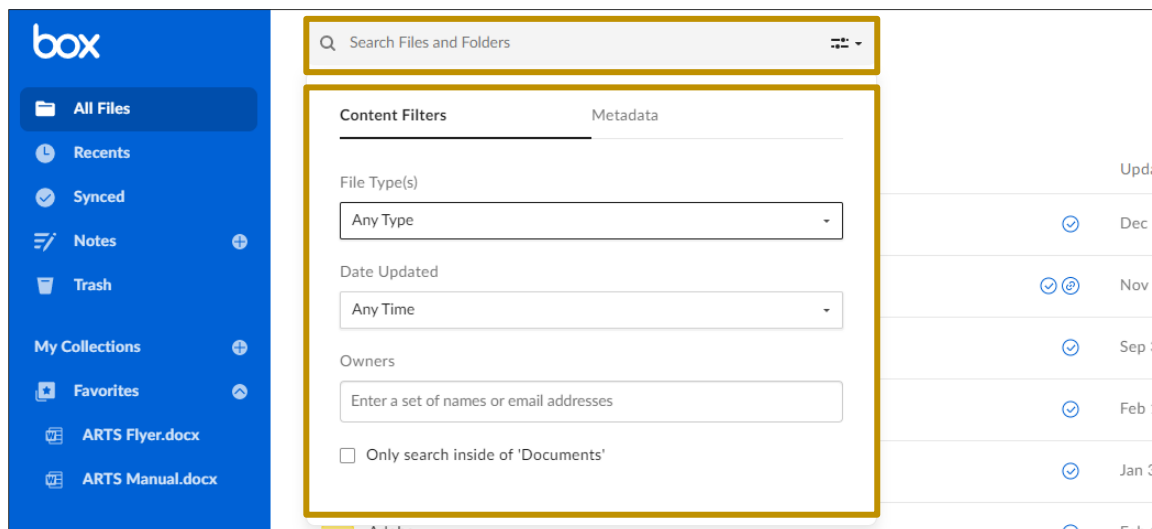
**Favorites:** Area to access favorite files and folders. <https://community.box.com/t5/Organizing-and-Tracking-Content/Creating-and-Viewing-Favorites/ta-p/50453>

## FOLDERS AND FILES

From the Box home page, you can open a folder, view a document, rename, move, print, or open a document in the application it was created in.

## SEARCHING FOR FILES AND FOLDERS

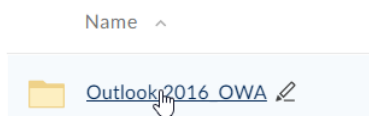
1. Click once in the “Search Files and Folders” box and complete the content filter fields, or begin typing a word and choose from the list below.



## OPENING A FOLDER


To open a Folder:

1. Click once on the folder name.



The folder opens showing any files stored in this folder.

## DOWNLOAD/DELETE/MOVE OR COPY/SETTINGS/MORE ACTIONS

Anytime see the icon with the three dots  this called the ellipses ( . . . ) which shows different features depending on where you are in the Box window.

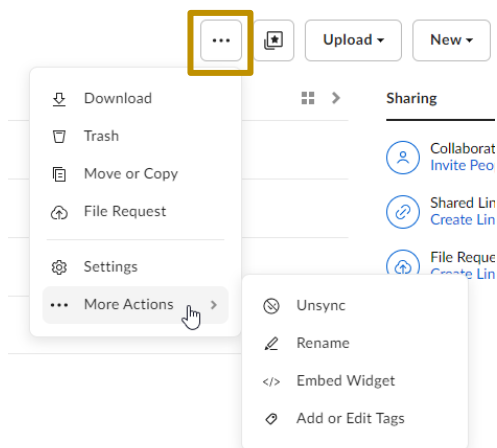
1. With a folder open, click the ellipses ( . . . ) in the **upper right corner** of the box window
2. Choose to:

**Download** – Creates a zip file of all the folders/files into a Zip file

**Trash** – Delete the folder

**Move or Copy** – Move or Copy a folder

**Settings** – Change specific settings for a folder like: Invitation restrictions/commenting/shared link access/collaboration control



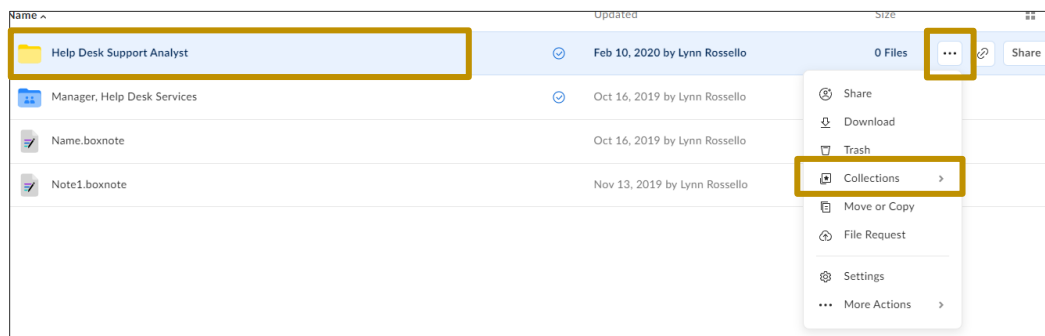
<https://support.box.com/hc/en-us/articles/360043696014-Understanding-Box-Folder-Settings>

**Rename** - Change the name of the folder

If you click the ellipses ( . . . ) to the right of a folder you will see basically the same options to choose except:

**Share** - opens the share screen to invite people to share the folder

**Collections** - move this selected folder to a collection already created, or create a new collection

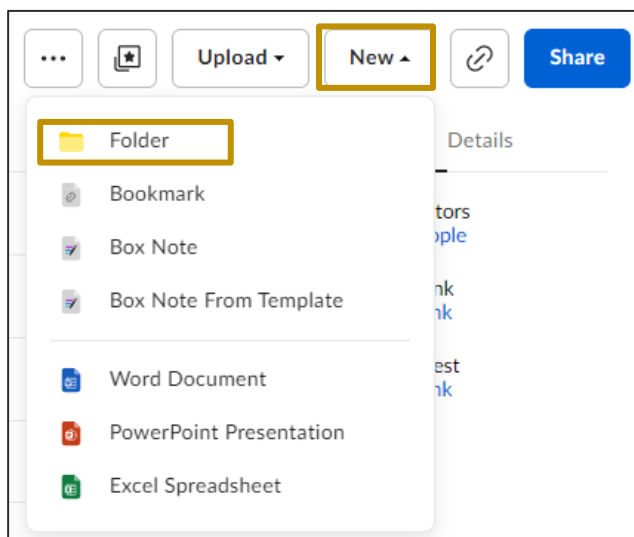


## HOW TO CREATE A NEW FOLDER

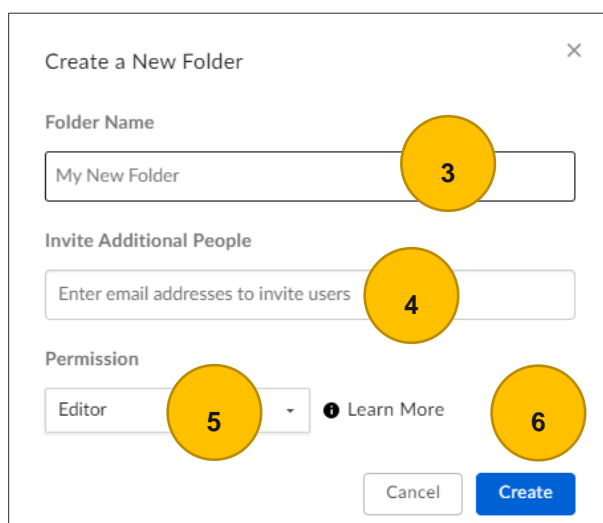
The **new folder option** will only be available when a folder is opened. Once you open a folder, the “**New**” button is visible and is located in the upper right section of the Box window.

**NOTE:** Before creating your folders, especially for collaborating, think about the Folder structure. Since you are the owner of the folder, you will be setting the permissions to the folders. For example, the first folder you create as the (Main) folder and then you will **share** the sub-folders to specific individuals.

1. Click once on “**My Documents**” or another folder to open this folder
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** level
6. Click “**Create**”





## UNDERSTANDING 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.

**Review this Video** on understanding folder permissions - <https://community.box.com/t5/Collaborate-By-Inviting-Others/Understanding-Folder-Permissions/ta-p/50256>

## BOX FOLDER SETTINGS

In the folder settings you can modify and control actions for a specific folder. The folder settings information part of this manual was copied from the link below. <https://community.box.com/t5/Organizing-and-Tracking-Content/Understanding-Box-Folder-Settings/ta-p/19827>

### NOTE:

- ✓ Folder settings are inherited by sub-folders, and cannot be 'undone' at a sub-folder level.
- ✓ Some settings can only be modified by folder owners and co-owners - check below

### To open Settings for a folder:

1. Click once on a folder and then choose the ellipses (. . .) located on the top bar in the upper right.
2. Choose “**Settings**”

All the settings appear for that specific folder. Once you are done updating the Folder settings,

3. Click “**Save Changes**” located in the upper right corner of the screen.

## COLLABORATION- INVITATION RESTRICTIONS

Restricts who can collaborate in this folder.

☒ Only folder owners and co-owners can send collaborator invites

☐ Restrict collaboration to within Rensselaer Polytechnic Institute

☐ Allow anyone who can access this folder from a shared link to join as a collaborator ⓘ

Allow users to join as: Editor

**NOTE:** These settings also apply to files in the folder whose settings you are modifying.

- **Only folder owners and co-owners can send collaborator invites** - If this box is checked, users with the access level of editor or below will not be able to invite collaborators into this folder.
- **Restrict collaboration to within your enterprise** - If this box is checked, only users within your enterprise will be able to join this folder as collaborators.
- **Hide collaborators** - If this box is checked, collaborators with the access level of editor or below will not be able to see the list of users collaborating in this folder. Owners and Co-Owners will still be able to see the full list.

- **Allow anyone who can access this folder from a shared link to join as a collaborator** - If this box is checked, users who follow a shared link to this folder will be prompted to join as collaborators. You can select the access level that these users will be granted below.

## COMMENTING

Disable and hide comments on content in this folder. No one can add comments to this folder or view any comments there were already created.

☐ Disable commenting for this folder

Note: This also hides any comments that are currently in this folder.

## SHARED LINK ACCESS

Restrict who can access this folder via shared links.

☐ Only collaborators can access this folder via shared links

For: Files and Folders

## PRIVACY - COLLABORATORS

Controls who can see collaborators in this folder.

☐ Hide collaborators and their activity from non-owners

Note: If enabled, only the folder owner and co-owners will be able to view collaborators and their activity in the folder. This also removes the ability for non-owners to invite collaborators.

## UPLOADING – EMAIL UPLOADS (CONFIGURABLE BY EDITORS)

Allow people in this folder to upload files via email.

☐ Allow uploads to this folder via email ⓘ

☐ Overwrite files with the same name when uploading by email or widget


## AUTOMATED ACTIONS – DELETE OR UNSHARE

Set a date to automatically delete or unshare this folder.

- **Auto-delete this folder on a selected date** - If this box is checked, this folder will be automatically deleted on the date selected below. (Owners only)

- When a folder is auto-deleted, no notifications will be sent to the owner or collaborators on the folder
- **Unshare this folder on a selected date** - If this box is checked, all shared links to this folder will expire on the date selected below. (Owners and Co-Owners)

☐ Auto-delete this folder on a selected date
   
☒ Unshare this folder on a selected date
   
 Un-share this folder on
   

Fri, December 6, 2019
 

- Collaborators will remain in the folder; however, the shared link will expire.

## EMAIL AND NOTIFICATIONS - NOTIFICATIONS

Email notifications alerts you to let you know when collaborators access or edit your files. Depending on how the notifications are setup, will depend on the type of notification you will receive.

- **Use my default notification settings** - If this option is enabled, you will receive notifications according to your notification preferences in your Account Settings.
- **Override default settings for this folder and all subfolders** - If this option is enabled, you can set custom notification preferences. To receive more or fewer notifications than usual for this folder and any subfolders, click check boxes under **Notify me when someone**.  
Enable this option to access **Disable all email notifications for all collaborators**.
- **Disable all email notifications for all collaborators** - If this option is enabled, collaborators will receive no emails about activity in this folder.

☒ Use my default notification settings
   
☐ Override default settings for this folder and all subfolders
   
☐ Disable all email notifications for all collaborators
   
 Notify me when someone
   
☐ Previews
   
☐ Downloads
   
☒ Uploads
   
☒ Deletes
   
☒ Adds a comment

<https://community.box.com/t5/Organizing-and-Tracking-Content/Understanding-Box-Folder-Settings/ta-p/19827>

## WORKING WITH FOLDERS

### When should I invite someone as a collaborator verses sending them a shared Link?

**Collaborator:** Invite someone into a folder as a collaborator if you're working with them on an ongoing basis, and they need persistent access to the content you're sharing.

**Shared link:** Send someone a shared link to a folder **or** file if you merely need to provide quick, read-only access (much in the way you'd send an email attachment). Your recipient can continue to reference that link for the most up-to-date version of the content.

<https://community.box.com/t5/Get-Started-Guide-for-New-Users/Collaborate-on-Files/ta-p/296>

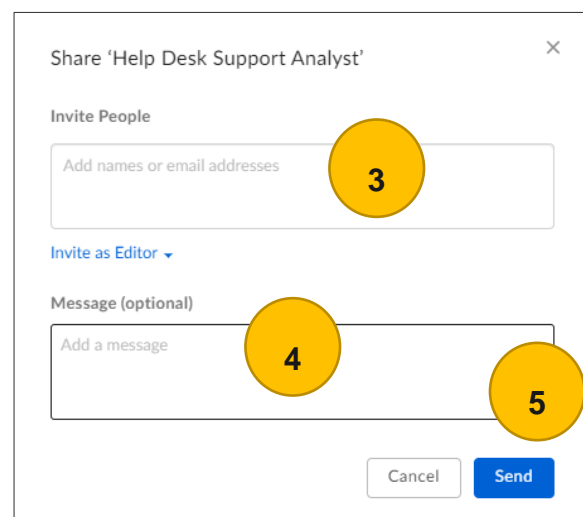
## SHARE A FOLDER

You can share a folder or send a link to that folder to anyone that has a Box account.

1. Click **Share** located to the right of a folder.
2. Choose **Invite People** and begin typing the person's name or email address (If they appear in the list below they have a Box account) IF a name or email address does not appear that person will first need to create a box account at box.com (sign up for a free account)
3. **Invitee Permissions** – Choose permission level for the Invitee.
  - **Editor:** An editor has full read/write access to a folder or file. Once invited to a folder or file, the editor is able to view, download, upload, edit, delete, copy, move, rename, generate and edit shared links, make comments, assign tasks, create tags, and invite/remove collaborators. The editor is not able to delete or move root level folders.
  - **Viewer:** A viewer has read access to a folder or file. Once invited to a folder, the viewer is able to preview, download, make comments, and generate shared links. The viewer is not able to add tags, invite new collaborators, edit shared links, upload, edit files, or delete items in the folder.
  - **Previewer:** A previewer has limited read access. The previewer is able only to preview the items in the folder using the integrated content viewer. The previewer is not able to share, upload, edit, or delete any content.
  - **Uploader:** An uploader has limited write access. The uploader is able only to upload and see the names of the items in a folder. The uploader is not able to download or view content.
  - **Viewer Uploader:** This access level is a combination of Viewer and Uploader. A viewer uploader has full read access to a folder and limited write access. They are able to preview, download, add comments, generate shared links, and upload content to the folder. They are not able to add tags, invite new collaborators, or delete items in the folder. To update a file, people with this permission had to download a file, edit it locally, and re-upload (using the same file name). Effective May 2014, these collaborators can use [Box Edit](#) to perform the same action (download, edit, and re-upload) seamlessly.
  - **Previewer Uploader:** This access level is a combination of Previewer and Uploader. A previewer uploader has limited read and write access to a folder. They are able to preview, add comments, add tasks, and upload content to the folder. They are not able to add tags, generate shared links, invite new collaborators, edit or delete items in the folder.
  - **Co-owner:** A Co-owner has all of functional read/write access that an editor does. This permission level has the added ability of being able to change some advanced folder settings. Co-owners cannot change the owner of a folder.

(<https://community.box.com/t5/Collaborate-By-Inviting-Others/Understanding-Collaborator-Permission-Levels/ta-p/144> )

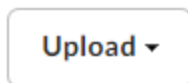
4. Type a **Personal Message** (optional)
5. Click **Send Invites**



## UPLOAD A FILE OR FOLDER

Uploading files or folders to box is easy.

1. While in Box, open the folder you would like the file/folder to be uploaded to, click **“Upload”** located in the upper right corner of the box window.



2. Choose File or folder.
3. **Locate the file or folder** from your computer and then click **“Open”**

**NOTE:** Hold the Ctrl key down while clicking each file to select multiple files to upload at one time. Be aware that you can only select one folder at a time to upload.

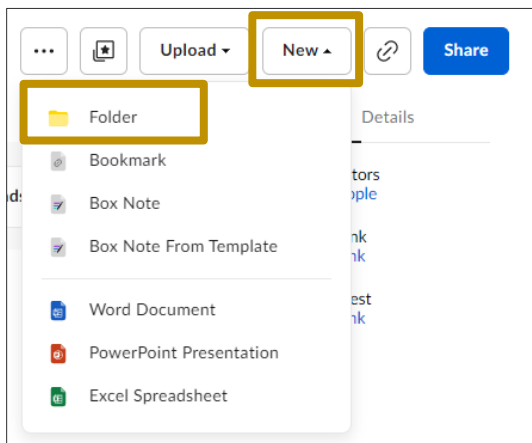
At the bottom of the screen, you will see a bar move until the document upload is complete. A message appears at the top to let you know that the file uploaded successfully to Box.

## WORKING WITH FILES

### CREATING AND OPENING A DOCUMENT IN BOX

Box allows you to create documents in Word, PowerPoint or Excel. **NOTE:** The New button will not be available unless you are in a folder.

1. While in a folder, click New located in the upper right corner and then choose the document type from the list.



2. **Type the name of the document** and then click **“Create”**

The New document opens in the application you choose asking if you would like to lock the file.

3. Click **Close** if you do not want to lock the file and begin working on the document or choose **“Lock file to prevent other from editing it”**
4. Click **Save** when you are finished creating the document and since this document was created while in box, this document will automatically save in Box.

## OPENING A DOCUMENT IN THE BOX WINDOW

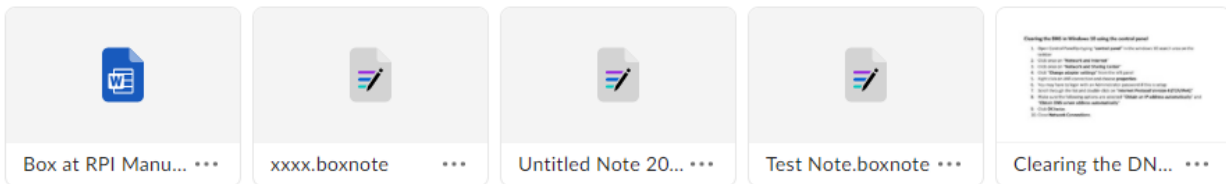
Before working on a document, you can open a document right from the Box window.

### Recent Files

You can quickly open a recent file by clicking once on one of the file icons at the top of the Box window.

All Files ▾

Recent Files

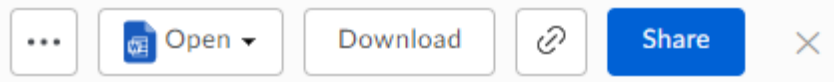


OR

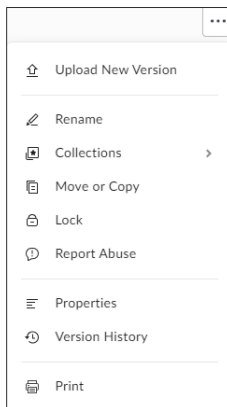
1. Click once on a file name.



The document opens in Box. Several options appear at the top right corner of the Box window.



- ✓ You can choose the three dots “...” to view more options, i.e. print



- ✓ You can choose “**Open**”, to open the document in the application it was created in.
- ✓ Click “**Download**” (the file opens in the app it was created in and you have the option to lock the file)
- ✓ **Share** the document

**To close the document and return to the “All Files” area in Box:**


2. Click the “**X**” located in the upper right corner of the box task bar to close the document.

## MORE ACTIONS - DOCUMENT IS OPEN IN BOX

With a document open, there are many actions that you can apply, such as *renaming*, *adding to favorites*, *move* or *copy*, *lock*, view the *properties*, *versions* and *print*.

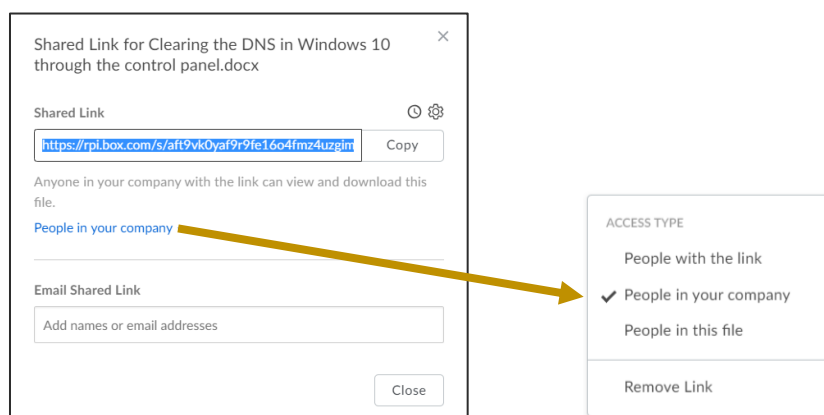
- ✓ Select for “**More Options**” button with the ellipses (. . .) located in the upper right corner of the Box task bar.

**Download** - opens the document in the application.

1. Click to highlight a file.
2. Click the download button  located at the located in the upper right corner of the Box task bar and the document appears at the bottom of the screen.
3. Click once on the file name and this document opens in the application on the screen.

**Share** - allows you to copy and paste this link or email this link to a person or group of people.

**NOTE:** When sharing a document, it is best to create a new folder with that the document(s) are saved to and then share out the folder. This will allow you to update the access levels easier.



A **shared link** is a URL sent to recipients to access a specific file or folder this URL is easy to copy and paste and that have defined permissions levels and security settings. A shared link can send content internally as well as externally. Someone does not need a Box account to receive a shared link.

## MORE OPTIONS

**Upload New Version** – Opens your files for you to choose a new version of the document on the screen.

1. Click once on the ellipses (. . .) located in the upper right corner of the Box task bar.
2. Choose a new version of this document from the list of files.
3. Click **Open**.

**Rename** – change the name of the document

1. Click once on the ellipses (. . .) located in the upper right corner of the Box task bar.
2. Choose **Rename**.

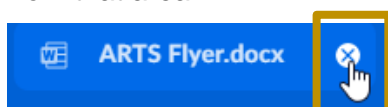
3. **Type a new name** in the Name field.
4. Click **Save**.

**Collections/Favorites** – add frequently used folders/files to a collection or favorites

1. Click once on the ellipses (. . .) located in the upper right corner of the Box task bar.
2. Hover over **Collections**
3. Choose a Collection, create a new collection or add to favorites.

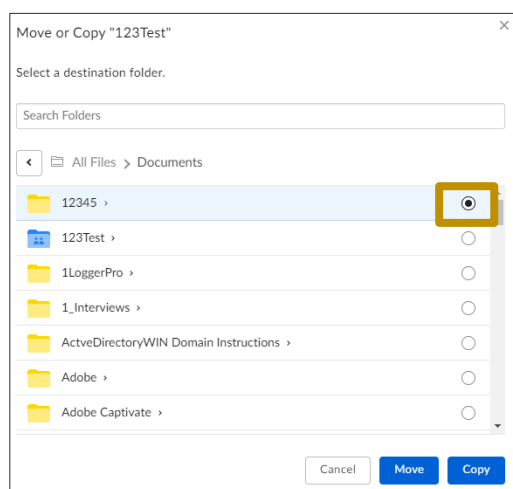
The item now appears on the left side of the navigation pane in the specific collection or within favorites.

4. Under Collections/Favorites, click the “X” at the end of the folder/file name to remove from that area.



**Move or Copy** – move or copy the document viewed on the screen to a different folder

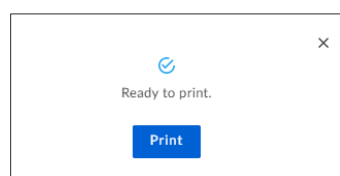
1. Click once on the ellipses (. . .) located in the upper right corner of the Box task bar.
2. Choose **Move or Copy**
3. Type the name of the folder in the search bar or scroll to locate the folder.



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.

**Print** – You can choose to print the document with the document on the screen.

1. Click once on the ellipses (. . .) located in the upper right corner of the Box task bar.
2. Choose **Print** and the Ready to print dialog box opens.



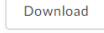
3. Click **Print**.



4. The print window opens with the printer settings. Make changes to these settings, and then click **Print**.

## DOWNLOAD (EDIT) AND SHARE DOCUMENTS


**Edit** - To edit a document you must first “**Download**” the document and edit this in the original application.

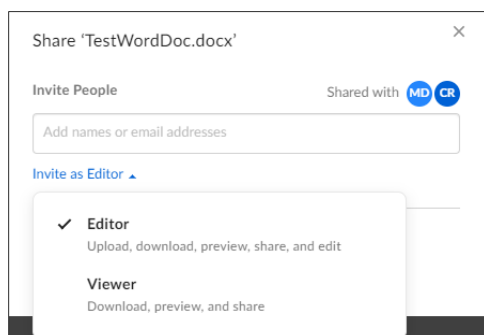
1. Click once on a document in Box, and then click once on the  Download button located in the upper right corner of the Box task bar.

The document appears at the bottom of the screen on a task bar.

2. Click once on the document name and the document opens in the application on the screen.
3. Click **Enable Editing** if this appears at the top and begin editing the document.

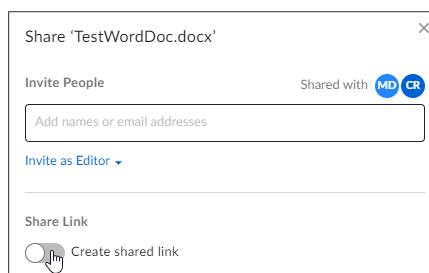
**Share** – A document can be shared to anyone at RPI (People in your company) or with those external to RPI (People with the link)

1. Click once on a document in Box, and then click once on the  Share button located in the upper right corner of the Box task bar.
2. **Invite People:** Type the name and choose from the list below or type an email address.
3. Choose if they will be an **Editor** or **Viewer** of the shared document.

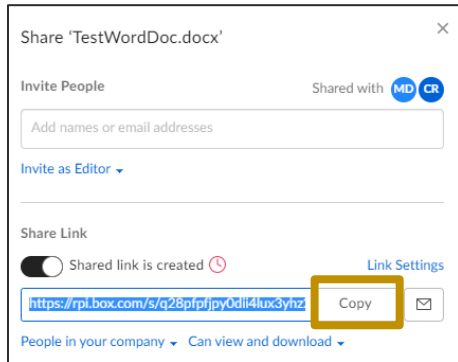


### Share a link

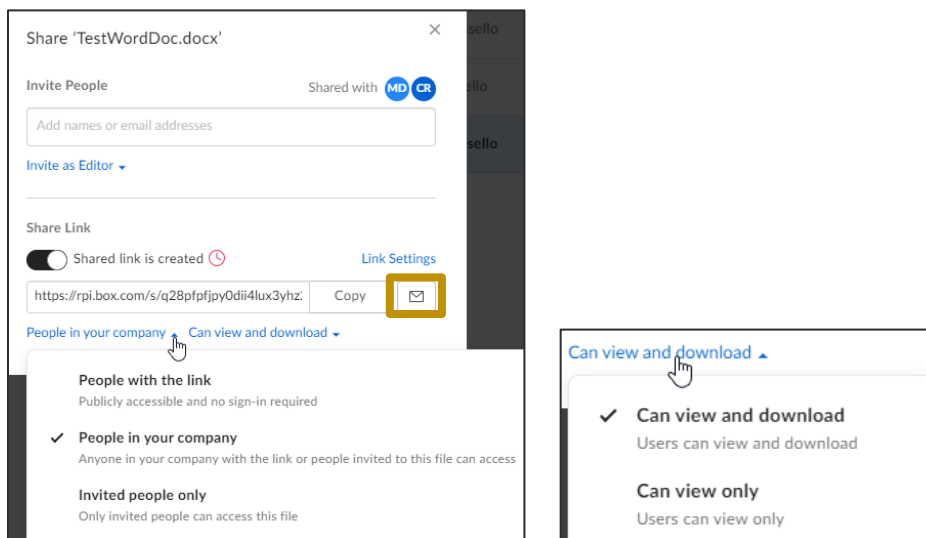
1. Slide the Share Link button to the right to open a link to copy.



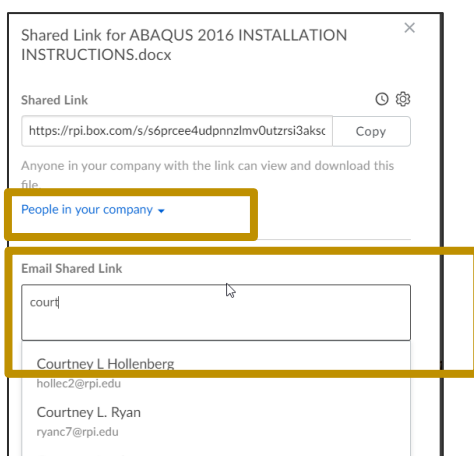
This Link can now be copied by clicking the “**Copy**” button and paste into an email **or** names can be added under “Email Shared Link” to email this to one person or to a group of people.



The second way is to email this link to those on the Invite People line. Before this link is sent through an email you should choose the link options below the link and determine who will be receiving this link and can they view and download or just view.



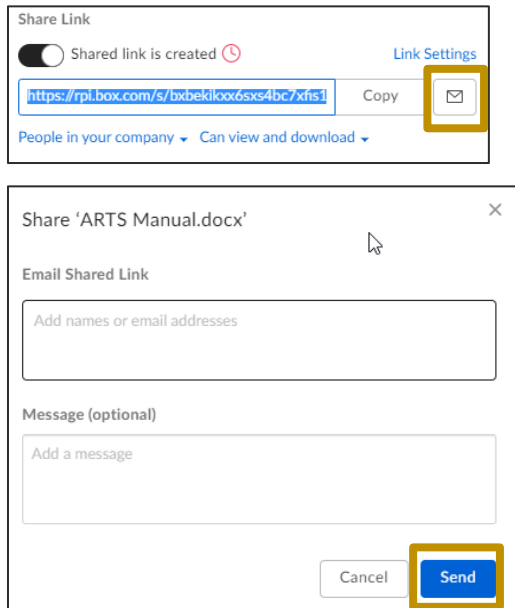
**Sharing with RPI Faculty/Staff that have a Box account** – Choose **People in your company**, and then begin typing the Faculty/Staff person’s name and then select them from the list.



**Sharing with someone outside of RPI** – Choose **People with the link**, and then those who do not have a Box account (external) people can view the document if they have a Box account. Those who do not have a box account will need to setup a free account from box.com.


**NOTE:** For external email addresses, when they click on the link:

- ✓ They **will be prompted to create a free box account** just adding their name and a password.
  - ✓ Once signed in they may get a message that the file can't be found. They should click **All Files. Accept terms. Then click on All Files again.**
2. Once the options are selected click the mail icon and complete the email address and add a message (optional)



3. Click **Send**.

## 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 window or click "... " to the right of the file and choose Trash.
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.

## DOCUMENT AND FOLDER OPTIONS FOR OWNERS

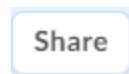
Once you choose a folder/document, the following buttons appear to the right of the folder.



= more options (share, trash, collections/favorites, move/copy, lock, properties, more actions)



= Create and copy shared link to the clipboard.



= Invite Send an email with the shared link to the document.

## RECOVERING A DOCUMENT USING VERSION HISTORY

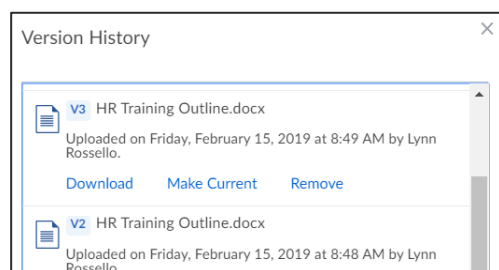
Each time you edit a document and upload this document to Box there is a new version of this document. Box shows the number of saved document versions (v) located to the right of the document name.

In Box, a version can be opened; made as current or be removed from the version history list.



**To open a previous version of a file:**

1. Click the version number to the right of the file name **V4** to open the Version History area.
2. Scroll to locate one of the versions (date/time) and then 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.

<https://support.box.com/hc/en-us/articles/360043697054-Accessing-Version-History>

## COMMUNICATION WHILE IN A DOCUMENT

### SENDING AN EMAIL TO COLLABORATORS IN A FOLDER


To update collaborators on new documents or to inform them on specifics regarding the folder, use the “Mail All” feature to send an email to the whole group.

1. With a folder open, click the ellipses (. . .) located in the upper right corner of the screen.
2. Choose . . . **More Actions**
3. Choose **Manage Collaborators**.
4. Click the **Mail All**  button.
5. **Type a Message.**
6. Click **Send**.

### COMMENTS

Comments are a great way for your collaborators to provide feedback, to notify others on updates to the file and for you to make notes to yourself.

#### Creating a Comment:

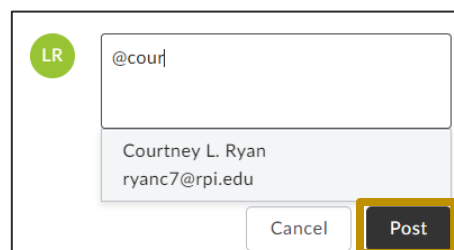
1. **With your document opened in Box**, click  located on the bar to the right of the document.



2. To send a comment to all the collaborators, just begin 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.

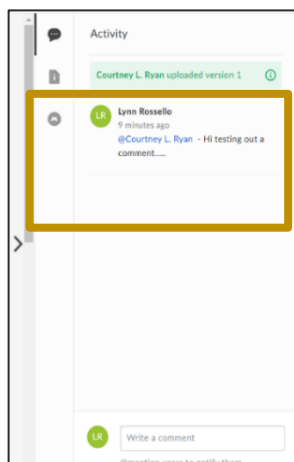
**NOTE:** to add more than one name, type @ followed by the next collaborators name and so on. All Collaborators will see the comment.

5. Type your comment in the “Write a comment” located at the bottom of the comment window.
6. Click “**Post**”

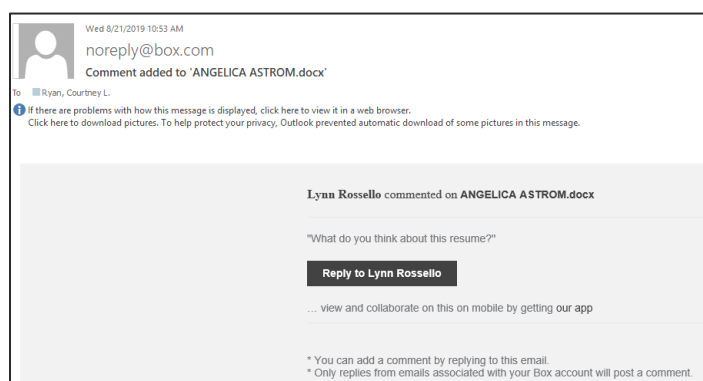


The comment appears along the right side of the document window in Box.

The collaborator receives an email letting them know that they have a comment regarding this specific document. All collaborators can see all comments and tasks within the documents.



**Example** of the email a collaborator receives when a comment was added:

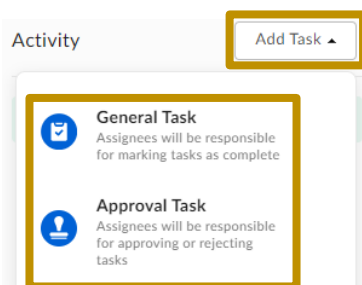


## TASKS

Instead of emailing back and forth to your collaborators, create a task in Box to keep assignments on track. Tasks will be located in one central area.

### Adding a Task:

1. **With your document opened in Box**, click  located on the top right side of the document and choose a **General or Approval Task**



2. Select assigned people for the task, add a brief description of the task and a due date.

Create General Task

×

Select Assignees

Add an assignee

Message

Write a comment

Due Date (optional)

Select a date

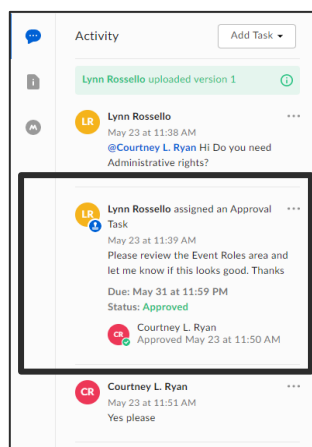
Cancel

Create

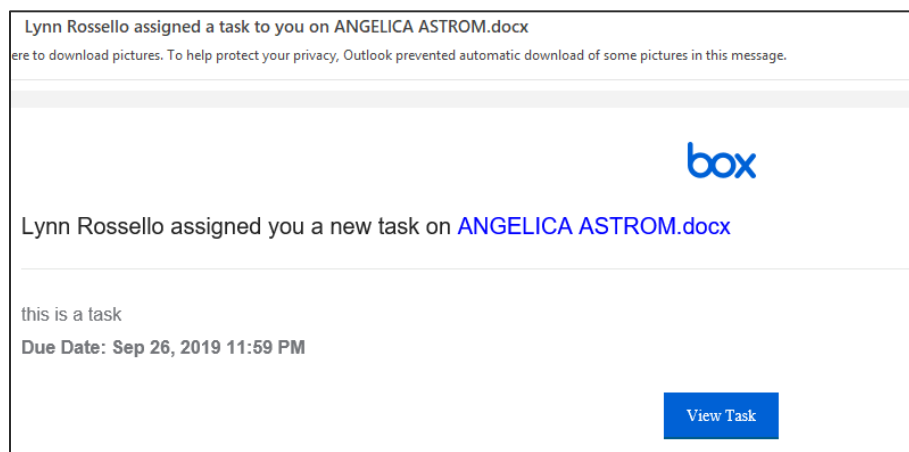
3. Click **Create**.

Tasks appear in the task activity screen on the right.

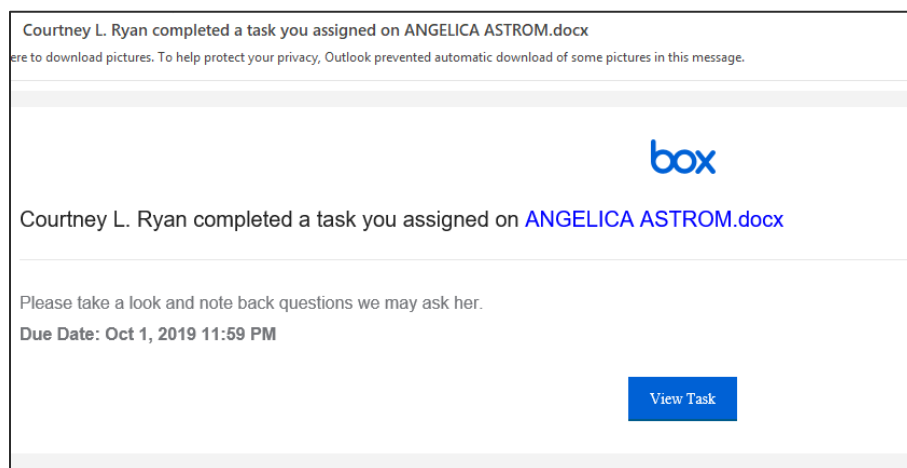
**NOTE:** Tasks can only be assigned to existing collaborators in a document.




**Example** of the email sent to the person who was **assigned** the task:



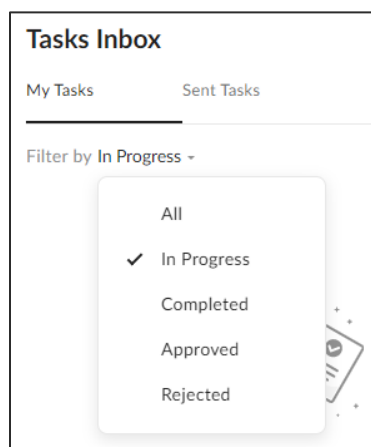
**Example** of the email you receive when the person **completes** the task:



## Viewing your Tasks

All your tasks can be viewed by clicking the task  icon located in the upper right corner of the Box window and then choose “View All Tasks”

The Tasks Inbox shows all of your tasks and sent tasks. You can filter your tasks by: **In Progress**, **Completed**, **Approved** and **Rejected**.



<https://community.box.com/t5/Get-Started-Guide-for-New-Users/Replace-Email-Chains-with-Comments-and-Tasks/ta-p/300>

## ADD OR EDIT TAGS

<https://support.box.com/hc/en-us/articles/360044195913-Using-Tags>

## CREATING A BOX NOTE

While in a folder, a Box note can be used to create, edit and share ideas in real-time with your collaborators. Box Note is a great way to communicate with those who have access to the folder.

1. Open the folder where you want to create the new Box note.



2. Click  **Notes**  or click **New→Box Note** or **New→Box Note From Template** (choose a specific template that prepopulates with predefined content)

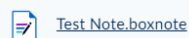
The Note windows opens on a separate browser tab.

3. Begin typing your note.
4. Close the tab at the top and the note saves.

The new note has been added to the folder.

**NOTE:** Your last note automatically saves when you create a new note or close the tab. Collaborators **do not receive an email** when a note is created.

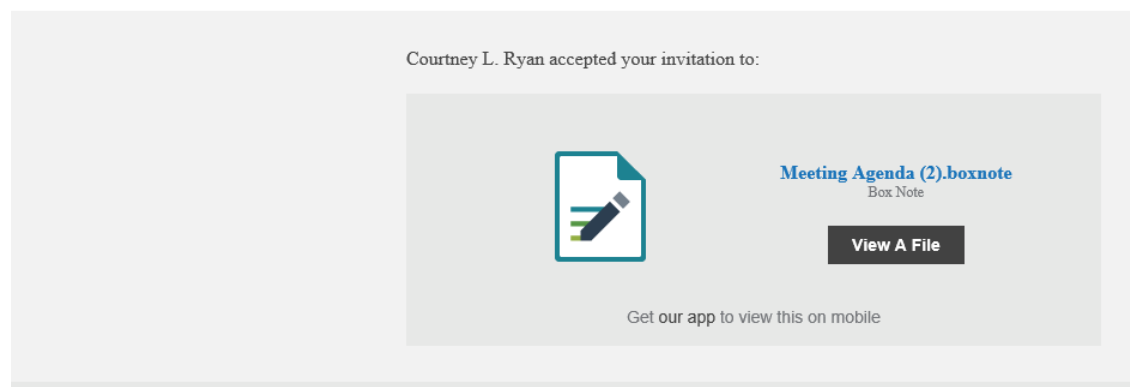
The Note Name appears in alphabetical order in that folder.



Click this Note to

**Example** of an email the collaborators of a folder receive:

Courtney L. Ryan has accepted the invitation to your 'Meeting Agenda (2).boxnote' on Box  
are problems with how this message is displayed, click here to view it in a web browser.



## COLLABORATORS

Collaborators are invited and given specific access to a file or folder. This is great way to share content for projects. Folder collaborators will need to register for a Box account.

### Collaborators can:

- ✓ add other collaborators
- ✓ setup permission levels
- ✓ depending on their access level, view, edit, upload/download documents, make comments or tasks

A **shared link** is a URL sent to recipients to access a specific file or folder this URL is easy to copy and paste and that have defined permissions levels and security settings. A shared link can send content internally as well as externally. Someone does not need a Box account to receive a shared link.

## COLLABORATOR PERMISSION LEVELS

<https://community.box.com/t5/Collaborate-By-Inviting-Others/Understanding-Collaborator-Permission-Levels/ta-p/144>

## INVITING A COLLABORATOR

The share window is where you can invite people to collaborate on a file or folder.

### To open the Share window:

1. In the Box window, click anywhere but on a file or folder title to highlight the line for this file or folder you want to share.
2. Click the **Share** button located to the far right of the file or folder. You can also click the right mouse button and choose **Share**.

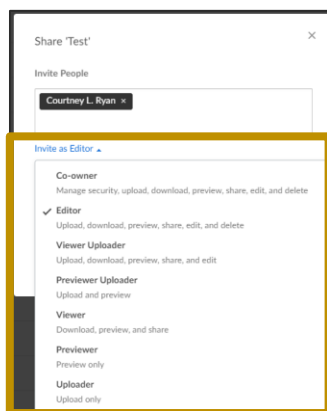


The share window appears.

### To invite someone to collaborate in a file or folder:

1. In the Share window, under **Invite People**, click in the **Add names or email addresses** box.
2. Type a collaborator's name or email address.
3. Click the drop-down icon beside **Invite as**. Box displays a list of [roles](#).
4. Click a role you wish to assign to the collaborator.

**NOTE:** When inviting collaborators to a single file, the only available access level is **Editor**. You can change this access level to **Viewer** from the [Manage Collaborators](#) page. These are the only access levels available for collaborators on a single file.



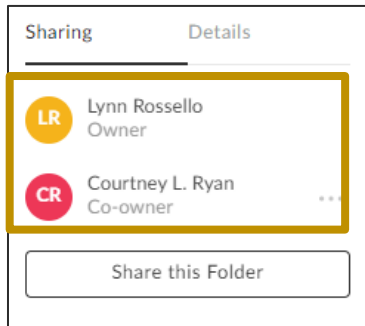
5. In the **Message** field, type a message of up to 750 characters for the collaborator.

### NOTE:

- The message field does not permit URLs.
- The message field is limited to 750 characters.

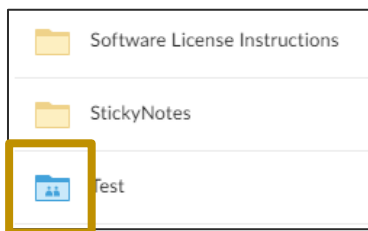
6. Click **Send**.

When you click on a folder/file, anyone who has access, will appear in the upper right corner of the box window

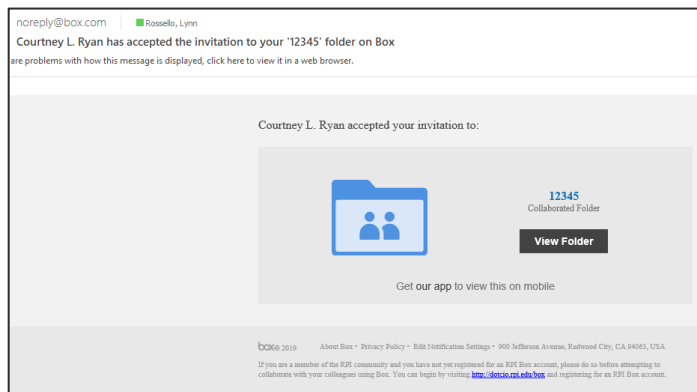


<https://community.box.com/t5/Collaborate-By-Inviting-Others/Inviting-Collaborators/ta-p/19723>

The folder turns “blue” indicating that it is a “**Collaborated folder**”.



**Example** of the email the collaborator receives:

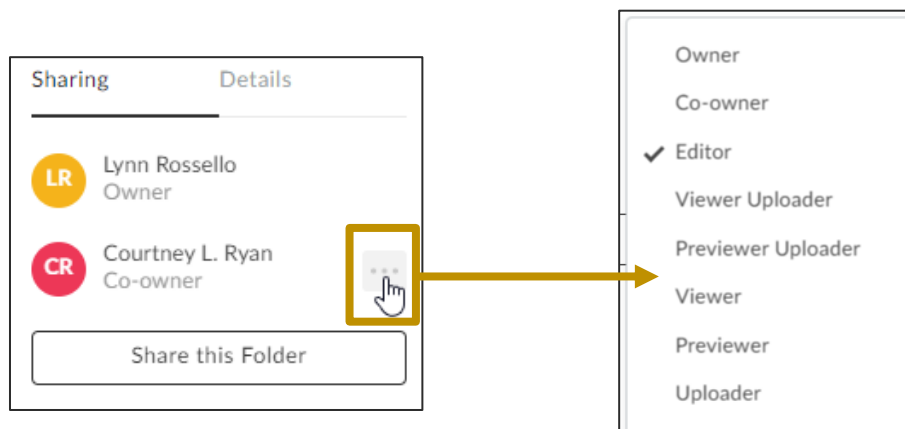


## MODIFY COLLABORATORS ACCESS LEVEL

**Modifying a collaborators access level in a folder:**

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

- Click the ellipses ( . . . ) to the right of a collaborators name and **choose a different access level**.



## REMOVING COLLABORATORS ACCESS

- Click to select the folder and view the collaborators on the right side of the screen under Sharing
- Click the ellipses ( . . . ) to the right of a collaborators name and choose **Remove**

## HIDE COLLABORATORS

Owners and Co-Owners of folders have the ability to “**hide collaborators**”. Those with “Editor” access or below will not be able to see other collaborators names (only Co-Owners will be able to see all collaborators)

- Right click on a folder or click the ellipses ( . . . ) by the folder you want to “Hide Collaborators” for that specific folder.
- Choose **Settings**
- Select “**Hide collaborators and their activity from non-owners**” under Privacy and select “**Only collaborators can access this folder via shared links?**” “under the Shared Link Access.

Privacy

Collaborators

Control who can see collaborators in this folder.

☒ Hide collaborators and their activity from non-owners
 

Note: If enabled, only the folder owner and co-owners will be able to view collaborators and their activity in the folder. This also removes the ability for non-owners to invite collaborators.

Shared Link Access

Restrict who can access this folder via shared links.

☒ Only collaborators can access this folder via shared links

For: 

Files and Folders

- Click “**Save Changes**” located in the upper right of the setting screen.

## WHAT IS BOX DRIVE?

Box Drive is a simple way to work with all your files right from your desktop.

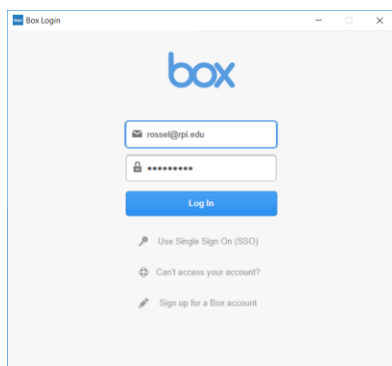
## BENEFITS OF BOX DRIVE

- ✓ Open File Explorer to find your files stored on Box, edit documents like you would any local or network file and it saves automatically to the cloud. No need to use Box Sync.
- ✓ Files stored in the Cloud always accessible using an internet connection.
- ✓ 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](http://policy.rpi.edu/policy/Information_Classification_Policy)

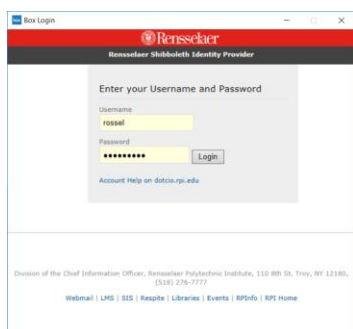
Reference: <https://community.box.com/t5/Getting-Started-with-Box-Drive/Box-Drive-vs-Box-Sync/ta-p/35829>

## INSTALLING BOX DRIVE (IF YOU HAVE BOX SYNC ALREADY – SEE SECTION ON SWITCHING FROM BOX SYNC TO BOX DRIVE)

1. Click to [download the Box Drive installer](#). If you wish, you can consult [detailed installation instructions](#).
2. Once on this page, click “**Download Box Drive**” and choose for Windows or for Mac
3. Click on the file that appears at the bottom of the screen.
4. At the Box Login, type your RPI email address and RCS password and then click “**Log In**”

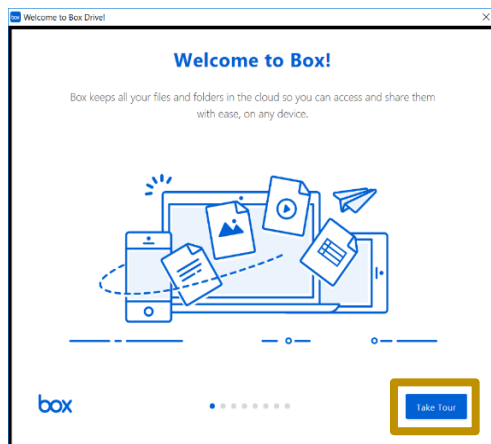


5. From the RPI's Box Login page, enter your RCS username ONLY and your RCS password.
6. Press **Enter** or click **Login**





Welcome to Box! Appears on the screen and a Box icon appears on your taskbar. You may want to take a quick tour to see how Box drive works.



1. When you complete the tour, click **finish** and Box opens.
2. You will receive an email from Box letting you know you logged into Box.

Get [more information on using Box Drive](#).

## SWITCHING FROM BOX SYNC TO BOX DRIVE

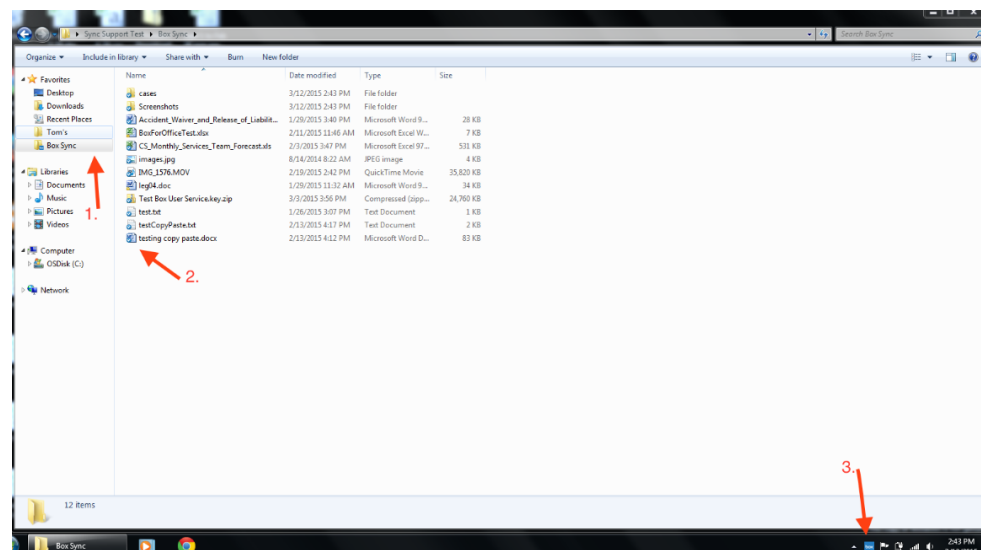
If you already have been using Box Sync, you will want to follow the steps below to switch to Box Drive.

**NOTE:** Sync your files to Box before uninstalling Box Sync.

<https://community.box.com/t5/Getting-Started-with-Box-Drive/Making-the-Switch-from-Box-Sync-to-Box-Drive/ta-p/50126#toc-hld--1329650726>

### Step 1: Check that all your files are synced to box

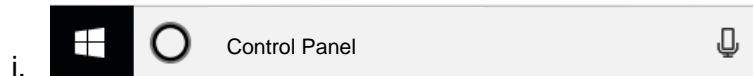
1. Use the desktop Sync icons(1) to verify that the syncing process has completed(2) and that no problem file notifications appeared(3)



## Step 2: Uninstall Box Sync

**NOTE:** A device cannot have both Box Sync and Box Drive installed, so before you install Box Drive you must uninstall Box Sync.

1. Open the **Control Panel** (windows) – Finder and then Applications (mac)
  - a. Lower left corner of Windows type “**control panel**”



- b. Select from list above
2. Under **Programs** – choose **uninstall a program**
3. Click **Box Sync** in the list.
4. Click **Uninstall** on the top bar.
5. Choose “**yes**” if asked “**Are you sure you want to uninstall Box Sync?**”

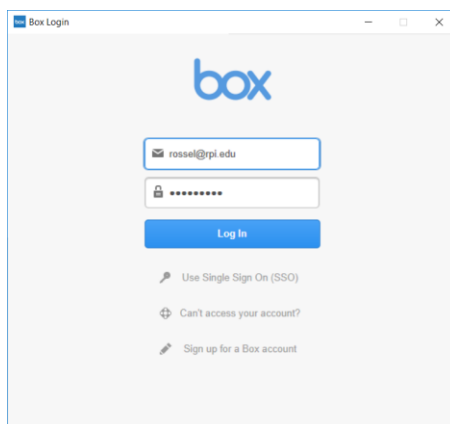
After Box Sync has been removed, you can locate your Box Sync folder from: c: users/(your username)/Box Sync/Documents

**NOTE:** Keep this folder until you are sure all documents have been safely stored in Box.

## Step 3: Install Box Drive

Once Box Sync is uninstalled, you are ready to [download the Box Drive installer](#). If you wish, you can consult [detailed installation instructions](#).

1. Once on this page, click “**Download Box Drive**” and choose for Windows or for Mac
2. Click on the file that appears at the bottom of the screen.
3. At the Box Login, **type your email address** and **RCS password** and then click “**Log In**”



4. From the RPI's Box Login page, enter your RCS username **ONLY** and your RCS password.
5. Press **Enter** or click **Login**


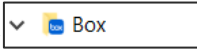
Welcome to Box! Appears on the screen and a Box icon appears on your taskbar. You may want to take a quick tour to see how Box drive works by clicking “TakeTour”

6. When you complete the tour, click **finish** and Box opens.

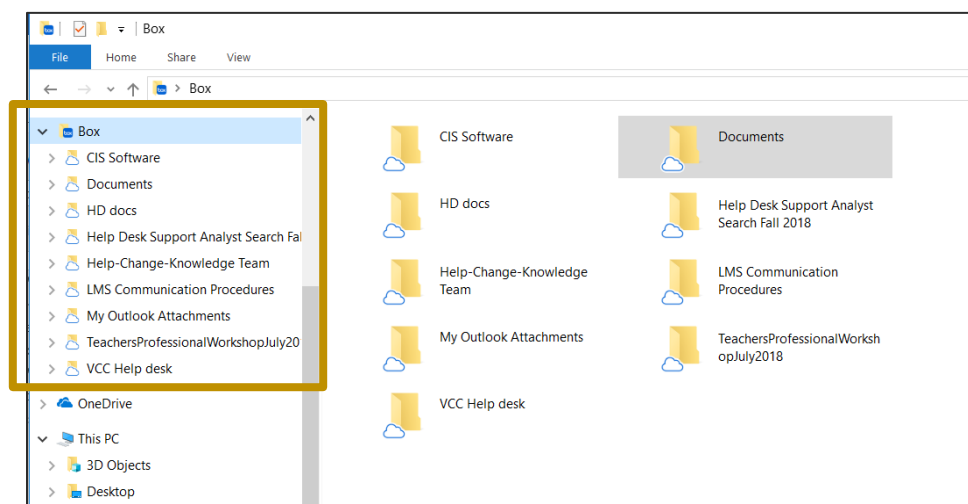
7. You will receive an email from Box letting you know you logged into Box.

Get [more information on using Box Drive](#).

## BOX DRIVE: WORKING IN FILE EXPLORER - PC

You can access Box Drive by opening File Explorer  located on the bottom of your taskbar and by navigating to the folder named Box  located on the left navigation area.

Open this folder to display all the contents located in your All Files page in <https://Box.rpi.edu>. You can navigate through any folder and open files as if you were working in your drive on the server.







**Tip:** If you do not see the Box folder in Finder (Mac) or File Explorer (pc), Box Drive may not be running.

In this case, from your **Start** menu click the Box icon or search for 'Box Drive'.

## BOX DRIVE: ICONS AND FILE/FOLDER STATUS

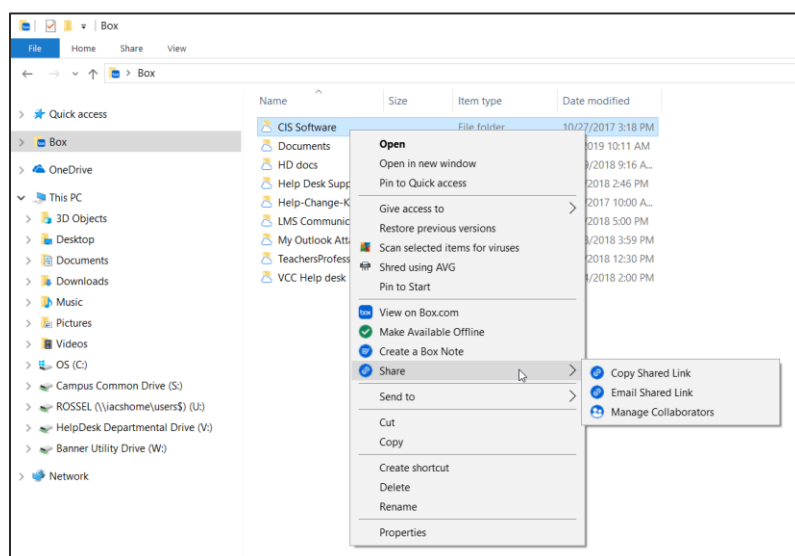
Box Drive icons tell you the status of your files and folders.

	Item is up-to-date in Box.
	Item is a problem item. For more information on <a href="#">problem items and how to resolve them</a> .
	Item is in the process of being saved to Box. This icon will display when Box Drive is uploading changes you made to files offline.
	Item has been locked.



## BOX DRIVE: QUICK WAY TO ACCESS BOX FUNCTIONS

You can also right-click on a folder or document in Box to choose additional Box functions, such as; copy or email shared links, manage collaborators, and view the item on Box.com. Also, create folders, Box notes and mark select content to make it available offline.



## COPYING OR EMAILING A SHARED LINK

1. Right click on a file or folder and choose “**Share**”
2. Choose **copy** or **email** shared link.

## MANAGE COLLABORATORS

1. Right click on a file or folder and choose “**Share**”
2. Choose **Manage Collaborators** and you will need to log into Box.
3. The Collaborators window appears and you can then click Share located in the upper right corner and invite people to be collaborators.

## CREATING A NEW FOLDER

1. Right click on a folder within File Explorer.
2. Scroll down to **New** and choose **Folder**.

## MOVING FILES AND FOLDERS

You can move a file or folder by dragging it from its current location to a destination folder.

## WORKING IN FINDER - MAC

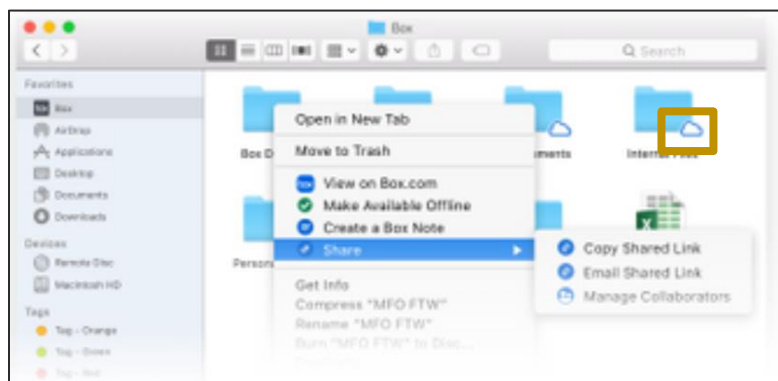
While in **Finder** on your Mac, navigate to **Devices**→**Favorites**→**Box**.

- This folder displays all of your files you see in the Box directory setup when you first registered for Box at <https://box.rpi.edu>.

- You can go to any folder and open every file you see just as if it were a local file.

The blue cloud icon to the right of a file or folder indicates the item is safely stored and up to date in Box. This icon changes to an orange syncing icon when a folder or file is added or updated.

The icon also displays as syncing when Box Drive is uploading changes you made to files offline. When the sync completes the icon resets to the blue cloud.



**Tip:** If the Box folder in Finder, is not visible, Box Drive may not be running. In this case, if you're using Launchpad click the Box icon; if you're using Spotlight search for 'Box Drive.'

Reference: <https://community.box.com/t5/Getting-Started-with-Box-Drive/Using-Box-Drive-Basics/ta-p/53641>

## BOX DRIVE BASICS

<https://community.box.com/t5/Getting-Started-with-Box-Drive/Using-Box-Drive-Basics/ta-p/53641>

## DOWNLOADING BOX APPS (BOX FOR OFFICE/BOX TOOLS)

Download a variety of Box apps for Windows, Mac, Android, & iOS

### Box for Office

Box for Office includes Box functionality for key Office products—Microsoft Word, Excel, PowerPoint, and Outlook—in a single app.

### 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.

**NOTE:** It is important to lock your document if other collaborators have rights to update, as box will make many saved copies of the document if many people are in the document at the same time. Therefore, it is important to lock a document as you are working on it.

**Box Apps (Article)** Get links on how to download these Box Apps from the Article

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

## BOX MOBILE FOR IPHONES AND ANDROIDS


The Box Mobile app is great for those on the go. A great example of how the Box Mobile app can be used is if your job at RPI requires you to take pictures and share these pictures with others.

Once you have installed the Box app on your mobile device you can:



- ✓ Share a Folder
- ✓ Upload files and pictures to a shared folder
- ✓ View these documents and pictures at anytime

**NOTE:** Before installing the Box application, you will need to request a Box account!

### □ Step 1: Request for an RPI Box account

1. Open a browser and go to <https://support.rpi.edu>
2. Click the  button and type “**Requesting a Box @RPI Account**” in the search area and follow the instructions.

### □ Step 2: Install and Locate the Box application on your device


1. Search and download the **Box - Cloud Content Management** app from your devices store.
2. **Android** - Click “**Work**” at the bottom of the screen and locate the Box icon .  
**iOS (iPhone)** - go to the App Store, search and down load the “**Box**” application.
3. Open the  **Box** application on your phone.
4. If prompted, tap **Log In** and then **type your RPI email address** and then click **Next**.
5. Type your **RCS username and password** at the RPI login page.
6. Tap **Login**.
7. Tap on **Enable Notifications** if you want to be notified when collaborators makes changes to the shared Box Folders/files.
8. Choose “**Allow**” to be notified of changes.

All Files/Folders in appear on the main screen of Box.

## TAKING AND SAVING A PICTURE

1. Click once on the folder that you designated for pictures.
2. Click the “**+**” located in the upper right of the screen
3. Tap “**Take Photo or Video**” (iPhone) or “**Capture Media**” (Andriod)
4. You may be prompted on Androids to “**Allow or Deny**” Box to access certain files on your phone, please select “**Allow**”
5. Tap Picture or Video and then choose “**Use Photo**”

### Renaming the image file:

1. Tap on the “**...**” to the right of the image
2. Tap “**Rename this File**”
3. Tap the backspace key  to delete the default name.
4. Tap “**Save**” in the upper right corner of the screen and the file is renamed.