Box End User Guide

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I. Logging into your Box Account

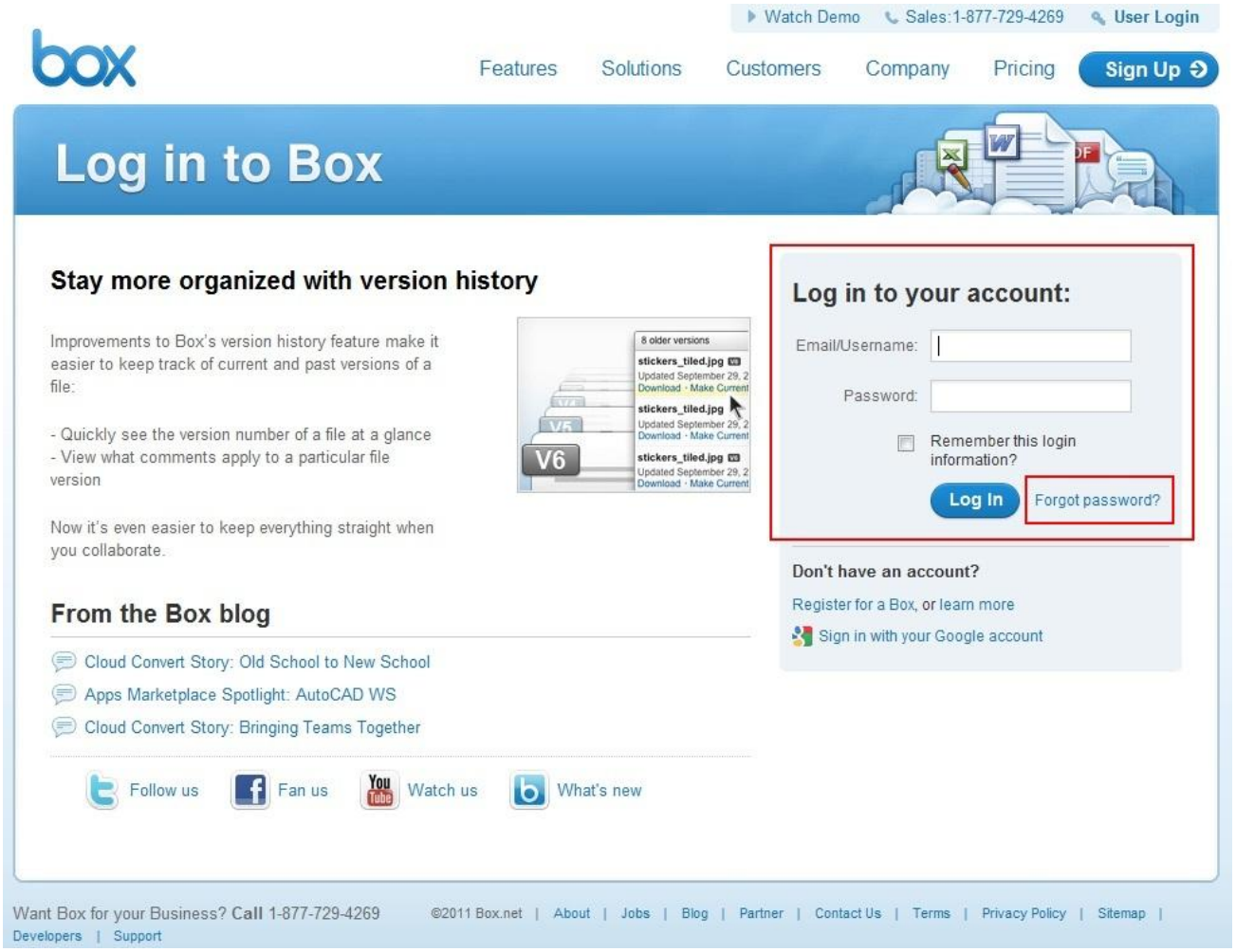
1. Go to http://www.box.com/login.

2. Enter in your email/username on the right hand side.

3. Enter in your password.

4. Click “Log In”.

Please note and utilize the “Forgot password?” link if you happen to forget your password.

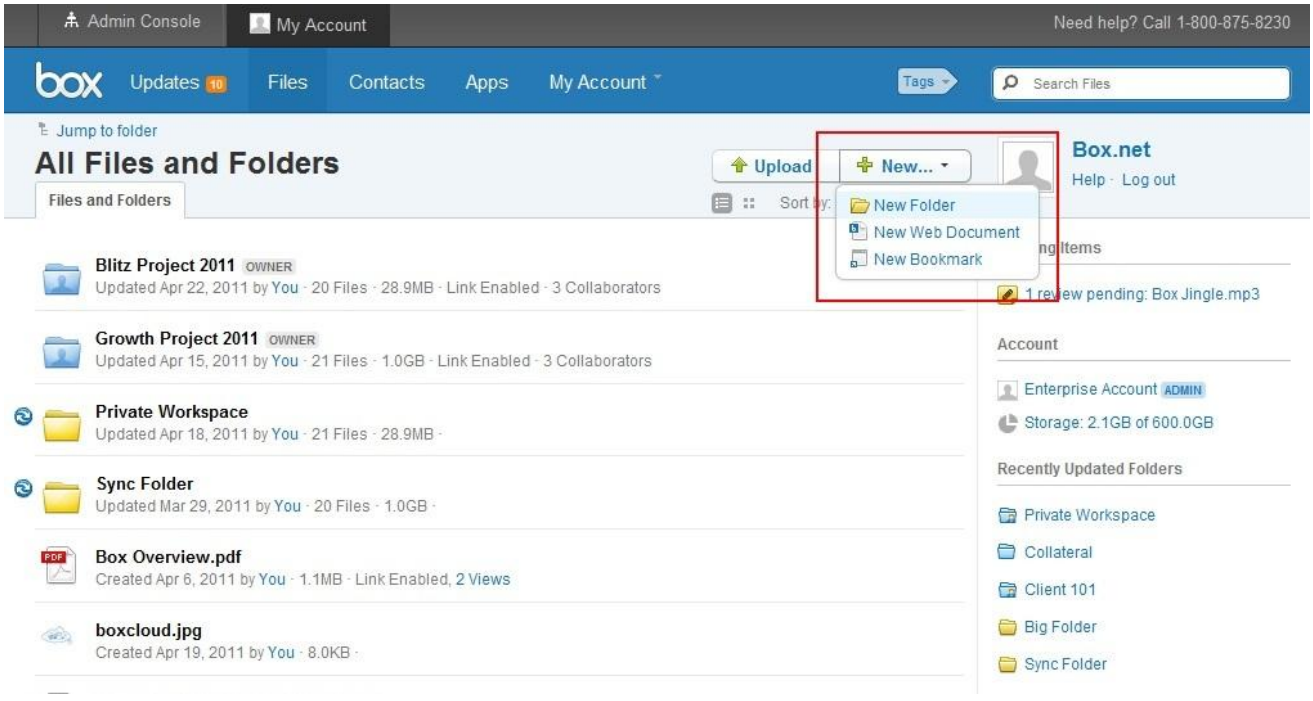


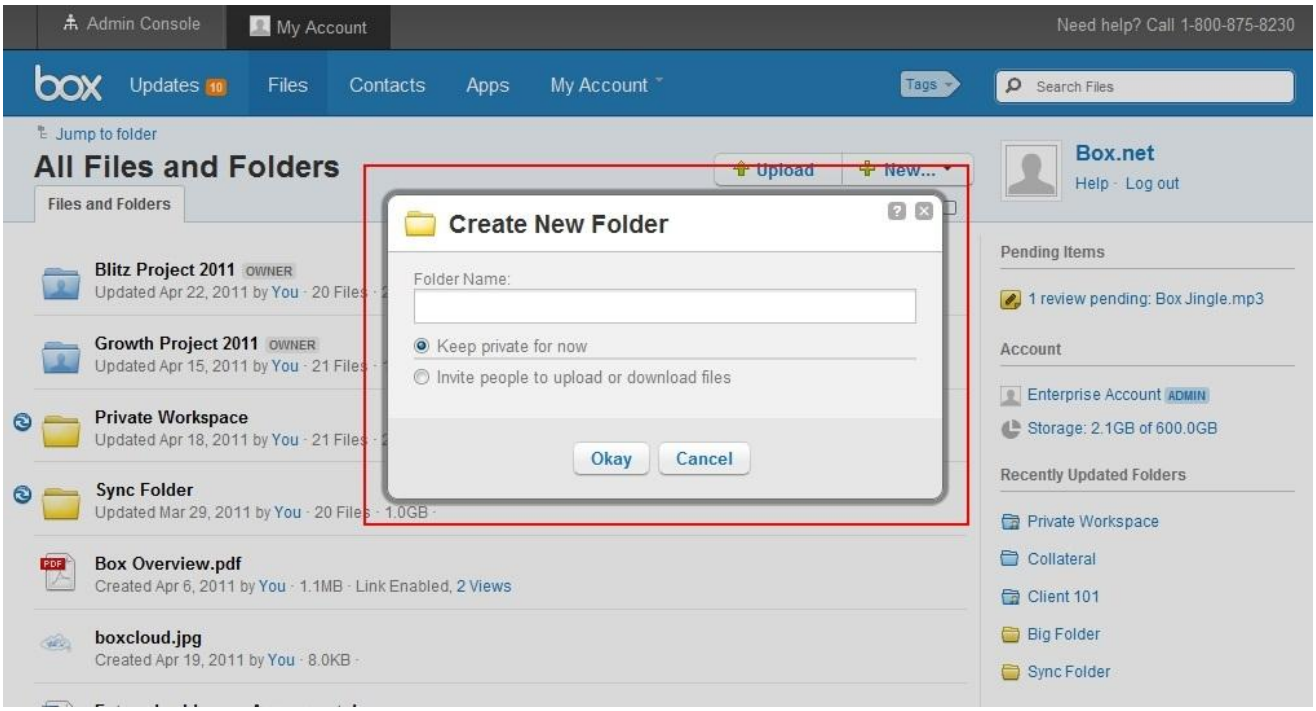
II. Creating a New Folder

1. Click the “New” button and select “New Folder”.

2. Enter in the folder name and select “Keep private for now” and click “Okay”.

3. To create sub-level folders simply click into the top-level folder and follow the above steps.

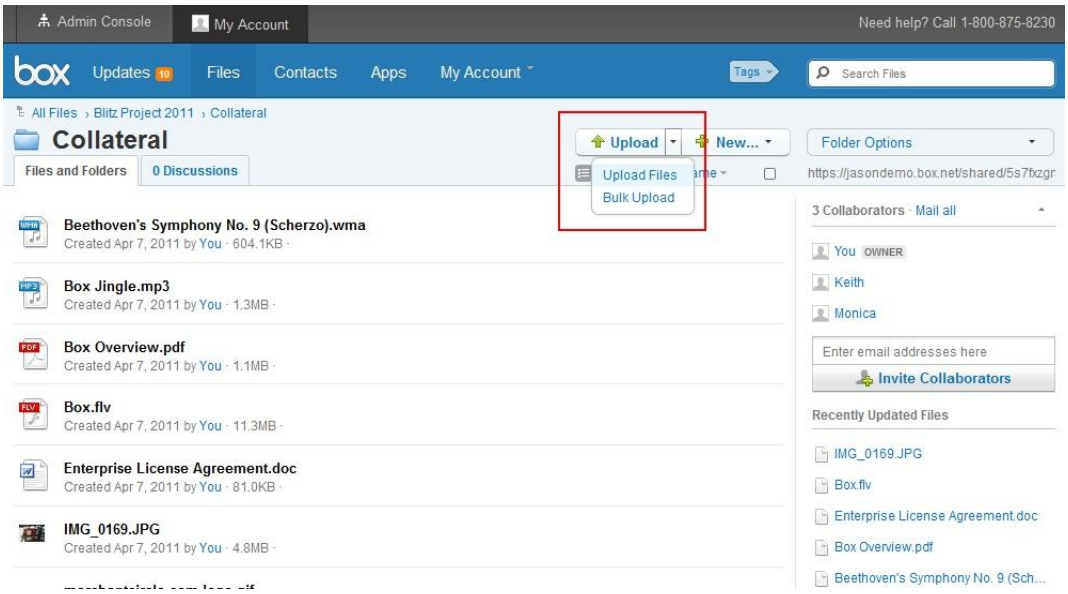


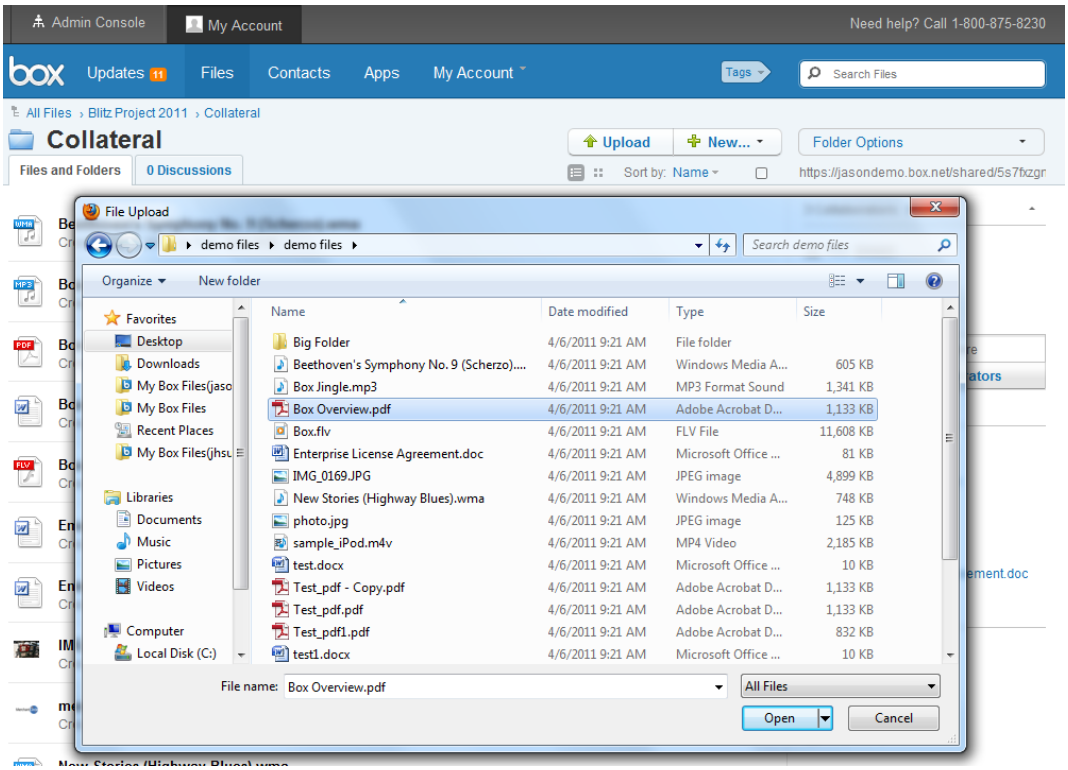


III. Uploading Files

a. Adding Files via Upload Files

1. Ensure that you are in the actual folder where you want to upload content.
2. Click the “Upload” button and select “Upload Files”.
3. A pop-up window will appear allowing you to select the specific file(s) you want to upload.
4. Select the specific file(s) and click the “Open” button.

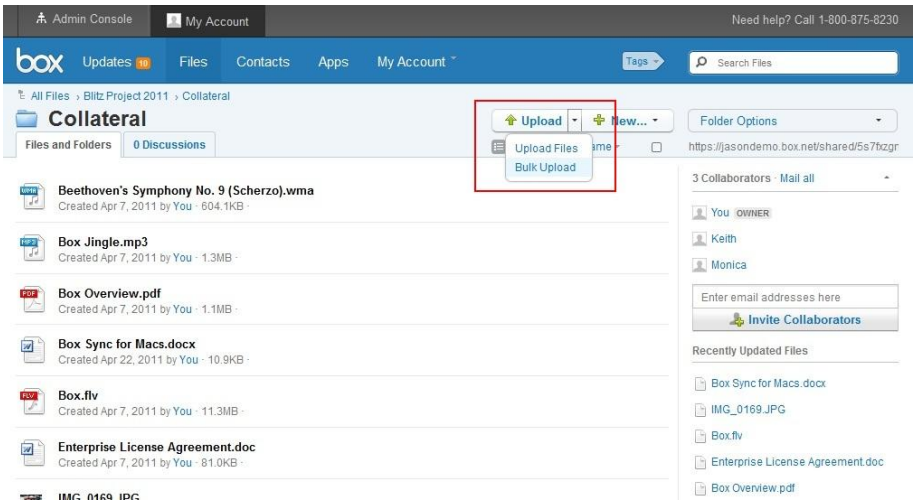


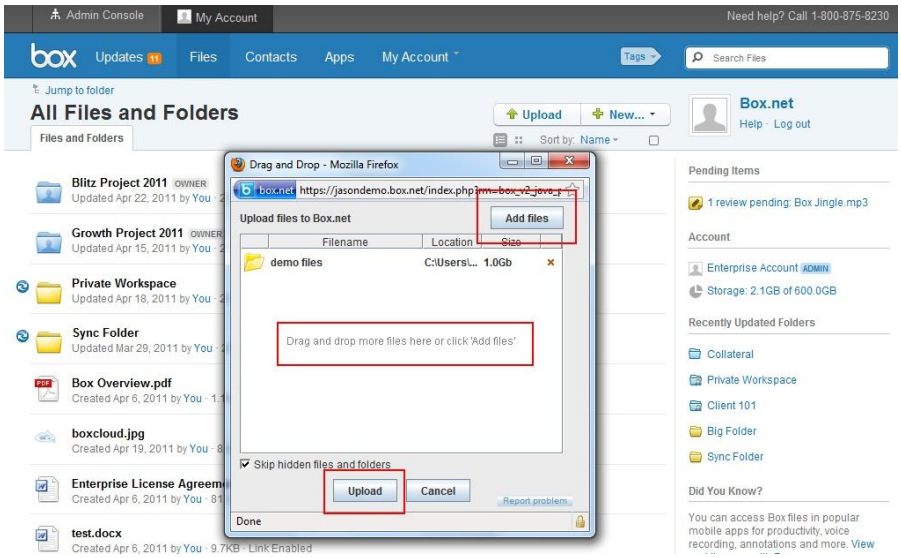


b. Adding Files via Bulk Upload (multiple files or folders at a time)

1. Ensure that you are in the actual folder where you want to upload content.
2. Click the “Upload” button and select “Bulk Upload”.
3. A pop-up window will appear allowing you to “Drag and drop” or to “Add Files”.
4. To use “Drag and drop” simply select, drag, and drop the files or folders into the pop-up window.
5. To use “Add files” simply click the “Add files” button and select the files or folders you want to upload. Once selected, click the “Open” button.
6. Once you have added the files or folders via “Drag and drop” or “Add files”, click the “Upload” button and your files or folders will be uploaded.

Note: Bulk Upload will not work properly without the latest version of Java. Use the following link to download or update: http://java.com/en/download/index.jsp





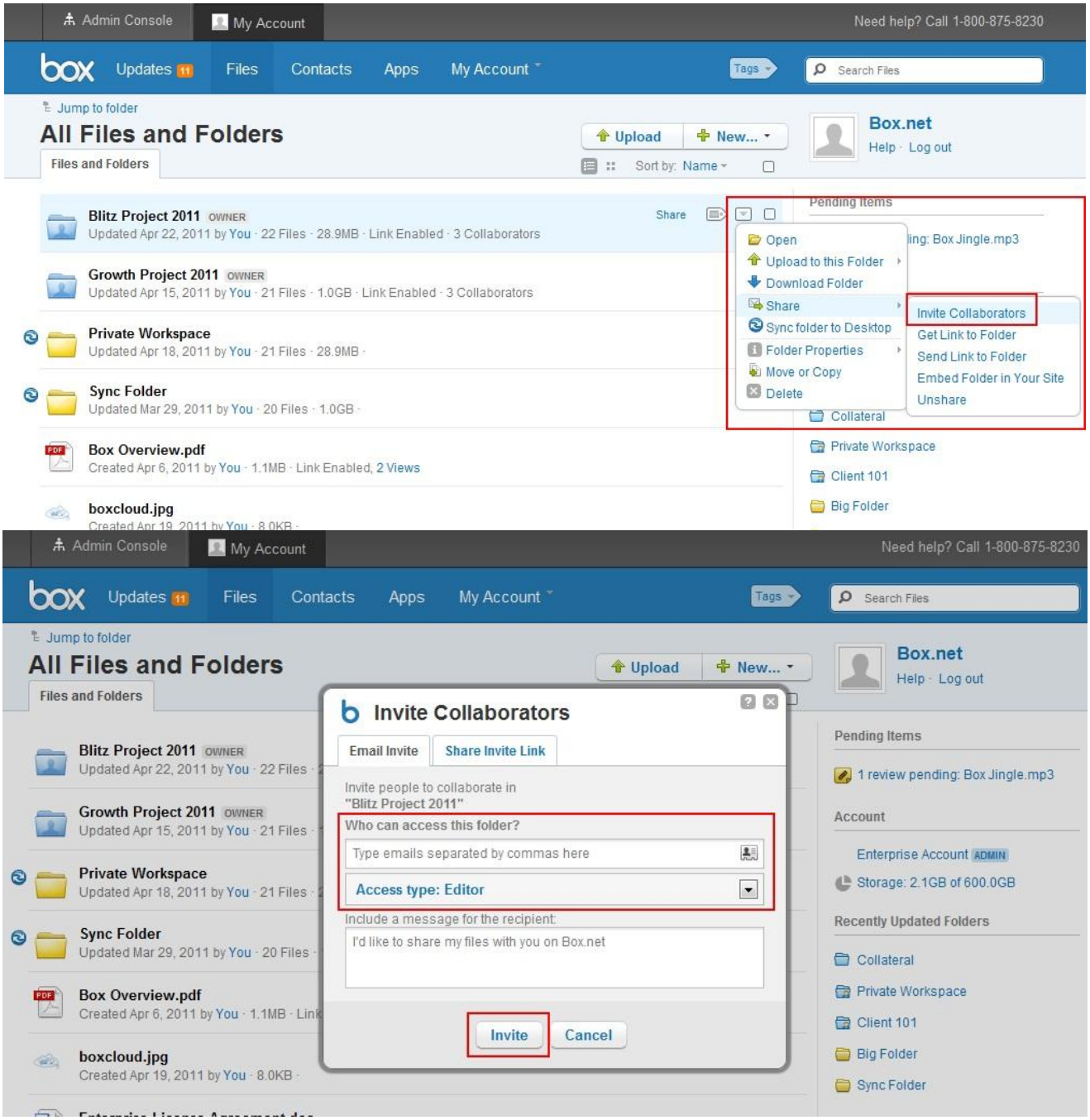
IV. Inviting Collaborators

Note: You can invite any person as a collaborator as long as he/she has a Box account.

1. Mouse over the desired folder and click the drop down arrow/menu. Select “Share” and click “Invite Collaborators”.

2. A pop-up window will appear allowing you to type in the email addresses of the collaborators you want to invite into the folder.

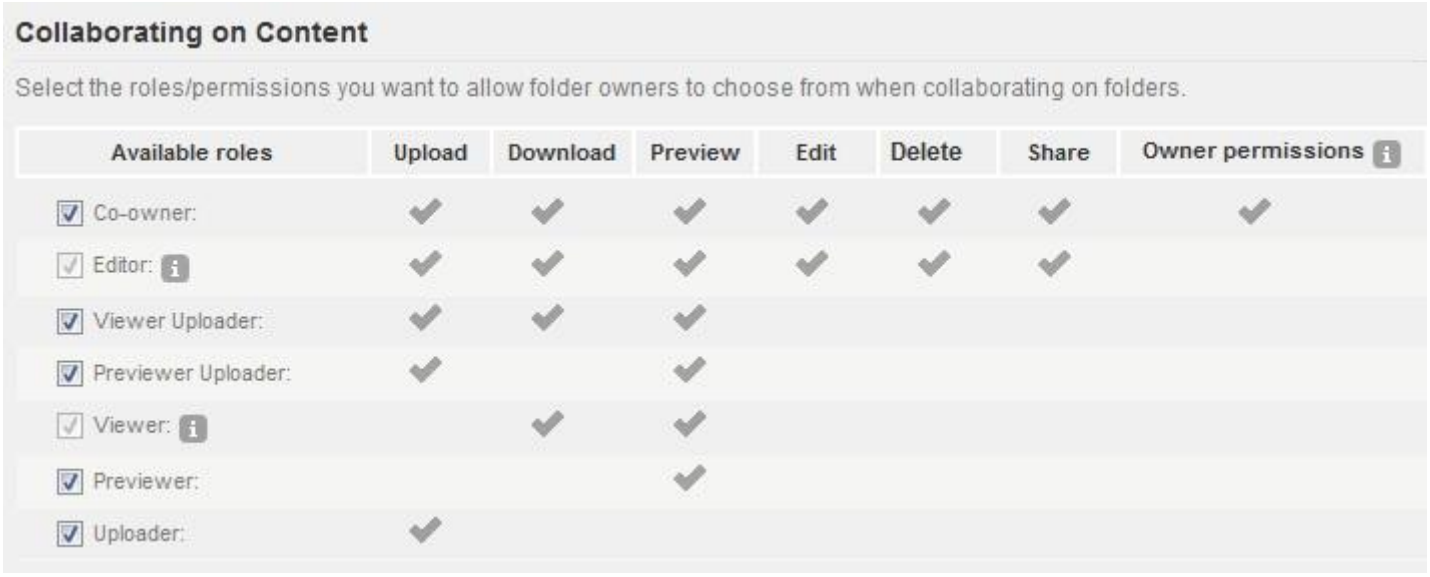
3. Select the “Access type” and click “Invite”. An email will be sent to your collaborators for confirmation.



a. <u>Access Type for Collaborators</u>

Note: A collaborator will have the same access type throughout a particular folder structure. For example, if a collaborator is an editor in a top-level folder he/she will be an editor in the associated sub-level folders as well.

1. Co-owner: Users will have the same permissions as the owner of the folder.
2. Editor: Users will be able to upload, download, preview, edit, delete, and share the files within this folder.
3. Viewer Uploader: Users will be able to upload, download, and preview the files within this folder.
4. Previewer Uploader: Users will be able to upload and preview the files within this folder.
5. Viewer: Users will be able to download and preview the files within this folder.
6. Previewer: Users will be able to preview the files within this folder.
7. Uploader: Users will be able to upload files into this folder.



V. Share Links

Note: Share links can be used to quickly share content with people who do not have a Box account. A person can only preview and/or download the contents of a share link (i.e. no collaboration features). Please note that there is very limited tracking and reporting on share links.

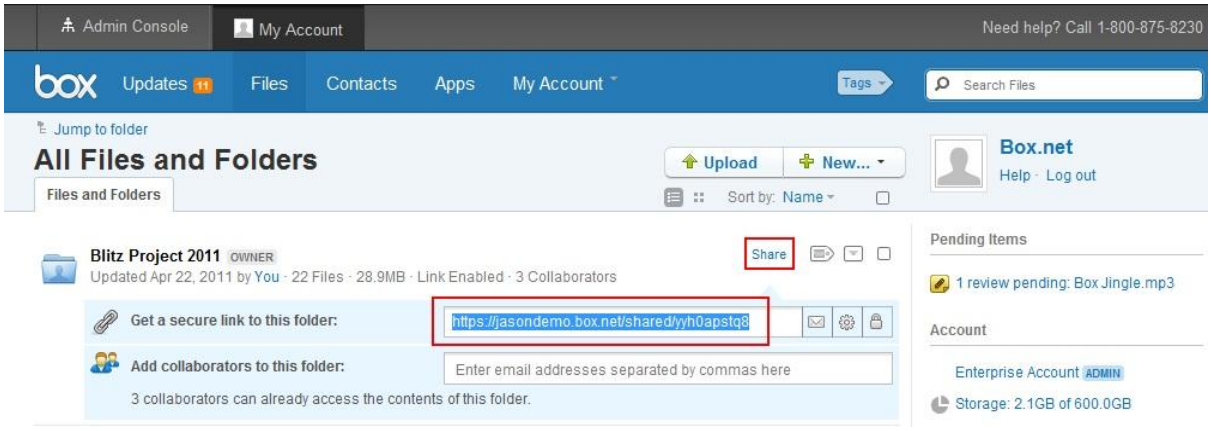
1. Mouse over the desired folder or file and click “Share”.

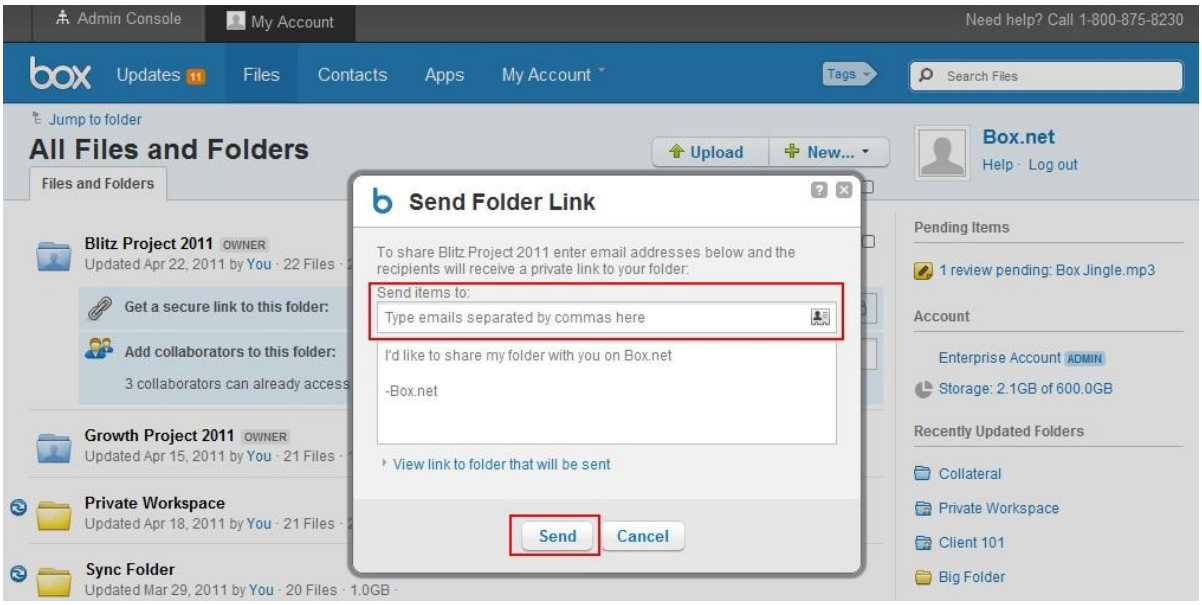
2. A new drop down window will appear below the selected folder or file revealing a secure link to that folder or file.

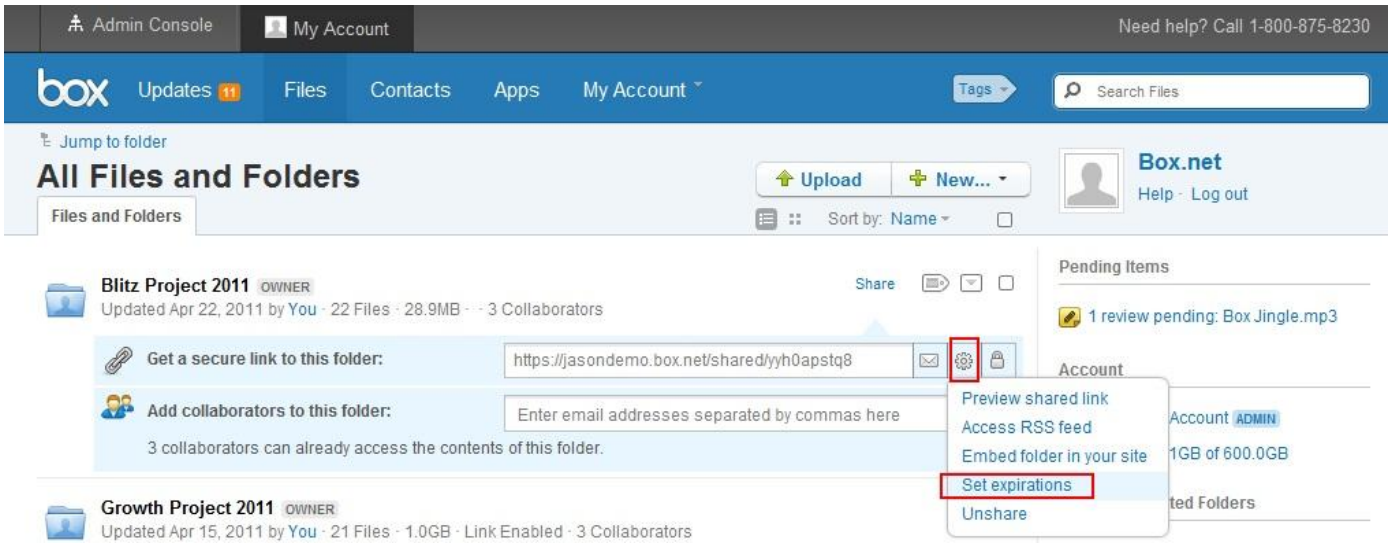
3. To share, you can copy and paste the secure link into an email or you can click the envelope icon next to the share link and type in the email addresses of the recipients you want to share with.

4. To set expirations for the share link click the cog/wheel icon and select “Set expirations”. Select a date through the “Unshare on” field and click “Okay”.

5. To set a password for the share link click the lock icon and select “Password protect this share link”. Type in a password and click “Save”.






Admin Console
My Account
Need help? Call 1-800-875-8230
box
Updates 11
Files
Contacts
Apps
My Account
Tags
Search Files
Jump to folder
All Files and Folders
Upload
New...
Box.net
Help · Log out
Files and Folders
Sort by: Name
Blitz Project 2011 OWNER
Updated Apr 22, 2011 by You · 22 Files · 28.9MB · · 3 Collaborators
Share
Get a secure link to this folder:
https://jasondemo.box.net/shared/yyh0apstq8
Add collaborators to this folder:
Enter email addresses separated by commas here
3 collaborators can already access the contents of this folder.
Growth Project 2011 OWNER
Updated Apr 15, 2011 by You · 21 Files · 1.0GB · Link Enabled · 3 Collaborators
Pending Items
1 review pending: Box Jingle.mp3
Account
Preview shared link
Access RSS feed
Embed folder in your site
Set expirations
Unshare
Account ADMIN
1GB of 600.0GB
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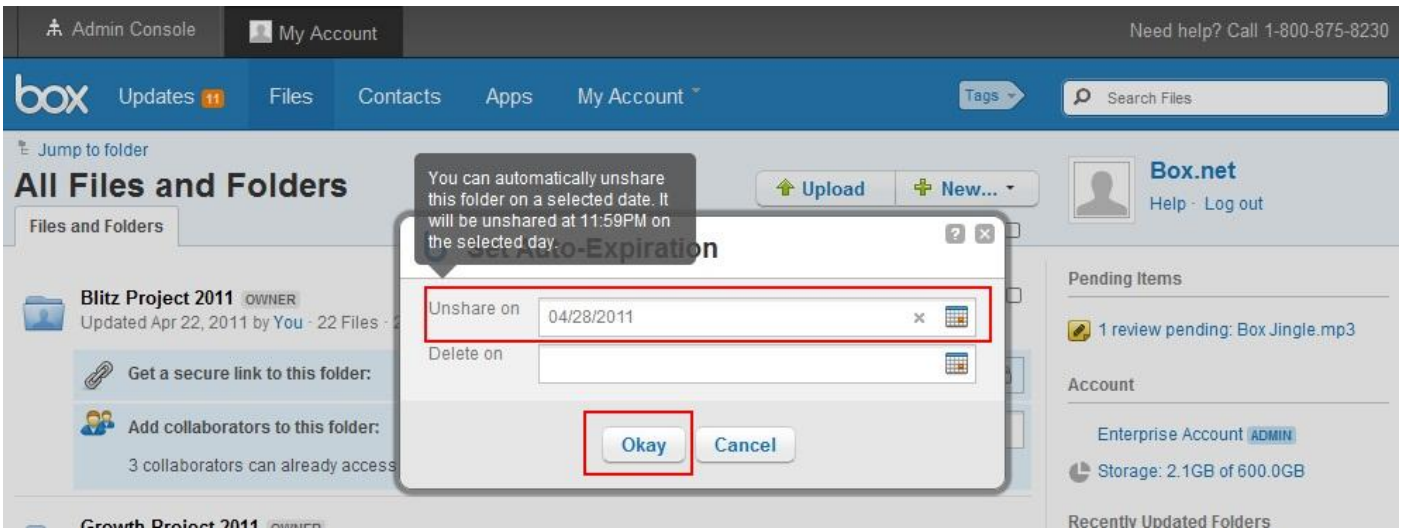
Admin Console
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Updates 11
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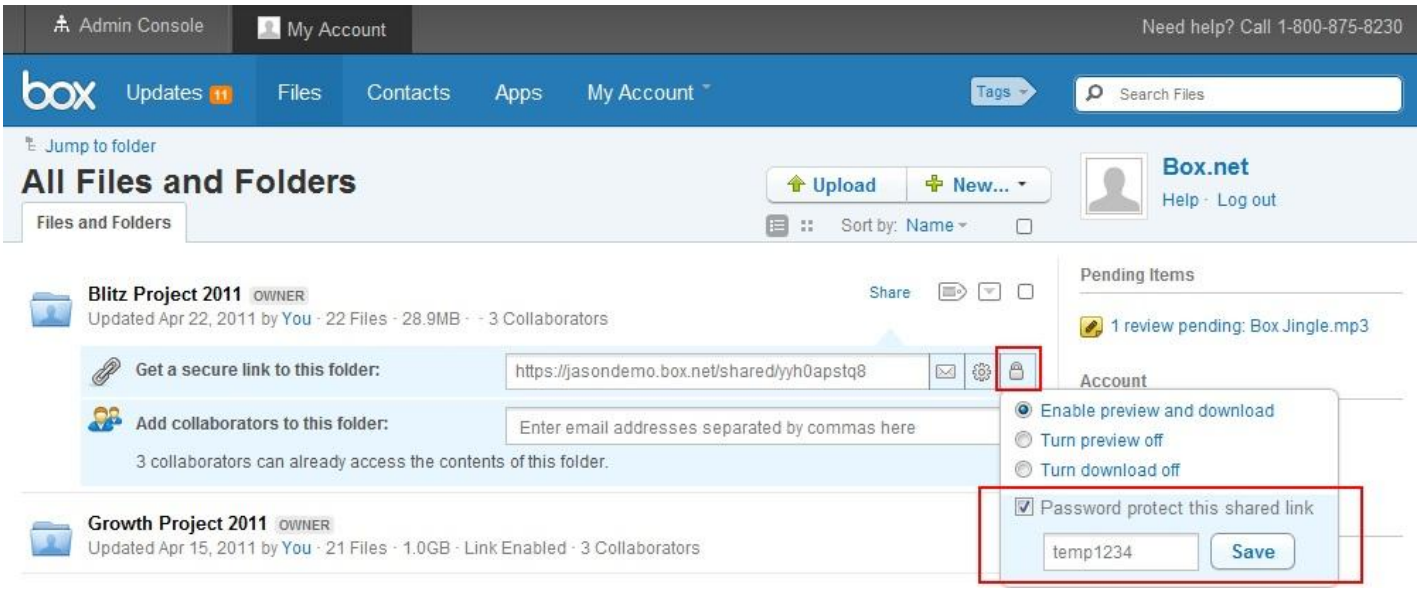
Upload
New...
Box.net
Help · Log out
Files and Folders
You can automatically unshare this folder on a selected date. It will be unshared at 11:59PM on the selected day.
Unshare on
04/28/2011
Delete on
Okay
Cancel
Blitz Project 2011 OWNER
Updated Apr 22, 2011 by You · 22 Files
Get a secure link to this folder:
Add collaborators to this folder:
3 collaborators can already access
Pending Items
1 review pending: Box Jingle.mp3
Account
Enterprise Account ADMIN
Storage: 2.1GB of 600.0GB
Recently Updated Folders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My Account
Tags
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All Files and Folders
Upload
New...
Box.net
Help · Log out
Files and Folders
Sort by: Name
Blitz Project 2011 OWNER
Updated Apr 22, 2011 by You · 22 Files · 28.9MB · · 3 Collaborators
Share
Get a secure link to this folder:
https://jasondemo.box.net/shared/yyh0apstq8
Add collaborators to this folder:
Enter email addresses separated by commas here
3 collaborators can already access the contents of this folder.
Growth Project 2011 OWNER
Updated Apr 15, 2011 by You · 21 Files · 1.0GB · Link Enabled · 3 Collaborators
Pending Items
1 review pending: Box Jingle.mp3
Account
Enable preview and download
Turn preview off
Turn download off
Password protect this shared link
temp1234
Save

VI. Adding a Discussion to a Folder

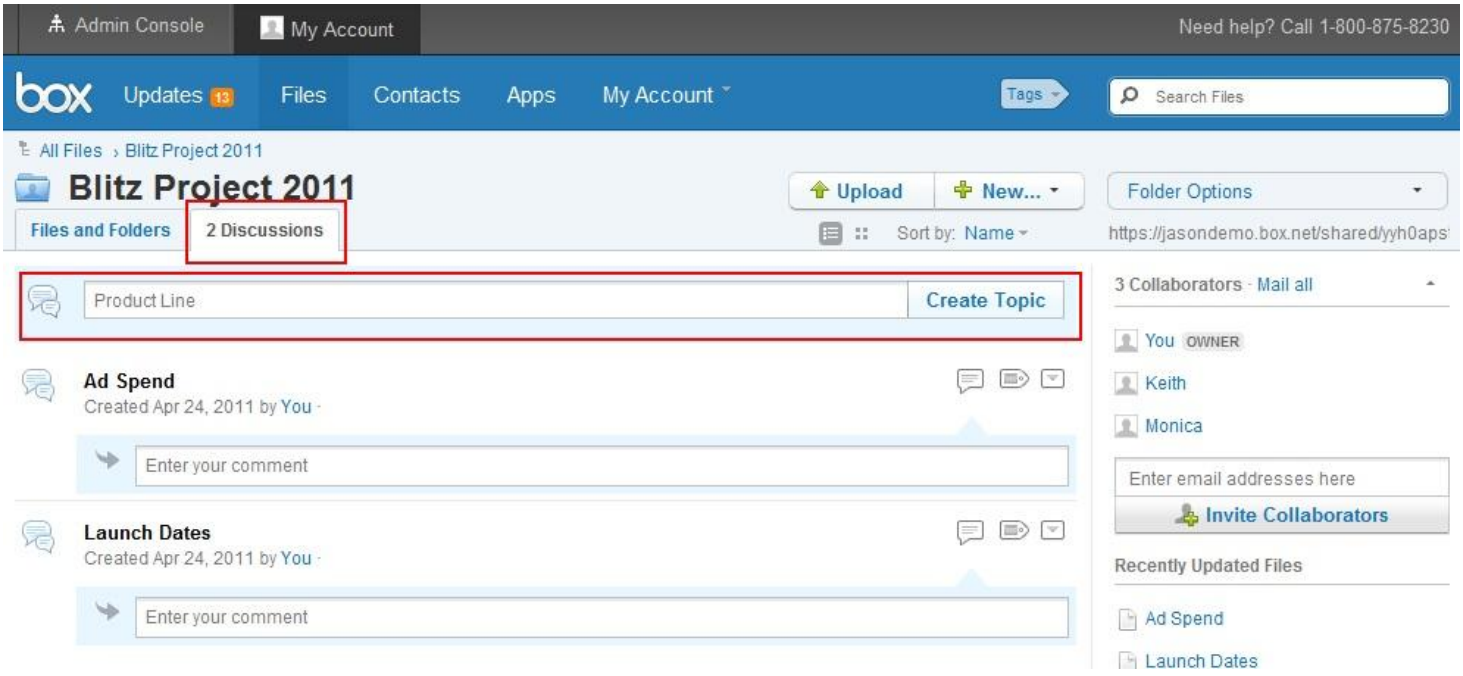
Discussions can be used to cultivate, track, and store all conversations pertaining to a folder. For example, all conversations pertaining to a specific project can be housed under “Discussions” (instead of email threads).

1. Click into the desired folder.

2. Select the “Discussions” tab.

3. Type in a topic and click “Create Topic” to begin a discussion thread.

4. The “Discussions” tab will update with the number of discussions associated with the folder.



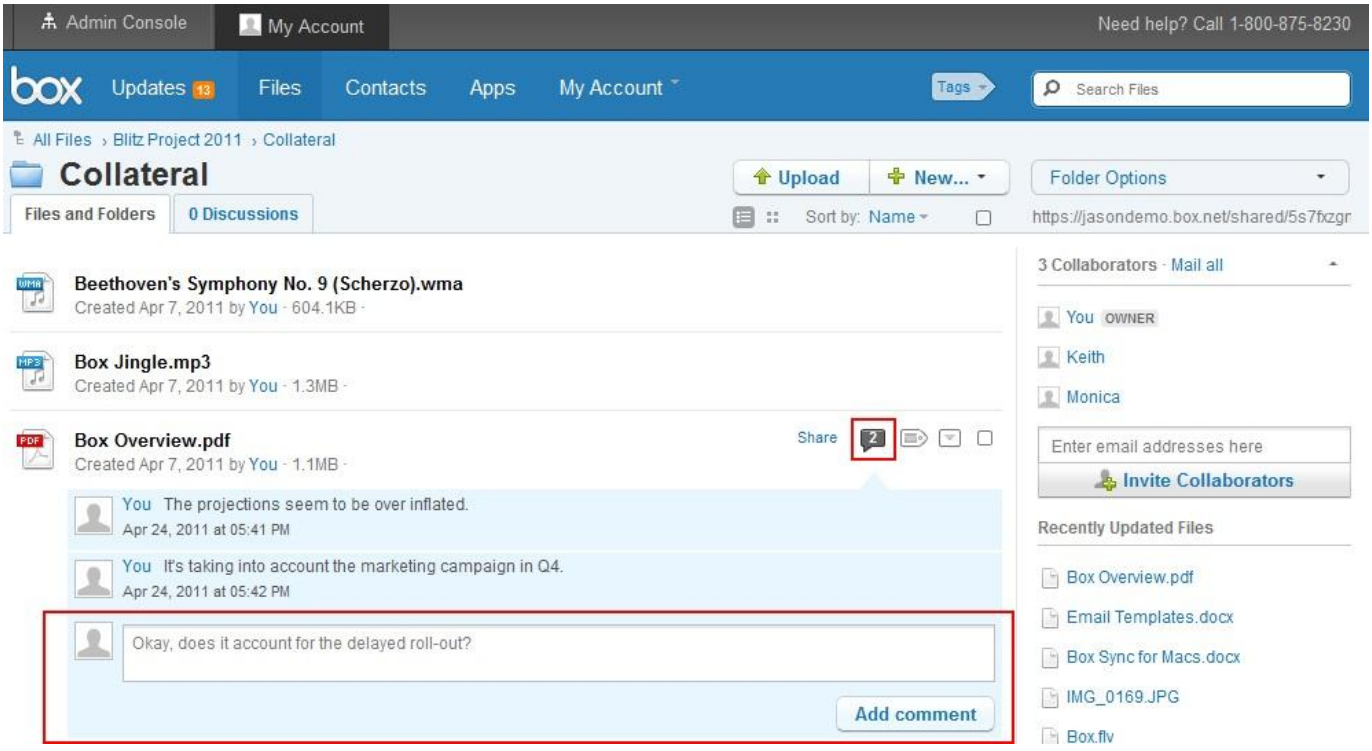
VII. Adding Comments to a File

Comments can be used to cultivate, track, and store all conversations pertaining to a file. For example, all conversations pertaining to a specific document can be housed under “Comments” (instead of email threads).

1. Mouse over the desired file and click on the comments balloon icon.

2. Type in your comments and click “Add comment”.

3. The comments balloon icon will update with the number of comments associated with the file.

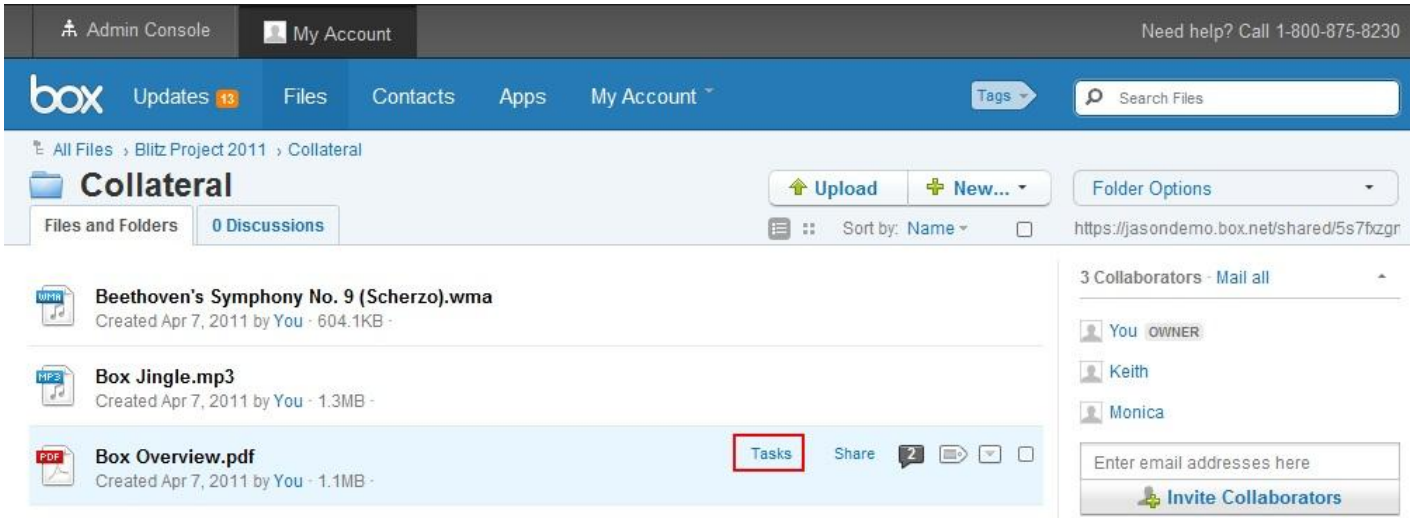


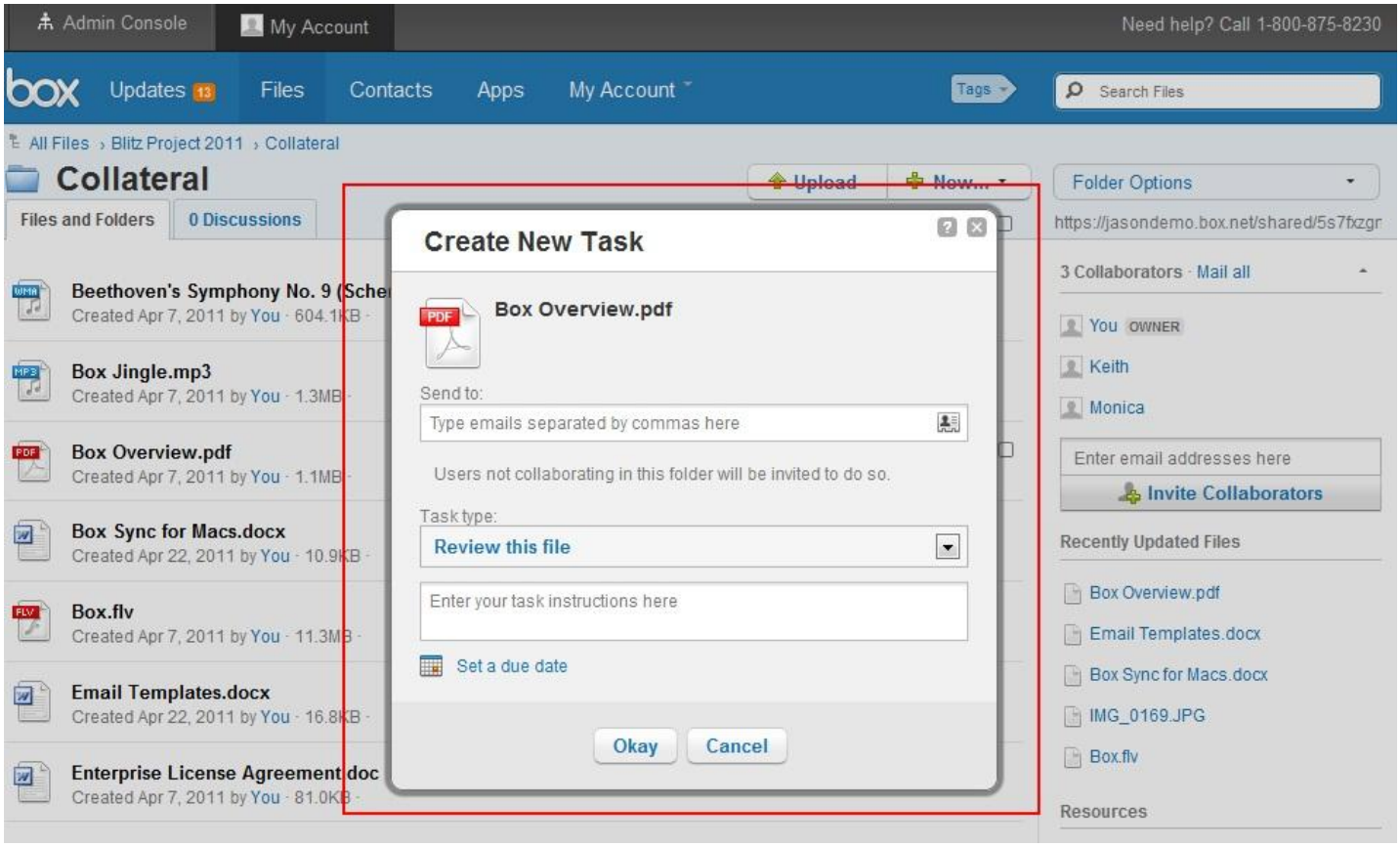
VIII. Creating Tasks for a Collaborator

Tasks can be created for any file and assigned to any collaborator.

1. Mouse over the desired file and click “Tasks”.

2. A pop-up window will appear allowing you to select the collaborator you want to assign the task to, the task type, additional instructions, and a due date. Click “Okay” when you are finished and a notification email will be sent out to the assignee.



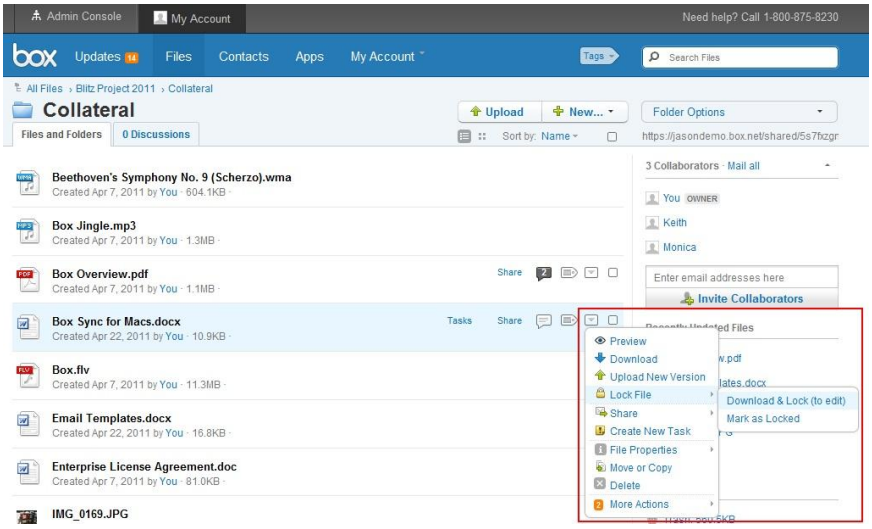


IX. Version Control and History

Version control and locking a file can be used to ensure that concurrent editing of a file does not occur. Your version history log will allow you to access and keep up to 10 versions of a particular file. Please note that all versions you store will count against your allotted storage.

a. Download and Lock a File to Edit

1. Mouse over the desired file and click the drop down arrow/menu. Select “Lock File” and click “Download & Lock (to edit)”.
2. A pop-up window will appear allowing you to download the file. If you want to prevent others from downloading the file while you make your edits select “Prevent other users from downloading this file while it is locked” and click “Continue”.
3. The file will open in the specified program (i.e. word, excel, etc.) you can make your edits.
4. After you have finished, save the file on your desktop. Ensure that you are saving the file with the exact same name.
5. To upload the new and edited version of the file, please refer to the next section titled **b. Upload a New Version.**



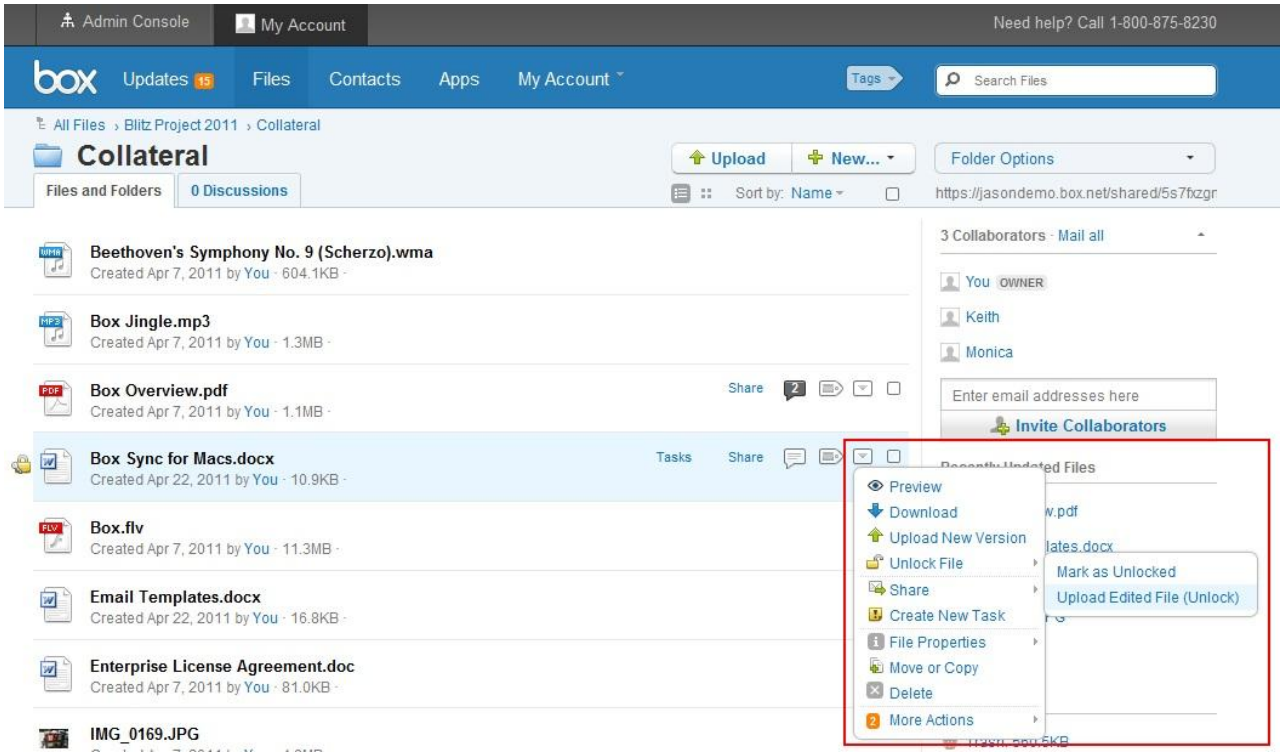
b. Upload a New Version

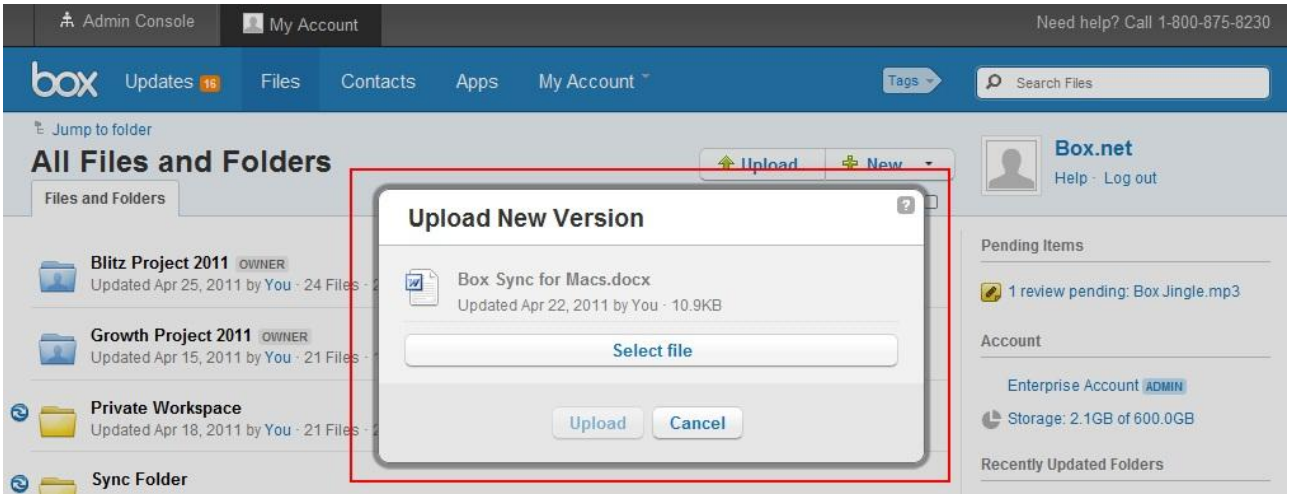
1. Mouse over the locked file and click the drop down arrow/menu. Select “Unlock File” and click “Upload Edited File (Unlock)”.

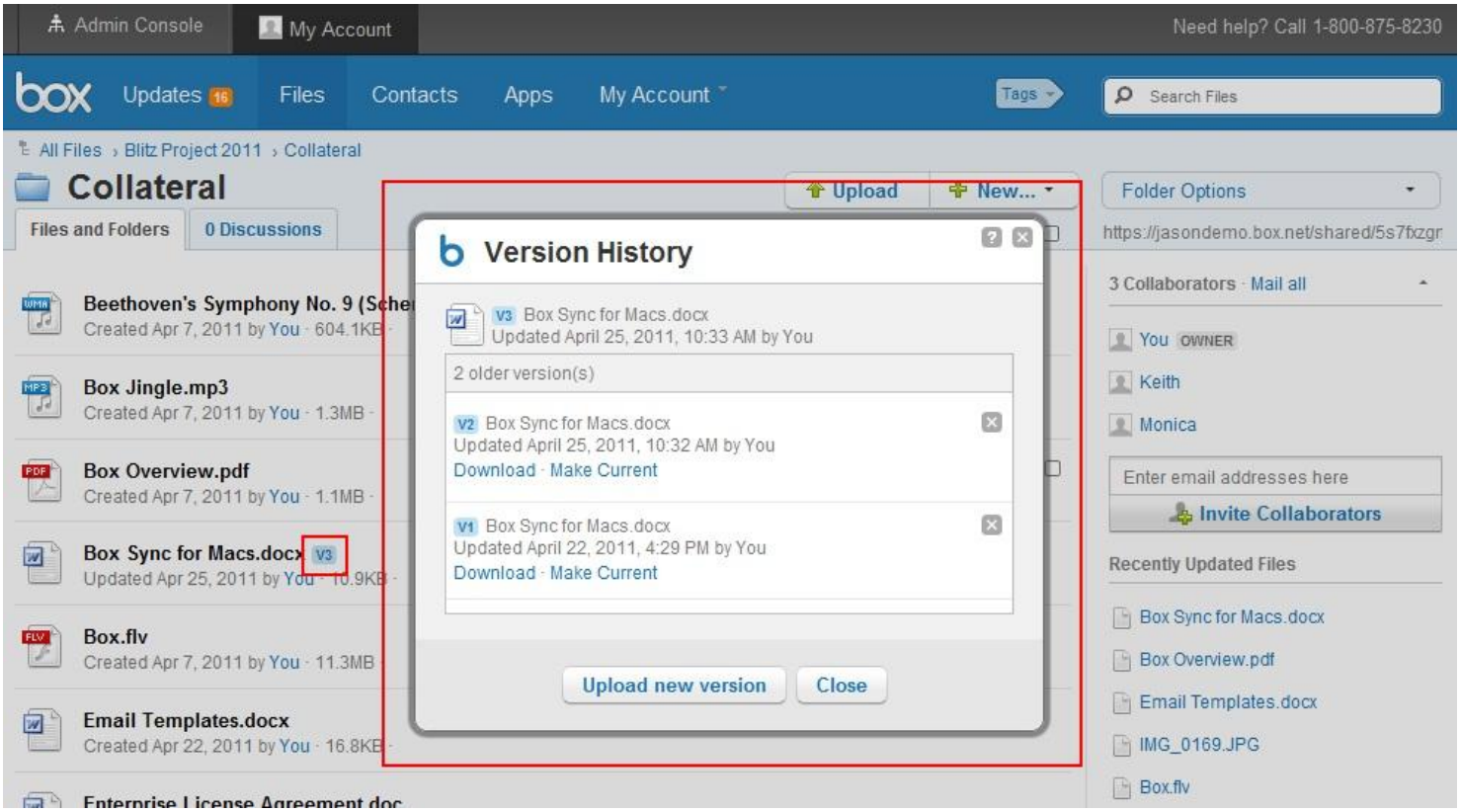
2. A pop-up window will appear allowing you to select the edited version. Click “Select File” and select the edited version of the file to upload and click “Open”.

3. Click “Upload” to upload and unlock the file.

4. Once you have completed the upload you will see a version icon next to the file letting you know the number of versions associated with that file. If you click on that version icon you will be able to see, download, and make current an older version of the file.






Admin Console
My Account
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Updates 16
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Tags
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Collateral
Upload
New...
Folder Options
Files and Folders
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Created Apr 7, 2011 by You · 1.1MB
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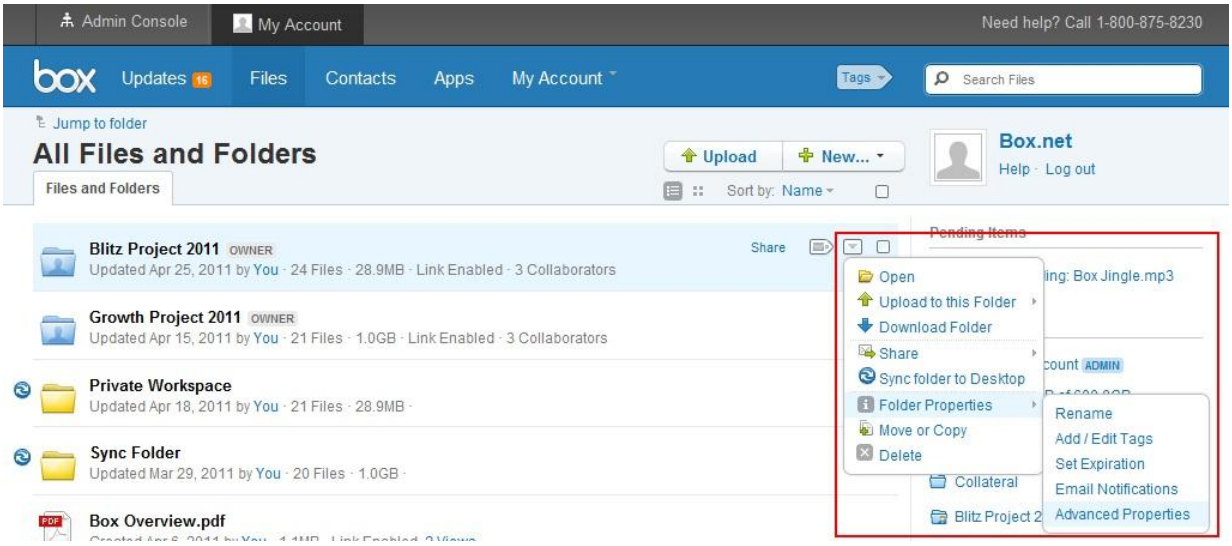
Version History
V3 Box Sync for Macs.docx
Updated April 25, 2011, 10:33 AM by You
2 older version(s)
V2 Box Sync for Macs.docx
Updated April 25, 2011, 10:32 AM by You
Download · Make Current
V1 Box Sync for Macs.docx
Updated April 22, 2011, 4:29 PM by You
Download · Make Current
Upload new version
Close
3 Collaborators · Mail all
You OWNER
Keith
Monica
Enter email addresses here
Invite Collaborators
Recently Updated Files
Box Sync for Macs.docx
Box Overview.pdf
Email Templates.docx
IMG_0169.JPG
Box.flv

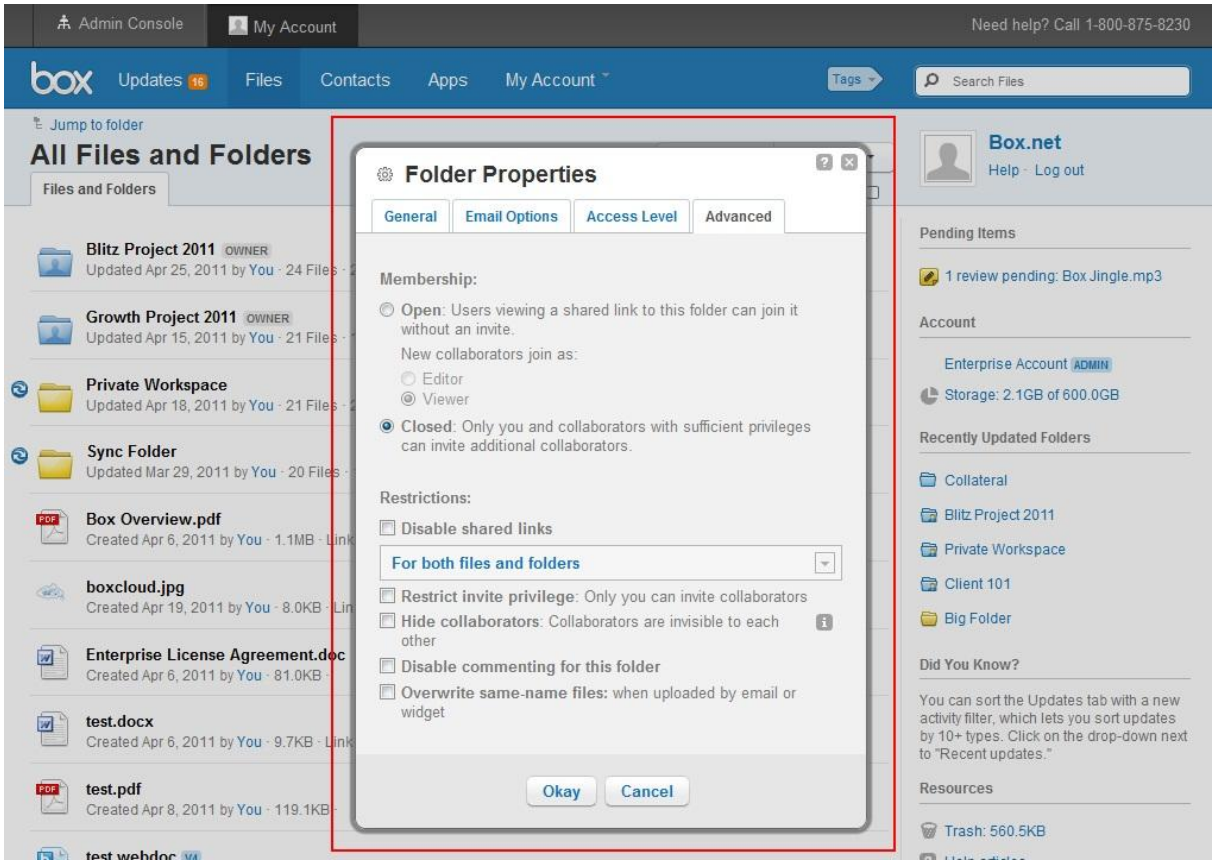
X. Advanced Folder Properties

Advanced folder properties are only accessible to the folder owner and co-owner (if there is one).

1. Mouse over the desired folder and click the drop down arrow/menu. Select “Folder Properties” and click “Advanced Properties”.

2. A pop-up window will appear allowing you to adjust the properties and restrictions of that folder. For example, you can disable share links, restrict invite privileges, and disable commenting for that folder.



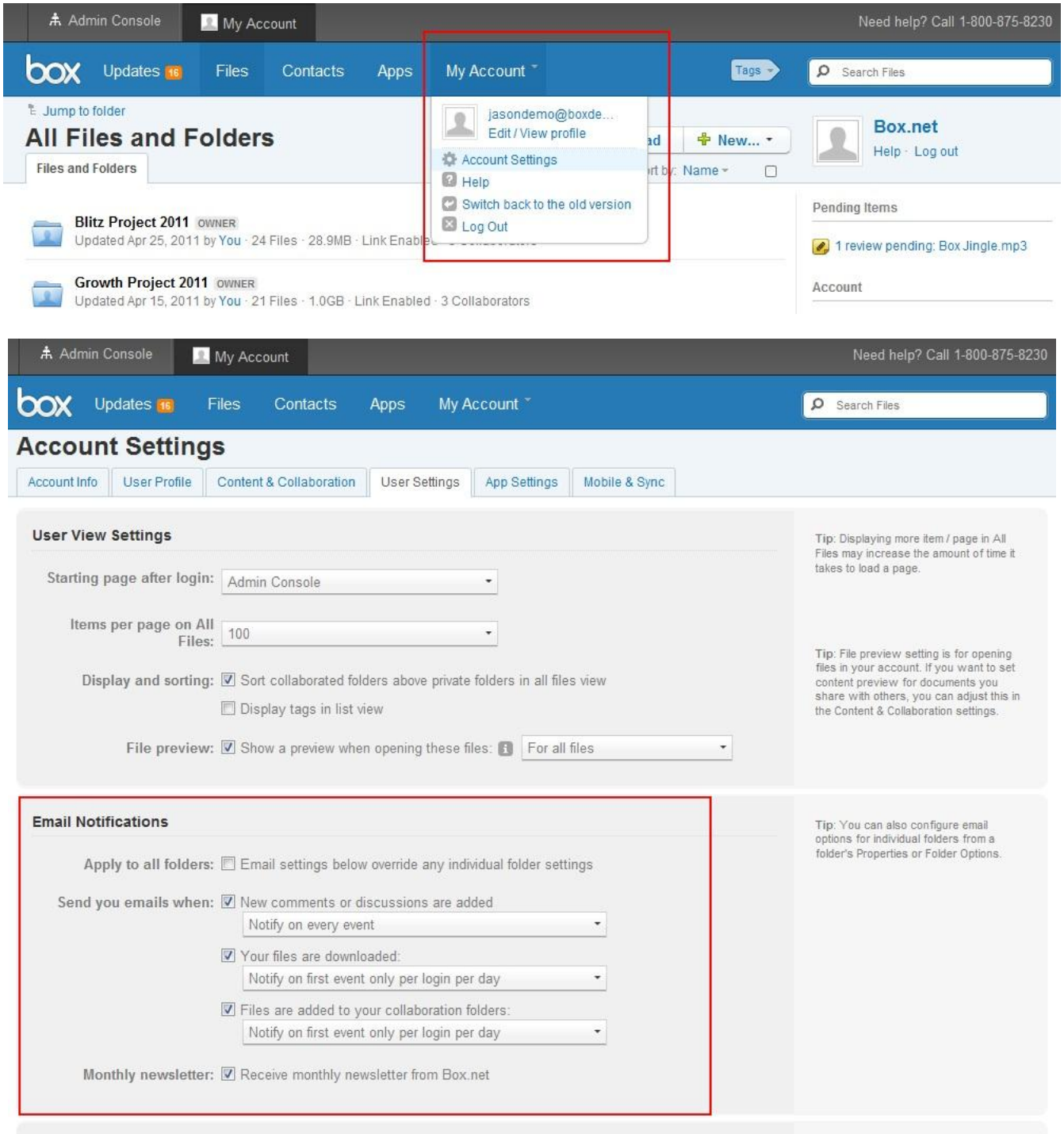


XI. User Email Notifications

1. Mouse over “My Account” at the top of your window and click “Account Settings”.

2. Click the “User Settings” tab and from here you will be able to adjust your email notifications for your account under the “Email Notifications” section. Click “Save” once you have finished.

Please note that email notifications can be adjusted on an individual folder level as well. The setting is under “Folder Properties”.



XII. Online Help Pages & Webinars

Our online help pages & knowledge base can be found at the below address. It is a robust directory of help docs and answers to frequently asked questions.

http://support.box.net/

We offer weekly webinars that will walk you through all the features of your Box account for both Administrators and End Users. You can access the webinars through the below link along with the schedules.

https://www.box.com/webinars