Stony Brook Medicine

Box® User Guide

Welcome to Box 101

In this handy guide, we'll show you how to share, access and manage your content – from anywhere. You'll see the play-by-plays you need to get the Box basics under your belt, plus some tips and tricks that'll make you a seasoned ninja in no time.

So have a look … and don't forget we're always here to help.

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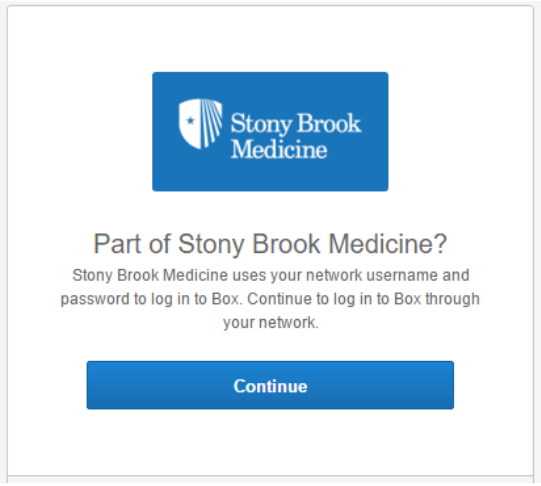
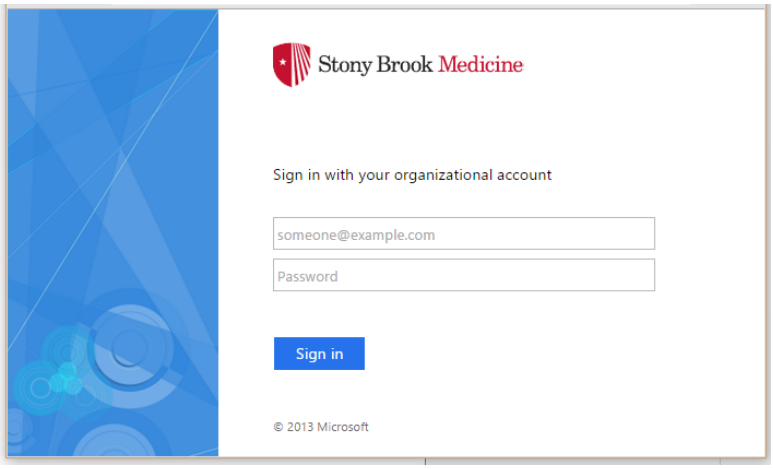
Logging in to Your Box Account

First thing's first! Here's how to log in:

1. Go to stonybrookmedicine.box.com



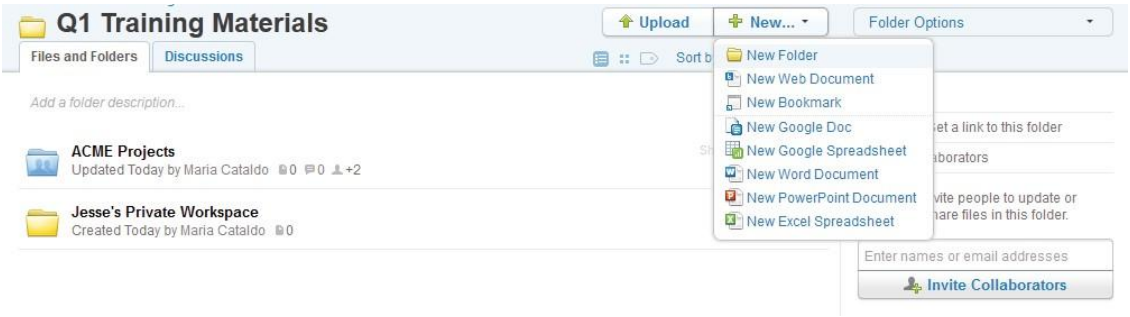
2. Enter your Stony Brook Medicine email or your UHMC username on the right of the page
3. Enter your password



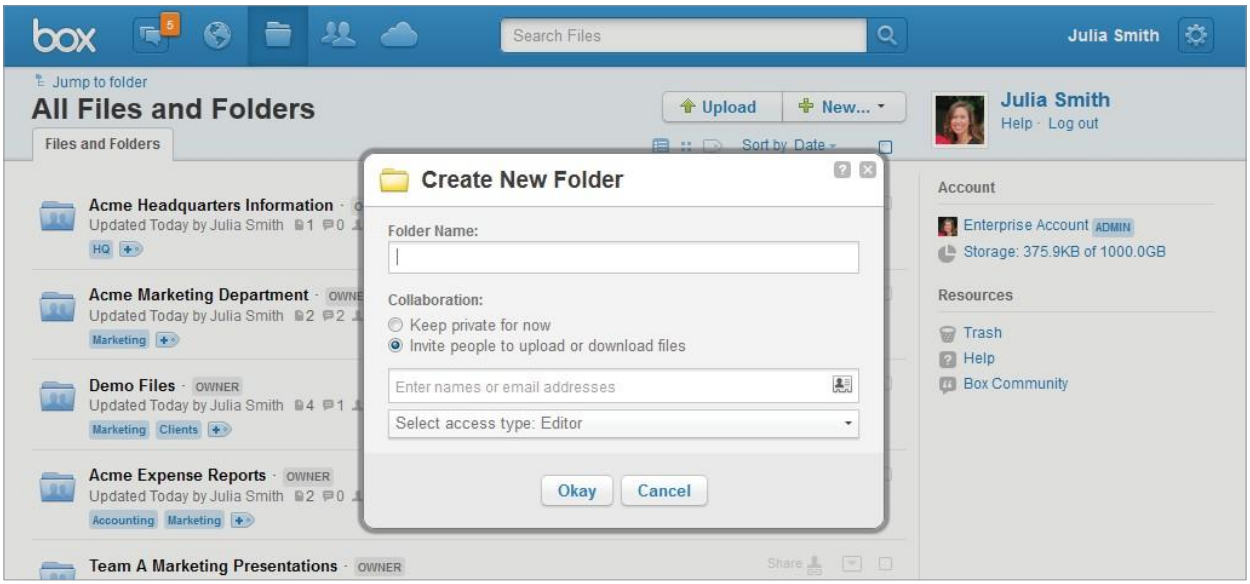
Creating a New Folder

The folder. It's your Box account's basic building block, where you'll group similar files together. Here's how they're created:

1. Click the **New** button and select **New Folder**



2. In the pop-up window that appears, enter the folder name. Prefer a private folder? Select **Keep Private For Now**. To create a folder where you'll work with others, pick **Invite People to Upload or Download Files**



3. Need folders inside the first one? To create sub-level folders, just click the top-level folder to open it, and repeat the steps above.

Uploading Files

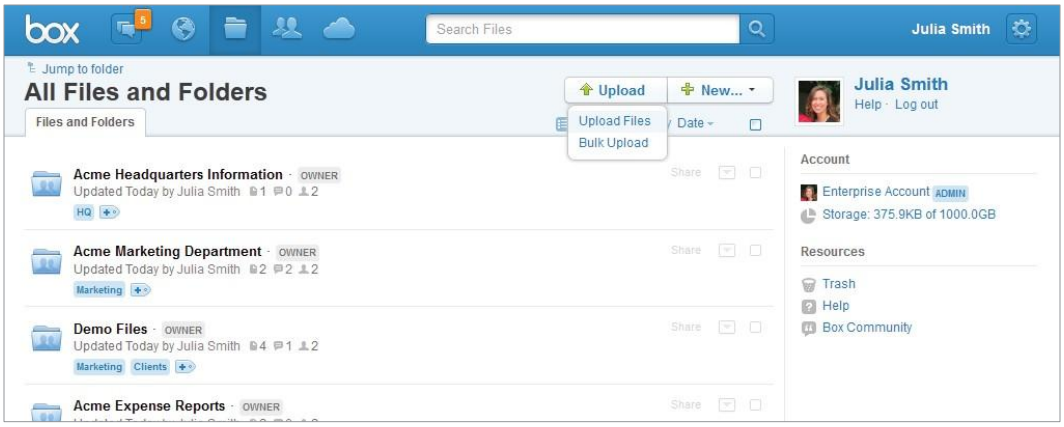
It's a breeze to share files using Box, but first – naturally – you'll need some in your account! You've got two main choices: Use **Upload Files** when you only have a few to get to the cloud, and **Bulk Upload** when the job's a bit bigger.

✔ Quick Tip

There's more than one way to get your content to Box. Try all of them: Upload, Bulk Upload, Sync and Emailing Files to Box.

Adding Files Via Upload Files

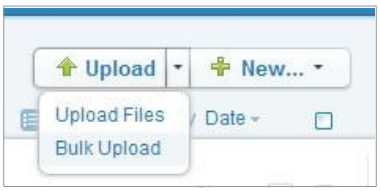
1. Navigate to the folder where you want to send your files
2. Click the **Upload** button, then choose **Upload Files:**



3. A pop-up window will appear, allowing you to select the specific file(s) you want to upload from your computer
4. Select the specific file(s) and click the **Open** button

Adding Files Via Bulk Upload

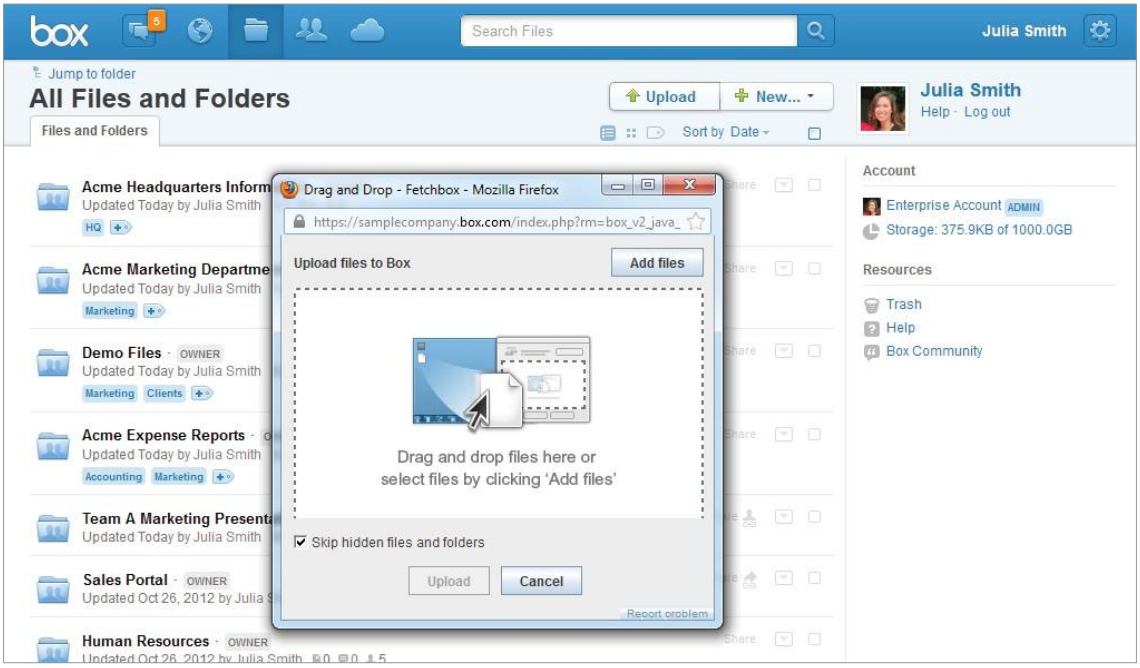
1. Navigate to the folder where you want to send your files
2. Click the **Upload** dropdown button, then **Bulk Upload:**



Quick Tip

Bulk Upload runs best on the latest version of Java; get it at java.com/en/download/index.jsp

3. A pop-up window will appear, where you can either drag files from your computer, or click **Add Files** to browse your computer's folders for the right ones:



Once you've added the files or folders you need, click **Upload** to get them up to Box.

Navigating Your Files

Once your files are living in the cloud, it's easy to access them wherever you are. Box's familiar, intuitive design makes it simple to navigate your account, and you've also got three slick shortcuts at your disposal: the **Search** tool, the **Jump to Folder** tool and the **Recent Activity** view.

Search

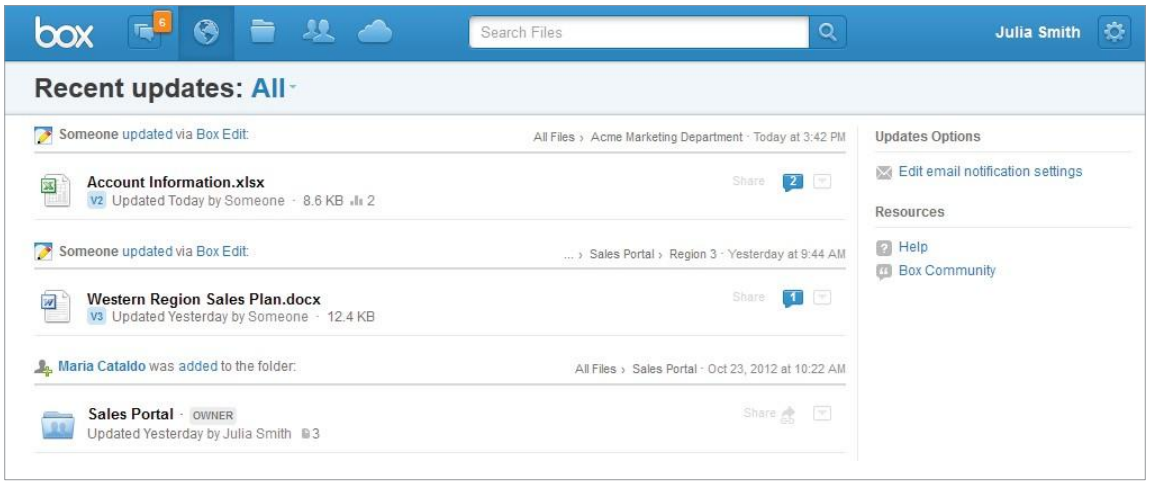
If you're looking for a certain file – or even a certain word or phrase within a file – jump right to it with the **Search** tool. Just pop your query into the search bar at the top right of your page. Box supports AND and quotation marks to narrow your results.

Jump to Folder

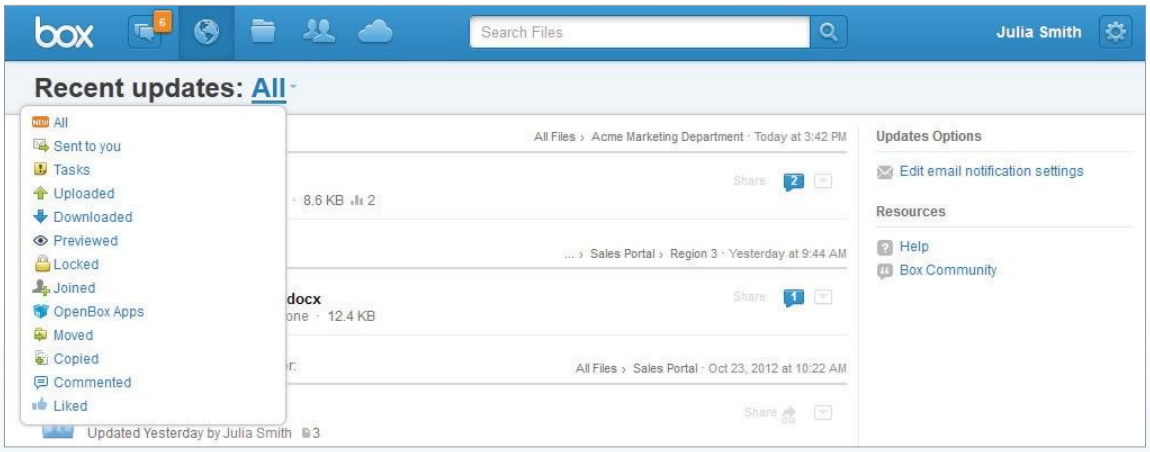
If you know the folder you want, use the **Jump to Folder** tool to get there in a flash. Click the tree icon in the upper-left-hand side of the page, and Box will let you click through your entire folder structure until you find the workspace you need:

Recent Activity

On this page, you'll see what files and folder have been recently updated in your Box account. You can click right into the file or simply view the history – including comments, tasks, versioning and more. To view recent updates click the **Globe** Icon in the blue menu bar:



Additionally, you can filter the results by the type of update made. To sort by action type, hover over **All** and select the filter you'd like to apply:



Inviting Collaborators

Now that we're on the topic, it's time for Box's bread-and-butter: simple, secure file sharing with collaboration.

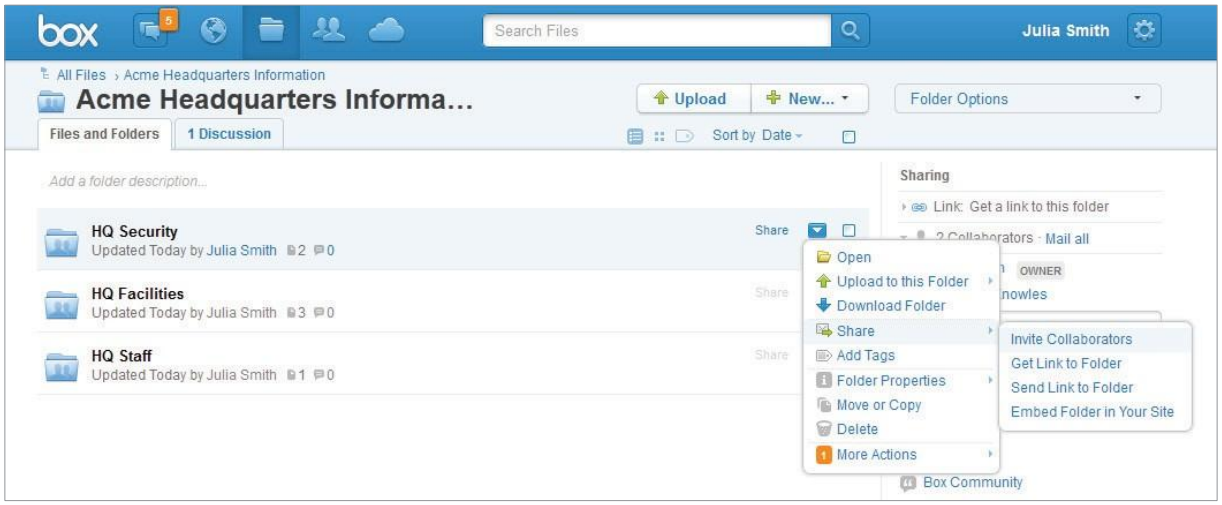
Box's collaboration system works at the folder level – you'll invite contacts to join one or more of your folders as collaborators, and can give them whatever access permissions you see fit. And not to worry: Your collaborators won't be able to peek at anything outside the folder(s) where they've been invited.

Here's how to start:

✔ Quick Tip

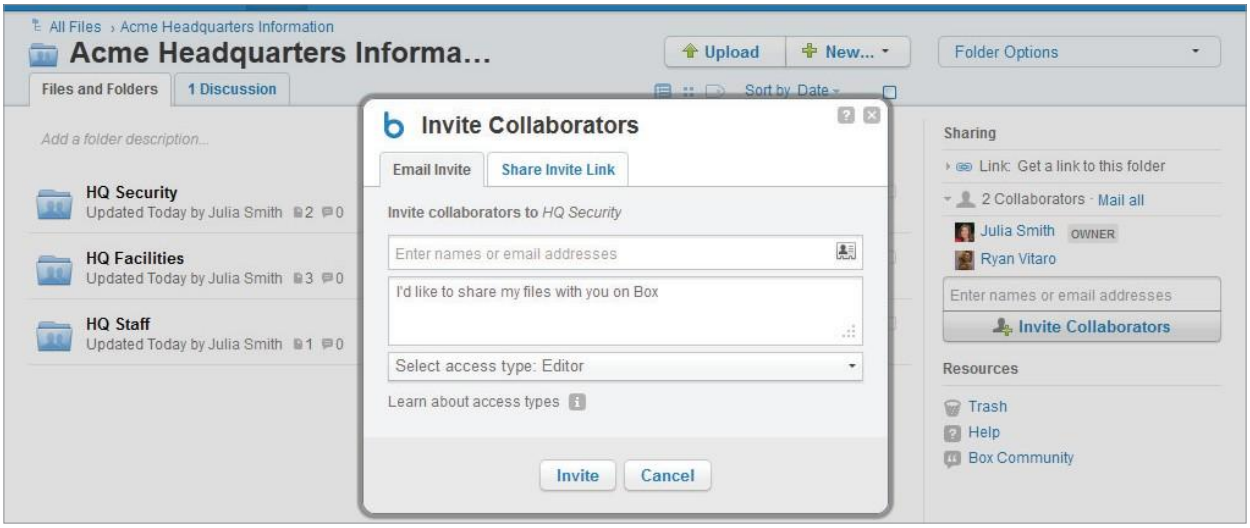
Collaborators have the same access type throughout a particular folder structure. For example, if a collaborator is an editor in a top-level folder, they'll be an editor in the folders inside, too.

1. Mouse over the folder you'd like to share and click the drop-down arrow to the right of its name. Mouse over **Share**, then click **Invite Collaborators**:



2. A pop-up will appear, where you'll enter the email addresses of the contacts you're inviting to the folder. You'll also need to assign the invitees an access type; here's a little list showing what they all mean:
   - Co-owner: Users will have the same permissions as the owner of the folder
   - Editor: Users can upload, download, preview, edit, delete and share files within the folder
   - Viewer Uploader: Users can upload, download and preview files within the folder
   - Previewer Uploader: Users can upload and preview files within the folder
   - Viewer: Users can download and preview files within the folder
   - Previewer: Users can only preview files within the folder
   - Uploader: Users can only upload files into this folder

3. Pick the access type they'll need, then click **Invite**: A friendly invitation with instructions for joining your folder (or for creating a Box account, if they're not already with us) will be sent, straight away



Shared Links

There may come a time when you'd like to quickly share files with folks who don't have Box accounts, but who don't really need to be full-blown collaborators in your folders.

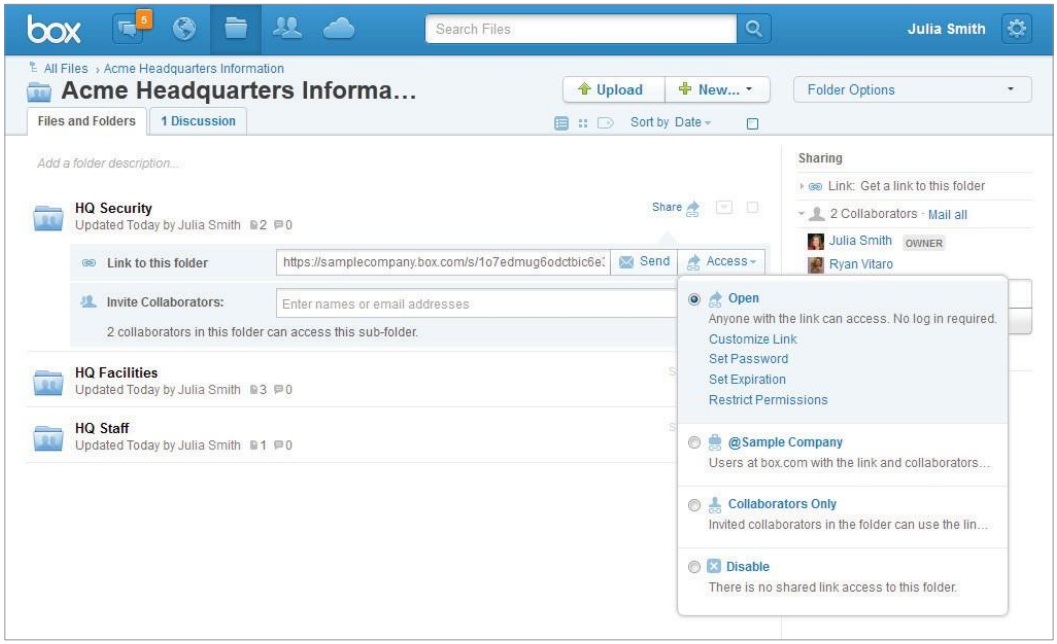
Enter shared links – your pleasantly painless solution. These are URLs that'll take any recipient right to the folder or file they need, without giving access to any other part of your account. Difference is – unlike collaboration – contacts with a shared link get read-only access and won't be able to make changes to your files.

Here's how to generate one:

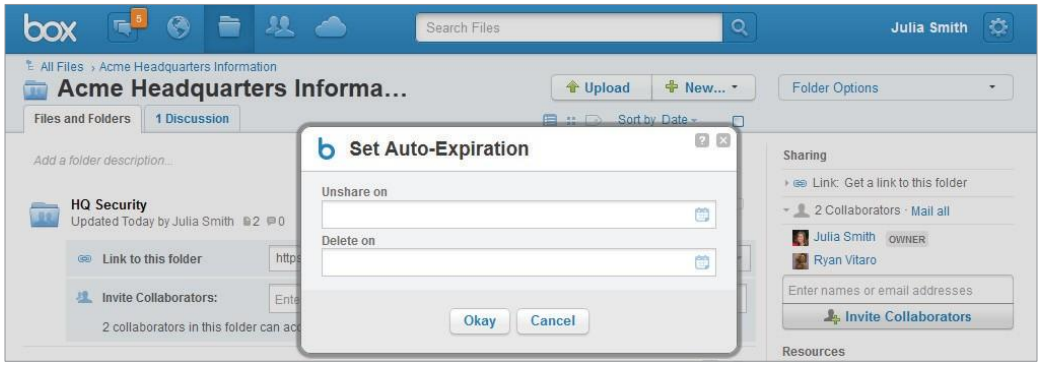
1. Mouse over the desired folder or file and click **Share**
2. In the space that appears below the item, you'll see a URL next to **Link to this folder** – that's your shared link:

3. To share, just copy and paste the secure link into an email/IM/calendar invitation/what have you, or click the envelope icon next to the shared link to have Box send an email to your recipient(s)

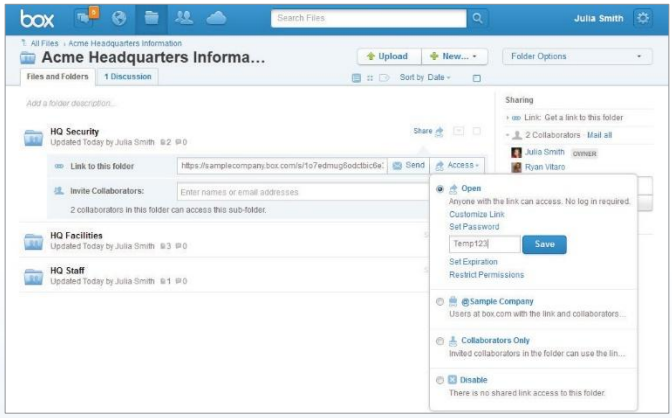
4. For added security, consider setting an auto-expiration for the shared link. This will sever the connection to your file/folder after the clock runs out, ensuring your content isn't accessible when it shouldn't be. Just click the **Access** button and select **Set Expiration:**



5. Pop a drop-dead date into the **Unshare On** field, then click **Okay:**



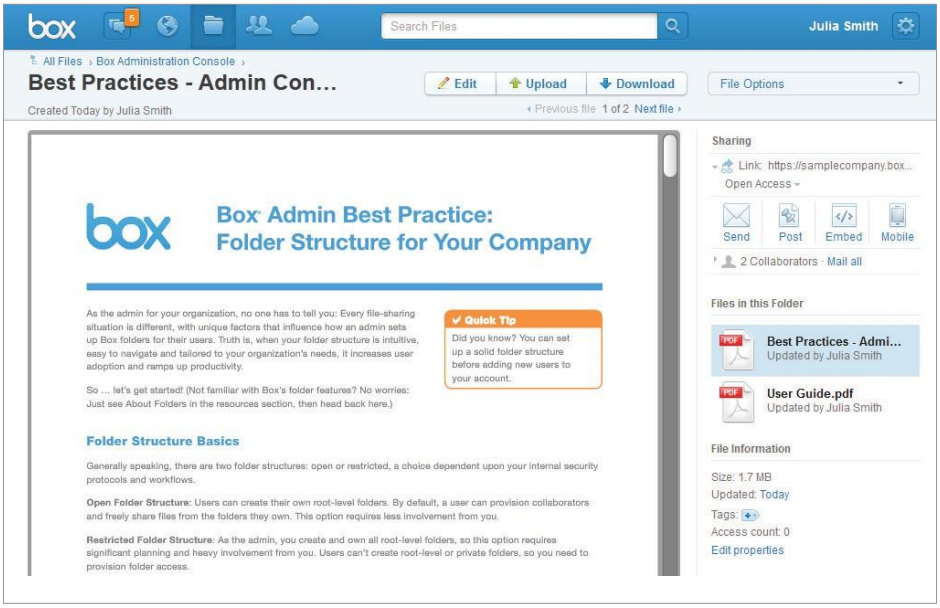
6. To require recipients to enter a password to use the shared link, just click the **Set Password** button, add your desired password and click **Save**



7. If you want to make this link more memorable, choose the **Customize Link option**. You can then enter in a personalized suffix.
8. Until now, we've been working with an **Open** shared link … but you'll notice that's not the only option availale to you in the Access menu. Want to beef up your link's security? If so, consider:
   - @[YourCompany]: The shared link will only be viewable by people with your company's domain
   - Collaborators Only: Only people who are collaborating with you on the file or folder will be able to open the link

Quick Sharing Options

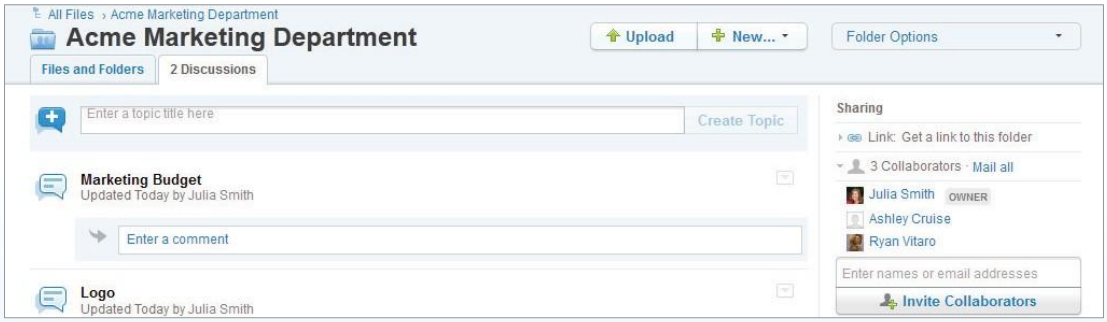
For even speedier sharing, you can distribute a document by using the icons in the Sharing section at the right of the preview window (you'll see this page when you click on a file in your account to open it). Here, you can share via email, social media, mobile device or website embedding:



Adding a Discussion to a Folder

Ever work on a project and feel yourself getting buried in all the email back-and-forth? Box has you covered: Use the discussions feature to keep relevant conversations tidied up in one central location. To get a discussion going:

1. Open the folder where the discussion will happen
2. Switch to the **Discussions** tab
3. Enter a topic and click **Create Topic** to start a discussion thread:



Adding Comments to a File

Box's commenting feature serves the same purpose at the file level. Here's how to start a thread:

1. Mouse over the desired file and click on the comments icon
2. Type in your thoughts and click **Add comment:**

Creating Tasks for a Collaborator

Here's another way you can use Box to tame the email beast and get your inbox under control: assigning tasks. Example: Instead of shooting your coworker an email asking for quick feedback on a file, consider creating a task for them to keep the whole process right in one centralized location.

To get going:

1. Mouse over the desired file and click on the comments icon
2. Click on **Assign Task**
3. A text box will appear where you can enter a description and/or additional instruction. Below, you'll select the task type, assign the

task to a collaborator and set a due date. Click Add when you're finished and a notification email will be sent to the assignee:

4. The assignee will see their pending tasks under the messages icon, right from their **All Files and Folders** page.

✔ Quick Tip

Email notification settings can also be applied at the folder level. You choose the default to your entire account, but you can give certain folders a different level. Just right-click the name of the folder, mouse over Folder Properties, then click Email Options.

File Locking and Version Control

You've seen how Box makes it easy to share your content with anyone, but you may be wondering what happens when two or more of those folks try to edit a file at the same time. Don't fret: We've developed one tool – file locking – to prevent this from happening, and another – version control – to correct it if it does.

Quick Tip

All versions you store will count toward your storage limit.

Lock a File

When you need to make changes to a file and want to prevent other users from getting to it while you work:

1. Mouse over the file and click the drop-down arrow to the right of the file name
2. Click **Lock File**:

3. A pop-up window will appear, where you can check boxes to prevent other users from downloading the file while you make edits, or set an expiration for the lock. Click **Continue**, and the file will open in the program of your choosing
4. All done? Save the file in the program you used to edit it – and be sure to use the exact same file name
5. To get the updated file back in Box, mouse over the locked file and click the drop-down arrow to the right of the file name. Then, mouse over **Unlock File** and click **Upload Edited File** (Unlock)

A pop-up window will appear, allowing you to select the edited version. Click **Select file**, grab the file from your computer, then click **Upload** to upload and unlock the file.

Version Control

Once you've completed the upload, you'll see a version icon next to the file name.

This icon shows you how many previous versions of the file are saved. If you click the icon, you'll see the older versions, can download them or make an older version the most current one. It's your very own time machine that'll ensure you never lose your work.

Folder Properties

As a folder owner, you've got a suite of sophisticated settings available to you – these properties control how your collaborators view and manage the files in your folder. To access these properties:

1. Mouse over the desired folder and click the drop-down arrow and Mouse over **Folder Properties**

2. A pop-up window will appear, where you can adjust the folder's settings – for shared links, invite privileges, commenting and more – to your heart's content.

User Email Notifications

To keep you absolutely apprised of current events in your account, we've built an email notification system that lets you know when your collaborators access or edit your files. It's up to you what actions you'll be notified about, so here's how to make your choices:

1. Mouse over **My Account** in the blue header bar at the top of the page, then click **Account Settings**
2. Next, switch to the **Notifications** tab: From here, you can adjust the email notification settings for your account. Once you're finished, click **Save**

Box Sync

This cross-platform productivity booster lets Box Business and Enterprise customers – and their teams – keep files from their Box accounts in sync with their computer desktops: automatically.

To use Box Sync, download the app from the Mobile and Sync tab under Account Settings. Once installation is complete, a Sync folder will appear on your desktop.

And any files you drag into this folder will be synced with your Box account. On Box.com, a blue symbol will be displayed next to all synced folders.