



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 OF BOX

- Online Storage (100gb storage (can request more), 150gb upload max file size)
- Secure File Sharing ([Security & Privacy Details >>](#))
- Box Sync (easily access all your files that are in the cloud from your desktop)
- Permission Controls (allows you to control exactly who has access to your files)
- Version History
- Box Mobile App (access all your files from any of your devices)
- Multi-layered encryption
- Secure Box-hosted backup
- Box Drive (brings your entire Box folder tree to your desktop)

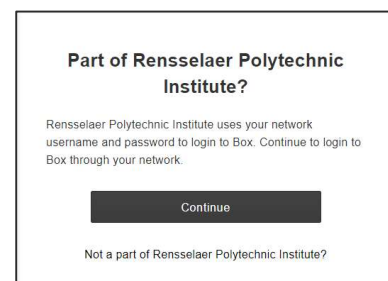
REGISTERING FOR A BOX ACCOUNT

The first step is to register for a Box account:

- **First time users:**
[Register](#)
Student, faculty, and staff can activate their accounts instantly

ACCESSING BOX AFTER YOU REGISTER

- **Registered users:**
[Login](#)
You must be registered with Box in order to log in
 1. Open a browser and type
<https://rpi.account.box.com/login>
 2. When the “Part of Rensselaer Polytechnic Institute?” box appears click “**Continue**”
 3. Then **type your RCS username and password** and then click “**Login**”



WHAT IS BOX DRIVE?

Box Drive brings your entire Box folder tree to your desktop. This allows you to access all the files on box through your desktop Box folder. Box Drive also supports making files available offline, so you can **work on them while disconnected from the Internet**. Box Drive synchronizes the versions as soon as you go back online. .

NOTE: Box Drive does locally cache files that you have opened. Box Drive's cache size limit is based on your free disk space (50% of available space) and has a maximum limit of 25 GB. **If you reach this limit, Box Drive begins removing files, starting with those files that have gone the longest without opening them. In addition, if a cached file has a new version created on Box, Box Drive discards the locally cached version.**

BOX DRIVE IS THE PREFERRED METHOD TO SAVE YOUR WORK

- ✓ Box Drive is very **easy to use** and you have access to all of the content you have stored in Box from your desktop.
- ✓ It ensures all of your **content is up-to-date**, saving all changes you make to your files.
- ✓ Box offers an **offline feature** that allows you to work on your Box Drive files without even being connected to the Internet. When you get back online, Box Drive automatically uploads your file changes.

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

SWITCHING FROM BOX SYNC TO BOX DRIVE

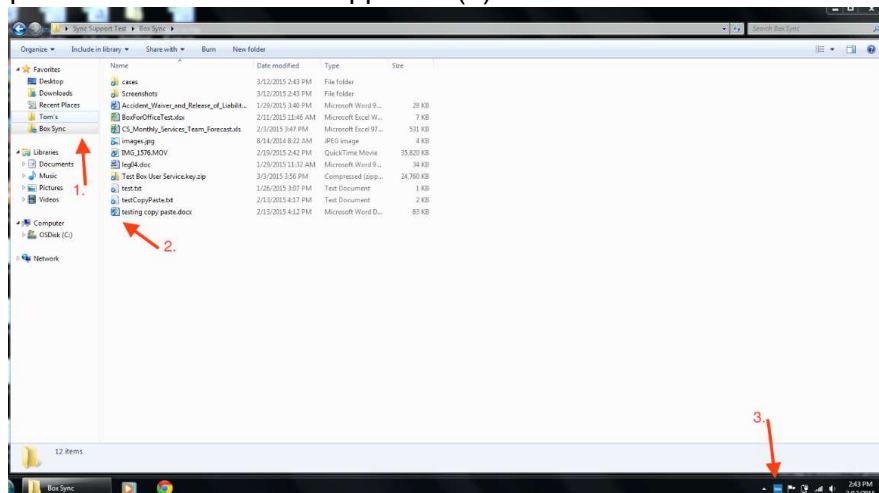
If you already have been using Box Sync, you will want to follow the steps below to switch to Box Drive.

NOTE: Make sure all of your files have been synced to Box.

<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

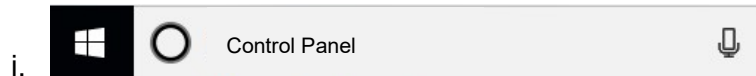
1. Use the desktop Sync icons(1) to verify that the syncing process has completed(2) and that no problem file notifications appeared(3)



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?**”

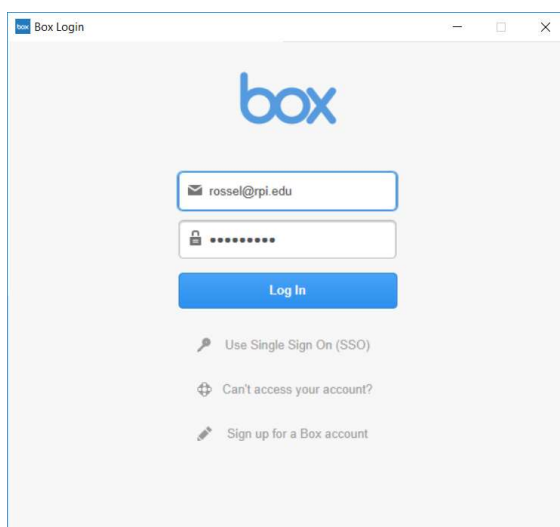
After Box Sync has been removed, you can locate your Box Sync folder from: c: users/(your username)/Box Sync/Documents

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

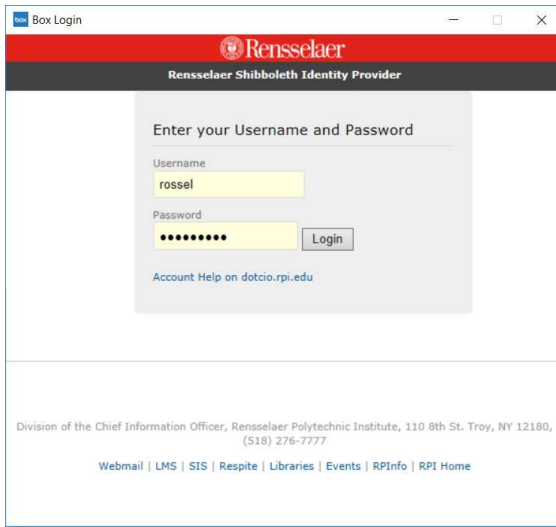
STEP 3: INSTALL BOX DRIVE

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

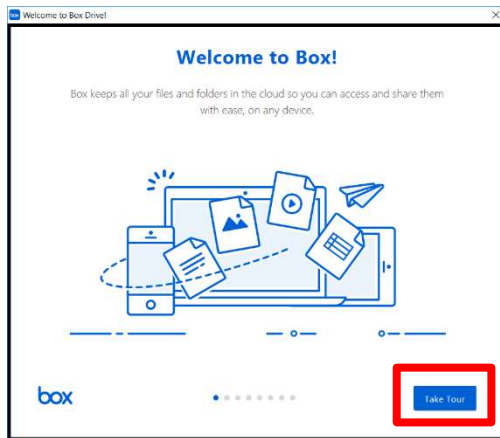
1. Once on this page, click “**Download Box Drive**” and choose for Windows or for Mac
2. Click on the file that appears at the bottom of the screen.
3. At the Box Login, type your email address and RCS password and then click “Log In”



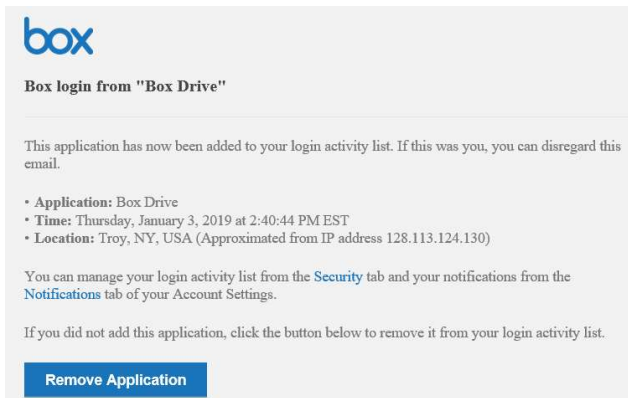
- From the RPI's Box Login page, enter your RCS username ONLY and your RCS password.
- Press **Enter** or click **Login**



6. 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.





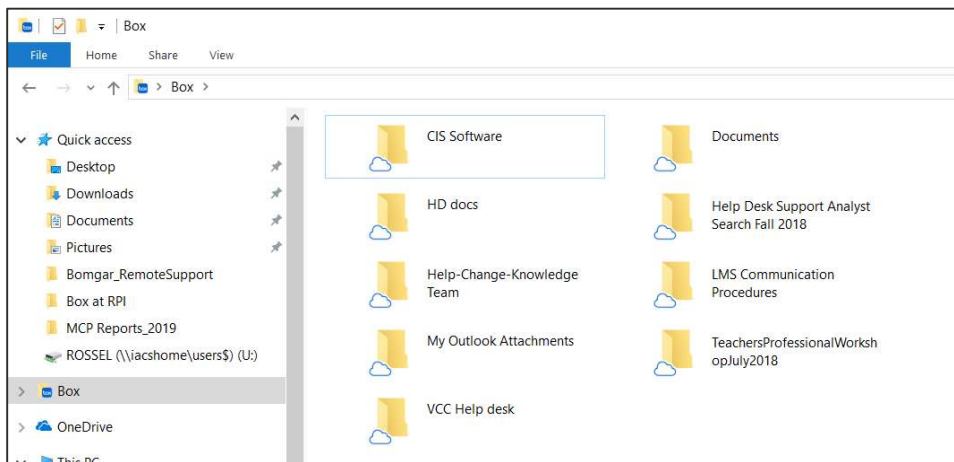
7. When you complete the tour, click **finish** and Box opens.
8. You will receive an email:



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

WORKING IN FILE EXPLORER - PC

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

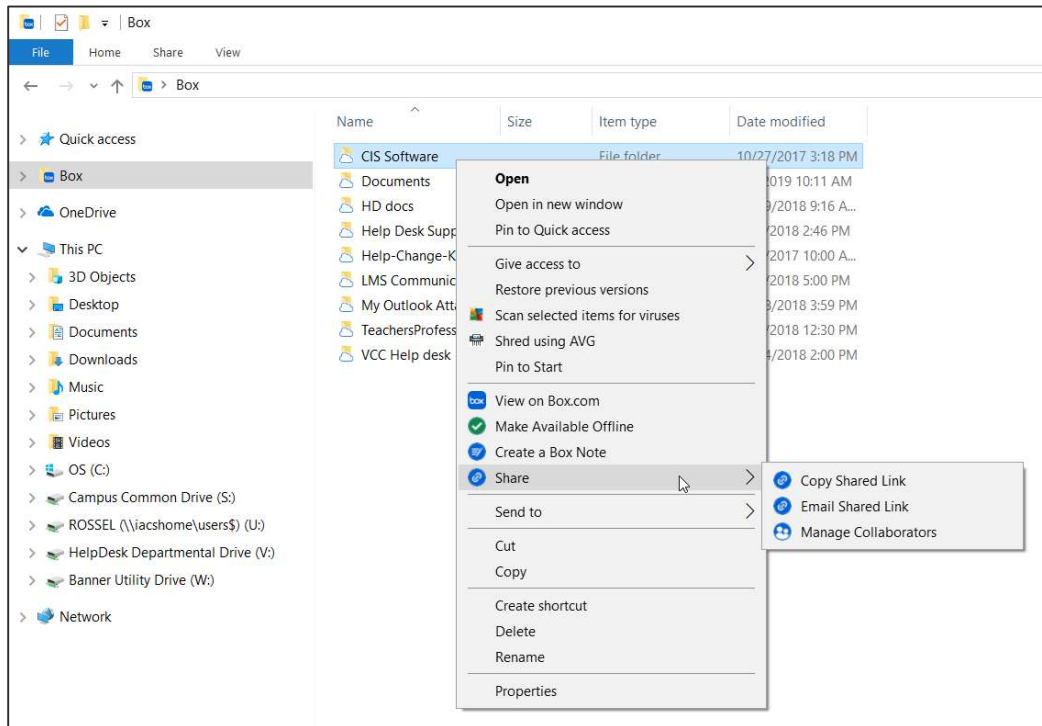
BOX DRIVE ICONS AND FILE/FOLDER STATUS

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 problem items and how to resolve them .
	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.

QUICK WAY TO ACCESS BOX FUNCTIONS

You can also right-click 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.



MAKING CONTENT AVAILABLE FOR OFFLINE USE

The Box drive offline feature marks your Box cloud content available whether you are working remotely or traveling on a plane regardless of whether you have internet connectivity or not.

How does content marked offline work?

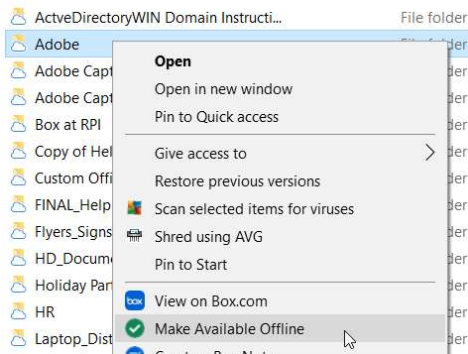
Once the content is marked for offline, Box drive downloads this content to your device's hard drive so you can work when you're not connected to the internet.

When do these offline files sync to Box Drive?

If you or someone else make changes to this content while you're offline, Box drive automatically uploads the revised content, when you are back online. This ensures that you are working in the most up-to-date version of your files.

To make content available offline:

1. Navigate to your Box folder in File Explorer or Finder (Mac).
2. Right-click on the folder you want to make offline.



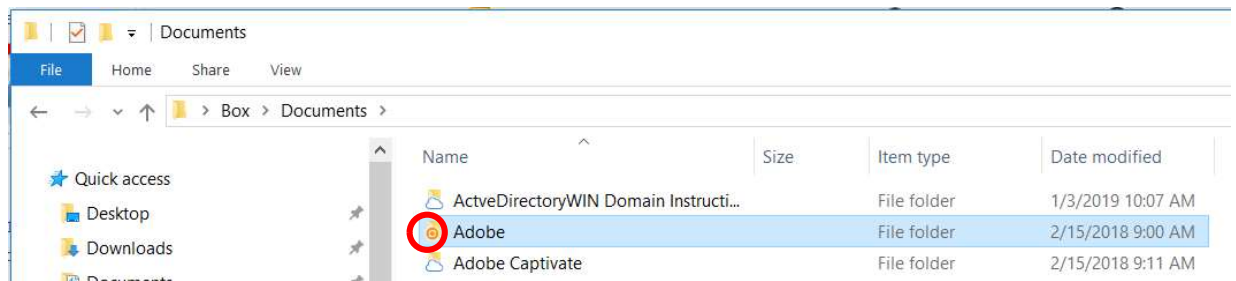
3. In the context menu that displays, click **Make Available Offline**.

NOTE:

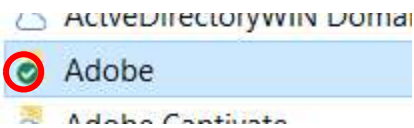
- **Only folders** you have download permission can be made available offline.
- You cannot make individual files available offline. However, you can open files and save them locally, then upload them to box when done.

Once you choose “**Make Available Offline**” Box Drive begins downloading the contents of this folder to your device.

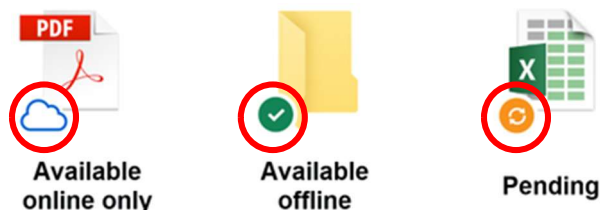
File is in Pending process - As files and folders download, they display with an orange **Pending** icon, meaning they are in the process of being downloaded.



File is complete and is Available Offline



When items finish downloading they display with a green **Available Offline** icon.



Note: Content you have saved or added to Box Drive also displays as pending while the upload is in progress.

As the process runs you do not have to wait for the download to finish, you can continue working. The process continues in the background as long as Box Drive is running and you are online.

NOTE: You can turn off your computer, quit Box Drive, or go offline while a download or upload is in progress, when you come back online, Box Drive continues right where it left off.

TIP: Try to make only the specific folders you need to work with available offline. When you make a folder available offline, Box Drive downloads the entire contents of that folder. This is IMPORTANT to understand how much content you're making available (and, therefore, downloading), so you don't unintentionally fill up your device's storage.

Open any file in a folder you have marked for offline, and if you are:

- **Working online:** Box Drive automatically uploads your revised file each time you save.
- **Working offline:** Box Drive automatically uploads all of your changes the next time you are online.

<https://community.box.com/t5/Getting-Started-with-Box-Drive/Making-Content-Available-Offline/ta-p/58822>

MOVING FILES AND FOLDERS

Files in Box Drive - Always inherit the status of the folder that contain them.

So...

- You move a file into a folder that is available offline, that file will be available offline, regardless of the file's prior status.
- You move a file into a folder that is available online, that file will not be available offline, again regardless of its prior status.

Folders in Box Drive - Always preserve their initial status regardless of where they are moved, with one exception,

So...

- Folders that are available offline retain that status.
- Folders that are available online retain that status.

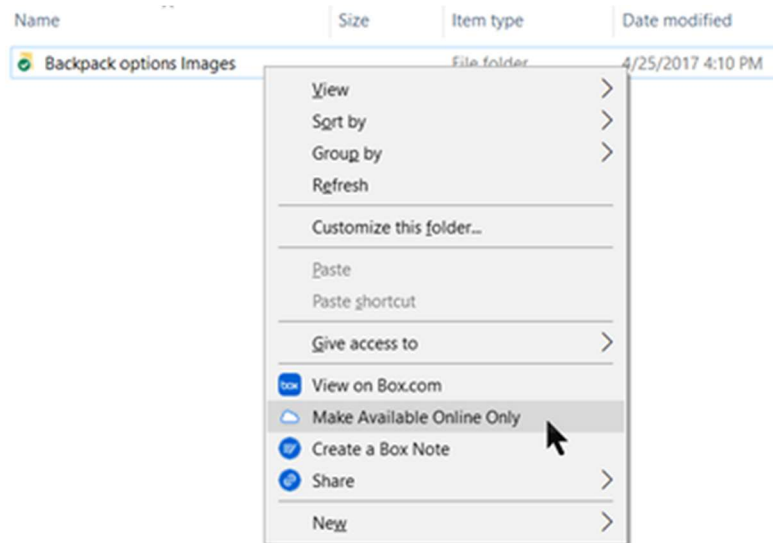
There is **one exception:**

When a folder that is online only moves into another folder that is available offline. In that case, the status of the online-only folder changes and its contents are made available offline.

IMPORTANT : The behavior above occurs regardless of who moves the content. So if someone else takes content that you have available online only, and moves that content into a folder that you have available offline, Box Drive downloads that content.

Can you change your mind and make offline folders available only online?

Yes. The "available offline" menu item is a toggle. So just as you'd make a folder available offline, you can right-click on an offline folder and, in the context menu that displays, click Make Available Online Only.



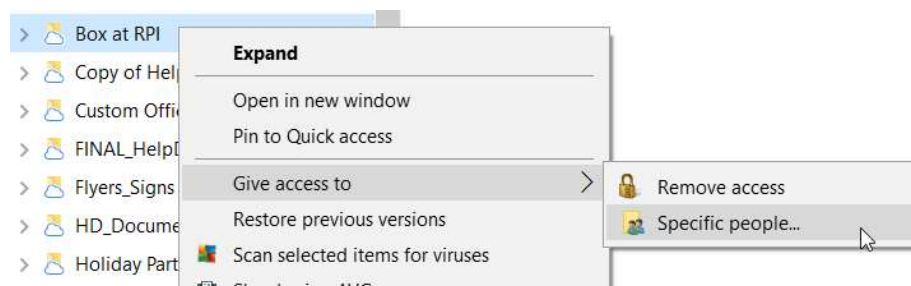
Reference: <https://community.box.com/t5/Getting-Started-with-Box-Drive/Making-Content-Available-Offline/ta-p/58822>

FOLDER ACCESS

You can grant or remove specific access to a folder for a collaborator.

To add access:

1. Right click on the folder and then move the mouse to "Give access to" and then choose "Specific people..."

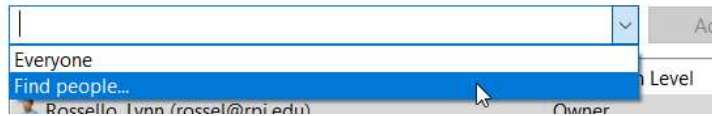


The Access

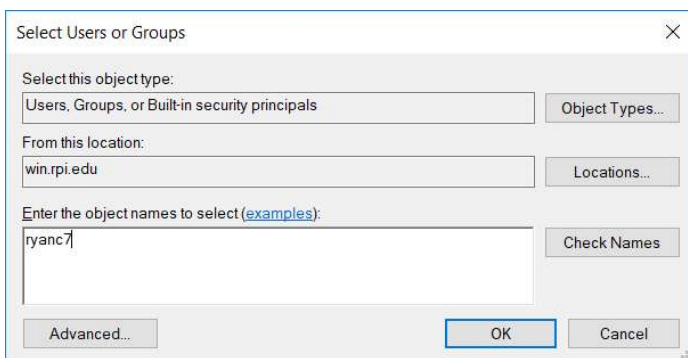
←  Network access

Choose people on your network to share with

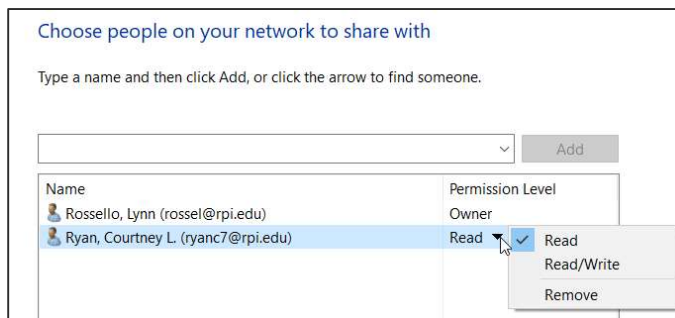
Type a name and then click Add, or click the arrow to find someone.



2. Begin typing their RCS username



3. Click **OK**.

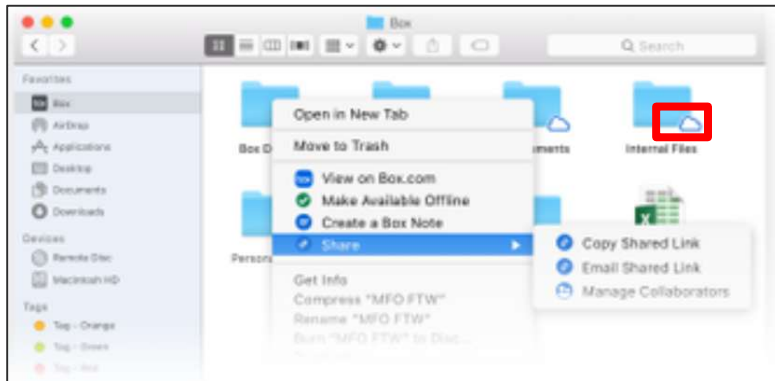


WORKING IN FINDER - MAC

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

- This folder displays all of your files you see in <https://rpi.app.box.com/folder/0>, which is 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 you don't see the Box folder in Finder, 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.'

LOGGING OUT OF BOX DRIVE

Logging out completely removes all traces of your Drive usage from your machine and enables you to log in again as a new user. Also, when you log out, your Box Drive session ends and the login screen displays. In addition, logging out of Box Drive deletes all of the downloaded content you had marked for offline availability. This of course clears up hard disk space on your device. It also returns to an online-only state all of the content you have marked for offline availability. You will have to repeat the process of marking folders for offline availability.

To log out on a Mac:

1. Navigate to the search menu by going to the menu bar and clicking the Box icon.

Alternatively, you can use the keyboard shortcut **Ctrl + Option + Cmd + space**.

2. Click the **gear icon**, and from the list that displays click **Log Out**.

Box Drive prompts you with an alert about the following types of files:

Open Files - You can save and close these files to prevent the loss of any work.

Items Uploading - You can wait for these to upload to Box. Box Drive cancels any uploads that do not complete before you log out.

Problem Items - These are local files or folders that cannot be synced back to Box. Logging out deletes these items. To view these items, navigate to the **Search Menu**, click the **gear** icon, and from the list that displays click **Error Updating an Item....**

To log out on Windows

Navigate to the search menu by going to the system tray and clicking the Box icon.

Alternatively, you can use the keyboard shortcut **Ctrl + Alt + Shift + B**.

Click the gear icon, and from the list that displays click **Log Out**.

Box Drive prompts you with an alert about the following types of files:

Open Files - You can save and close these files to prevent the loss of any work.

Items Uploading - You can wait for these to upload to Box. Box Drive cancels any uploads that do not complete before you log out.

Problem Items - These are local files or folders that cannot be synced back to Box. Logging out deletes these items. To view these items, navigate to the **Search Menu**, click the **gear** icon, and from the list that displays click **Error Updating an Item....**

QUITTING BOX DRIVE

Exiting Box Drive does **not** remove any locally stored Box Files from your computer and it does **not** log you out. If when you exit there are changes in the midst of being saved, the next time you open Box Drive it picks up right where it left off and finishes saving these changes.

To Quit Box Drive on a Mac:

1. Navigate to the search menu by going to the menu bar and clicking the **Box** icon.
 - Alternatively, you could use the keyboard shortcut **Ctrl + Option + Cmd + space**.
2. Click the **gear icon**, and from the list that displays click **Quit**.
3. Follow the prompts to close any open files and confirm that you are quitting.

To Quit Box Drive on Windows:

1. Navigate to the search menu by going to your system tray and clicking the **Box** icon.
2. Alternatively, you could use the keyboard shortcut **Ctrl + Alt + Shift + B**.
3. Click the gear icon, and from the list that displays click **Exit**.
4. Follow the prompts to close any open files and confirm your exit.

BOX DRIVE BASICS

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

BOX FOR OFFICE

DOWNLOADING BOX APPS

- **Get Box Apps:**

[Download](#)

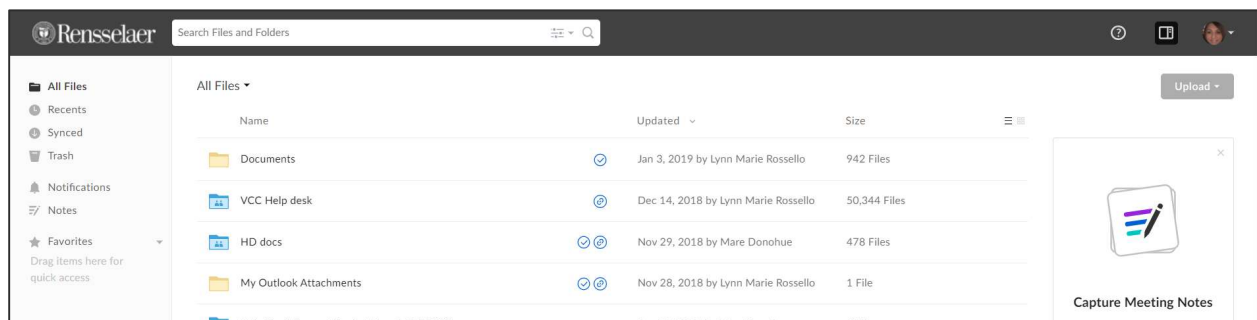
Download a variety of Box apps for Windows, Mac, Android, & iOS

BOX ARTICLES IN ITSSC

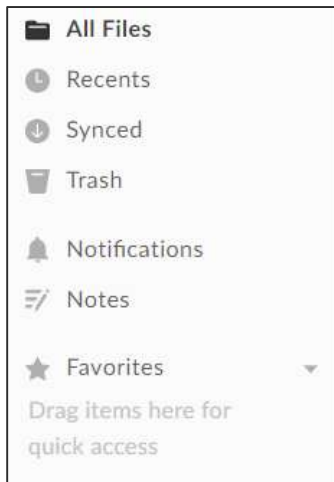
<https://itssc.rpi.edu/hc/en-us/articles/360004742212-Box-Overview>

BOX HOME PAGE

In the “All Files” area a “**Documents**” folder appears along with other folders depending on if someone granted you access to these folders.



LEFT SIDE NAVIGATION BAR



All Files: Show all the files you have access to.

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.

Favorites:

<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, open in the app the document was created in and share this document.

OPENING A FOLDER

To open a Folder:

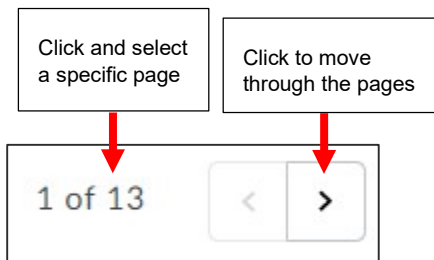
1. Click once on the folder name.




The folder opens showing any files stored in this folder.

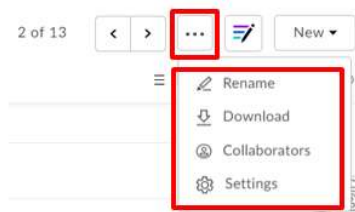
FOLDER FEATURES – WITH A FOLDER OPENED

These features appear in the upper right corner of the Box window once you navigate to a folder.



RENAME/DOWNLOAD/COLLABORATORS/SETTINGS

Keep in mind that when you see the icon with the three dots  different features appear depending on where you are in the Box window.



Rename - Change the name of the folder


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

Collaborators – Lists who have rights to this folder

Settings – Click this link to learn more about Box settings <https://community.box.com/t5/How-to-Guides-for-Migrating-and/Understanding-Box-Folder-Settings/ta-p/19827>

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. Navigate to a folder where you want to create the new Box note.
2. Click  or click **New→Box Note** or **New→Box Notes from Template** (choose a specific template that prepopulates with predefined content)
3. Type a name for your Box Note, and then click **Create**.
4. Type your Note.

NOTE: your last note automatically saves when you create a new note or close the tab.

The Note Name appears in alphabetical order in that folder.



Click this Note

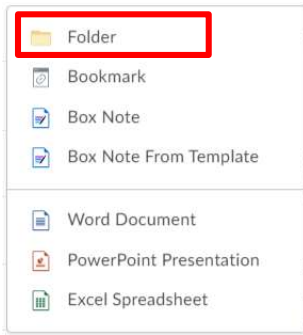
to add more notes within the folder.

HOW TO CREATE A FOLDER IN BOX

IMPORTANT: In order for the “New” button located in the upper right section of the Box window to be available, you must first open any folder in Box.

<https://itssc.rpi.edu/hc/en-us/articles/360018713171-How-to-create-a-Folder-in-Box>





CREATING BOOKMARKS

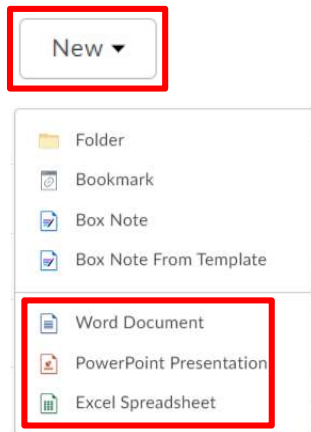
<https://community.box.com/t5/Organizing-and-Tracking-Content/Creating-Bookmarks/tab/36248>

WORKING WITH DOCUMENTS

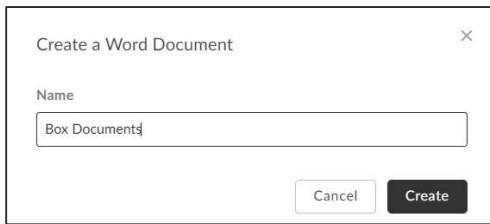
CREATING AND OPENING A DOCUMENT IN BOX

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.

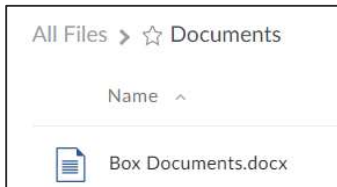
1. While in a folder, click New and then choose the document type with in the list.



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



The file appears at the top of the folder window.



OPENING A DOCUMENT IN BOX

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

1. Click once on the file name.



The document opens on the screen for you to view. Several options appear at the top right corner of the Box window.

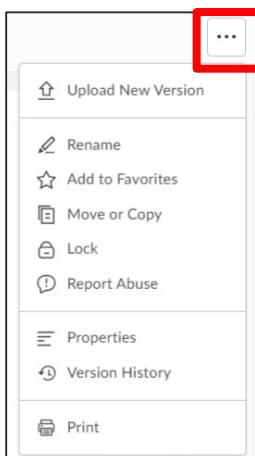
2. Click the “X” located in the upper right corner of the box task bar to close the document.

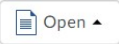


MORE ACTIONS, OPEN, DOWNLOAD AND SHARE A DOCUMENT WHEN A DOCUMENT IS OPEN

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

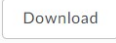
- ✓ Select for “**More actions**” button with the three dots located in the upper right corner of the Box task bar.



- ✓ The **Open**  button located in the upper right corner of the Box screen **NOTE DO NOT USE ????**



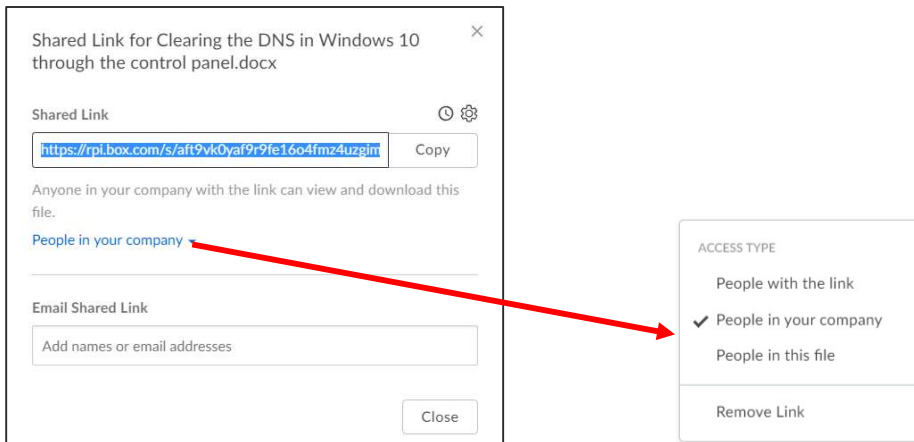
- ✓ **Download** allows you to open your document in the application the document was created in.

1. 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




2. Click once on the file name and this file opens in the application with the document on the screen.

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





MORE ACTION FEATURES - RENAME, ADD TO FAVORITES, MOVE/COPY, OR PRINT A DOCUMENT

Rename – change the name of the document

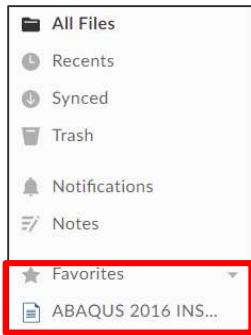
1. Click once on the button with the three dots  located in the upper right corner of the Box task bar.
2. Choose **Rename**.
3. **Type a new name** in the Name field.

4. Click **Save**.

Add to Favorites – add frequently used folders/files

1. Click once on the button with the three dots  located in the upper right corner of the Box task bar.
2. Choose **Add to Favorites**  Add to Favorites
3. A bar appears at the top stating **Item added to Favorites**


The item now appears under the Favorites area.

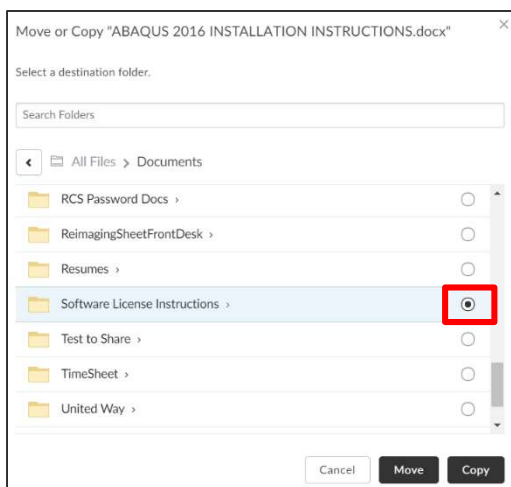


4. Under Favorites, click the “X” at the end of the folder/file name to remove from the Favorites area.




Move or Copy – move or copy the 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.

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

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 (EDIT) AND SHARE DOCUMENTS


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

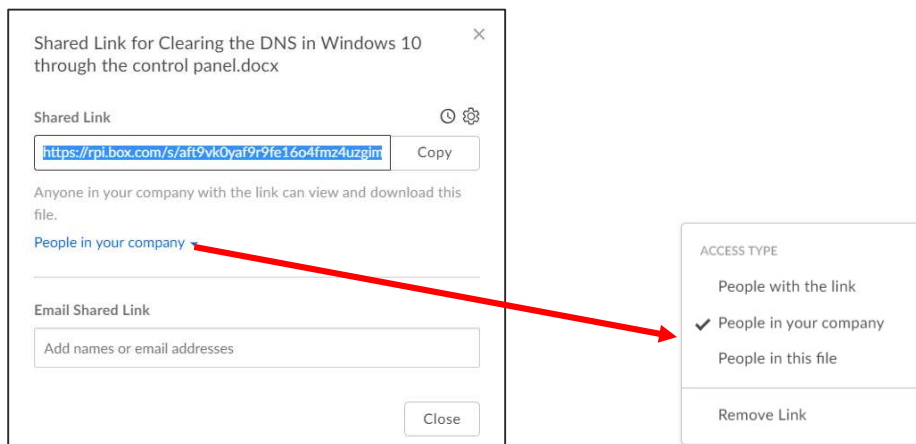
1. Click once on a document in Box, and then click once on the  Download button located in the upper right corner of the Box task bar.

The document appears in the lower task bar.

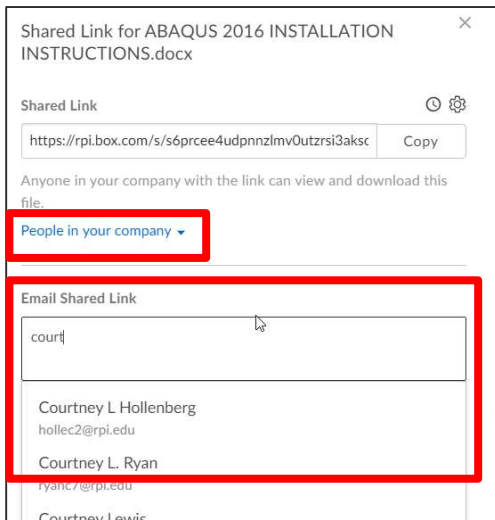
2. Click once on the document name and the document opens on the screen.

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

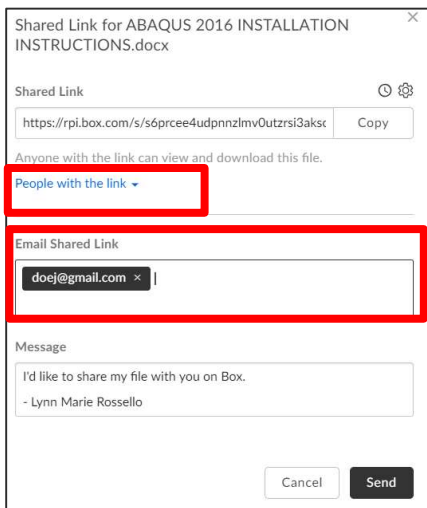
1. Click once on a document in Box, and then click once on the  Share button located in the upper right corner of the Box task bar.
2. Allows you to copy and paste this link or email this link to a person or group of people.




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.



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. A screen appears asking “Are you sure you want to delete this item?” click **Okay** and the document is deleted.

DOCUMENT AND FOLDER OPTIONS FOR OWNERS

While viewing a document or folder the following options appear.



Using Tags – Used to mark, sort and easily search for related files. For example, you can filter and search for files

Email –

Download –

Move or Copy –

Trash -

WORKING WITH FOLDERS

SHARE A FOLDER

click Share next to a folder / choose invite collaborators / Invite / Invitee Permissions (<https://community.box.com/t5/Collaborate-By-Inviting-Others/Understanding-Collaborator-Permission-Levels/ta-p/144>) / personal message / send invites

UPLOAD FILE/FOLDER

DRAG AND DROP

ADD OR EDIT TAGS

COLLABORATORS

Collaborators can be internal people who work at RPI or external people

ADD, EDIT OR DELETE A COLLABORATOR

If you are attempting to create folders or sync files at the root of your Box directory, this is not permitted.

The root of a Box user's account is limited to the "Documents" folder, in some cases, the "My Outlook Attachments" folder, and folders and files shared to you by other Box users.

RPI Box users MUST consider the "Documents" folder as the root for what can be synced to/from their desktop.

COLLABORATOR PERMISSION LEVELS

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