UCLA Health

How to Use box

uclahs.box.com

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BASICS OF BOX

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

Logging in to Your Box Account

First thing's first. Here's how to log in:
1. Go to uclahs.box.com
2. Enter your Mednet Username
    a. Please do not add "AD\" or "@mednet.ucla.edu" to your Mednet Username
3. Enter your password
4. Click **Sign In**

If you have forgotten your password, please contact Customer Care at 310-267-CARE (2273). Specialists are available 24/7 to provided support.

Creating a New Folder

The folder: It's your Box account's basic building block, where you'll group similar files together.

Follow the steps below to create a new folder:
1. Click **New**, and from the menu that displays click **New Folder**. The **Create a New Folder**dialog box displays.
2. Enter the folder name.
3. (Optional) To enable others to access this folder, enter the email addresses of each person to whom you want to grant access. Use a comma between each email address.
4. To control others' level of access – for example, whether you want people to be able to make changes to folder contents or just to view files – click the **Permission** down arrow and select the appropriate role (co-owner, editor, viewer, and so on) for the level of access you want to assign.
    a. If you're uncertain as to what each role is capable of, click **Learn More** to display a graph that matches the roles with their capabilities.
    b. For more information, see Understanding Folder Permissions.
5. Need folders inside the first one? To create sub-folders, just click the top-level folder to open it, and repeat the steps above.

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Navigating Your Account

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.

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 of your page.
Box will search the titles of your files and folders as well as the body of your documents. Receive too many results? Simply apply some filters. You can sort by folder, file type, date, content type, and owner.

Folder Tree:
    If you want to get to a folder quickly, use the Folder Tree tool. Simply click the dropdown menu next to **All Files** to access your entire folder structure and be taken directly there.

Recents:
    On this page, you'll see what files and folder have been recently updated in your Box account. To view recent updates click **Recents** in the left side bar.

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:
1. Mouse over the desired folder and click the **...** button.
2. From the drop-down menu you can adjust the folder settings for shared links, user privileges, commenting and more.

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 the gear icon in the right corner of the blue header bar at the top of the page, then select **Account Settings** from the dropdown menu.
2. Next, switch to the **Notifications** tab. From here, you can adjust the default email notification settings for your account. Once you're finished, click **Save**.

Tip Your default email notification settings can also be overridden at the folder level. Settings in the section pictured above apply by default to your entire account, but you can give certain folders a bit more granularity by setting notifications at that level. To do so, mouse over the desired folder and click the **...** button, then click **Settings**. From that page, locate **Email and Notifications** to make adjustments.

LOCKING/UNLOCKING FILES

If you are working on a file with other collaborators, be sure to lock files before opening them with Box Edit. This will prevent other users from making changes to documents that you are working on until you unlock the file. Locking files is not currently supported on our mobile applications.

Note When you lock a file, you will see a lock icon, but you are still be able to edit the file. If another user locks a file, any collaborator with Co-owner, Editor, or Viewer Uploader access can unlock it.

From the Web Application
To lock a file from the Box webapp:
- Right-click a file (or click the ellipses (**...**)) to open the **More Options** menu.
- Click **Lock**
- Choose a duration for the lock. If you choose unlimited, the file will be locked until you unlock it manually. You can also choose to prevent users from downloading the file while you are editing it.
- A lock icon to the left of the file's name will indicate that the file has been locked. If you use Box Sync, you will also see a lock icon over the file icon in your Box Sync folder.
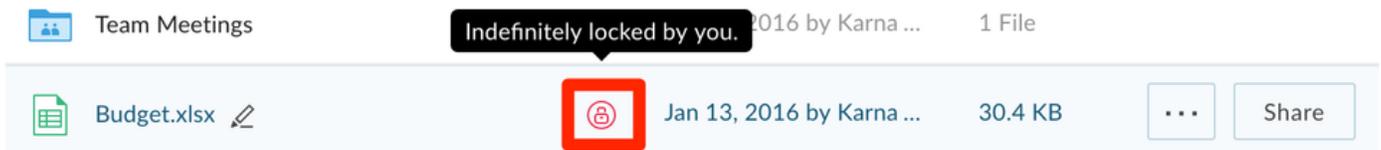
To unlock a file from the Box webapp:
- Right-click a file (or click the ellipses (**...**)) to open the **More Options** menu.
- Click **Unlock**

From Your Desktop With Box Sync
You can also lock and unlock files directly from your desktop using Box Sync.
- To lock a file, right click on the name of the file in your Box Sync folder, navigate to **Box Sync**, and select **Lock**. A lock icon will appear over the file icon to indicate that the file has been locked.
- When you lock a file from your desktop, a lock icon indicating that the file is locked will also appear to the left of the file's name in the web application.
- Once you have finished your work, simply right click on the name of the locked file, navigate to **Box Sync**, and select **Unlock.** If you forget to do so, any other collaborator who has editing capabilities is also able to unlock the file.

If you need to concurrently edit a document, you can use our Office Online integration to collaborate on Microsoft Office documents in real-time. Box Notes and Google Documents can also be edited with others in real-time.
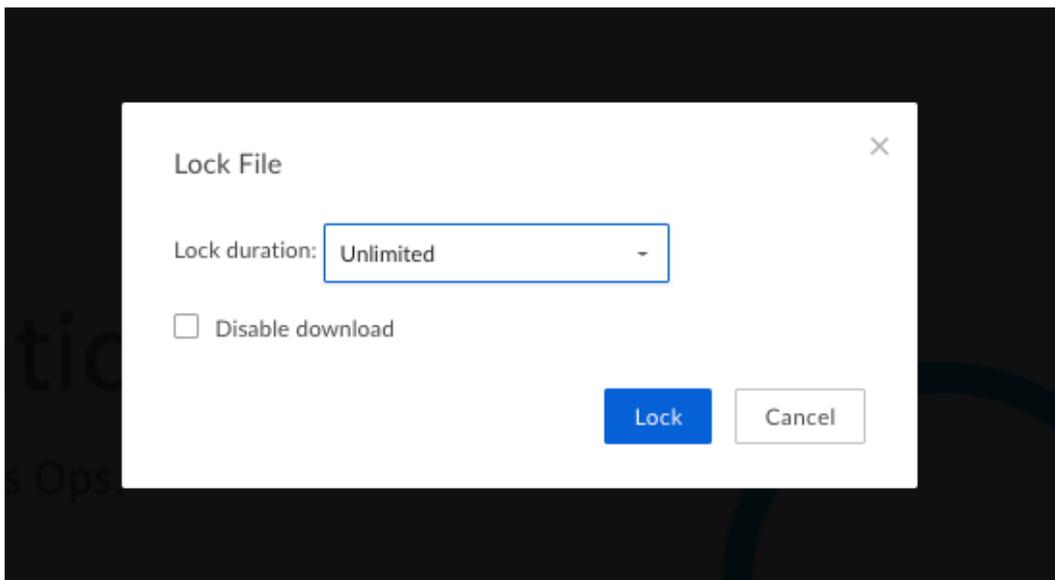
From Box Edit
To lock a file from Box Edit/Tools:
- Click Open with ...
- A prompt will pop up stating that Box is launching your file within the native application chosen.
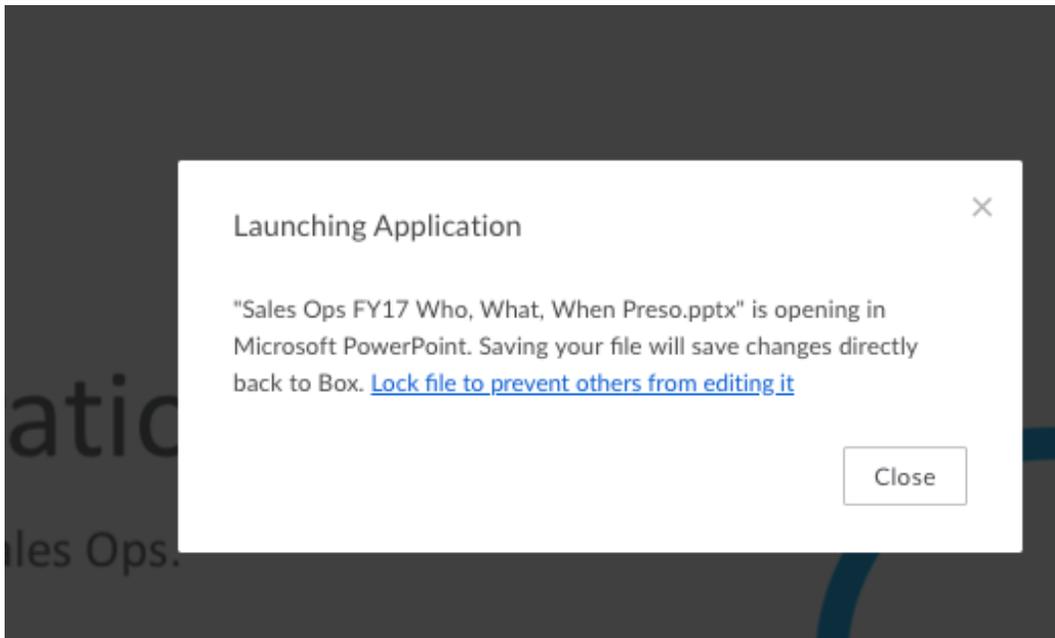
- Choose the blue text "Lock file to prevent others from editing it".
- Select the dropdown next to duration in order to choose how long to lock the content.
- You can also choose Disable Download

From Box for Office
- In Office, if you open a document via Box for Office, the content will be opened and Locked automatically.
- Once you select which content you would like to open:
- On the Home tab you will see in the upper right hand corner an icon which lists "Locked" upon opening the content.
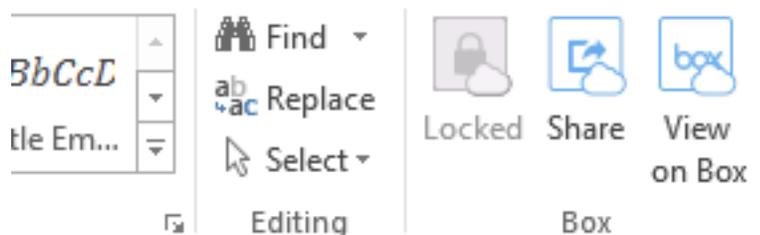
- When the content you have opened to edit is closed, the content will no longer be locked.

From Box Drive
To lock a file from Box Drive, please follow the steps below. If you do not see the option to lock the file, make sure you are on the most recent version of Box Drive:
1. Locate the file you would like to lock in your Box Drive folder structure.
2. Right-click on the file.
3. In the menu that appears, select **Lock File**.
4. To unlock, right-click the file and select **Unlock File.**

OPEING AND EDITING FILES WITH BOX EDIT

Box Edit is an add-on feature that allows you to open and edit files stored in Box. Designed for all file types, browsers, and platforms, Box Edit uses the default application installed on your computer to open and edit files: Docx files open in Microsoft Word, PPTx files open in Microsoft PowerPoint, Xlsx files open in Excel, and so forth.

Once you have installed Box Edit, you can open and edit documents directly from Box. To open files with Box Edit:
- Right-click a file or click the ellipsis (**...**) to open the **More Options**menu.
- Click **Open With...** If there is more than one application with which you can open the file, you will have the option to select the appropriate application.
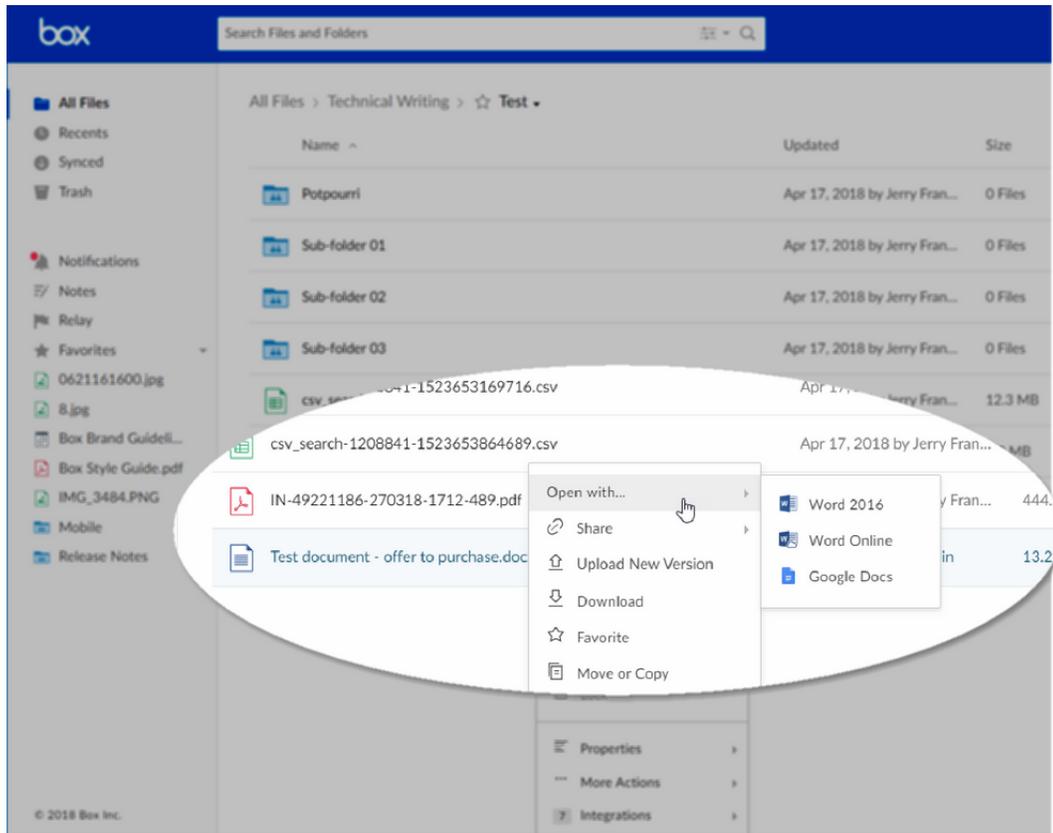
You can also open and edit documents after previewing them. To open files with Box Edit from the preview screen:

- Click the file to open it in preview
- Click **Open**. If there is more than one application with which you can open the file, you will have the option to select the appropriate application.

BOX EDIT WALKTHROUGH

Learn how to edit your files quickly with Box Edit through the New WebApp!

Click Here for a short walkthrough video on how to use Box Edit with Mac & PC.

To find out more about using Box Edit join us for our upcoming Communicating and Editing (Live) class.

USING BOX DRIVE

Learn how to install and use Box Drive in the tutorial videos below for Mac and PC environments:

Click Here for the tutorial video.