Box Workshop Training

TCU Information Technology
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What is Box?

Box is a Cloud based file storage and collaboration service available to TCU employees and students. Here are some of the features that come with this new tool:

- **Substantial Storage Space** - With Box you have access to 100GB of storage space by default and can always ask for an increase. The maximum single file size that can be uploaded is 15GB.
- **Online Sharing and Collaboration** - Share documents with your colleagues at TCU or people outside of TCU.
- **Mobile App** - Connect to your files from your smart phone or tablet using the mobile app.
- **Box Sync** - Store select files locally and edit them offline. Let the tool sync updates to the Cloud when you reconnect to the Internet.
- **Single Sign On (SSO)** – Box is integrated with our SSO system so that you can use your TCU username and password to log into the system.
- **Learn more at:** [it.tcu.edu/box](http://it.tcu.edu/box)

Getting Started

**Login**

- Open your web browser
- Go to: [http://tcu.box.com](http://tcu.box.com)
- Click **Continue** and login with your **TCU username** and **password**
Create a Folder

- Click the **New** button
- Select **Folder**
- In the pop-up window that appears, **enter the folder name**.
- If you do not want to share the folder, just click the **Create** button.
- If you do want to share/collaborate, enter the email address or addresses of those that you want to share the folder with into the **Invite People** box. You also must select a **Permission level** for those you invite.

To create sub-level folders, just click the top-level folder to open it, and repeat the steps above.

Upload Files to Your Folder

There are several ways to get your files up to Box: **Upload Files**, **Upload Folders**, **Drag and Drop**, **Email Files to Folder**

For individual documents, use the standard upload by clicking **Upload** located at the top right corner of the folder page, then choose **Files**.
Invite Collaborators

Collaboration in Box works at the folder level. You can invite contacts to join one or more of your folders as collaborators and give the appropriate permission level. Collaborators can only access content in folders they have been invited to.

To start, just open your folder and click the Share this Folder button on the right side of page. Choose Invite Collaborators, enter your collaborators’ email addresses, choose the access levels, then click Send Invites.
Access Levels for Collaborators:

<table>
<thead>
<tr>
<th>Co-Owner</th>
<th>Editor</th>
<th>Viewer</th>
<th>Previewer</th>
<th>Uploader</th>
</tr>
</thead>
<tbody>
<tr>
<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
</tr>
</tbody>
</table>

There may come a time when you'd like to quickly share a file with others who do not have Box accounts and who don't necessarily need to be collaborators in your folders. A **Shared Link** is a unique URL that can be sent to someone to allow access to a specific file or folder on Box. These are URLs that will take any recipient right to the folder or file they need, without giving access to any other part of your account. The link can be opened in any browser. Anyone with the link can access the content it points to, even if the individual does not have a Box account.

1. To the right of the file or folder, select the **Share** button and choose **Get Shared Link**
2. In the new window, you’ll see a URL that is a secure link to the file or folder
3. Choose the **Access Type**. You will need to choose **People with the link** to share this link with people outside of TCU.
4. Enter the email address of the person you want to share the file with and click **Send**.
Advanced Options for Shared Links

1. To the right of the file or folder, select the Share button and choose Get Shared Link

2. Click the gear wheel icon to choose advanced settings and restrictions.

3. **Set Custom URL**: Create a custom URL that is easy to remember.
4. **Password**: Set a password for added security
5. **Set Link Expiration**: Shared Links can be set to expire. By default, when a TCU Box user creates a shared link, an expiration for the link is set to 180 days.
6. **Allow Downloading**: Choose to allow or not to allow downloading of the files.
More Collaboration with Box

Comments and Tasks

Comments and Tasks allow you to exchange ideas and streamline communication with your collaborators. Using these collaboration tools can be much more productive than email threads.

When previewing a file, the comments section is located in the lower right window pane. Click Enter Comment and the dropdown arrow allows you to choose comment or task. All collaborators who have notifications enabled will receive an email when your comment is created.

To add a task, click the Add Task check box, include a description of the assignment and assign it to your collaborator. You can even set a due date or add comments if necessary. Don’t forget to click the Post button.
**Box Notes**

Use **Box Notes** to quickly share ideas and collaborate in real-time with your team. The notes are web-based documents and do not require any other software in order to create, view or edit.

To create a Box Note:

- Go to the folder where you want to create the new note
- Either click the **Notes icon** or click the **New** button and choose **Box Note**

  ![Box Notes creation process](image)

- Enter the **name** for the Box Note and click **Create**

  ![Create a Box Note](image)

- A new tab will open in your browser where you can edit the new note and also edit other recent notes. When finished, select **Go to All Files** from the menu or just close the tab in the browser.
Automatically Accept Invitations

You may want to change the settings to **automatically or not automatically** accept incoming collaboration invitations.

- To adjust your default settings, click your initials in the upper right corner of the window and select **Account Settings**
- Click the **Sharing** tab from the top navigation
- Under **Collaborating on Content** choose whether or not to automatically accept invitations and click the **Save Changes** button.
Email Notifications

- Under Sharing settings, you can also customize your email notifications.

![Email Notifications settings](image)

Security Policies

Storing Confidential TCU data in Box is **not allowed**. Confidential data is defined as TCU Data which if exposed could significantly harm an individual or the University. This data may also be protected due to legal, regulatory, contractual or University policy. Examples include: Sensitive Personal Information (SPI), Payroll data, FERPA, HIPAA, GLB, and credit card information.

More details can be found on the **Data Classification Policy** page.

**TCU Approved Electronic Data Storage Locations Matrix:**

<table>
<thead>
<tr>
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<th>Personal</th>
<th>Public</th>
<th>Private</th>
<th>Confidential</th>
</tr>
</thead>
<tbody>
<tr>
<td>Personally-Owned Computing Devices</td>
<td>Yes</td>
<td>Yes</td>
<td>No 1</td>
<td>No</td>
</tr>
<tr>
<td>TCU Computer Local Hard Drive</td>
<td>Yes 2</td>
<td>No</td>
<td>No</td>
<td>No</td>
</tr>
<tr>
<td>TCU Personal Drive (e.g. M:)</td>
<td>Yes 2</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td>TCU Common Drive (e.g. N:)</td>
<td>No</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td>TCU SharePoint Site</td>
<td>Yes 2</td>
<td>Yes</td>
<td>Yes</td>
<td>No 2</td>
</tr>
<tr>
<td>External Media (e.g. CD, USB drive)</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes 4</td>
<td>No 3</td>
</tr>
<tr>
<td>TCU Enterprise Box Cloud Storage</td>
<td>Yes 2</td>
<td>Yes</td>
<td>Yes</td>
<td>No</td>
</tr>
<tr>
<td>Non-Enterprise Box Cloud Storage</td>
<td>Yes</td>
<td>Yes</td>
<td>No</td>
<td>No</td>
</tr>
<tr>
<td>External Parties</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes 5</td>
<td>Yes 5</td>
</tr>
</tbody>
</table>
Box Sync

Box Sync is a tool that allows you to mirror data stored on Box to your desktop. You can navigate and modify content stored on the Box website using your computer’s native file browsing interface. Content that syncs to your computer is available even when you are not connected to the internet. If changes are made to files when offline, the content will sync back automatically to your Box account when the computer is back online. Box Sync is available for Windows and Macintosh.

Download and Install Box Sync

To download, select the icon with your initials from the upper right corner of the window and choose Apps from the menu. Then click the Box Sync button to begin the download.

What’s the difference between Box Sync and Box Edit?

Box Sync and Box Edit both allow you to make changes to your documents.

Box Sync is great for offline editing. Since Box Sync downloads your documents to your hard drive, you can still edit your documents, even if you’re offline. When you are online, Box Sync continually updates any changes made to your files or changes made to files shared with you.

Box Edit is a great tool to make quick changes online. Documents can be edited anywhere you have an internet connection and you can use your desktop app or the online app.
The downloaded installation file will most likely be located in your Downloads folder. Double-click on the file to run the installation.

After installation, run Box Sync. You will be prompted to login. Then click **Start Syncing**. Once you are logged in, your files will stay in sync.

**Choose Content to Sync**

Once Box Sync is installed, you must choose which folders to sync to your computer. Login to tcu.box.com, right-click the folder and select **More Actions**, then select **Sync**. Folders that are synced will show a blue icon with a check to designate it as a Box Sync folder.

Use the link on the left navigation, **Synced to Desktop** to see a list of all folders currently synced.

**Utilizing Box Sync**

Once you’ve chosen the files that you want to sync back and forth between Box.com and your local computer, you can edit files either in your Box Sync folder, or on Box.com. When you make a change to a file that’s located in your Box Sync folder, that change will also be reflected on Box.com and vice-versa.
**Box Edit**

*Box Edit* is an add-on tool that allows editing of files or creation of files directly on Box using the default application installed on your computer.

**Install Box Edit**

- Login to tcu.box.com
- Select the icon with your initials from the top right corner of the screen
- Choose Apps from the dropdown menu
- Find Box Edit and click to download and install the App

**Note:** Box Edit is not available for mobile devices but works on any browser on your Macintosh or Windows computer.

**Using Box Edit**

When in file preview, click the **Open** button to edit any file directly from Box.

To create a new file using Box Edit, click the **New** button and select **Word or PowerPoint or Excel**.
**Lock the File for Editing**

When opening the file, you may be prompted to **Lock** the file. This will prevent others from editing the file at the same time. Then, when you’ve finished editing, unlock the file by clicking the **Unlock** button. Once you unlock the file, it opens the file to other collaborators.

You may also use the menu to **Open**, **Lock** and **Unlock** the file for editing.
Box for Office

With **Box for Office**, essential Box functions have been integrated into the Office applications.

- Open, edit and save files from Box from within Word, Excel and PowerPoint
- Access Box options directly from the ribbon in Office apps
- Generate Box shared links and control their permission
- From Outlook, save attachments to Box from incoming mail
- Convert outgoing attachments to Box shared links in Outlook

**Requirements:** Box for Office requires Windows 7 or higher and Office 2010 or higher. Box for Office is not available for Macintosh. Detailed explanations can be found at [Box for Office Integrations](#).

**Install Box for Office**

- Login to your account at [http://tcu.app.box.com](http://tcu.app.box.com)
- Click your name in the upper right corner of the window and select **Apps** from the menu
- Find **Box Edit** and click to **download**

**Using Box with Microsoft Word, Excel and PowerPoint**

Opening Files from Box Microsoft Word, Excel or PowerPoint:

- Navigate to the **Open** menu
- Choose **Box** as a source to open files from and login to your Box account.
Box commands are available on the application ribbon:

- **Upload** example below:

![Save to Box](image1)

- **Share** example below:

![Share from Box](image2)
Using Box with Microsoft Outlook

Save Incoming Attachments to Box:

1. Use the **Save Attachments** command from the Box ribbon menu.
2. The **Save to folder** will show allowing you to choose where you want to save the attachment.

Send Links to Files on Box When Composing an Email:

1. Click **Attach from Box** from the Outlook **Box** ribbon menu.
2. Use the **Attach from Box** pop-up to select the file you want to share.
3. Choose an access level for this file from the **Access** drop-down menu and click **Insert**.
4. The chosen file will appear as a shared link in your email draft.

Real-Time Co-Authoring

Box also supports real-time co-authoring of documents for those who have access to Office Online. Multiple people can edit a single document simultaneously, and all changes will be automatically saved back to **Box**. As multiple people edit a document, their names appear next to their edits in different colors.
Useful Box Settings

Login Activity

You can monitor login details for your account to see when and where the account was accessed.

- To view Login Activity, click your name in the upper right corner of the window and select **Account Settings**
- Click the **Security** tab from the top navigation

![Login Activity Table]

Space Used

You can see how much storage space is in use at the **Account** tab.

![Account Details]

21.1 GB of 100.0 GB

Bandwidth used
0B

Max file size
15 GB

Login address
tcu.box.com/login/
**File Recovery**

Deleted files can be recovered for up to 90 days.

- To recover a deleted file, use the left navigation window to select Trash
- Click the Menu next to the file and choose Restore
- Use the Restore All and Delete All buttons to manage all the files in the trash