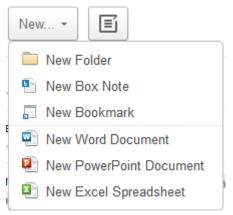
Get started with your Box account online!

Logging In to Box

Go to kp.app.box.com. Click the button that reads '**Continue**'. You'll be prompted to log in using your Web Single Sign On credentials. Once you've entered your KP credentials, you will be redirected back to your Box account. If you are accessing your account for the very first time, you'll need to accept the Acceptable Use Policy before you continue to your account.

Working with Documents on Box

Uploading Your Files and Folders: Click the **Upload** button in the top-left corner, then select **Upload Files** or **Upload Folders**. NOTE- you may not upload PHI at this point in time.



- Create a New Document:
- Enter the document title, and it will open in the MS office application on your computer. When you click save, a new version of the file will be saved automatically back to the folder where you created the document.

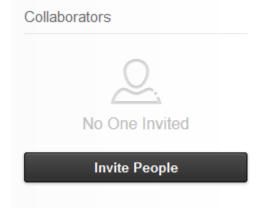
SHARING DOCUMENTS WITH COLLEAGUES ON BOX

With Box, you'll be able to share information easily and securely with any employee of Kaiser Permanente that has a KP Box account. There are **two ways to share** information with your colleagues in Box:

- 1. **Collaboration**: Inviting current Box users into a Box folder for ongoing, back and forth collaboration on documents.
- 2. Shared link: A unique URL associated with a file or folder that allows the recipient to view or download the file or folder.

Collaboration:

• **How to Invite Collaborators**: to invite your KP colleagues with Box accounts to a folder on Box, simply click into the folder you wish to share, and click on **Invite People** from the right hand side. Enter the email address of the KP colleague you wish to collaborate with.



Invite to "Box Reports"	×
Invite Get Invite Link	
Invite:	
Names or email addresses	
Permissions:	-
Editor -	J
Message:	
Hello, I want to share my folder on Box.	
Send Cancel	

• **Setting the right collaborator access permission:** be sure you have given the appropriate level of access by referencing this chart:

Access Levels	Upload	Download	Preview	Get Link	Edit	Delete	Owner
Co-owner:	•			epoirs	•	•	•
Editor:	•	Invite	Get	te Link	•	•	
Viewer Uploader:	•	•	•	•	•		
Previewer Uploader:	•		•				
Viewer:		e c	•	•			
Previewer:			•				
Uploader: Permissio	ns: 🖕						

• ***IMPORTANT NOTE* Inherited Permissions:** When you invite a collaborator to a folder, they will retain the same permission you have given them to each of the subfolders beneath the folder you invited them to. Their permission levels can neither be revoked nor modified within the subfolders they have access to. Be sure you have invited them in to the folder tree at the right level.

8 🗭 / 🖡 …	×
Enter a Comment Assign a Task	
@Adi <u>Gulati</u> Please review and provide feedback	
	_
Add Comment	

• Using Comments and Tasks:

0

• Version History: Box keeps track of a document's version history for you

E	1	to Box for Kaiser Permanente.docx ed Nov 26, 2014 by Aditya Gulati · 18.5 K	B 🐵 🕕 32
		× Version History	
		V9 Welcome to Box for Kaiser Am Permanente.docx Uploaded Nov 26, 11:08 AM by Aditya Gulati	
		Vie Welcome to Box for Kaiser Per Uploaded Nov 26, 8:50 AM by Samuel Karp Download - Make current	
		VV Welcome to Box for Kaiser Per Uploaded Nov 26, 8:48 AM by Samuel Karp Download · Make current	
		Upload New Version Close	
		Using Shared Links:	
Howt Link:	o Send a Shared		
		for Kaiser Permanente.docx 6, 2014 by Aditya Gulati → 18.5 KB അ ⊪ 32	Share 3
	📾 Link http	s://cloud.box.com/s/orh7pmt1omytgnnoh5vw	🚔 People in your company 👻

À

- 1. To the right of the file or folder, select the "Share" button
- 2. In the new section, you'll see a secure URL to the file that lets the recipient view and download it.
- 3. Be sure to assign the right Access Level by clicking on the dropdown menu to the right of the link.

🛔 Pe	eople in this folder -
	People in your company
	People in this folder
\times	Remove Link

4. Either copy the link or send an email notification directly by clicking on the gear icon > email.

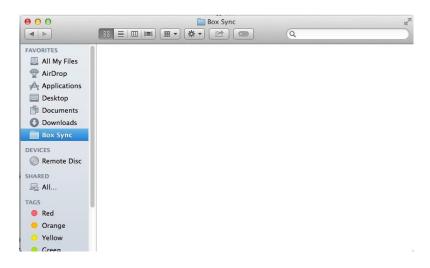
- Setting the Link Access Level: There are two link access levels you can assign:
 - 1. **People in this Folder:** the link recipient must be logged in to Box to access, and MUST be a collaborator in the folder already in order to view/access the file
 - 2. **People in your Company:** The link recipient must be a KP employee, and must be logged into their Box account to view or download the link.

Syncing Files to your Desktop from the Web:

Once box Sync is installed, you'll need to log in. Click the button that says "Use Company Credentials" to log in via Web Single Sign on. Enter your KP email address into the email field and click "Log In".

box	box
Ernail Address	user@kp.org
Password	Log In
Log in	P Use Box account credentials
Use Company credentials	Can't access your account?
Can't access your account?	Sign up for a Box account
Sign up for a Box account	

Once logged in, you will find an empty Box Sync folder on your desktop. Instructions for getting Box Sync installed can be found in the Setup Guide on the <u>Box website</u>.

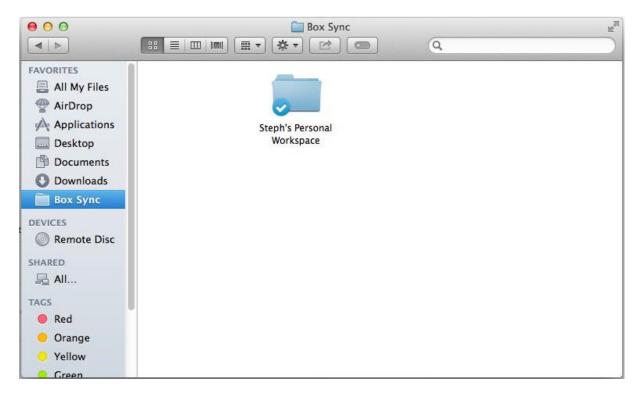


To sync the folders to your desktop you can go to <u>kp.app.box.com</u> and select the folders you want to sync. *Please note:* you must have Editor Access or higher to use Box Sync on a folder.

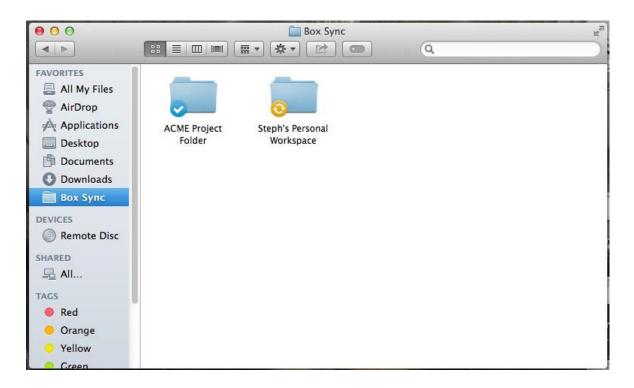
- Click the More Options dropdown arrow next to a folder.
- o Select Sync Folder to Computer.
- Click the Sync Folder button to begin syncing to your computer.

Steph's Personal Workspace	Share 🟠 📼	Storage: 5.6GB		
Updated today by Stephanie Ferrara 11316 @		Dpen		
Box Updated today by Cindy Kim 10428 ± 508 ± 1 ∞ Box Corporate	60160 G	 Download Upload Options 		
	Ğ	^{\$} Share		
		11 Invite Collaborators		
		🍘 Add / Edit Tags		
	e	Sync Folder to Computer		
Expiration Testing · Owner	Share 📩 🖸	Properties >		
Updated today by Stephanie Ferrara 115 11.2 (19)	4	Move or Copy		

Now you'll see the folders you Synced in Box Sync.



When a folder is in the process of updating you will see this represented with an orange icon. When a folder has completed syncing you will see this this represented with a blue icon.



When you're working from the Web Application you will see folders that have been synced represented with a blue icon.

0	Steph's Personal Workspace Updated today by Stephanie Ferrara 11316 @
12	Box Updated today by Cindy Kim ₪10426 1.508 1.1 @ Box Corporate (+)
12	Customer Success Teams Updated today by Jessica Fain 20123 13 14 @
	Use Case (*) Do NOT Sync

Uploading with Box Sync

Once Box Sync is installed, you can move files to the Box Sync folder on your computer and these additions will automatically be uploaded/synced with the Box website. If you experience an error message, contact your <u>Box</u> <u>Admin</u> or see the Box Sync Help Page.

Deleting with Box Sync

When a folder or file is deleted from the desktop Box Sync folder, it will also be deleted from the Box Web Application.

Navigating the Box Mobile App

Logging In on mobile:

Once you've installed the mobile application, open it on your phone. You'll be prompted to log in. Click "Use Company Credentials" enter your KP email address, and click "Log In". You'll be redirected to sign in via Web Single Sign On. After successful login, you'll now have access to Box on your mobile device!

See it in Action (quick tutorial):

- iPhone: <u>https://cloud.app.box.com/s/29gs1bj7gm7f4e2i35oc</u>
- iPad: <u>https://cloud.app.box.com/s/3l4i130hekr8ij1jt4um</u>
- Android: https://cloud.app.box.com/s/1awrxjq5mvi11f7ic2xv