CARDBOX

Box User Guide

In this handy guide, we'll show you how to share, access and mange 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.

Have additional questions? Visit community.box.com for more information and training resources.

Contents

Logging in to Your Box Account:

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

Go to louisville.box.com
    1. Click **Continue**
    2. Type in your user name and password

Don't have access yet? Go to louisville.edu/it/cardbox for more info.
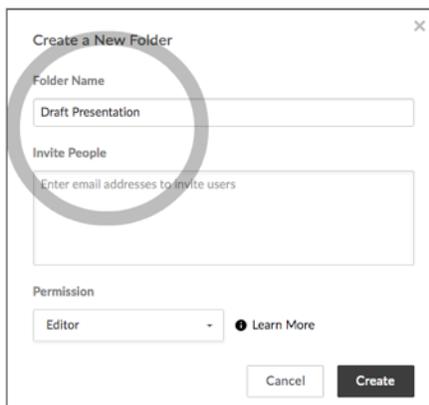
Creating a New Folder

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:
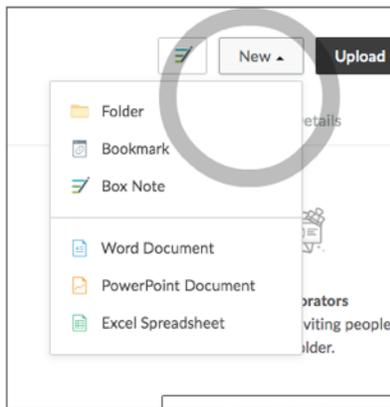
    2. In the pop-up window that appears, enter the folder name and optionally invite Collaborators into the folder by entering their email address.


    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.

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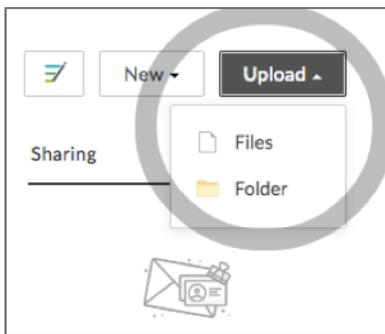
3. A pop-up window will appear, allowing you to select the specific file(s) you want to upload from your computer.
4. Select the specific file(s) and click the Open button.

### *Adding Files Via Upload Folders*

1. Navigate to the folder where you want to send your files
2. Click the Upload button, then Folders
3. A pop-up window will appear, which allows you to browse your computer to upload folders
4. Once you've added the files or folders you need, click OK to get them up to Box.

Navigating Your Files

Once your files are in Box 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, Jump to Folder and the Updates view.

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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 will search the titles of your files and folders as well as the body of your documents. You can apply filters to your search by selecting the advanced search icon next to the magnifying glass. You can filter by file type, date updated, owners, and opt to only search within the folder you are currently in.
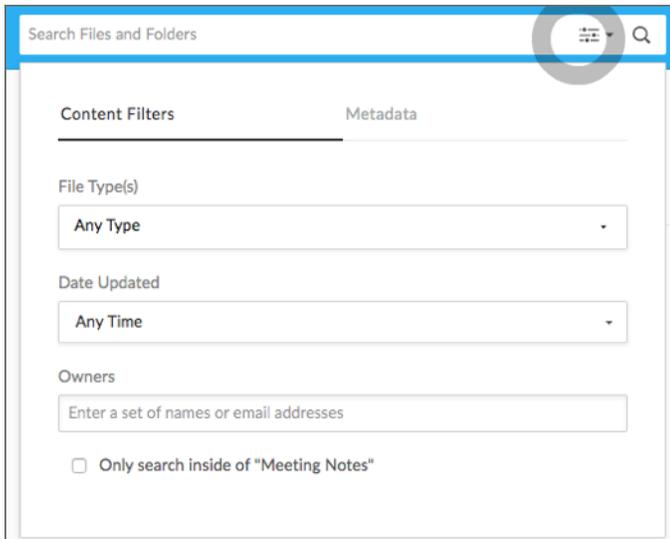
Received too many results? More filter options such as file type and size are available at the top of the page after your search is complete.
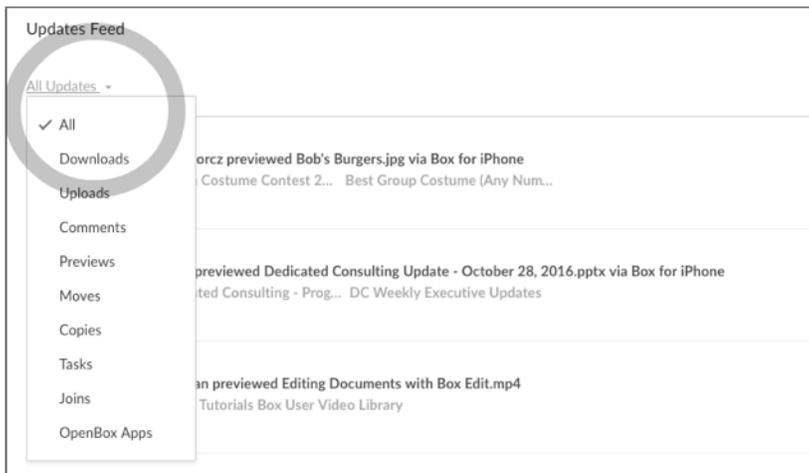
Jump to Folder

If you want to get to a folder quickly, use the Jump to Folder tool. Simply click the dropdown menu in the upper left corner of your All Files page to access your entire folder structure and be taken directly there.

![CARDBOX logo]
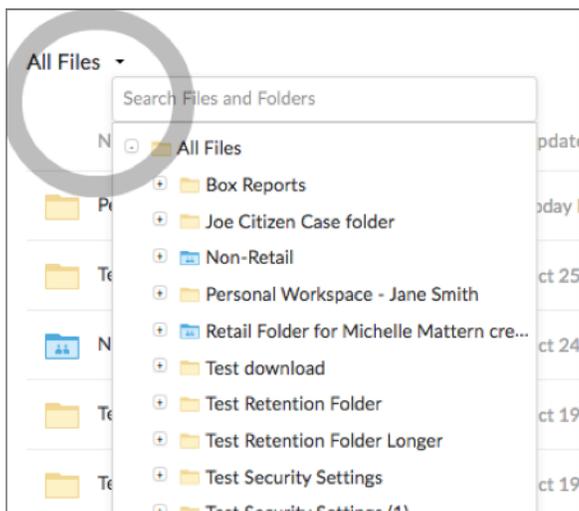
Updates

To view recent updates, click your initials (or your Box profile picture) in the upper right corner, and then select Updates. You can click right into the file or simply view the history – including comments, tasks, versioning and more.

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

Received too many results? More filter options such as file type and size are available at the top of the page after your search is complete.

If you want to get to a folder quickly, use the Jump to Folder tool. Simply click the dropdown menu in the upper left corner of your All Files page to access your entire folder structure and be taken directly there.
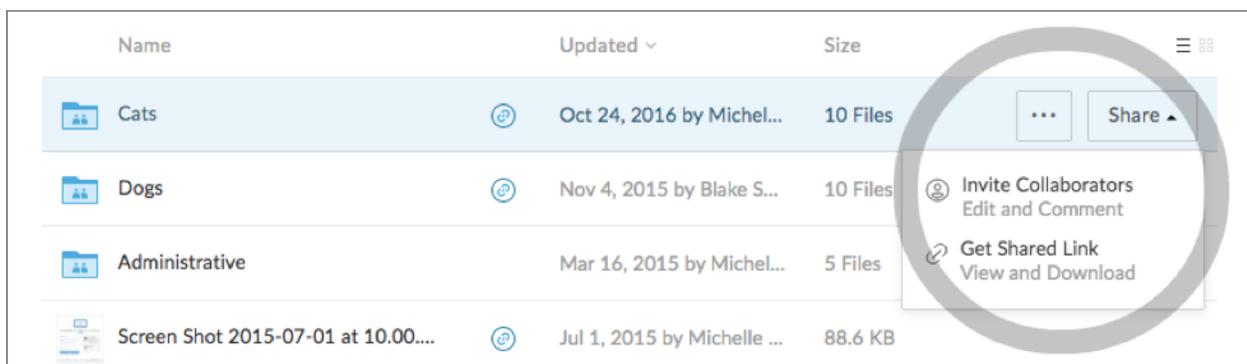
Inviting Collaborators

This is 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:

1. Once a folder is selected, click the "Share" button inline or the "Share this Folder" link in right Sharing sidebar. Then click Invite Collaborators.

2. In the pop-up, enter the email addresses of the contacts you're inviting to the folder. You'll also need to assign the invitees an access level based on the permissions you wish to provide for each collaborator.

3. Select the access level 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.


Inviting Collaborators

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. Select the file or folder and click Share

2. Select "Get Shared Link" and then a pop up window will display where you'll see URL – that's your shared link.

3. To share, just copy and paste the secure link into an email/IM/what have you, or enter an email address in the Email Shared Link section 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 Gear icon and select Set Expiration:
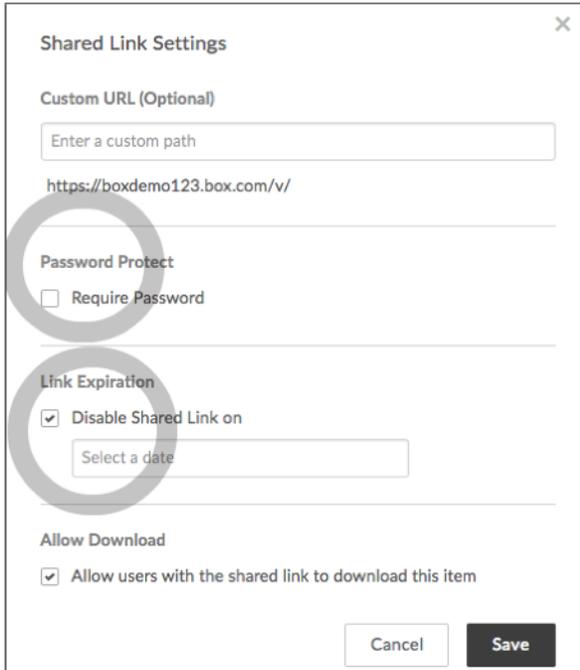
5. To require that recipients enter a password to use the shared link, click the Set Password link, add your desired password, and click Save.

6. Until now, we've been working with an Open shared link … but you'll notice that's not the only option available to you in the Access menu. Want to beef up your link's security? If so, consider:

- People with the link: Anyone with the link can view this folder and download its content.
- People in your company: Anyone in your company with the link can view this folder and download its contents.
- People in this folder: Any collaborator on the folder with the link can access this folder.

Adding Comments to a File

Get rid of lengthy email chains, especially when you are going through review cycles! Keep your comment and notes directly in Box attached to your files!

1. Click on the document you want to comment on to view it in preview mode.
2. Type in your thoughts, @mention key people you want to notify and click post!
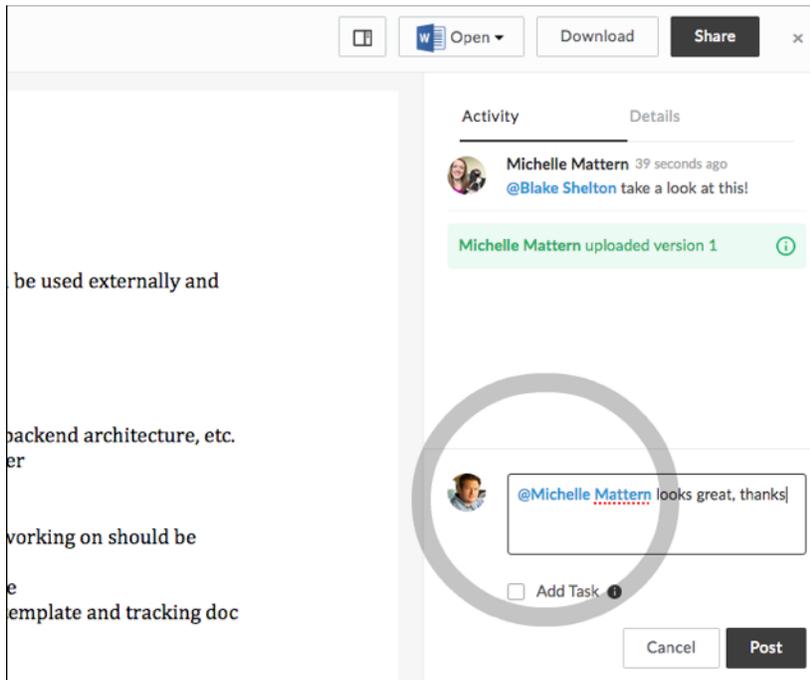
Creating Tasks for a Collaborator

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. Check the "Add Task" checkbox below the comment window.
2. Enter a collaborators name who will be responsible for completing the task.
3. Set a due date for completion; automatic reminders will be sent 7 days prior to the due date as well as on the actual due date if the task has not been completed.
4. Enter the description of the tasks or instructions for the assigned person to complete, click assign.
5. The assignee will receive a notification and will see pending tasks from their Box Messages.
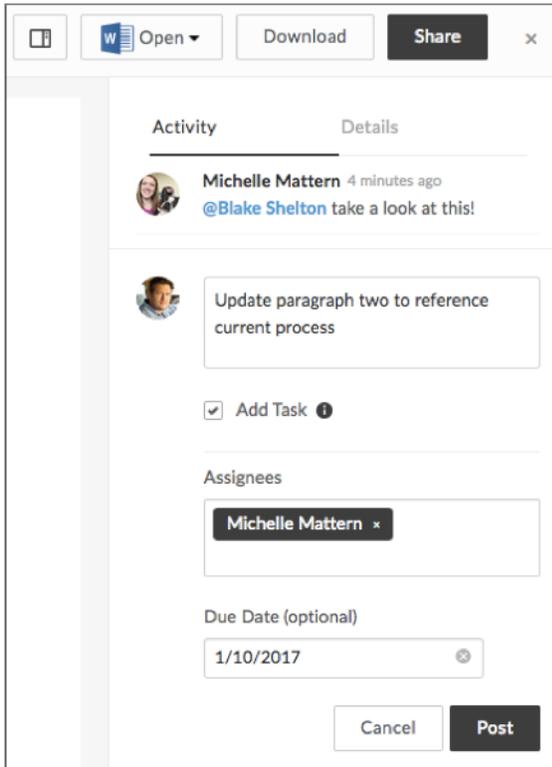
File Locking and Version Control

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.

Download and Lock a File to Edit

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

1. When you select "open" a pop-up window will appear in which you can select to prevent other users from downloading the file while it is locked and/or set an expiration time for the lock. Click Continue, and the file will be locked.

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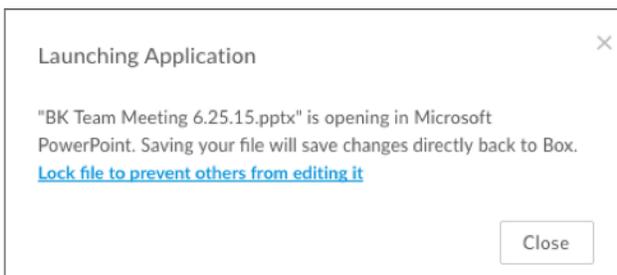
2. All done? Save the file in the program you used to edit it – and be sure to use the same file name.
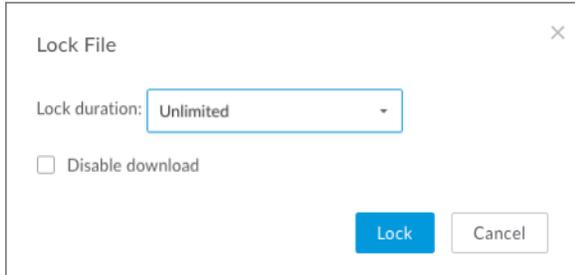
3.To get the updated file back in Box, click the down arrow next to the document name, and then click Unlock.
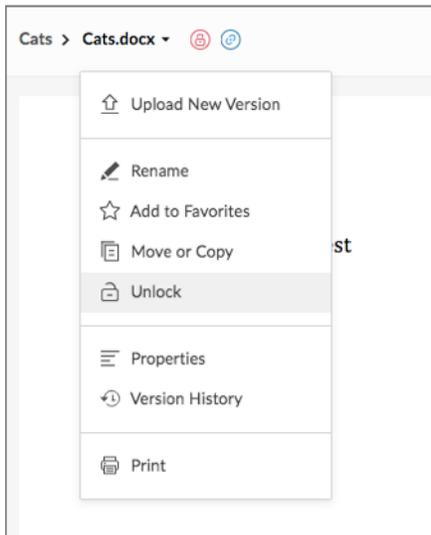
Version Control

When you select a document, additional details about the document will display on the right side of the page under the Details sidebar. If there are multiple versions of a document, those will be displayed at the top of the Details section.

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If you click the Saved Versions text, you'll see the older versions of the file, you can download them, or make an older version the most current one.
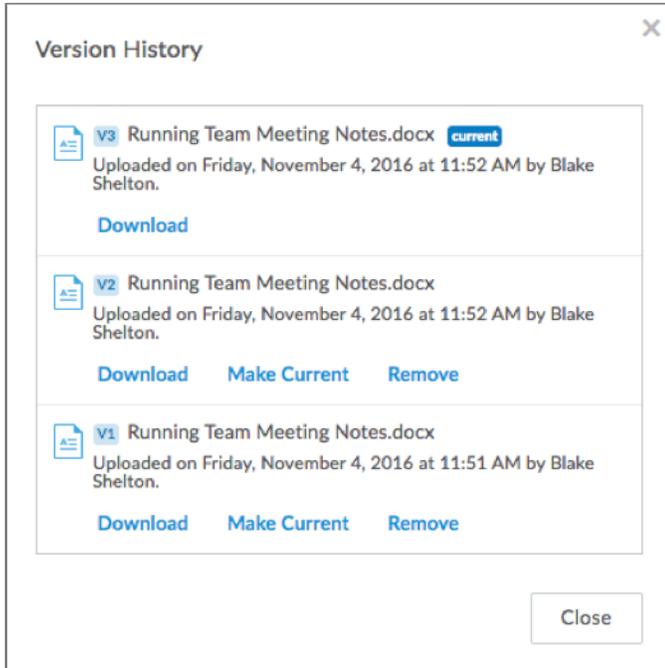
When you delete an older version of this file, the deleted version is retained as determined by the trash policy for your account. You cannot restore a deleted version after the trash policy's expiration date. It's your very own time machine to ensure that you never lose your work!
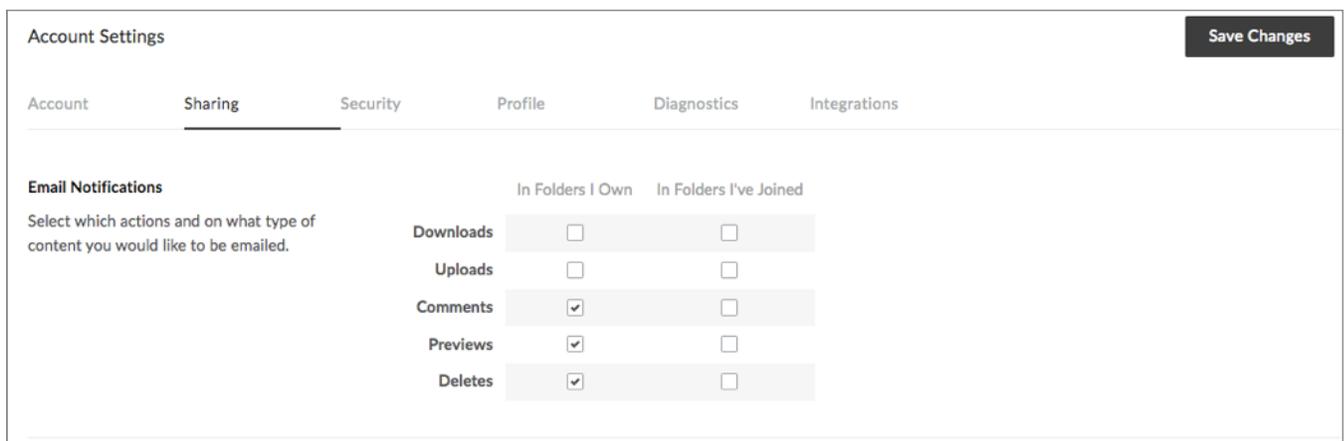
Folder Properties

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 mouse over the desired folder and click the drop-down '…' button and then select Settings (or, if you are already in the folder you want to modify settings for, click the folder name and then Settings).
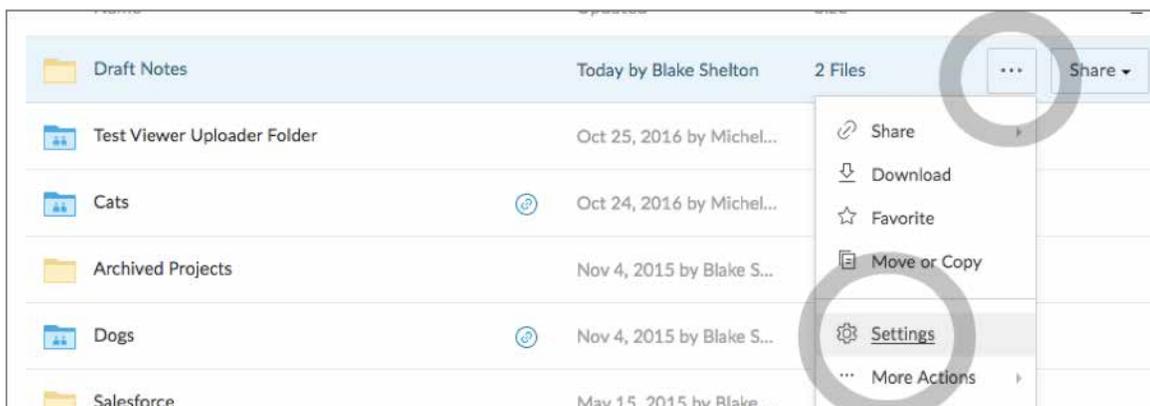
User Email Notifications

To keep you 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. Click your initials or profile image in the top right corner of your account and select Account Settings from the drop down menu.

    2. Next, select the Sharing tab and scroll down to the Email Notifications section. From here, you can adjust the default email notification settings for your account. Once you're finished, click Save Changes in the upper right corner.

Box Sync

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

To use Box Sync, download the app from the Box website here. 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 checkmark will be displayed next to all synced folders.

For any folders you have on Box already, you will need to select them to be synced in order for them to appear in your Box Sync folder and be accessible while you are offline. To do so, select a folder and then view the Details tab on the right side. Move the Sync to Desktop radio button to start syncing (or stop syncing) a folder. Note that you can only sync folders where you have Editor access or above.

Box Edit

What happens when you need to make a change to a file in Box? Box Edit lets you edit files directly on Box. If you have a program that can edit a file type, you can use Box Edit by clicking the Open link within the preview view.

Box will open the file in the program on your computer or within Office Online, and you can then make changes like you normally would and click Save. Box will automatically save your changes to Box as the next version of the file.

Learn more and download plugin applications here. Box for Office, Box for Outlook and Box for Mobile and more!

Have Questions?

Visit louisville.edu/it/cardbox or community.box.com for more information on Box features and functionality. You can also check out our awesome End User Video Tutorial library here!

Don't forget to review key information in our Getting Started Folder!