

## Introduction

Box is a platform to store, share and collaborate either from the cloud or your desktop using the Box Drive feature that is available to all UCSF students, staff, and faculty members.

## Accessing Box

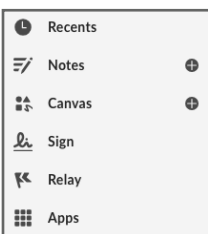
1. Navigate to <https://www.box.com>.
2. Select the link.
3. Enter your **UCSF email address** then the button.

4. If prompted, enter your **UCSF email address** and **Password** on the MyAccess log-in screen.

## Navigating the All Files Landing Page

Once you have logged into Box, you will be taken to the **All Files Landing** Page, which provides access to all your files in Box.

1. The left-hand navigation includes access to your recent/ synced files, Box Notes, Sign and Relay or applications to enhance your Box experience.



2. The top portion of the screen, there is a search box to search for your files or folders.

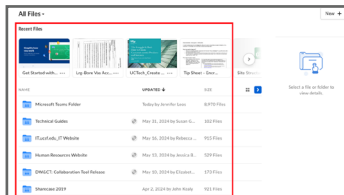
3. The will provide quick access to your account settings and profile.

## Accessing and Sharing Files in Box

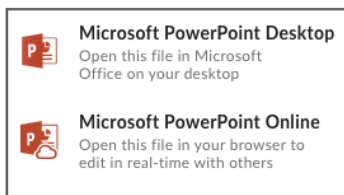
Box provides a simple method for accessing and sharing files with your collaborators.

### Accessing Files in Box

1. The **All Files Landing** page provides access to the recent files and the list of folders that you created (or were shared with you).
2. To access a file within Box, select the file directly from the *Recent* portal or a folder by clicking the *title* to open it in a new tab.



3. The button can be clicked before selecting the **Desktop** or **Online editor** for popular file formats such as Word, Excel or PowerPoint.



### Accessing Files in Box

1. Select the to provide collaborators with access to the file.

**NOTE:** If you would like to share folder and **ALL** the files within it, you can select the **Share** button for the folder before following these steps.

- a. Enter the intended **recipient's name or email address**.

- b. Set the Permission Levels ( ) to **Editor** or **Viewer**.

## Accessing Files in Box (continued)


c. Add an optional **message** to provide context regarding the document to the recipients.

Message (optional)

Add a message

d. Click the **Send** button to share the document.


**NOTE:** You can select the **Copy Link** button to send a shareable link to the file via email or chat with collaborators.

5. When finished with the file, select the  to return to the *All Files Landing* page (if you accessed a Recent file) or *folder* (If accessed from a folder).

## Creating New Folders and Documents in Box

The process to create a folder or document within Box is relatively simple and will make it easy to manage and locate your files as you continue to develop documents in the future.

### Creating Folders

1. Select the  in either the *All Files Landing* page or within an existing *folder*.

2. To create a folder, select the  **Folder** option.

**NOTE:** If a folder is created within an existing folder, it will be a subfolder, whereas folders created from the *All Files Landing* page will appear along with your existing files and folders.

3. Add a **Folder Name**.

Folder Name

My New Folder

4. Optionally, you can add the *email address* of people that you would like to collaborate with on the files within this folder.

Invite Additional People

Enter email addresses to invite users


5. Set the **Permission Level** if the file is to be shared with collaborators.

Permission


Editor  Learn More


6. Click the **Create** button to create the folder.


### Creating Folders

1. Select the  button within either the *All Files Landing* page or an existing folder.

2. Select the preferred **document type** (e.g., Word, PowerPoint, or Excel).

 Word Document

 PowerPoint Presentation


 Excel Spreadsheet

3. Add a **Name** for the Document.


Name

4. Click the **Create** button to create the file.

5. After the document is created, it can be accessed by selecting the title of the document.

 Test Document.docx

**NOTE:** You may need to provide access to Box for the file. If prompted, Select the **Use SSO** option link then enter your **UCSF email address** before clicking the **Authorize** button. If you are not signed into *MyAccess*, enter your *UCSF email address* and *password* before clicking the **login** button to complete the process.

5. To begin editing your document, select the *downward arrow* in the  **Open** menu and then either **Microsoft Word Desktop** or **Microsoft Word Online** to open it in the preferred application client.

 **Microsoft Word Desktop**  
Open this file in Microsoft Office on your desktop


 **Microsoft Word Online**  
Open this file in your browser to edit in real-time with others

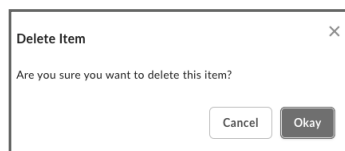
**NOTE:** If you open the document in the desktop client, once the document is closed on your desktop, the changes will appear automatically online in Box!

## Removing Files or Folders in Box

As you continue your work at UCSF, there might be files that you do not need any longer in your work and can be deleted to keep your files both organized and current.

### Deleting Files or Folders from All Files Landing page

1. Hover over the File or Folder to delete from the *All Files Landing* page or within a Folder.
2. Select the **Checkbox** () for the file or folder (Repeat for multiple files and folders).
3. Select the  icon.
4. When prompted, select the **Okay** button to add the selected files to the Box trash.




### Restore Files or Folders from Box Trash Can

1. Select the  **Trash** icon.

**NOTE:** If you would like to *restore* or *delete* all the items within the Trash, select the **Restore All** or **Delete All** options.

2. Hover over the *file* or *folder* then select the  before selecting the  option.

**NOTE:** If you select the  option, the file or folder will be deleted permanently.


3. Click the  button to restore the file or folder.

## Access and Configure Box Drive

Box files can be accessed and synced from your desktop by using Box Drive. Box Drive can be added to non-UCSF IT managed workstation by following these instructions:

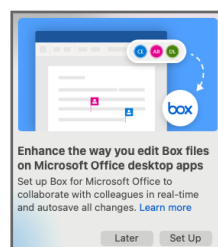
1. Select the  application from **Start Menu** (Windows) or **LaunchPad** (Mac).

2. Select the  button.

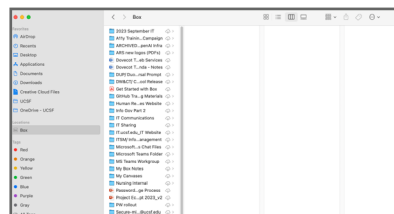
3. When prompted, enter your **UCSF email address** before clicking the  button.

3. Enter your **UCSF username** and **password** on the *MyAccess* screen.

4. If prompted, take the tour to learn more about Box.



5. After completing the tour, a file window will load that contains all your Box files and folders.



**NOTE:** If you place a file in the main folder or specific folders, it will sync to the same location online in Box!