Box Workshop
Presenter: Christy Forte, Program Manager, DGIT
Agenda
1. The Basics
2. Integration with Office 365
3. Box Drive
4. Box Tips
5. Upcoming with Box
6. Specific Questions
Basics

Folder Types

Guidelines

- Shared folder, owned by someone in UCLA Health
- Shared folder, owned by an external collaborator
- Personal folder, only available to you

The folder color indicates if the folder is shared and how it is shared if applicable.
Basics

Box Permissions

Guidelines

💡 When a folder is shared, collaborators have access to the shared folder and every folder below it.

💡 Use the invitation dropdown to determine what permission level to grant your collaborators.
Basics
Sharing Folders

Guidelines

💡 Invite collaborators to access your folders by clicking the “Share” button

💡 Create “Shared Links” accessible to anyone in UCLA Health by clicking “Enable shared link” from the invitation screen
External Collaboration

Guidelines

External collaboration requires a 5-minute training for activation.

Non-UCLA Health users can either use their company’s Box instance OR sign up for a free Box account (tip sheet available).

Download this tip sheet and send to your external collaborators for instructions to log in.

Visit https://lms.ccnet.ucla.edu/elearning/box100/ to complete your external collaboration training.
Basics

Mobile Devices

Guidelines

Airwatch is required to use Box on mobile devices

Download “Box for EMM” from the U App Catalog to get started

Box for EMM will stream all Box files to your mobile device

Follow these steps to install Box for EMM on either your Apple or Android mobile device.

1. Open the U App Catalog from your mobile device

2. Tap the Install button next to Box for EMM

3. Tap Install on the pop up window to authorize the installation

4. After installation is complete, click on the Box icon on the home screen to launch Box

5. Follow the prompts to complete the tutorial and tap Log In

6. Enter your Mednet ID and Password and select Authorize

If you are off site you will be prompted for multi-factor authentication with Duo. You may also need to restart your phone after installation.
Office 365

Editing Online

Guidelines

💡 Word, Excel, and PowerPoint files can be edited using Office Online through Box

💡 Office Online allows multiple people to edit the same file at the same time

💡 If a file is being edited Online, it automatically locks
Save attachments directly to Box from Outlook on your Windows computer

Box and Outlook integration also supports saving the entire email itself as a file in your Box folders instead
**Box Drive**

**Features**

- Stream all your files from Box to your desktop
- Appears like another drive on your computer
- Right click files to access the Box actions menu

**Guidelines**

- View on Box.com
- Lock File
- Share
Box Drive

Marking Files for Offline

Guidelines

💡 Box Drive, like the old Box application, Box Sync, can be used to work on files while you do not have internet connection

💡 Right click on a folder in Box Drive to make the files inside it available offline

❱ Item is up-to-date in Box.

⚠️ Item is a problem item. View the Box Drive Error Notifications article for more information on problem items and how to resolve them.

🔄 Item is in the process of being saved to Box.

🔒 Item has been locked from editing.
Box Tips

Box Notes

Guidelines

💡 Use Box Notes to quickly collaborate in real time with colleagues

💡 Box Notes also has version control and will show recent changes

💡 Create or leverage templates to help structure your notes
Box Tips

Comments

Guidelines

Use the right-hand pane on a document to leave comments for colleagues.

When you leave a comment using “@”, the tagged person will receive an email notification.

You can reply to comments by going to the file or responding to the email alert.

Christy Forte uploaded versions 1 - 2

Christy Forte

Today at 4:59 PM

@Christy Forte Please review and add changes

Someone mentioned you in a comment on DGIT Onboarding Project Manager-ck edits[1].docx

"@Christy Forte Please review and add changes"

Reply to Someone

… view and collaborate on this on mobile by getting our app

* You can add a comment by replying to this email.
* Only replies from emails associated with your Box account will post a comment.
Box Tips

Version Control

Guidelines

💡 Quickly view a file’s version history and revert to previous versions if needed

💡 Box saves up to 100 versions of a single document. When the 101st version is made, the 1st version gets deleted, and so on
Upcoming

Outlook for Web Access

Guidelines

💡 The power of Box for Outlook is coming to Outlook for Web Access (OWA)
💡 Save and attach files directly from Box through OWA
Upcoming Workgroup Shares

Guidelines

Access your team files from anywhere on nearly any device using Workgroup Shares.

Similar to department network drives, these shares have restricted permissions and access is granted through groups.
Resources

1. “Get Started with Box at UCLA Health Sciences” Box folder found in your Box account
2. Mednet Website: https://mednet.uclahealth.org/box/
3. DGIT Website: https://dgit.healthsciences.ucla.edu/pages/box
NEED IT HELP?

EMAIL dgsupport@mednet.ucla.edu

CREATE a ticket at uclahsprod.service-now.com

CALL (310) 267-CARE (2273)

VISIT IT Connect for walk-up support