

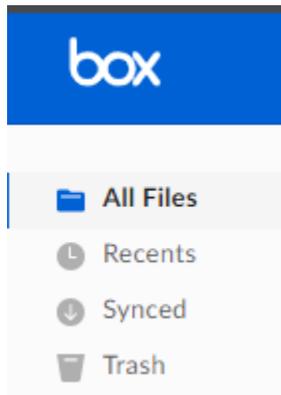
# GENERAL BOX INSTRUCTIONS

## Initial Connection

1. Click the link from your inbox
  - a. Log in using your email account
2. In the top right corner, select “Save Link” – this will make the link accessible for you without needing to find that email every time.



- a. The link will be found from now on under your “All Files” folder as long as you are logged in with this account.



# SHARING, TWO WAYS

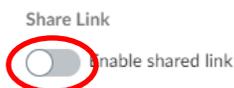
1. You can share a file or folder by clicking the “Share” button to the right of it:



2. You can share a file or folder by clicking on the ellipsis (...) and selecting “Share”:

## Share Options:

1. Add people using the “Invite People” box by entering their email into the text box. This email will come from the First/Last Name information you input when you created your box account.
  - a. Use the blue “Invite as” option to define the user access:
    - i. “Editor” will allow them to join as a collaborating user if they create a free Box account. They will have access to all the same features and functions as you. Use this option for employees and users that you trust with full access to the file or folder in question.
    - ii. “Viewer Uploader” can do everything BUT delete files.
    - iii. “Previewer Uploader” means they can’t delete, share, or edit.
    - iv. “Viewer” is the default option when you copy/paste the link into a separate email. They are able to preview the document in the browser, download the file, and share the link.
    - v. “Previewer” only allows them to view the document in the browser.
    - vi. “Uploader” only allows them to put new files into that folder.
2. Enable the “Share Link” option by clicking the slider



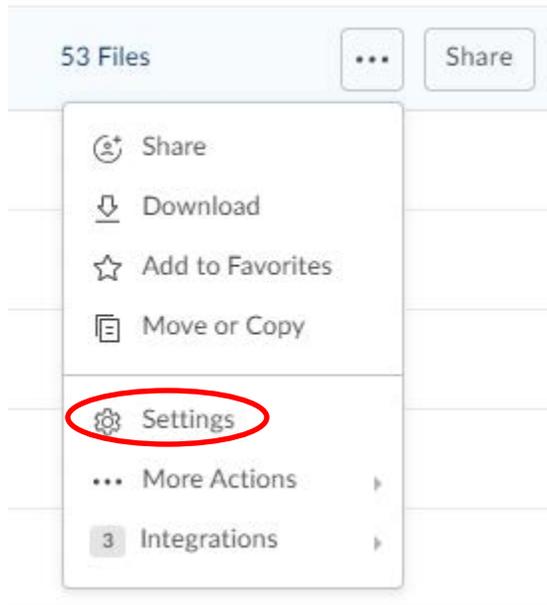
- a. “Link Settings” gives you options to
  - i. “Disable Shared Link on” which will give you a calendar to pick an expiration date from
  - ii. “Enable Custom URL” should not be used when there is sensitive content within the link. Don’t use this option.
  - iii. “Allow Download” is selected by default, if you unselect this they will be able to preview and share the item.

3. Below the link box is a drop-down menu to identify who can access the file or folder using the link:
  - a. Default is “People in Oklahoma State Dept. of Health” or “People in your Company” – this will mean that the only individuals who can see it are people logging in with a “health.ok.gov” email handle. All others will get an error message.
  - b. “People with this link” will allow you to copy and paste the link into an email and send to an external partner. This will **only** allow the partner to preview the document in the browser, download the file, and share the link.
4. “Invited People Only” will allow the greatest control over your files: you won’t be able to copy/paste that link into an outlook email – you will only be able to share it using the “Invite People” text box, however the email you send as an invitation can’t simply be forwarded to allow access to someone outside your knowledge. This option allows EPRS to maintain user access through managing the collaborator list and is the most recommended option.



5. Beside the link/copy button is an envelope:  This allows you to send the link via email. The default is “Viewer” and this option cannot be used if you do not have “people with this link” selected.
6. Below that drop down is another which allows you to set the permissions with the link:
  - a. “View and Download” will allow the recipient to download the file/s
  - b. “View Only” sets them as a “Previewer” and download will not be an option.

# FILE/FOLDER SETTINGS



**Uploading:** You can create this email address for a particular folder. If you need your external partner to sign something and send it back, but you expect no other changes, you might want to use this option. Simply send them the email address and the document to print and sign, they can review the document, sign their portion, scan and send back to this email address. It will automatically upload the file to the folder location that you created it from. It will probably be easiest for your partners to download the file as an attachment from your email with the upload address, but it is at your discretion if you want to send them the file link and the upload address in one email, or if you want to send them an invite link to the folder separately from the upload email.

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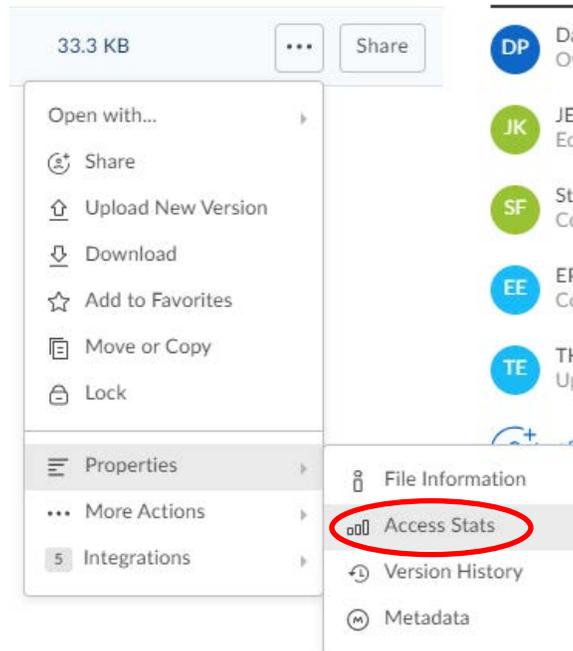
**As of 3/28/2019 the option to overwrite files uploaded by email is no longer available, you will need to monitor your Box folder to ensure duplicates and outdated files are cleared promptly.**

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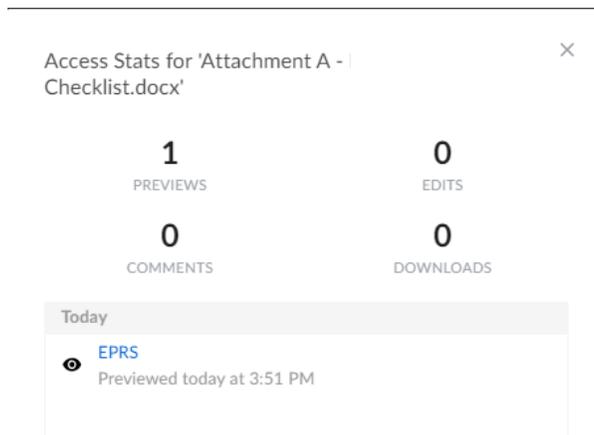
# EMAIL & NOTIFICATIONS

Default notification settings can be edited in the Settings menu so you can be notified any time an item is deleted.

If you want to monitor your files but don't need an immediate notification, you can select the file in question and under the ellipsis you can hover over properties and choose "Access Stats".

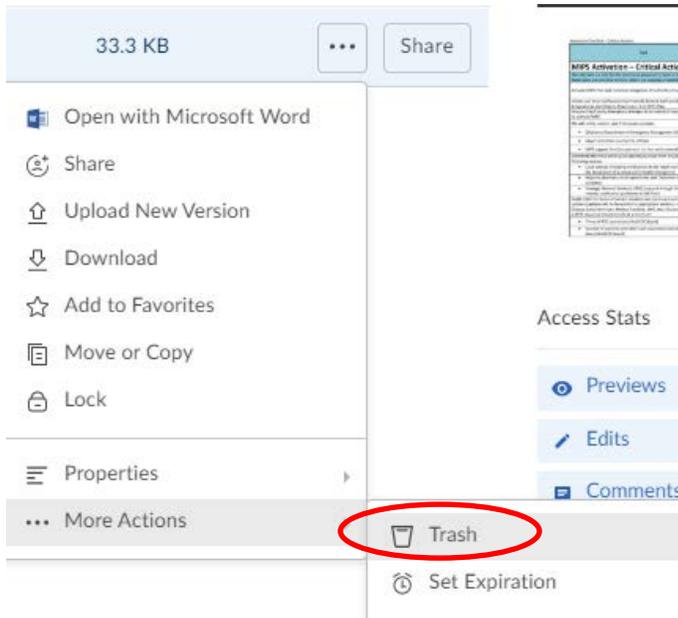


Which will show you the following:



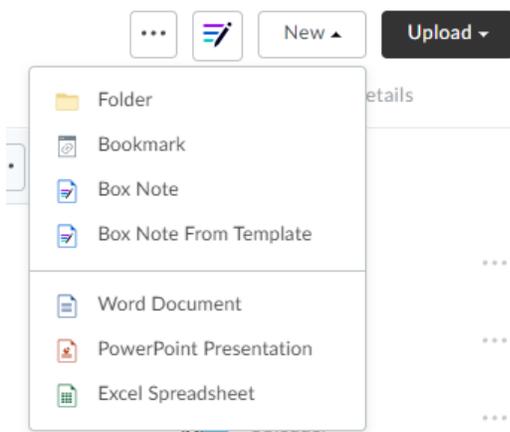
# DELETING AN ITEM

As a collaborator/editor, you can delete items from your folders. Do this by selecting the ellipsis > More > Trash:



# CREATING A NEW FILE/FOLDER

You can create a new Folder or File by selecting the "New" button on the top right.



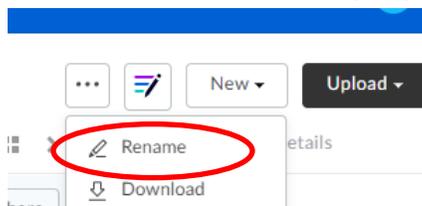
# ADDING EXISTING FILES TO YOUR BOX

1. The “Upload” button allows you to add a document from your computer or shared drive by navigating to it in Windows Explorer, much like adding an attachment in Outlook.
2. Alternatively, you can open Windows Explorer and navigate to the location of the file you want to upload, and select-drag-drop the file onto your Box browser window. You should get a grey box at the bottom of your screen while the file uploads and a green box at the top of your screen when the upload is completed.
  - a. This can take some time if you have a big file or are moving a whole folder, be patient!
  - b. If the uploading bar goes away but you don’t see your file on the folder screen, refresh your browser window.

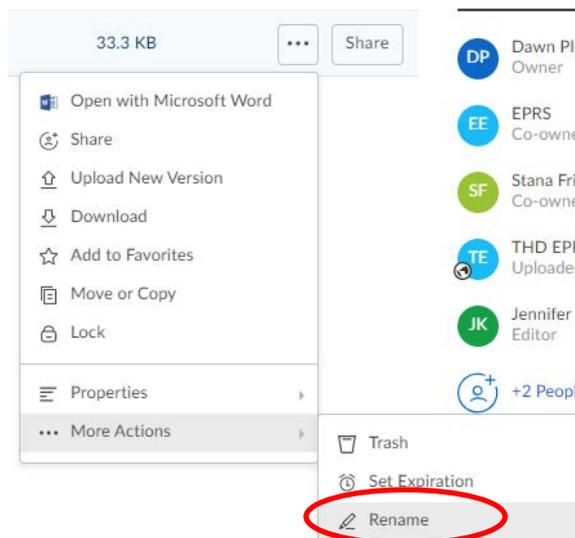
## RENAMING A FILE

There are **three** ways you can rename a folder/file: First, select the file you need to change, then:

1. From the menu at the top right, select the ellipsis and choose “Rename”



2. From the ellipsis on the right of the file/folder line, choose “More Actions” and then “Rename”

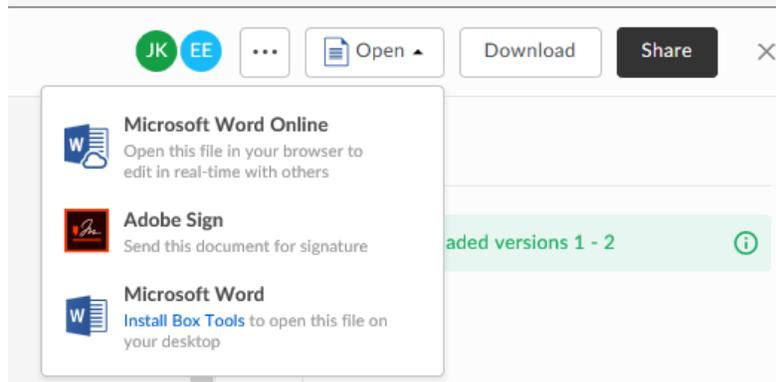


3. Immediately next to the name of the file, select the little pencil icon:



# BOX TOOLS

With a **file** open, you should see the "Open" button on the top right



Select "Microsoft Word Online" to open in Office 365.  
Select "Microsoft Word" to install Box Tools.

Install Box Tools



To edit and upload new versions of this file automatically, please download and install Box Tools.

Once installed, simply click the same "Open" button that brought you here and your file will open on your computer. After making your changes, save your file as you normally would and the file on Box will be automatically updated.

Cancel

Download

Choose Download, then Run

Do you want to run or save **BoxToolsInstaller.exe** (4.62 MB) from **e3.boxcdn.net**?

 This type of file could harm your computer.

Run

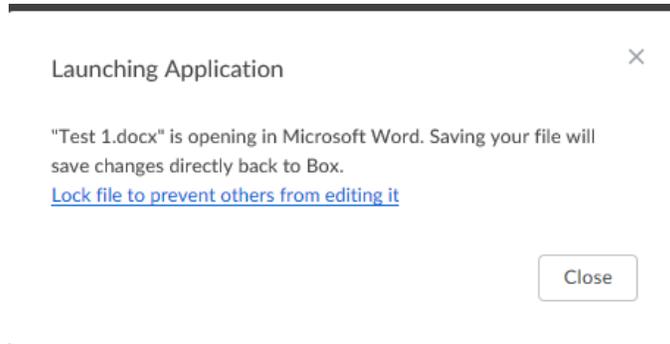
Save

Cancel

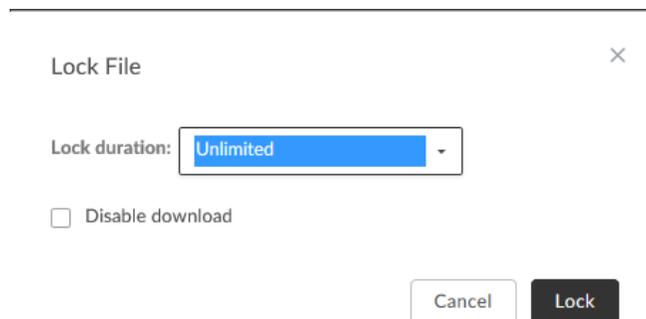
Follow the prompts in the Setup Wizard (Next>Install>Finish)

The App will not open independently after install, you will need to Refresh your page, select Open and Microsoft Word again.

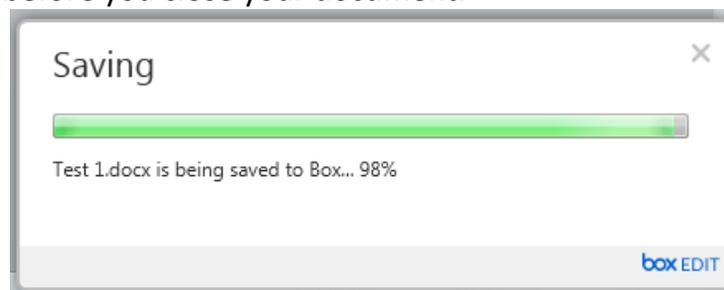
A prompt will appear asking you to lock the file - if you do not select the link to lock the file, you will not be able to save your changes without saving locally and uploading them manually. This works like having something open in "Read Only" status because it is open for editing elsewhere.



The next window allows you to set how long to keep the file locked. Give yourself enough time to complete your edits, choose "Lock". File will auto-unlock when you save the file and close it.



When you complete your edits, hit "Save" and the changes will be automatically loaded back into the box document. No local file will remain, if you need a local file, please choose "Save As" before you close your document.



You should get a green prompt box at the top letting you know your file has changed:

