Box User Guide (Windows)

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What is Box?

Box is a cloud storage platform that helps people securely store, access, share, and collaborate on files across devices. The Box platform is accessible through the web and mobile apps, and comes with many useful features, such as:

- Search
- Metadata
- Granular permission models
- Enterprise-grade security
- Preview capabilities for 120 file types
- Ability to share files and folders with colleagues inside or outside the University

Aston University staff have an unlimited storage allowance, with an individual file limit of 5Gb.

Logging in to Your Box Account

First things first: Here’s how to log in:

1. Go to aston.box.com and click “Continue”
2. Enter your Aston email address on the right of the page
3. Enter your password (this is the normal password you use for the network)
4. Click Log In

Sometimes you will find that you will go straight into Box without having to enter any details.

Forgot your password? Please do NOT click on any links within Box to reset your password. Due to the Single-Sign-On, for any password issues, please contact the IT helpdesk.
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 Folder:

2. In the pop-up window that appears, enter the folder name. To share the folder with others, enter their names in the Invite People box:

   **Watch Out!**
   When sharing folders, Box uses waterfall permissions, which means any user who has access to the folder also has access to any subfolders inside it or anywhere further down the tree from there.

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 choices: Use **Upload Files** when you only have a few to get to the cloud, and **Upload Folders** when the job’s a bit bigger.

Adding Files via Upload Files

1. Navigate to the folder where you want to send your files
2. Click the Upload button, then choose 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 complete Folders

1. Navigate to the folder where you want to send your files
2. Click the **Upload** button, then **Folder**
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
4. Once you’ve added the files or folders you need, click **Upload** to get them up to Box.

**NB.** Uploading Folders uses Java, which may not be installed on your computer
Navigating Your Files

Once your files are living in the cloud, you can access them wherever you are. You can navigate through your folder structure or use the Search facility to quickly find what you’re looking for.

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 type your query into the search bar at the top of your page:

Typing a term in the search bar will produce a list of results immediately and if you want more simply click on the See all results button at the bottom.

After clicking See all results, the page will refresh to show a more complete set of results, along with some filter tools at the top of the page to narrow your search.
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.

**NB:** 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.

Here’s how to start:

1. Mouse over the folder you’d like to share and click the **Share** button to the right, then click **Invite Collaborators**:

   ![Invite Collaborators](image)

   If you’re already in the folder that you want to add collaborators to, simply click the Share this Folder button on the Sharing tab of the right-hand sidebar.

   ![Share this Folder](image)
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, edit 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

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

Remember that Box uses **Waterfall Permissions**, so that any user who has access to the folder also has the same level of access to any subfolders inside it or anywhere further down the tree from there. Also, users can only see folders that they have access to, so ensure that you name the folders in a way that will make sense given the visibility.
Shared Links

There may come a time when you’d like to quickly share files with people 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 the Share button on the right hand side.

![Share Button](image)

2. For a folder, you will additionally need to select the option to Get Shared Link

3. The Shared Link dialog box will pop up on screen:

![Shared Link Dialog](image)

4. Select the access level from the dropdown that will default to People in this folder, but can also be set to People in your company or People with the link

5. To share, just copy and paste the secure link into an email/IM/what have you, or click into the Email Address box and type/copy a valid email address to have Box send an email to your recipient(s) – a default message will usually appear that you can edit.
6. 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 settings button, select **Disable Shared Link on** and type/select a date:

![Shared Link Settings](image)

7. You can also choose whether to allow sharers to download the file and, for those times when you allow anyone with the link to access the file, you can use the **Require Password** option.

8. In situations when you need to provide a long-term link to lots of people, you could also create a Custom URL.
### 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. In the file preview, click in the Write a comment box at the bottom of the Activity tab of the right sidebar (use the toggle sidebar button, at the top right of the screen, if the sidebar is not showing).

2. Type in your thoughts and click **Post**:

3. Add the “@” symbol before a name to tag an individual with the comment (@-mentioning will directly email the person and populate the message in their Box account).

### 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 sending 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. In the file preview, click in the Write a comment box at the bottom of the Activity tab of the right sidebar (use the toggle sidebar button, at the top right of the screen, if the sidebar is not showing).

2. Tick the Add Task checkbox. Additional text boxes will appear, asking for **Assignees** and a due date (optional).

3. Click **Post** when you’re finished and a notification email will be sent to the assignee.

3. And the assignee will see their pending tasks, right from their **All Files and Folders** page:
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: Box has one tool – file locking – to prevent this from happening, and another – version control – to correct it if it does.

Download and Lock a File to Edit

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

1. Right-click the file and choose Lock from the menu

2. 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 Lock, and the file will be marked as locked and a padlock icon will appear next to the file name.

3. All done? Save the file in the program you used to edit it – and be sure to use the exact same file name.

4. To make the updated file fully available back in Box, click Unlock on the right-click menu.

Note: When you lock a file, it will show a lock icon, but you will still be able to edit it. When someone else locks a file, you will see a different lock icon, and you will not be able to modify the file unless you unlock it.

Version Control

Each time you save a file in Box, it will create a new version. If you click the More Options button next to a file, you’ll see how many saved versions there are in the Details tab of the right sidebar.

If you click the highlighted text, the Version History dialog will pop up and you 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.
**User Email Notifications**

To keep you absolutely apprised of current events in your account, there’s 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. Click on your initials or picture on the right of the header bar at the top of the page, then click **Account Settings**:

2. Next, switch to the **Sharing** tab: From here, you can scroll down to the email notification settings for your account.

   ![Email Notifications Settings](image)

Quick Tip: Email notification settings can also be applied at the folder level. Settings in the section pictured above apply by default to your entire account, but you can give certain folders a bit more granularity by setting notifications at that level. To do so, right-click the name of the folder in question, click **Settings**, then scroll to **Email and Notifications**.
Box Edit

Box Edit is an add-on feature that allows you to open and edit files stored in Box. Designed for all file types, browsers, and platforms, Box Edit uses the default application installed on your computer to open and edit files: .docx files open in Microsoft Word, .pptx files open in Microsoft PowerPoint, .xlsx files open in Excel, and so forth. This application should appear in your PC’s list of advertised programs in the normal way (just right-click the icon in the Windows notification area and choose Show New Programs to install).

Opening and Editing Files

Once you have installed Box Edit, you can open and edit documents directly from Box. To open files with Box Edit:

- Right-Click a file (or click the ellipses (...)) to open the More Options menu.
- Click Open with... If there is more than one application with which you can open the file, you will have the option to select the appropriate application.

![Box Edit screenshot]

You can also open and edit documents after previewing them. To open files with Box Edit from the preview screen:

- Click the file to open it in preview
- Click Open. If there is more than one application with which you can open the file, you will have the option to select the appropriate application.

Saving Files to Box

After editing a file using Box Edit, simply save your changes in the native application. All changes will be saved back to Box automatically as a new version of the file.

Locking/Unlocking Files

If you are working on a file with other collaborators, be sure to lock files before opening them with Box Edit (See File Locking and Version Control, above, on page 12). This will prevent other users from making changes to documents that you are working on until you unlock the file. Locking files is not currently supported on our mobile applications.
Box Sync

This cross-platform productivity booster lets you keep files from your Box account in sync with your computer desktops: automatically.

**WARNING**: The files saved in Box Sync on your local drive are not encrypted. This should be borne in mind when choosing which folders to sync as sensitive or confidential documents should not be stored here. If you have a need to do this, then please consult the IT Helpdesk as your drive will need to be encrypted as an additional security measure (laptops and mobile devices should already be encrypted).

To use Box Sync, you will need to request the Box Sync app from the IT helpdesk. Once installation is complete, a Box Sync shortcut will appear on your desktop:

Any files you drag into your Box Sync folder will be synced with your Box account. On Box.com, a blue sync badge will be displayed to the right of all synced folders. Hovering over the sync badge will display a tip saying “this item is synced”.

Files can be opened and saved back directly to your Box Sync folder on your local machine. In addition, right clicking files in your Box Sync folder enables you to use the Box Sync submenu to:

- Lock and Unlock files,
- copy or email links or
- click to view the file on box.com in the browser

**Locking files with Box Sync**

You can lock and unlock files directly from your desktop using Box Sync.

- To lock a file, right click on the name of the file in your Box Sync folder, navigate to **Box Sync**, and select **Lock File**. A lock icon will appear over the file icon to indicate that the file has been locked.

- When you lock a file from your desktop, a lock icon indicating that the file is locked will also appear to the left of the file’s name in the web application.

- Once you have finished your work, simply right click on the name of the locked file, navigate to **Box Sync**, and select **Unlock File**. If you forget to do so, any other collaborator who has editing capabilities is also able to unlock the file.

- If you need to set an expiration or disable downloads, you will need to lock the file using Box on the web.
Box for Office

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

Essential Box functions are integrated into the Backstage view of the most popular Office applications. Now, right from within Word, Excel, and PowerPoint on desktop and mobile, you can:

- Open files from Box, with easy access to recently accessed files and folders
- Save files to Box, even with documents from your desktop
- Get Box options directly from the ribbon in Office apps
- Generate Box shared links and control their permissions

In addition, from Outlook you can:

- Save attachments to Box from incoming email
- Easily send links to files already stored in Box
- Convert outgoing attachments to Box shared links

Box for Office needs to be installed on your PC – if it is not already advertised to your PC, please contact the IT helpdesk.

Opening Files from Box
(Office 2013)

Once in the Open menu, you can open a file from Box in one of two ways:

1. Click on a recently accessed file
2. Choose a recently opened folder to navigate or open a file browser directly to pick a file.
3. From the file picker, users have the following options:
   1. Navigate up and down the folder hierarchy
   2. Search for files anywhere in your Box account
   3. Open the file from Box (triggering a download)

Note: Microsoft Office files will lock automatically when you open them from Box for Office. They automatically unlock once you close the file.
Saving Files to Box
(Office 2013)

If you previously opened a file from Box or previously saved a file as a Box file, you can use Control-s, or the normal Save menu to save a new version of that file.

If you opened a file from the local desktop or other non-Box source, you can always save it to Box by using the Save As menu, which provides options to browse to a Box folder and save your file.

Note: When you save a file to Box, future saves go straight to Box as new versions of that file.

Generating Box Shared Links
(Office 2013)

The Share menu option is only available when there is an open and active file. When on this page, you have the following options:

- **Share a Link**: Create a shared link for the file and copy it for use elsewhere. If the file was not already stored on Box, you are prompted to upload the file to Box on the spot.
- Change the shared link **access level**.
- **Advanced**:
  - Set an expiration date for a link
  - Allow downloading
- **Email link**: Send the link using your system default e-mail client.

Ribbon Options

Right from the ribbon at the top of your Microsoft Word, Excel, and PowerPoint files, you'll see the following additional options to Share your file using Box, Upload your file to Box, or View on Box.
Box and Office Online

If you need to concurrently edit a document with others, you can use Office Online integration to collaborate on Microsoft Office documents in real-time.

Box is seamlessly integrated with Microsoft Office Online. This integration lets you create Microsoft Word, PowerPoint and Excel files in Box, edit them using the Office Online web applications, then save them directly back to Box without downloading additional programs or applications. In addition, MS Office Online integration supports concurrent editing, so you and your co-workers can collaborate on documents in real-time.

Creating Microsoft Files through Box and Office Online
To create a new Microsoft file in Box using Office Online:

1. Navigate to the Box folder you want to contain the new file.
2. Click New from the Box menu and select the type of Microsoft file you want to create.
3. When prompted, name your file.
4. If you do not have Box Edit installed, Box will create your file and automatically open it in Microsoft Office Online. If you do have Box Edit, your file will open in your default desktop application.
5. If you have Box Edit and you wish to perform real-time editing with others, save the file on Box, then choose Open with… from the right-click menu to open with the online version of the Office application.

Real-Time Co-Authoring
Box for Office Online now supports real-time co-authoring. Multiple people can edit a single document simultaneously, and all changes will be automatically saved back to Box. When multiple people are editing a document, their names will appear in the upper right corner. Your collaborator’s text cursor will appear in a unique color, and their name will be displayed next to it.
Work with others in Word Online
When you are editing a document in Word Online you might see notification that others are working in the document too. There is no special co-authoring mode and no command to begin working together on a document. You edit in Word Online as you normally would, and if others are also editing the document, Word Online alerts you to their presence, and shows you the paragraph they’re working on. All changes will be automatically saved back to Box.

Work with others in Excel Online
If you make your workbook available for others to edit, your friends can work on the workbook at the same time as you. This works well for workbooks where you are collecting information from a group of people, such as a list of information or a group project. No more e-mailing a list around.

While you are editing the workbook, Excel Online shows you where others are also working on the workbook.

Notes:
- Everyone works in Excel Online; if someone opens the workbook in the Excel desktop application, the workbook can’t be edited in Excel Online until it’s closed again in desktop Excel.
- Because Excel Online automatically saves everyone’s changes, the Undo and Redo commands might not work the way you expect.
- Also, when one person changes the sort order or filters data, the view changes for everyone who is editing the workbook. So, be mindful of sorting and filtering while others are in the workbook.

Work with others in PowerPoint Online
Team presentations and projects: you can work on them together in PowerPoint Online. When more than one person is editing a presentation at the same time, you see their names in top of the PowerPoint Online window:

You and your colleagues will see each other’s changes immediately, and PowerPoint Online saves the presentation automatically.

Note: Office Online supports editing for .xlsx, .pptx, and .docx files.
Any 97 - 2003 files (.xls, .ppt, .doc) cannot be edited with Office Online. Additionally, the following file size limits apply when editing files with Box and Office Online:
- Excel: 5MB
- PowerPoint: 500MB
- Word: 500MB
Using Box with Microsoft Outlook

Upload to Box and Attach to Your Email in One Step
If you’re working on a local Microsoft Office file and want to share it with others, you can use Microsoft Outlook to simultaneously upload the file to Box and email it out to collaborators.

To upload and attach your files:

1. Click **Upload and Attach** from the Outlook Box ribbon menu. This will open a file picker.
2. Use the file picker to select the file you want to upload to Box and email to others and click **Open**.
3. Having selected a file, use the **Upload to folder** pop-up to select where you want the file to live in Box.
4. Choose an access level for this file from the **Access** drop-down menu and click **Upload**.
5. Once the file is in Box, a shared link will appear in your email draft.

Send Links to Files on Box
When you are composing an email, you can insert shared links to files or folders stored in Box, and you can customize the link **access levels**.

To send a shared link:

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.

**Note:** With the Box for Office integration, when you try to attach a file that is not in Box, you will be given the option of uploading the file to Box and sending as a shared link. You can simply dismiss the pop-up prompt and proceed with your local attachment if you don't want to upload that file to Box.

Save Incoming Attachments to Box
When you receive an email with attachments, you can save the attachments directly to Box.

To save an email attachment to Box:

1. Open the email either in the Outlook preview pane or in an individual email window.
2. Click **Save Attachments** from the Outlook Box ribbon menu.
3. In the **Save to folder** pop-up, choose where you want to save the attachments from your selected email. Please note, you cannot save individual attachments to different locations, they all need to be saved to the same location.
4. Click **Save** to save all the attachments to your selected location in Box.

**Note:** To save attachments from multiple emails, multi-select the emails you wish to download attachments from and follow the steps above.