# 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.
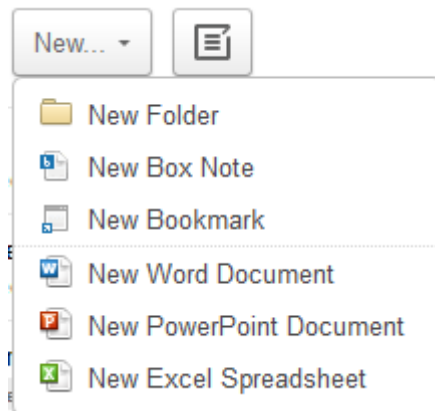


- Create a New Document:
- Enter the document title, and it will open in the MS office application on your computer. When you click save, a new version of the file will be saved automatically back to the folder where you created the document.

**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:

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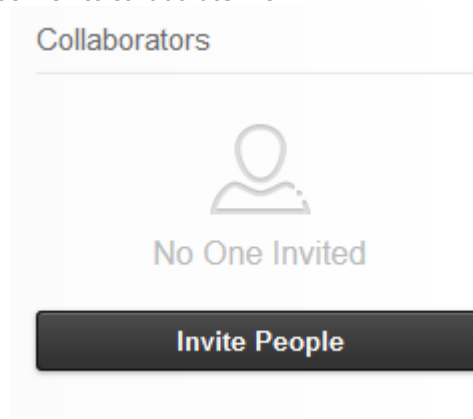
- o **Setting the right collaborator access permission:** be sure you have given the appropriate level of access by referencing this chart:



- o **\*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.
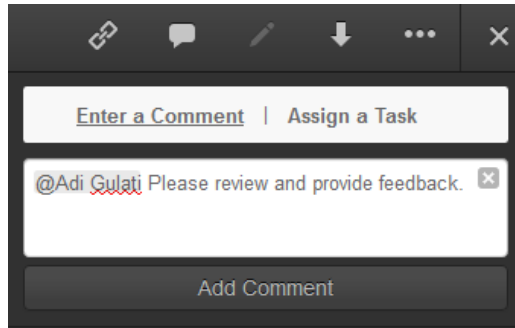
- o **Using Comments and Tasks:**

- o **Version History:** Box keeps track of a document's version history for you
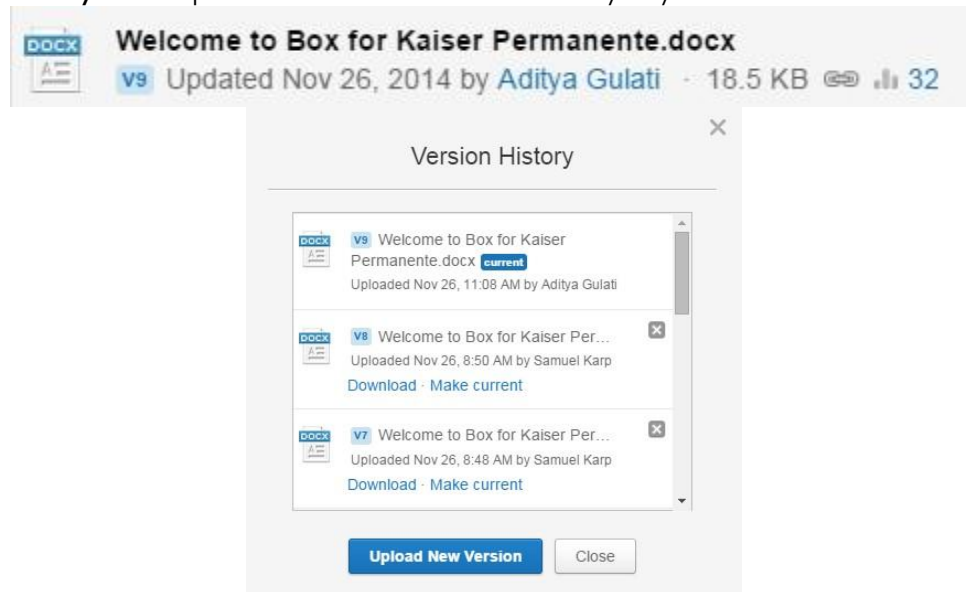


<u>**Using Shared Links:**</u>

- o **How to Send a Shared Link:**



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.
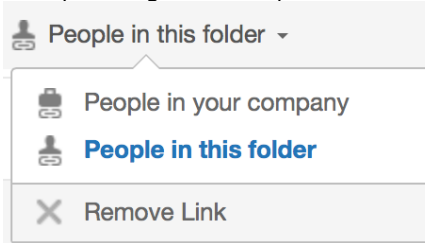


4. Either copy the link or send an email notification directly by clicking on the gear icon > email.

- o **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.

<div align="center"><b>Syncing Files to your Desktop from the Web:</b></div>

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".
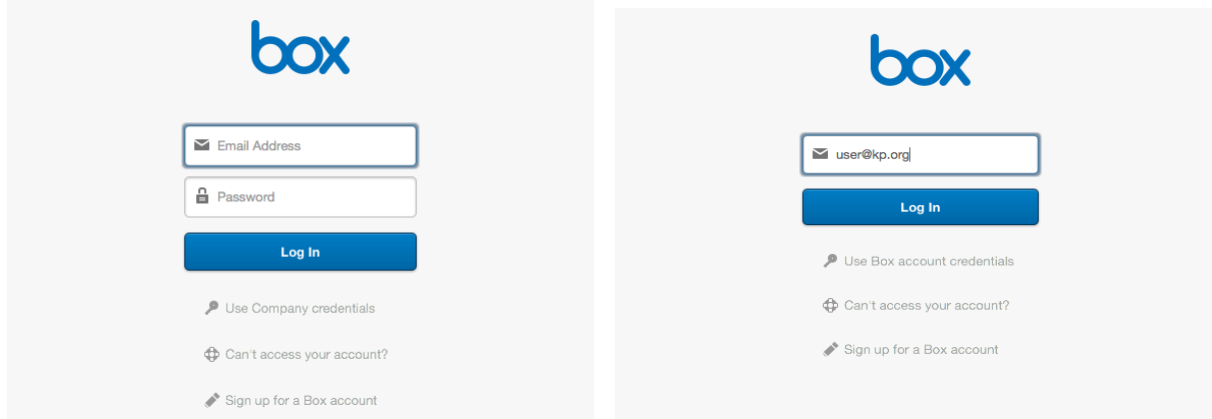


Once logged in, you will find an empty Box Sync folder on your desktop. Instructions for getting Box Sync installed can be found in the Setup Guide on the Box website.
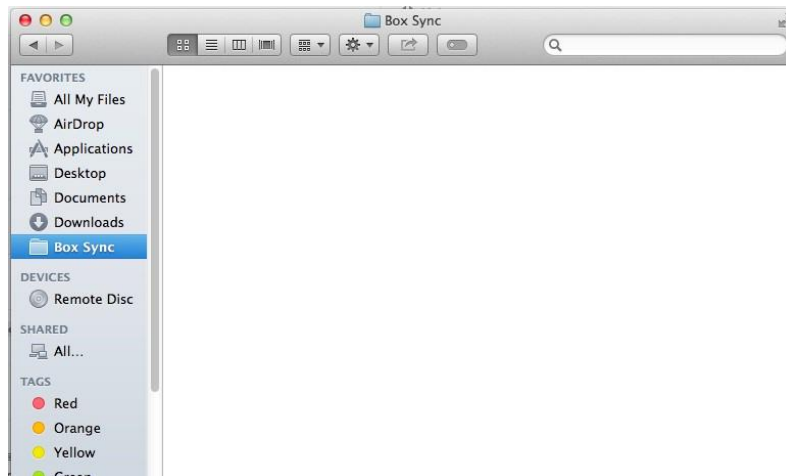


To sync the folders to your desktop you can go to kp.app.box.com and select the folders you want to sync.
*Please note:* you must have Editor Access or higher to use Box Sync on a folder.
- o Click the More Options dropdown arrow next to a folder.
- o Select Sync Folder to Computer.
- o Click the Sync Folder button to begin syncing to your computer.
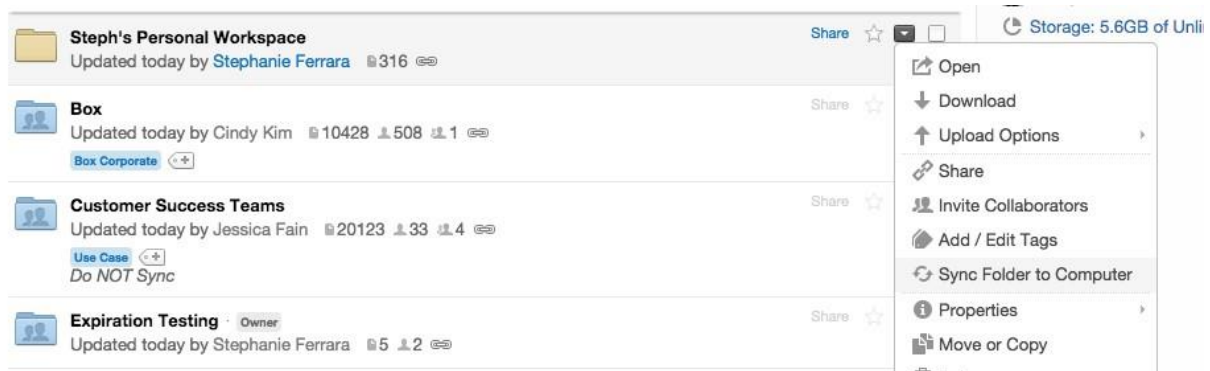
Now you'll see the folders you Synced in Box Sync.
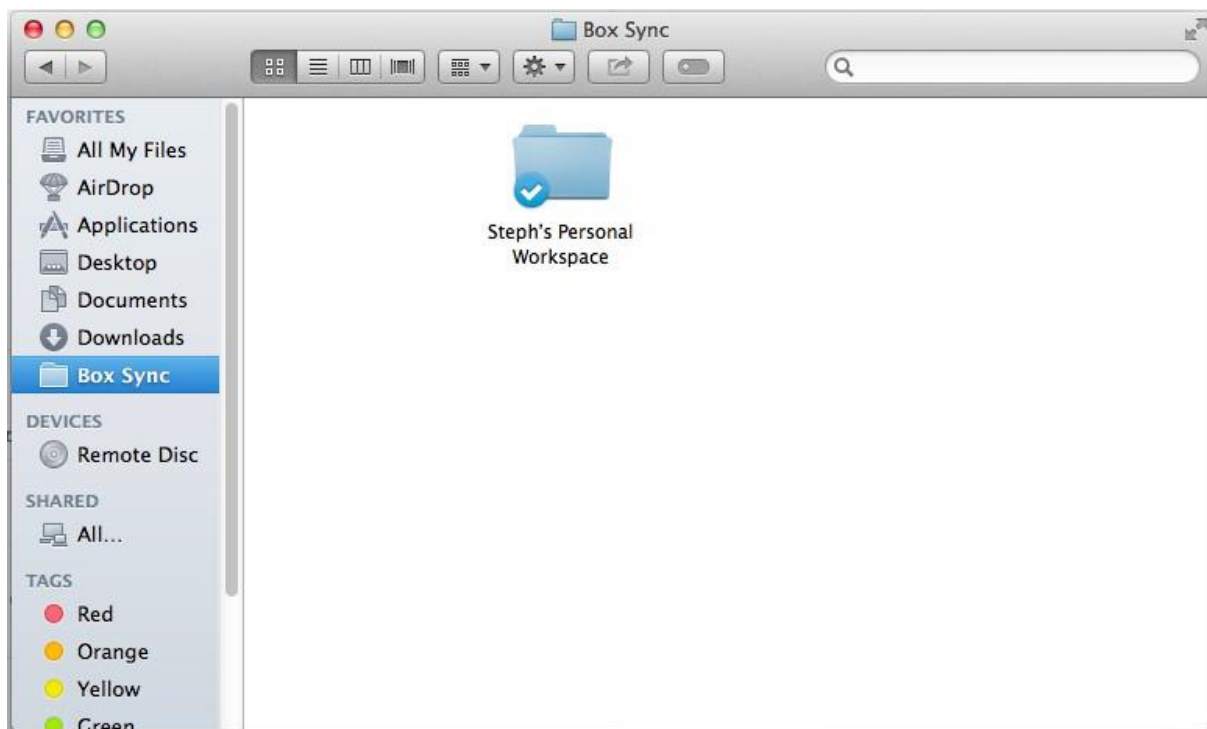


When a folder is in the process of updating you will see this represented with an orange icon.  When a folder has completed syncing you will see this this represented with a blue icon.
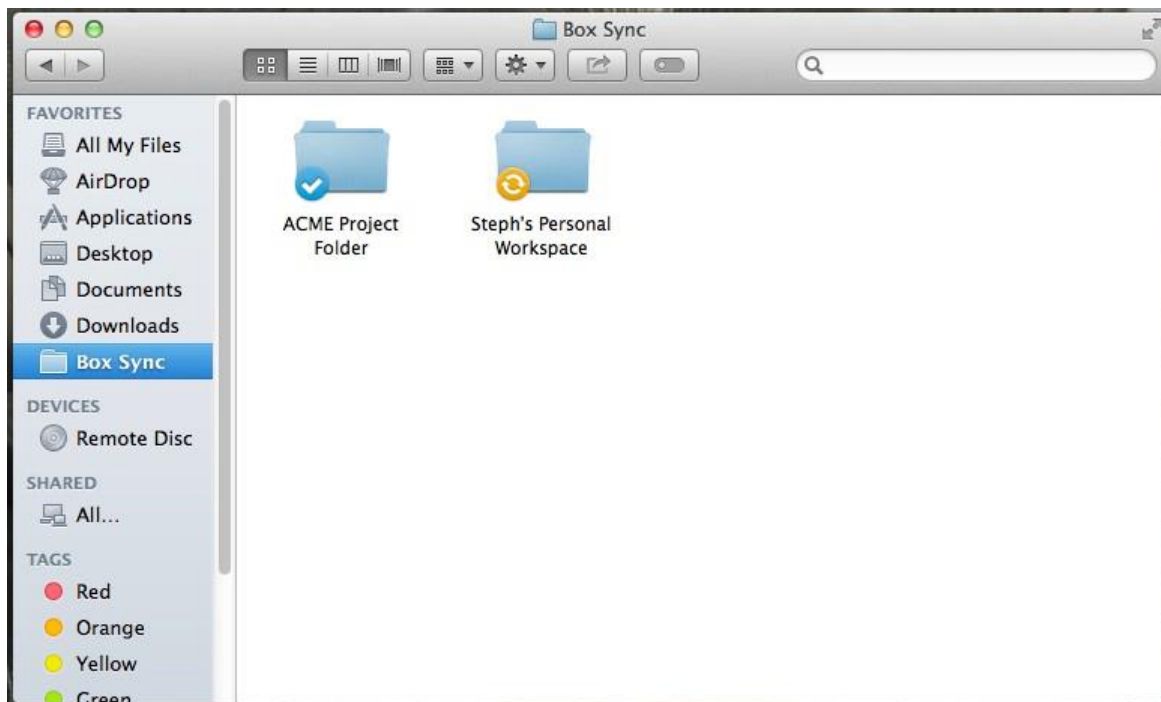
When you're working from the Web Application you will see folders that have been synced represented with a blue icon.
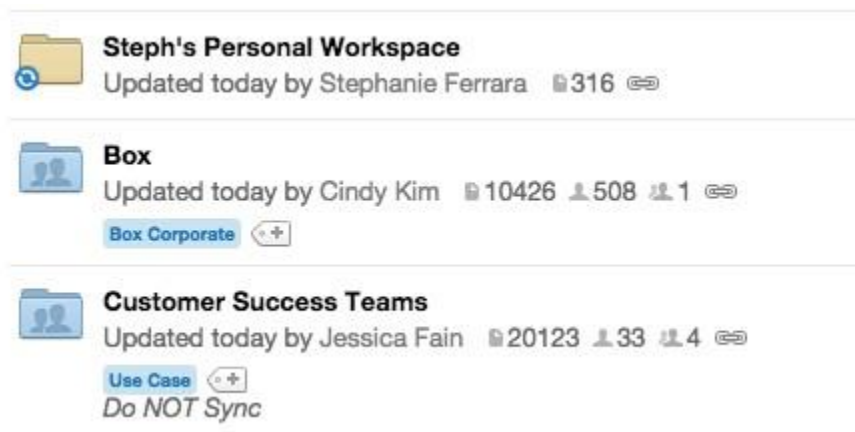


**Uploading with Box Sync**

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 Box Admin 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.

<u>**Navigating the Box Mobile App**</u>

**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: https://cloud.app.box.com/s/29gs1bj7gm7f4e2i350c
- iPad: https://cloud.app.box.com/s/3l4i13ohekr8ij1jt4um
- Android: https://cloud.app.box.com/s/1awrxjq5mvi11f7ic2xv