

# File Sharing & Collaboration

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## *Box.com File Sharing*

Revision Date: October 29, 2013

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## Overview

Box is a cloud-based secure file storage solution that provides a central repository to collaborate on project related documents. Box provides an easy mechanism to upload, archive, encrypt, sync, secure, share, propagate change notifications and collaborate on documents. Box also provides document management workflow tools including task assignments and tracking, and a robust third-party application ecosystem to extend base functionality. With granular role-based security, social communication and tagging of documents, document versioning and rollback and support for multiple platforms and mobile devices, Box is ideal to support JCESR's diverse on-going collaborative partner dialog.

Box provides the following services:

- Online file storage
- Sync files on your desktop
- Data encryption
- Share files and folders
- Send link to file/folder
- Receive real-time change notifications
- Collaborate: sharing (view/edit/manage – privileges), edit, comment, assign & manage tasks, real-time updates
- Share large files (5GB)
- Native support for Windows, Mac, iOS and Android
- Audit trail
- Versioning and file rollback
- Robust third-party application ecosystem

## Account Request

File sharing services are provided when a collaborator requests a JCESR Collaborator Account.

## Installation

Installation is not required for basic access to Box.com at <http://anl.box.com>

However, it is recommended that you install a few additional Box Applications including:

- Box Sync (Mac or Windows) - provides easy desktop to Box syncing
- Box Edit - easily edit documents within Box using native applications on your desktop

Both applications can be installed from Box.com's rich application ecosystem by following the instructions below.

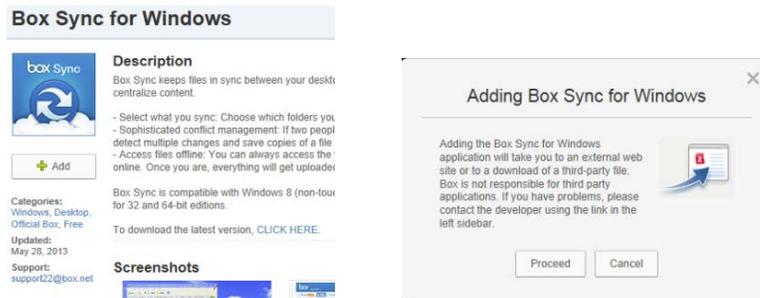
## Installing Box Sync

Box Sync provides downloading of online Box.com files and folders simply by flagging the desired files or folders as available for offline access.

1. Log into <http://anl.box.com>
2. Click on the Cloud icon at the top of the screen
3. Enter "Box Sync" in the Search Applications search field at the top of the page and click Search



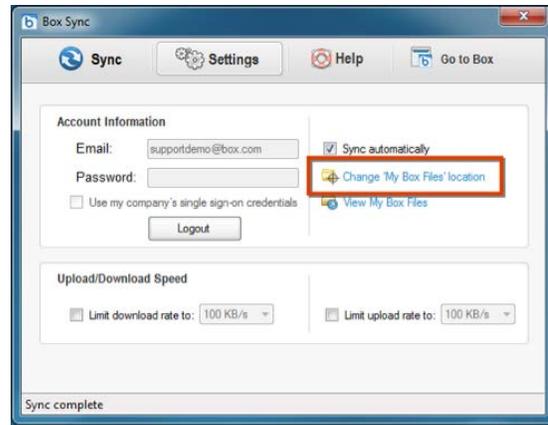
4. Select Box Sync for your platform (Windows or Mac) and click on the "+ Add" button to install



5. Select Box Sync button and complete the installation

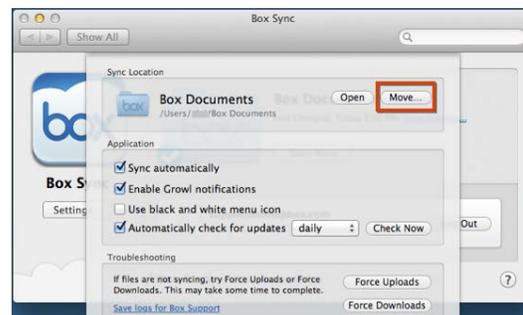


6. Upon completion of the installation you will be prompted to enter your Box.com credentials (user name (anl.gov email address) / password) to use Box Sync.
7. After logging into Box Sync, a **My Box Files** (for *Windows*) or **Box Documents** (for *Mac*) folder will be located under "My Documents" or under the Mac user profile folder, respectively.
8. OPTIONAL: The default location of this folder can be changed
  - a. Windows
    - i. Launch Box Sync
    - ii. Open the Box Sync Preferences by double clicking the Sync icon in your System Tray
    - iii. Under the Settings tab, click "Change 'My Box Files' location"
    - iv. Designate a new location for "My Box Files" and click "OK" to confirm
    - v. Allow Box Sync to complete the move



b. Mac

- i. Launch Sync
- ii. Click on the Box Sync icon in the top navigation bar
- iii. Select “Open Box Sync Preferences...”
- iv. Click “Settings”
- v. Click “Move” next to the “Box Documents” icon
- vi. Designate a new location for “Box Documents” e.g.
- vii. Allow Sync to complete the move



## Installing Box Edit

Box Edit provides an easy mechanism to edit documents within Box using native applications on your desktop and also to enforce collaborative rules including file locking to reduce simultaneous multi-author file editing conflicts.

1. Log into <http://anl.box.com>
2. Click on the Cloud icon at the top of the screen
3. Enter “Box Edit” in the Search Applications search field at the top of the page and click Search



4. Select Box Edit and complete the installation

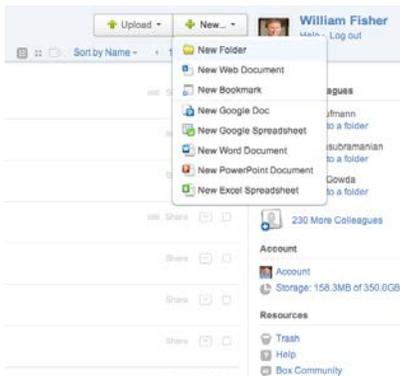


## Creating Files or Folders in Box

Box provides 4 easy ways to create documents including using Box.com, uploading files into Box.com, drag and drop into Box.com or using Box Sync.

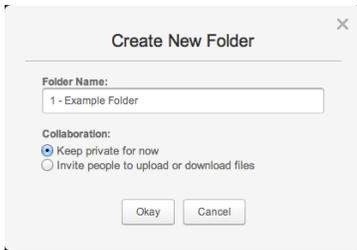
## Creating Files Using Box.com

1. Log into Box and select New Folder from the New button

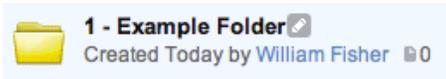


*Note: If you do not create a folder to store your documents, Box will place files in the **Default Sync Folder***

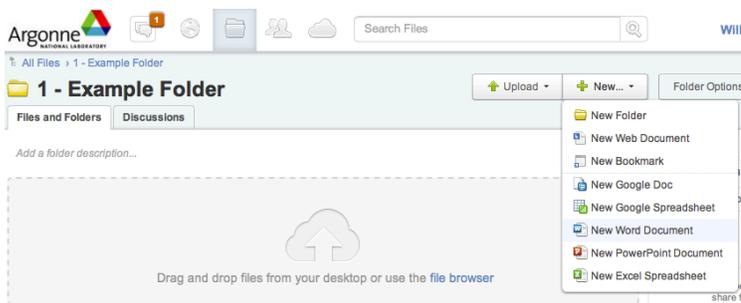
2. Enter a name for the folder and choose to "Keep private for now"



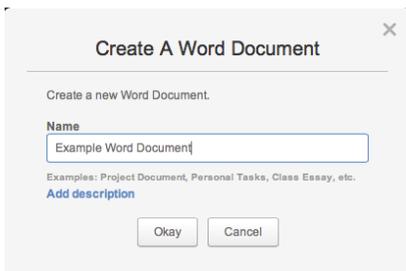
- Open the folder you just created by clicking on the folder name



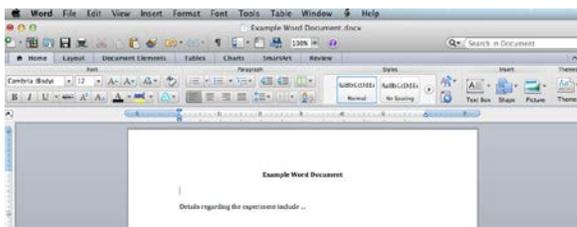
- Create a new Word document by selecting New from the toolbar and choosing new Word document



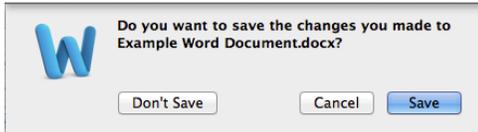
- Enter a name for the document.



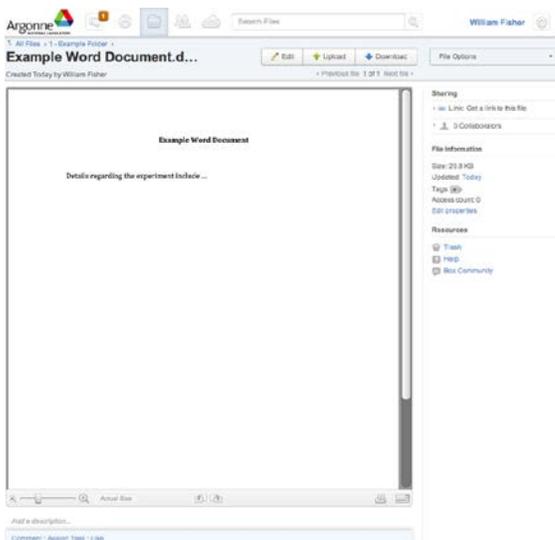
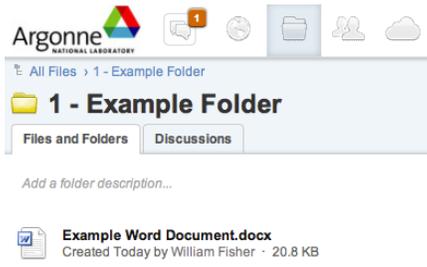
- Begin entering content in the document.



- Save and close the document. (Important: Do not choose Save as ... or change the default location where the file is being saved)

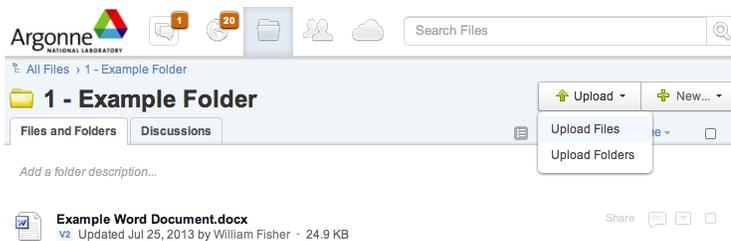


- Return to Box.com to preview your recently created document by clicking on the title of the document

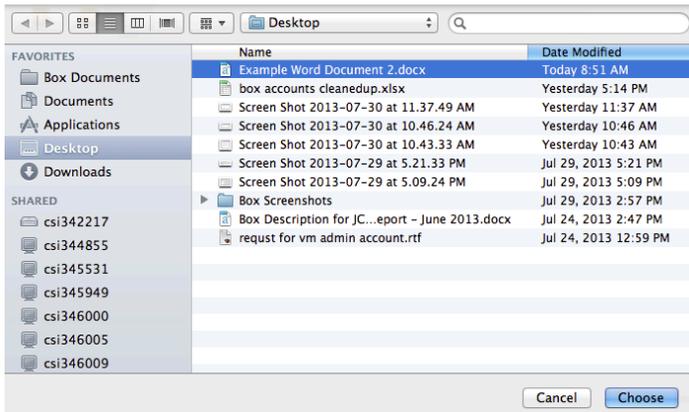


## Creating Files or Folders via Uploading using Box.com

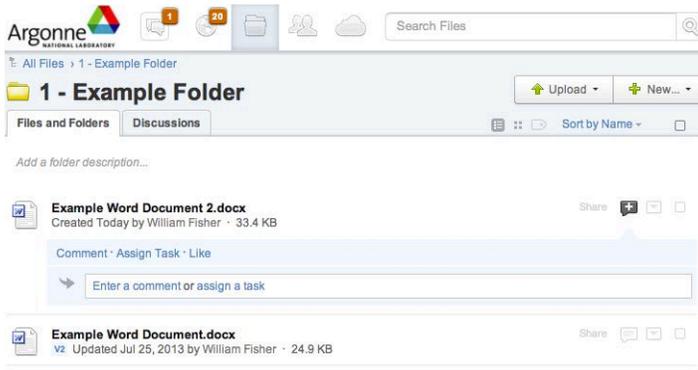
- When logged into Box.com, navigate to the desired folder you would like to upload a file to and select Upload Files or Upload Folders from the Upload button.



2. Select the desired file or folder from your computer

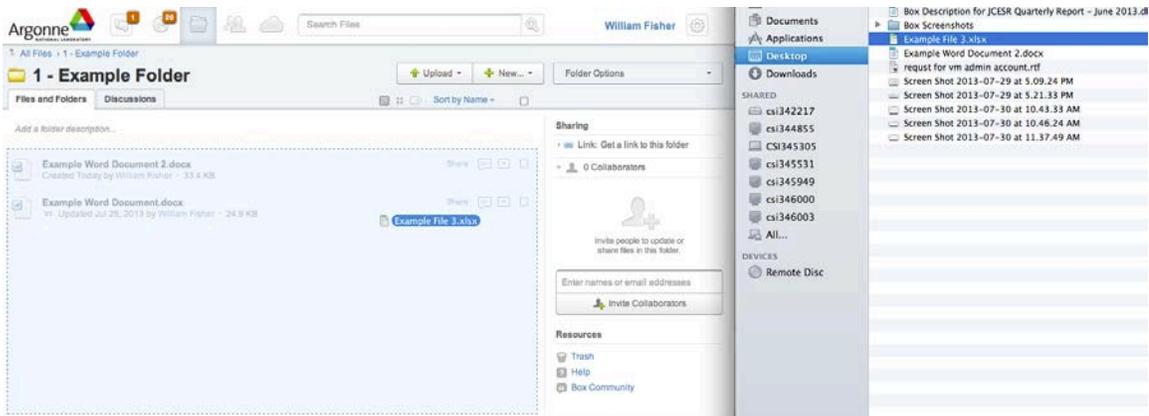


3. In this example, the desired file is uploaded



## Creating Files via Drag and Drop into Box.com

1. With both Box.com open and visible, open a Folder on your computer and have it visible beside Box.com
2. Simply drag-n-drop file (s) and/or folder (s) to the desired destination folder in Box.com (notice the blue dashed-line silhouette in Box.com when you have placed the file over the appropriate target area)



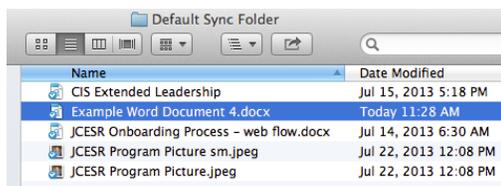
## Creating Files or Folders using Box Sync

Files and folders are easily synchronized from your desktop to Box.com using the Box Sync application by simply adding them to your “My Box Documents” (Windows) or “Box Documents” (Mac) Folder on your computer.

1. Drag an existing file and/or folder to your “My Box Documents”/”Box Documents” folder.



2. The file is moved to this directory on your computer, automatically uploaded to Box.com and placed in a folder labeled “Default Sync Folder”



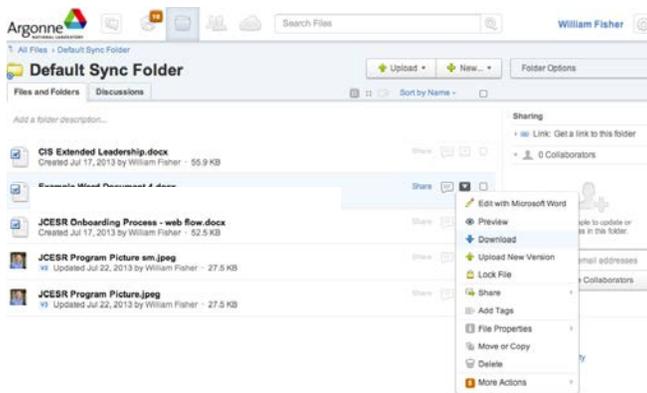


**Note:** If you wish to have files/folders from your computer placed in a particular directory on Box.com (and not Default Sync Folder) either drag to the desired folder within “My Box Documents”/”Box Documents” folder or create a new folder within this Folder.

## Downloading Files or Folders in Box.com

### Downloading Files or Folders using Box.com

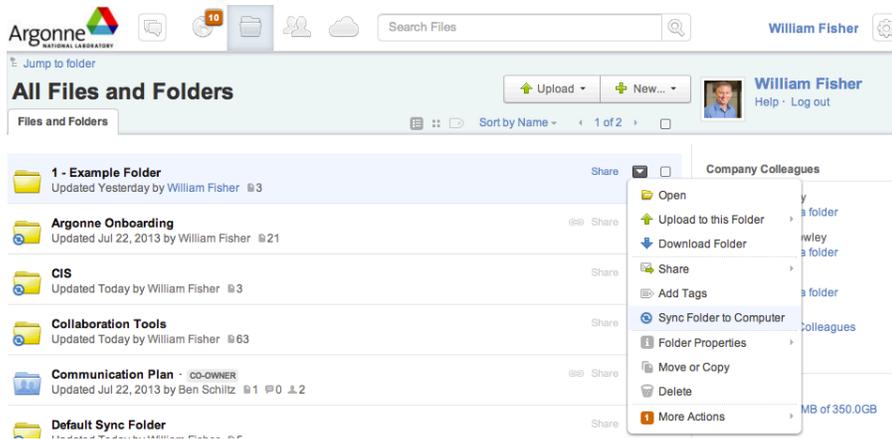
1. Log into Box.com, navigate to the desired file or folder and select Download from the small down arrow next to the file/folder name.



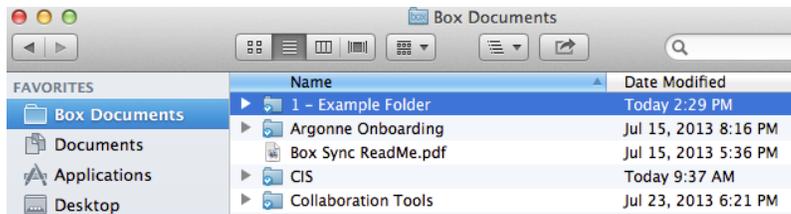
### Downloading Files or Folders using Box Sync

Box Sync provides downloading of online Box.com files and folders simply by flagging the desired files or folders as available for offline access

1. Log into Box.com, navigate to the desired file or folder and select “Sync Folder to Computer” from the small down arrow next to the file/folder name.



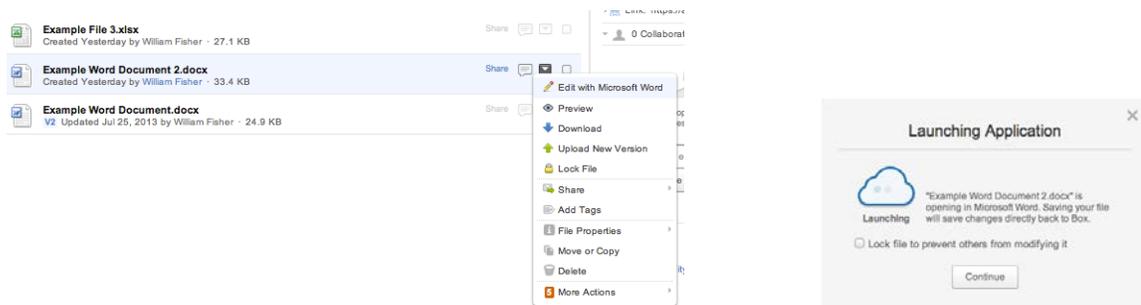
- The Folder (or file) appears in your local “My Box Documents”/”Box Documents” folder



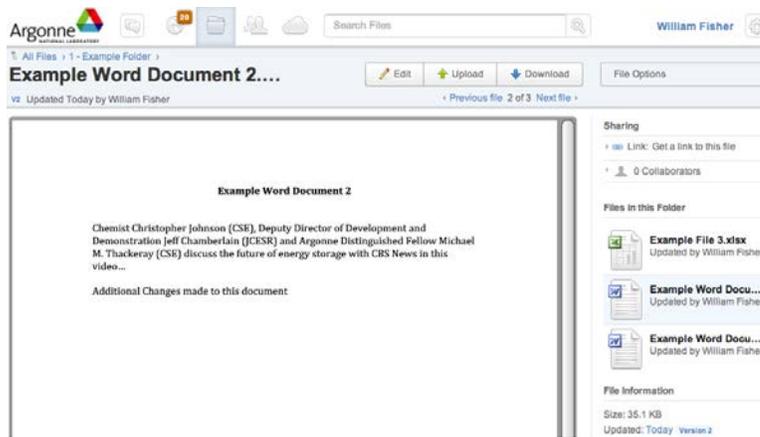
## Editing Files in Box.com

### Editing Files within Box.com

- Log into Box.com, navigate to the desired file and select Edit from the small down arrow next to the file name (Note: It will open in the default application used to create the document, if available.)



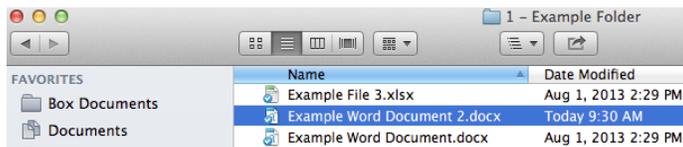
- Make changes to the file as desired. Choose Save and close the file.
- In Box.com, notice the updated file has been uploaded. This can be seen by previewing the file in Box.com by simply clicking on the title of the file.



## Editing Files using Box Sync (online & offline)

Box Sync enables direct editing of files located on your machine and synchronizes changes with Box.com.

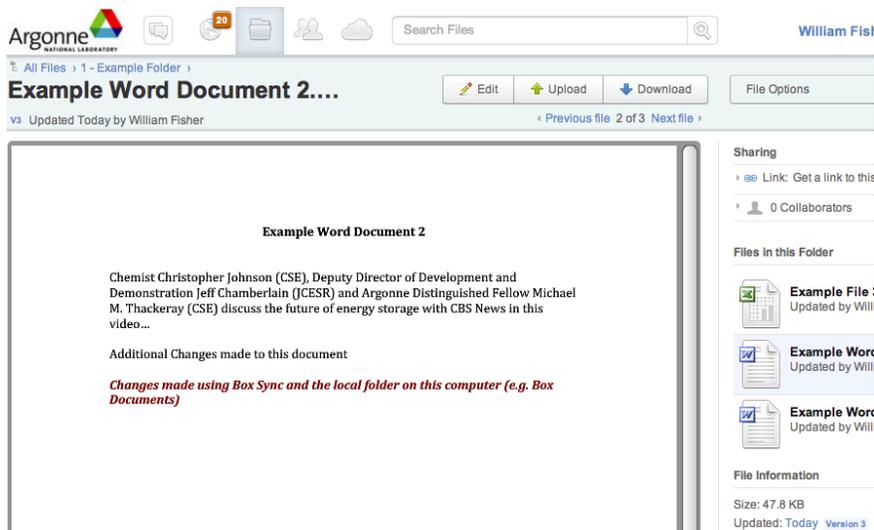
1. Navigate to the desired file within your “My Box Documents” (Windows) or “Box Documents” (Mac) Folder on your computer.



2. Simply open the file on your computer, make the desired changes, save and close the file.
3. When network access is available, all changes are synchronized with Box.com (Notice the orange swirling arrows on the file icon indicating the file is being synchronized with Box.com. The document will have a blue check on the file once it has been synchronized with Box.com)



4. In Box.com, notice the updated file has been uploaded. This can be seen by previewing the file in Box.com by simply clicking on the title of the file.

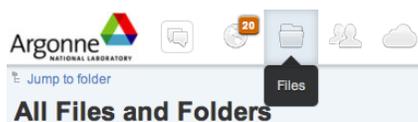


**IMPORTANT TIP: Box Sync is ideal for traveling staff. Simply make a file/folder available for offline access by selecting “Sync Folder to Computer”. Access the files on your computer – even when you are offline. Make desired file changes and save. When you return to the office, the files will be automatically synchronized with Box.com**

## Sharing Files/Folders and Collaborating

### Sharing a File or Folder

1. Log into Box.com and select the “All Files” page



2. Click on the little down arrow to the right of the folder (*can also be performed on a file*) you wish to share, select “Share” and choose “Invite Collaborators”

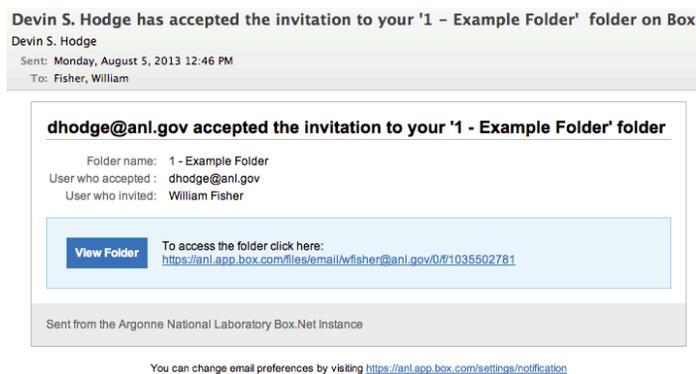


- Enter email address (s) of the individuals you would like to share this folder with, set the desired “Access Type” and choose Invite.

**Important Note: Access privileges can be set when sharing files and folders. Refer to the table below when deciding what level of permission you would like to grant a colleague.**

Access Type	Upload	Download	Preview	Get Link	Edit	Delete	Owner
<b>Co-owner</b>	✓	✓	✓	✓	✓	✓	✓
<b>Editor</b>	✓	✓	✓	✓	✓	✓	
<b>Viewer Uploader</b>	✓	✓	✓	✓			
<b>Previewer Uploader</b>	✓		✓				
<b>Viewer</b>		✓	✓	✓			
<b>Previewer</b>			✓				
<b>Uploader</b>	✓						

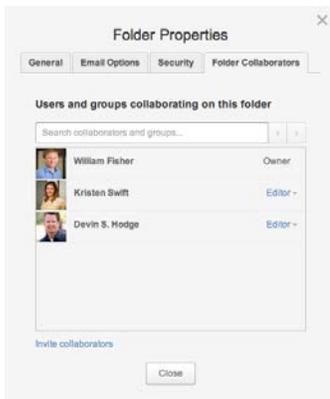
- Colleagues will receive confirmation of the accepted invitation.



- Notice that shared folders will be blue with silhouettes of people

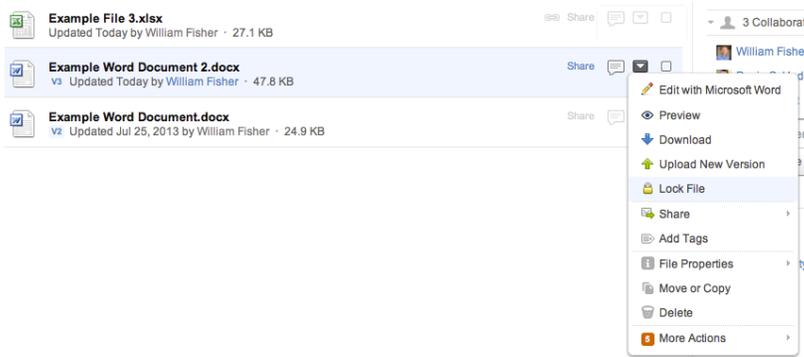


- To determine who you are sharing a folder with, simply select the down arrow next to the Folder, select Folder Properties and then Collaborators

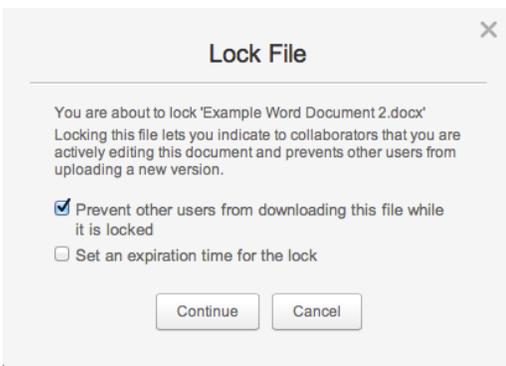


## Collaborating – Accessing a Shared File

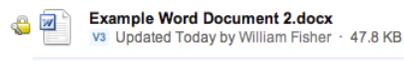
- Log into Box.com, navigate to the desired file you wish to collaborate on and select “Lock” from the small down arrow. (This is not required but highly recommended to avoid potential multi-author edit conflicts)



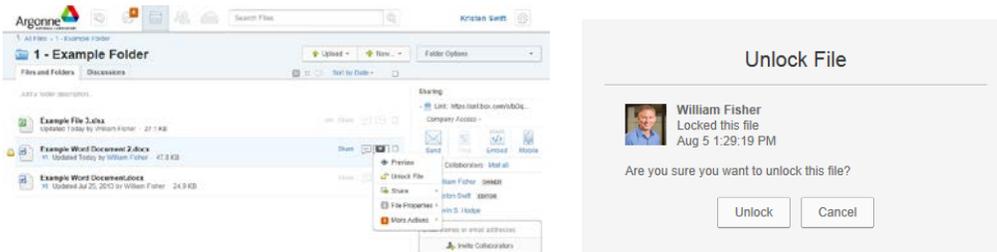
2. Select to “Prevent other users from downloading the file while it is locked”. Optionally, choose a lock expiration time.



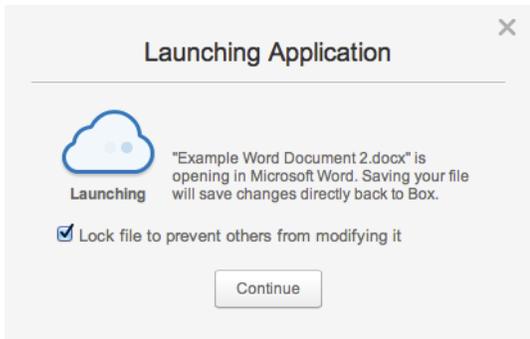
3. The file is now locked and can be edited without concern for unintentional collaborator edit conflicts.



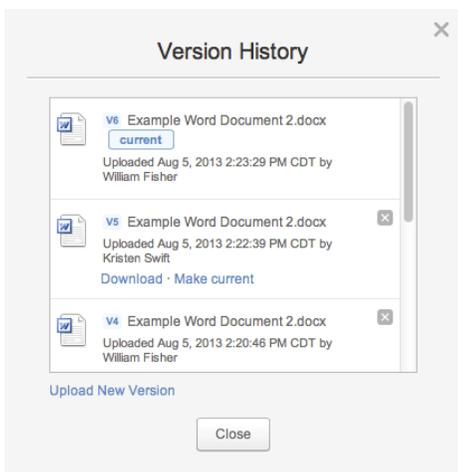
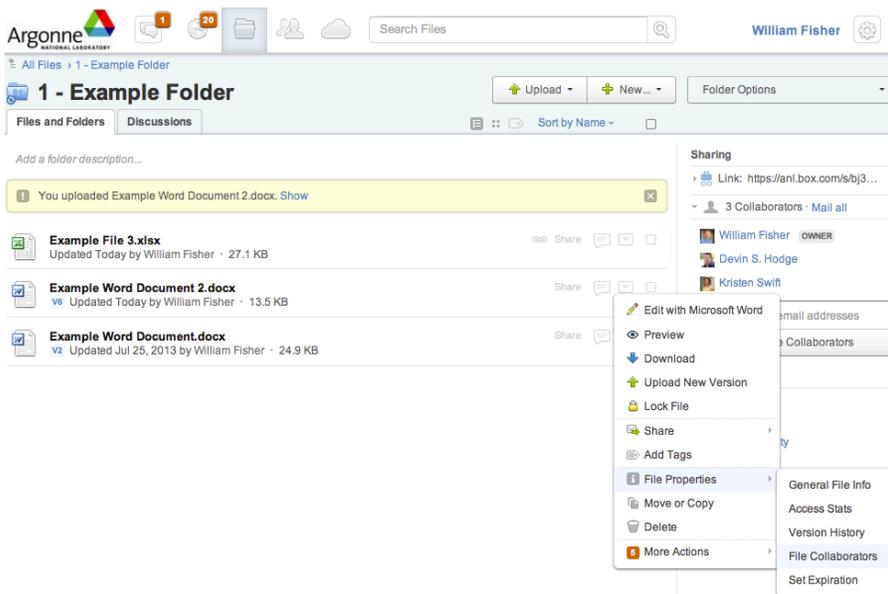
*Note: Collaborators granted the Access Type “Editor” can choose to unlock your file.*



4. Upon selecting to edit the file, Box.com notifies the owner that the file is Locked to prevent others from modifying the document until unlocked.



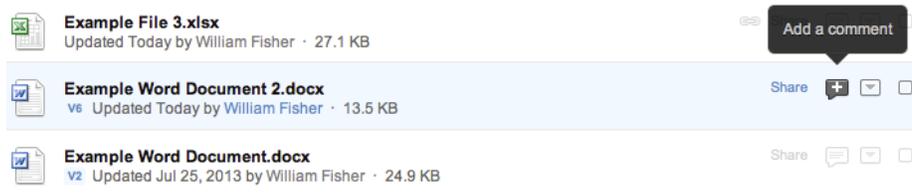
- To review collaboration activity, note the “v” number in blue below the file name. In this example the file is on version 6. Additionally, detailed information including copies of prior document versions can be viewed by selecting the down arrow next to the file name, choosing File Properties and Version History.



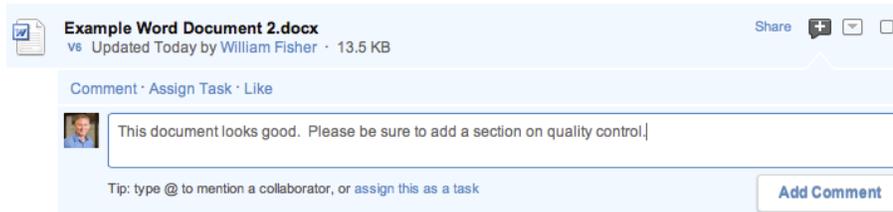
TIP: From the Version History dialog, prior file versions can be used to replace the current version; view prior versions or upload entirely new versions to replace the current version.

## Collaborating – Providing Document Comments

1. Navigate to the desired file or folder you wish to comment on within Box.com and click on the quote bubble next to the file name to add a comment.

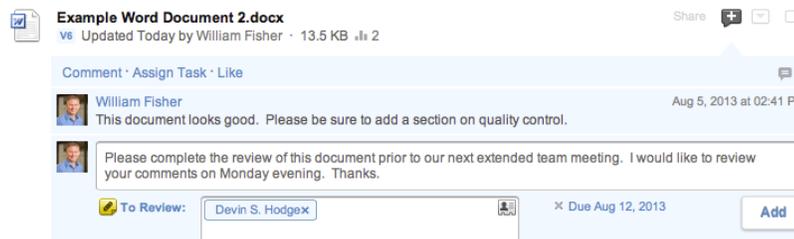


2. Enter the desired comment and choose Add Comment to associate the comment with the document.



## Collaborating – Assigning Colleague Tasks

1. Navigate to the desired file or folder you wish to assign a Task within Box.com, click on the quote bubble next to the file name and click the link “Assign Task” just below the file name.
2. Enter your task information, select Reviewers, choose a Due Date and click Add.



3. The person assigned a Task receives an email with a link to the file, where they can directly review the document and provide comments back to the assigner. Additionally, they can see Assigned Tasks at Box.com by clicking on the Messages area at the top of the page.

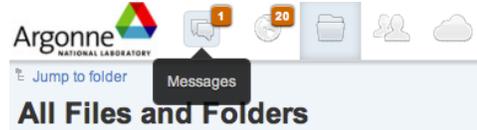
 [Example Word Document 2.docx](#)  
All Files / 1 - Example Folder

**William Fisher** has assigned you a task to review

"Please complete the review of this document prior to our next extended team meeting. I would like to review your comments on Monday evening. Thanks."  
**Due Date:** Aug 12, 2013

[Complete Task](#) [View File](#)

You are subscribed to receive email notifications. [Account email preferences](#)



4. Upon completion of the task, the assignee can leave a comment for other collaborators that will live with the document.

**Example Word Document 2.docx**  
Updated Today by William Fisher · 13.5 KB · 4

Comment · Assign Task · Like

View 1 more comment

**William Fisher** Aug 5, 2013 at 03:20 PM  
Please complete the review of this document prior to our next extended team meeting. I would like to review your comments on Monday evening. Thanks.

**To Review:** Task Complete. Due Aug 12, 2013 1 of 1

**Kristen Swift** Aug 5, 2013 at 03:32 PM Completed

View 1 more comment

Enter a comment or assign a task

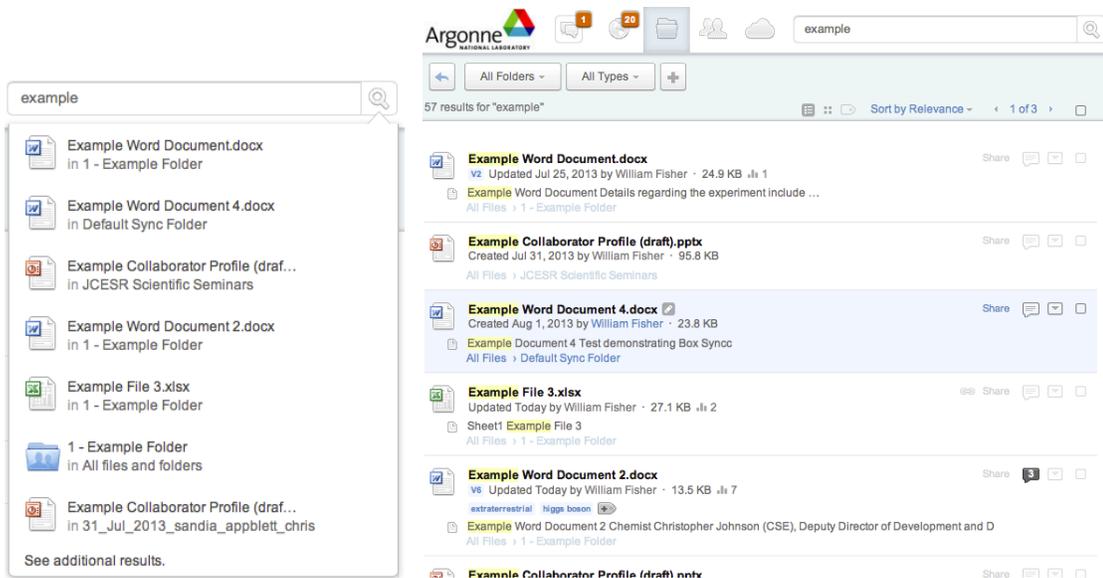
## Searching

### Searching for content within a Document

1. Enter desired search term (s) in the Search Files field at the top middle of the Box.com page



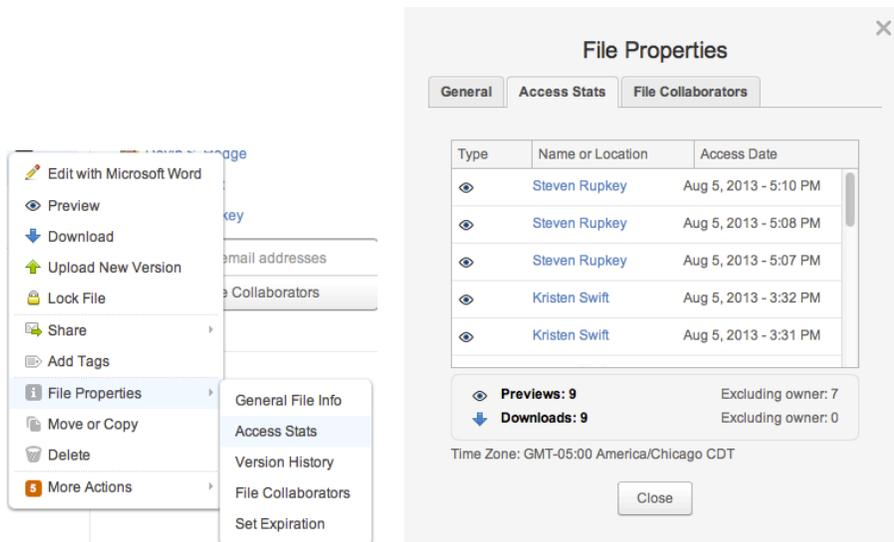
2. Box.com provides both type-ahead search and locate as well a complete result set file index



## Advanced Topics

### Document Access History

1. Select the small arrow next to the desired document of interest, chose File Properties and finally Access Stats



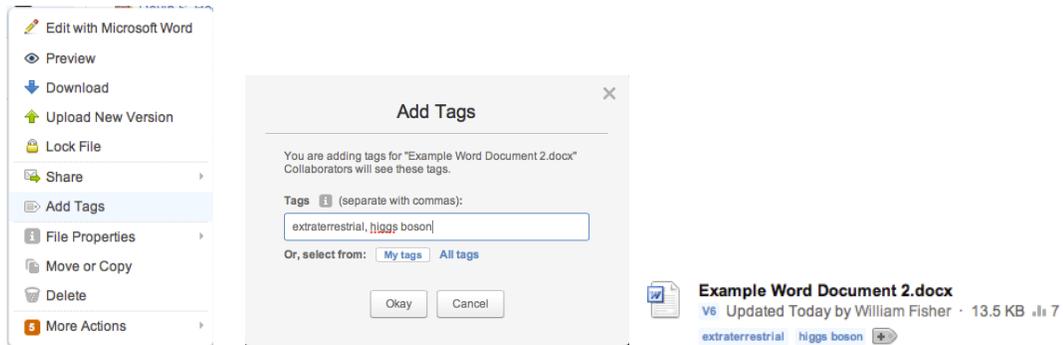
### Tags

Tags provide an additional mechanism to group, categorize and relocate content. Tags are unique in that they do not exist within the document but rather exist as externally linked meta data. Tag benefits

including being able to categorize a document into multiple groups without affecting the original content as well to create a group/department/organization wide set (s) of controlled vocabularies for enhanced content taxonomy. This typically leads to better content management which lends itself to an increased ability to locate content, curate data for multiple purposes, increase IP protection and reduce risk exposure.

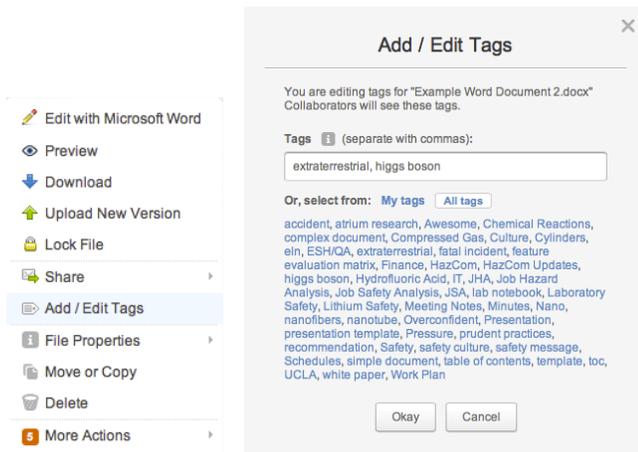
### Creating a Document Tag

1. Select Add Tags from the small down arrow next to the desired file
2. Enter desired Tags separated by commas if more than one and choose Okay



### Adding Organization-Wide Tags

1. Select Add/Edit Tags from the small down arrow next to the desired file
2. Click the "All tags" link below the search box, add the desired Tags and choose Okay



### Searching for Tagged Documents

1. Select the Tags icon at the top of the screen and choose the Tags you would like to filter your accessible documents on.



2. Documents containing the selected Tags are listed

