Instructions for using and managing your Box account

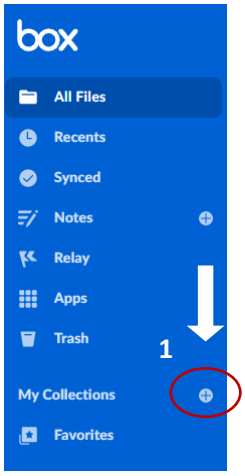
Box update

The institution's Box account has just undergone a much-needed reorganization. Fifteen root or primary-level folders have been created. All institutional files on Box are being moved into one of the fifteen root folders (see table at end of document). All data and file names remain intact, though their location on Box has likely moved. Root folder owners are responsible for providing appropriate-level access to those that need it. If you are searching for a file, use the search box at the top of your home page. If you still can't find the file you are looking for, reach out to the point of contact for the root folder where you believe your materials should be as access to the files changed when they were moved to their new location.

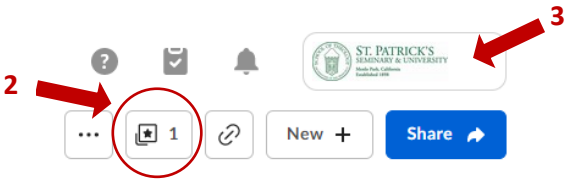
To better manage Box moving forward, some of the settings have also been changed. Since the Seminary has a limited number of Box user licenses, new managed users can only be set up and invited into the system by the Box administrators. An individual user can no longer invite or share Box content with anyone who is not a managed user.

You will also notice that on your Box home page that you can no longer add a new file folder or upload files directly to your Box home page. This restriction was put in place to keep the number of root folders and primary files to a minimum. Unbeknownst to individual users, whenever a new file folder was created for personal content on your home page you actually created a root folder, not a subfolder. Files uploaded directly to your home page became root files. The proliferation of root files and folders, often with the same name created by different individuals, created quite a mess on the administrative side. To address this issue, individual users will now only be allowed to create their own folders as sub-folders in one of the primary root folders. Uploading documents remains the same, you just can't do it on your home page directly, you'll need to be inside one of the root folders. A folder is being set up for each individual that you and only you will have access to. Feel free to add files and sub-folders to this location.

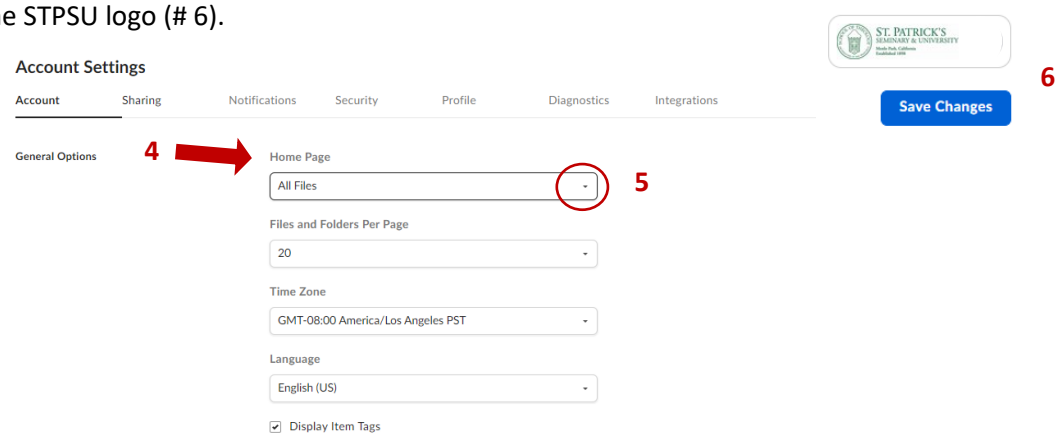
How to organize Box files and folders



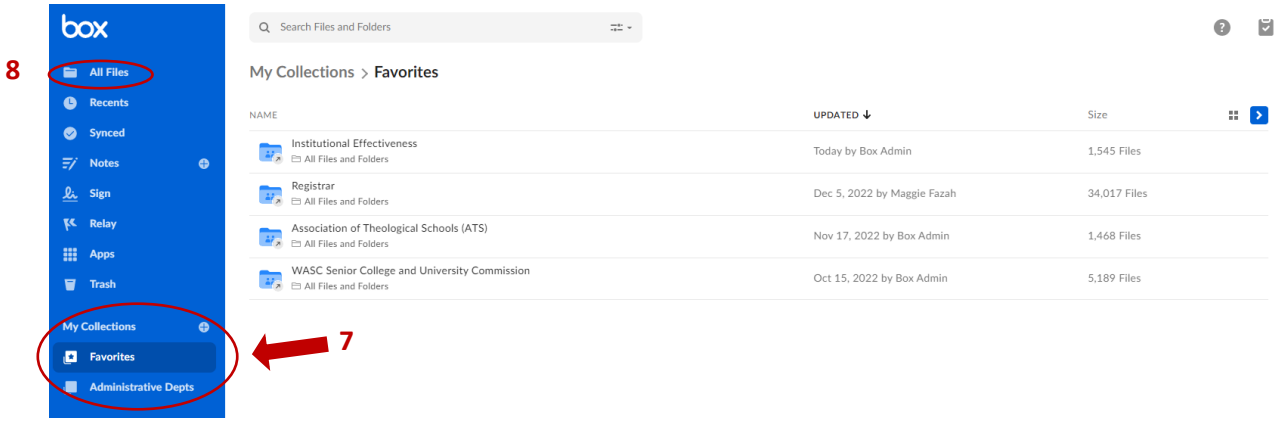
To better organize the Box files you have been given access to, you can arrange the folders and files into various categories (e.g., favorites, departments, work products, by year, by topic, etc.…). This does not change the root file structure – it only changes how the files are viewed on your Box home page. To set up folders (or categories) click on the plus sign next to the My Collections found in the left-hand menu (#1). Once you've named your folders then just drag and drop the folders and files on your Box home page into your newly created categories that will show up under the My Collection section. You can also set up categories or folders by clicking on the folder or file, then at the top of the page there is a box with a star on it (# 2), click this and add to favorites or create your own collection by selecting "create collection".



Your home page is automatically set up to show all folders and files that you have access to. To change these settings, click on the St. Patrick's logo (# 3) in the right corner of the page and go to account settings. Using the drop-down menu labeled "Home Page" (# 4) you can choose to see: All Files (default), Favorites, Recents, or My Collections (#5). Make sure you save the changes in the right-hand corner of the page under the STPSU logo (# 6).



Your Favorites and other collections can be found on the left-hand side under "My Collections" (#7). You can also see all the files you have access to by clicking on "All Files" at the top of the page under the BOX icon (#8).



Understanding folder permissions

Permission levels on Box follow a "waterfall" design in which individuals have access only to the folder they are invited into and any subfolders beneath it. You can also be invited to individual files. For example, a user invited to be a collaborator on the Academic Office parent folder would have access to all subfolders. However, a user invited to be a collaborator in a subfolder can only view that subfolder and the folders and files inside the subfolder.

Sharing access to files and folders

Only folder owners and co-owners can invite collaborators. In the past, anyone with access to a file or folder on Box could share that file or folder with others. In order to appropriately manage the content on Box, folder owners will be responsible for granting and/or restricting access to users in their domain. Below are some guidelines for sharing access to files and folders.

Folder owners and co-owners should keep their collaborators (the people to whom they give access to folders) up-to-date.

- Only add people who need access to do their Seminary work.
- Only add them with the lowest level of permission that they **need** in order to collaborate on the work.
    - If you are unsure what permission level they need you may want to review Table 1 below first.
- Remove people as collaborators immediately when they no longer need that access (for example, when they leave the Seminary or change jobs).

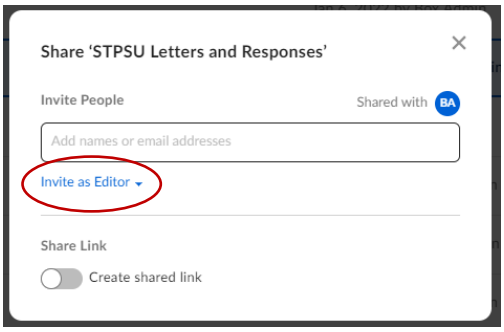
Table 1: Refer to the following table for the different permissions that accompany each access level.

	Co-Owner	Editor	Viewer Uploader	Previewer Uploader	Viewer	Previewer	Uploader
Download	X	X	X		X		
View/Add Comments*	X	X	X	X	X	X	
Delete Files/ Folders	X	X					
Create Tasks	X	X	X		X		
Invite People	X						
Edit Folder Name	X						
Create Subfolders	X	X	X	X			X
Edit Folder Settings	X						
Preview	X	X	X	X	X	X	
Upload	X	X	X	X			X
View Items in Folder	X	X	X	X	X	X	X
Set Access Permissions	X						
Move/Copy	X	X					

Adding collaborators to a folder or file

1. Click on the folder you want to add collaborators to.
2. Click on **Share this Folder** and select **Invite Collaborators** in the folder sidebar on the right. *A pop-up window appears.*

Use this drop-down menu to select the access level for the collaborators



3. Enter the email addresses of the individuals you would like to add under **Invite People**.
   - The email address you enter must be the same email address that was used to set up the collaborators Box account.
   - Start typing in the users name and email address options should be prepopulated.
   - If a user does not yet have a Box account, you will need to contact one of the co-administrators to ask that the individual you want to collaborate with be set up with a Box account. Note that only some faculty and staff have Box accounts, not all.
   - The account security measures that the Seminary has put in place only allow collaboration invitation to be sent to people within St. Patrick's Seminary & University and those individuals must have an existing Box account.
   - To share with more than one person at the same time put their individual addresses within the box for the appropriate collaboration level. For example, if you want to invite three individuals as editors, add their email addresses and send them the invitation. If you also want to invite two individuals as Viewer, you will need to send a separate invitation and change the access level to viewer before sending the invitation.
   - DO NOT use Google Group or departmental email addresses to include multiple people. Each individual must have their own Box account to access the content.
4. Select the access level for the collaborator(s) you are inviting from the **Invited Permission** menu. Editor access has been selected as the default. If this level of access is not need by the collaborator, please use the drop-down menu to select the appropriate level.
5. Modify the **Personal Message (Optional)** field, if desired.
6. Once you have entered all collaborators, click **Send**. Emails will be sent to your new collaborators notifying them of your invitation.
7. Once your collaborators log into their Box account, they will be able to accept or reject your invitation to collaborate on that folder.

Removing Collaborators

You should be removing a collaborator's access as soon as they no longer need the file or folder you are sharing with them.

The information below gives you instructions on how to remove a collaborator from an individual folder or from all folders that you own. You cannot remove collaborators from folders and files that you do not own.

1. Navigate to the folder or subfolder you want to remove a collaborator from within Box.
2. Click on the ··· button and select More Actions
3. Next click on Manage Collaborators
4. A new page should open with a list of collaborators and their level of access. In the Permissions column there is a drop-down menu.
5. Select Remove at the very bottom of the list of options to remove the individual from collaborating with the file or folder.

Sharing files without outside collaborators

You may share individual files with outside collaborators by selecting Share and then clicking on create shared link. This creates a direct link to your document. When you copy the link and insert it in a document or email, individuals without a Box account can now view and download the document. You can set the link to expire on a particular date and you can password protect the file. Basically, the content of the file is publicly available to anyone with the link.

Root Folders and Point of Contact(s)

Folder Name	Point of Contact(s)
Academic Office	Dr. Margaret Turek/Ms. Maggie Fazah
Admissions	Fr. Mark Doherty/Ms. Maggie Fazah
Advancement Office	Mrs. Martha Sheridan
Association of Theological Schools	Dr. Jill Fegley *(co-admin)*
Board of Trustees	Fr. Mark Doherty/Ms. Maggie Fazah
Business Office	Dcn. Rich Dizon
Communications/Public Relations	Fr. Anthony Stoeppel *(co-admin)*
Dean of Men	Fr. Mark Doherty/Ms. Maggie Fazah
Faculty & Staff– *individual faculty and staff folders are here*	Box Administrator
Former Employees	Dr. Jill Fegley/Fr. Anthony Stoeppel *(co-admins)*
Human Resources	Ms. Linda Greco
Institutional Effectiveness	Dr. Jill Fegley *(co-admin)*
Rector's Office	Fr. Mark Doherty/Ms. Maggie Fazah
Registrar	Ms. Maggie Fazah
WASC Senior College and University Commission	Dr. Jill Fegley *(co-admin)*