



EMMA ECCLES JONES
COLLEGE of EDUCATION
and HUMAN SERVICES
Utah State University®



Sorenson Center for
Clinical Excellence

Module 4:
Account
Settings

Module 3:
Files and
Tagging

Module 2:
Collaboration

Module 1:
Folder
Infrastructure

Box Training

Effective Use of Box for
Securing HIPAA-Regulated Data

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Box Document Management Platform

Box is a document management system that allows you to share, access, and manage your content from anywhere and on multiple devices—all within the secure Box environment. This document discusses the Box features that will help you effectively utilize this multi-feature platform.

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Data breach average cost: \$3.86m

Organizations: 40% ▲ in data incidents

Education sector: 103% ▲ in data incident

Identity Theft Center October 2019 Report

The Medical/ Healthcare sector experienced the highest number of data breaches and the highest amount of sensitive records exposed.

Employee Error/ Negligence/ Improper Disposal/Lost was the second most common method of breach accounting for 28 percent of the total number of data breaches reported.

The Business sector exposed the highest amount of non-sensitive records (9,963,258) in October.

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Box Document Management Platform

The protection of health information is of upmost importance to all professionals. USU offers the Box Document Management Platform to balance the protection of data confidentiality, integrity, and availability in a manner where productivity is least affected.

Box offers

- Encryption of files uploaded to Box
- Document processing in a secure environment
- Means of collaborating in a secure environment
- Document version control

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USU Policies Relating to Data Protection

- USU Policy 558: “USU requires all employees, contractors, consultants, vendors and students: to follow best practice protection of the USU IT Resources they use to store, process or transmit information. Protection from both electronic and physical compromise or loss is required. Some uses of equipment may be prohibited because of the exposure risks they introduce to PSI being processed on the same equipment...”
- USU Policy 556: “Users are expected to understand the available access control options and maintain appropriate access restrictions for stored information in their control.”
- CEHS HIPAA Privacy Policy 115: “...CEHS HCCs to maintain and retain protected health information (PHI) and other required documentation in compliance with applicable governmental and regulatory requirements.”
- CEHS HIPAA Security Policy 101: “Ensure the confidentiality, integrity, and availability of electronic data, including ePHI, that is created, received, maintained, or transmitted within CEHS”

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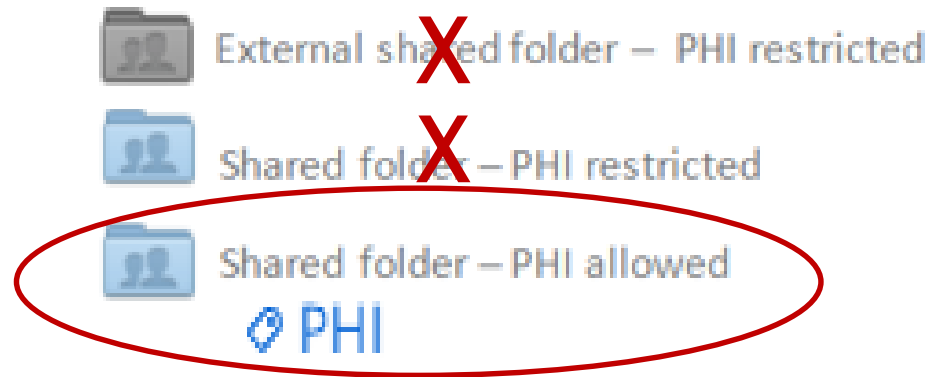
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Box Document Management Platform

Box folders with additional controls have been created for secure HIPAA-compliant storage of ePHI that may need to be maintained outside of the Electronic Medical Record (EMR). Eligible employees and students will have access to these designated, tagged folders.

A sample of a properly tagged folder is circled below:



Tagged PHI Box folders are the only CEHS-approved storage solution for ePHI outside of the EMR. ePHI may only be stored, with approval, in specific folders that have access managed by authorized data administrators.

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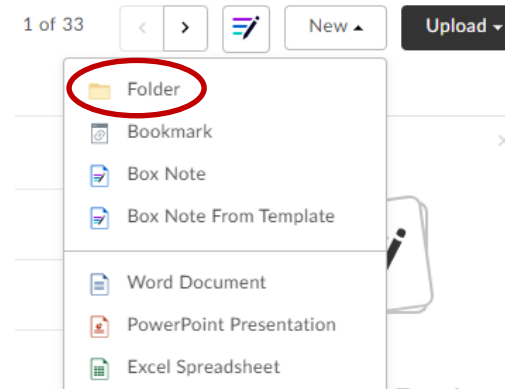
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Create a Box Folder

Folders are the basic building blocks for your Box account. As in other drives, folders allow you to group similar files together.

1. To create a new folder, click the **New** button (upper right corner) and select **Folder**.



Best practice: Use a standard naming convention, folder descriptions, and tags for more effective document management. Follow department or university requirements, if available, else create an effective naming convention for your individual files.

2. In the pop-up window, enter the folder name and click **Create**. Inviting others to the folder will be covered later in the training. See *Inviting Collaborators* section below.
3. To create subfolders within a folder, click the top-level folder to open it, and repeat the folder creation steps above.

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Create a Box Folder

Important Message for Individuals Handling Protected Health Information (PHI):

Files containing PHI should not reside in personal account folders. For data inventory and data protection purposes, as well as to ensure proper patient care and patient record accuracy, HIPAA-regulated data must be placed in designated, PHI tagged folders.

Contact your HIPAA privacy officer for procedures relating to the proper PHI storage folders. Sorenson Clinic employees may also review policy and procedures.

 PHI

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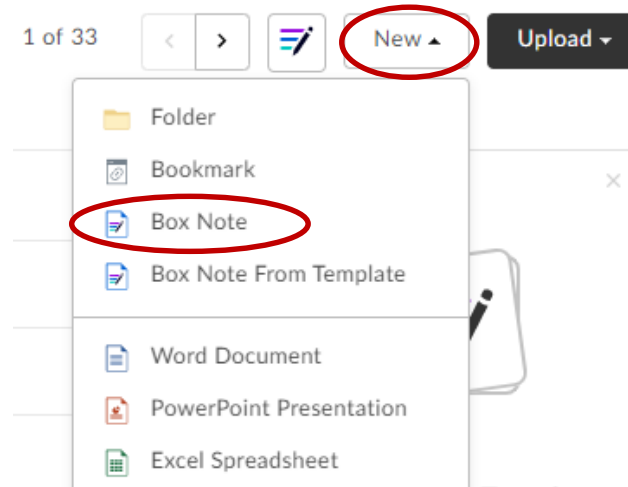
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Create a Box Note

Box Notes are real-time, online note-taking for teams. With Box Notes, you can quickly take notes, share ideas, and collaborate in real-time with your team – all without leaving Box.

1. To create a new Box Note, navigate to the folder where you want to create a new Note.
2. Click the **Box Note Icon** (upper right corner) or click **New**, then **Box Note**.



3. Name your Box Note, then click **Create**.
4. Start typing in your new Box Note. All changes are saved automatically.

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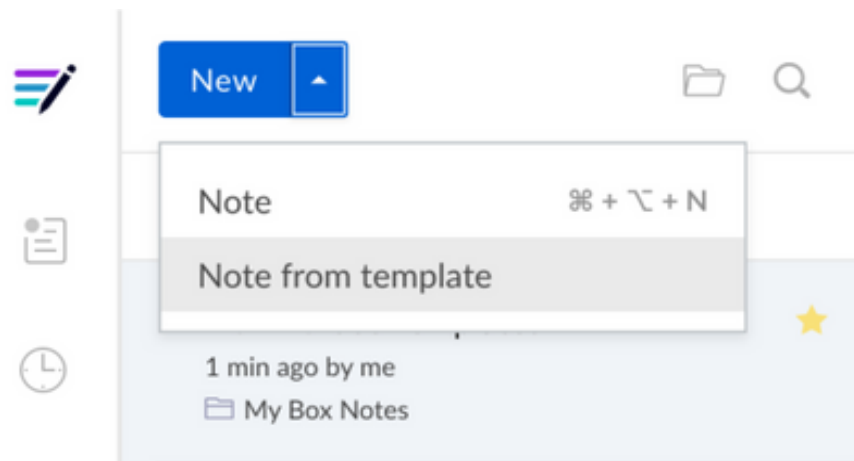
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Create a Box Note from a Template

Box Note templates are also available. They allow quick creation of a Box Note using pre-populated content. Choose from a set of default templates, or use custom templates that you create. Templates are useful when you need a standard format or structure for your document, e.g., agendas or calendars.

1. To create a new Box Note from a template, click the arrow next to the **New** button (in the Box Notes side navigation).
2. In the dropdown list that displays, click **Note from Template**, choose a template and click **Create**.



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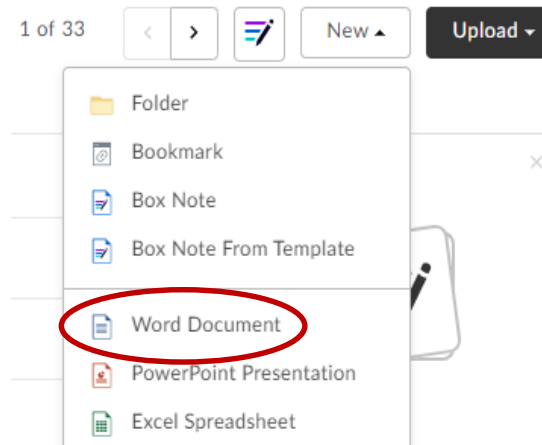
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Create a New Document

Box Edit makes it possible to use Microsoft Office and other programs within the Box environment. Any file type that can be opened in a program on your computer can be opened in Box Edit, e.g., docx, xlsx, pptx, pdf, txt.

1. To create a new Word document, click the **New** button (upper right corner) and select **Word Document**.



2. Name the document and click **Create**. Microsoft Word opens a new document.

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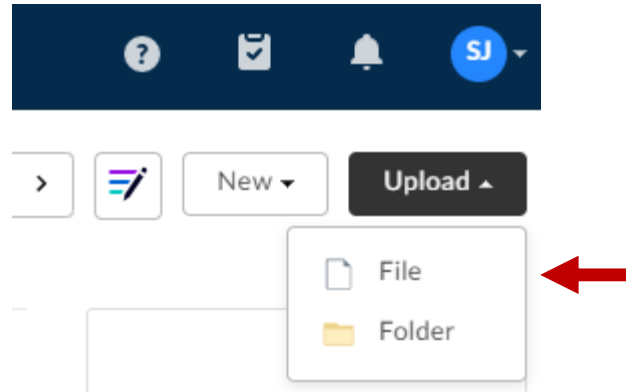
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Upload Files and Folders

Use the Upload File feature when you have only one or a small number of files to transfer to the Box environment. If you need to upload a folder or many files, use the Upload Folder feature.

1. Navigate to the folder where you want to send your files.
2. Click the **Upload** button (upper-right corner) and choose **File** or **Folder**, depending on your transfer.



3. A window will appear, allowing you to select the specific file(s) or folder(s) you want to upload from your computer.
4. Select the specific file(s) or folder(s) and click the **Open** button.

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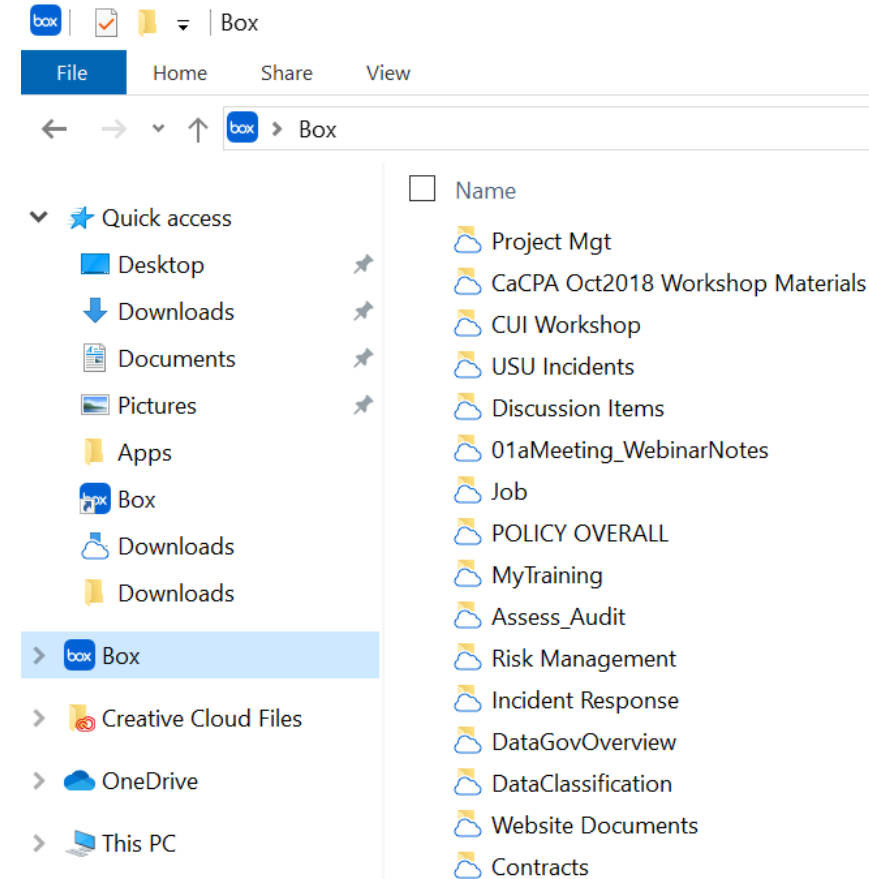
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Opening and Editing Files with Box Drive

If you prefer to access files from your desktop, via Apple Mac Finder or Windows File Explorer, Box Drive is cloud drive mapped to desktop file management.

Box Drive is the simplest way to use Box. It does not require your browser; instead, files are opened from Mac Finder or File Explorer. Whether you create a new Microsoft Word document or edit a PDF in Adobe, any changes you make automatically save back to Box.

You open a file the same way you open files in Mac Finder and File Explorer. You can also right-click any file or folder to take advantage of collaborative Box features such as sharing and locking or creating Box Notes.



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Navigation: Search

Box has a simple navigation system; one component is the **Search Bar**.

If you are looking for a certain file or even a certain word or phrase within a file, utilize the **Search Bar**. Type your query into the search bar at the top of your page.



Box will search the title of your files and folders as well as the body of your documents. Once you have initiated a search, you may apply filters to further narrow your results. You can sort by folder, file type, date, content type, and owner.

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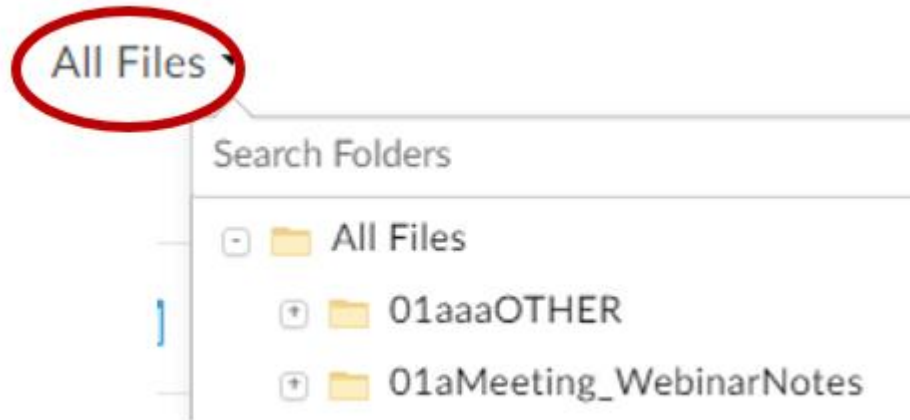
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Navigation: Folder Tree

Another navigation feature is the Folder Tree.

If you want to get to a folder quickly, click the **All Files** dropdown menu under the Search Bar to access your entire folder structure. Click on the folder; Box will take you to the folder.



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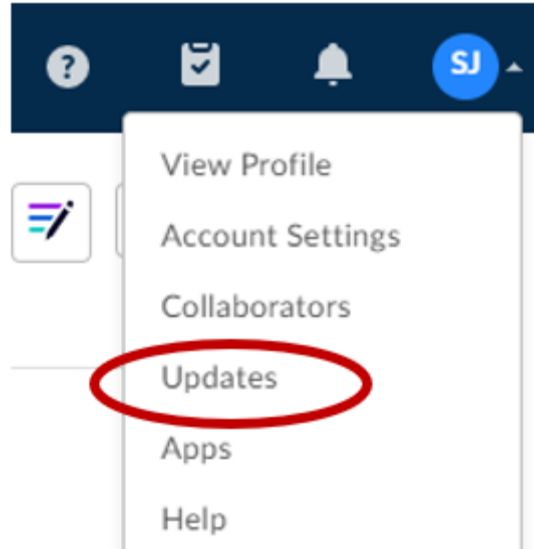
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Navigation: Updates

To view recent updates to the documents in your Box account, click your Account Icon (right side of main blue bar) and click **Updates**.



On the *Updates Feed* page, you will see the files and folder that have been recently updated in your Box account. You may view all updates or filter the results by the type. To sort by action type, click **All Updates** and select the filter you wish to apply.

You may also open the file from the *Updates* list.

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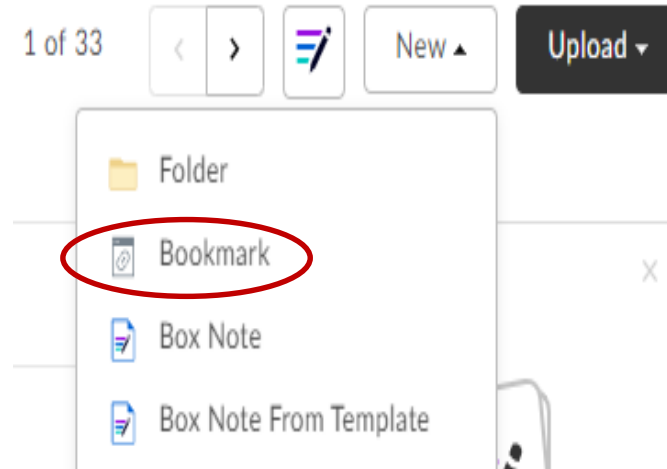
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Navigation: Bookmarks

Any webpage URL may be saved in Box as a Bookmark, helping you organize and quickly access your web-based content. You may also use Bookmarks to create quick links to content for which you only have “Viewer” permissions.

To create a bookmark, click the **New** button in the upper-right corner of the page. Select **Bookmark**.



A pop-up window will prompt you to enter (1) the URL to bookmark and (2) a name for the new bookmark. Click **Create** to complete the process.

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Navigation: Favorites

Mark files and folders as Favorites. The items will display on the left sidebar as well as on a *Favorites* page.

To add/remove a file or folder in Favorites List, right-click the item, and click **Favorite** or **Remove Favorite** from the menu.

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Add Description to Folder

A 255-character maximum description can be added to folders and files in Box. Descriptions should be used to explain more about the folder/file content or provide directions concerning use.

Once the folder has a description, the  symbol will be added to the folder/file name.

Adding a description to a folder

1. Click the folder (do not open the folder).
2. In the right pane under *Details*, you will see the **Description** area allows you to enter or modify a description.

☆ TEST is selected

Tags Email Download Move or Copy Trash

Name	Updated	Size	Sharing	Details
UserLogs	Nov 16, 2017 by Admin	2 Files	✓ Sync to Desktop	
test1	May 31, 2018 by Admin	2 Files		Description Enter a description
Test Folder	Mar 28, 2018 by Jame...	1 File		
TEST	Yesterday by Admin	0 Files		Owner Admin

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Add Description to File

A 255-character maximum description can be added to files in Box. Descriptions should be used to explain more about the file content or provide directions concerning use.

Once the file has a description, the  symbol will be added to the file name.

1. Click the file (do not *Preview* the folder).
2. In the right pane under *File Properties*, the **Description** area allows you to add or modify a description.

All Files > Box Reports > ☆ User Statistics run on 2017-08-16 08-53-51 ▾

Name ▾	Updated	Size	≡ ☰
 User Activity Report run at 2017-08-16 15-53-51 Pa...	Aug 16, 2017 by Ad...	203 B	

Sharing Details

☒ Sync to Desktop

Description
Enter a description

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Invite Collaborators

Box allows for secure file sharing to simplify collaboration at both the folder and file levels. Collaborators are invited to work in partnership on one or more of your folders, but you define and control their access permissions. Based on the permissions you set, your collaborators will not be able to see files and folders that they are not invited to join.

Once the folder or file has collaborators, the  symbol will be added to the folder/file name.

1. To begin collaboration, hover your mouse pointer over the folder or file you would like to share and click the **Search** button to the right of the folder/file name. First, add the name(s) or email address(es) of your collaborator(s).

Share 'Downloads' 

Invite People

Add names or email addresses

[Invite as Editor](#) ▼

Share Link



Enable shared link



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Invite Collaborators

2. Second, assign the collaborator(s) an access type; see chart below:

Access Levels	Upload	Download	Preview	Share	Edit	Delete	Owner
Co-owner:	•	•	•	•	•	•	•
Editor:	•	•	•	•	•	•	•
Viewer Uploader:	•	•	•	•			
Previewer Uploader:	•		•				
Viewer:		•	•	•			
Previewer:			•				
Uploader:	•						

Note: Collaborators have the same access type throughout a particular folder structure. For example, an editor in a top-level folder will also be an editor in all the related subfolders. This is called the Waterfall Method.

Carefully plan the folder layout to ensure you set proper access control. Only individuals who have a business *need-to-know* should be granted access to documents.

3. Third, determine if you would like to establish an access link. If so, please see the *Shared Link* Section. If you do not require a Shared Link, click **Send**. An email invitation with instructions for joining your folder will be sent to your collaborator(s). The recipient is also notified in Box **Notifications** (bell icon on the top blue menu).

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Enable Shared Link

Box has a *Shared Link* option to quickly share files with

- (1) others who may not have Box accounts,
- (2) many individuals in your organization, or
- (3) individuals who do not need to be collaborators in your folder.

Enable **Shared Link** by using the slide bar. A Shared Link is a URL that will take a recipient directly to the folder or file, without giving access to other parts of your account.

Unlike collaboration, contacts with a shared link can be limited to read-only and download access to your files. You can also disable Download for share links if you choose.

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Enable Shared Link

To create a Shared Link:

1. Hover the mouse pointer over the desired folder/file and click **Share**.
2. Enable **Shared Link** by using the slide bar. In the space below the bar, you'll see a URL link to the folder/file. Copy and paste the link into an email, Slack message, or communication channel of choice.
3. By default, the URL link will work for **Invited People Only**.

This option may be changed to one of the following options:

- a. People with the link:** Only people who have this link will be able to access the folder or file. Individuals do not need a Box account to access the content.
 - b. People in your company:** The shared link will only be viewable by Box users with an email address that matches your company's email domains
4. Click **Link Settings** to set an expiration date on the link or to publish content broadly with a non-private URL.

Share 'Downloads'
×

Invite People

Add names or email addresses

[Invite as Editor](#)

Share Link

☒ Shared link is enabled
[Link Settings](#)

https://usu.box.com/s/to23nnwjy7xpmt1edzzt
Copy


[Invited people only](#)

People with the link
Publicly accessible and no sign-in required

People in your company
Anyone in your company with the link or people invited to this folder can access

☒ **Invited people only**
Only invited people can access this folder

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Folder/File Security

For added data security and privacy, consider the additional Settings options.

1. Hover the mouse pointer over a folder/file, and click the (...) icon to the right of the file name.
2. Click **Settings**. From this window, you are able to
 - Choose who can collaborate and how they join (includes auto-join)
 - Hide comments
 - Restrict access via shared links
 - Control who can see collaborators
 - Add watermarking to deter unauthorized sharing
 - Allow uploads via email
 - Set date for automatic deletion or to discontinue sharing
 - Control frequency and type of email notifications generated
3. When the options are set, click the **Save Changes** button in the top-right corner.

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Add Comments

Comments provide a convenient way to manage discussions around content in your Box account. Use comments to request feedback from others, make notes to yourself, and notify others of file updates.

You can leave comments to a file from the preview screen.

1. Click on a file name to open it in preview.
2. Type your comment in the comment box at the bottom of the right-hand sidebar.
3. Click **Post** to add your comment.
4. When you enter a comment, all collaborators who have notifications enabled will receive an email.

@-mentions

Use @-mentions to direct a comment to a specific colleague. [*next slide*]

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Collaboration

@-mentions

Use @-mentions to direct a comment to a specific colleague.

- Start your message with the @ symbol and type the name of the person you'd like to notify. Their name will appear in blue.
- @-mentioning will send an email to the person tagged. They will also receive a message in their Box Notifications.
- Your comment will also appear in the file, giving context for others coming to work with this information.

Note

- When using @-mentioning, the person to whom you are directing the message must already be a collaborator in the folder.
- @-mentioning yourself produces a notification from "Someone" rather than from your name.

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Create Tasks

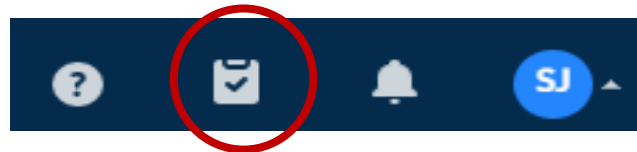
Another effective way to manage your documents is through assigned tasks. Both the *Comments* and *Tasks* features eliminate long email chains and places the collaboration around the document itself.

Task Types

Approval Tasks – Assignees will be responsible for approving or rejecting tasks

General Task – Assignees will be responsible for marking tasks as complete

A list of your assigned tasks may be viewed by clicking on the *Clipboard* Icon on the main blue menu bar.



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Create Approval Tasks

Assigning an approval task

1. Click a file name to open it in preview.
2. In the Activity sidebar, click the **Add Task** button (upper-right corner) and select **Approval Task**.
3. Assign approvers (the people who will approve or reject the content). You can assign multiple approvers, but all approvers must be collaborators in the folder containing the file.
4. To specify that the entire approval task is completed when any one assignee completes it, check the box next to **Only one assignee is required to complete this task**. Otherwise, Box marks the status "Approved" when all assignees have completed the task.
5. Add a message and due date for the approval, if necessary.
6. Click **Create**. The approvers receive email notifications, as well as messages in Box. They can approve or reject the content directly in either the Task Center or Preview window.

Note

- @-mentions are not supported in tasks.
- People assigned to tasks in a folder must be collaborators on the folder.

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Create General Tasks

Assigning a general task

1. Click a file name to open it in preview.
2. In the Activity sidebar, click the **Add Task** button (upper-right corner) and select **General Task**.
3. Assign people to the task. You can assign multiple people, but all assignees must be collaborators in the folder containing the file.
4. To specify that the entire task is completed when any one assignee completes it, check the box next to **Only one assignee is required to complete this task**. Otherwise, Box marks the status "Completed" when all assignees have completed the task.
5. Add a message and due date for the completion, if necessary.
6. Click **Create**. The assignees receive email notifications, as well as messages in Box.

Note

- @-mentions are not supported in tasks.
- People assigned to tasks in a folder must be collaborators on the folder.

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Module 3: Files and Tagging

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Box Edit

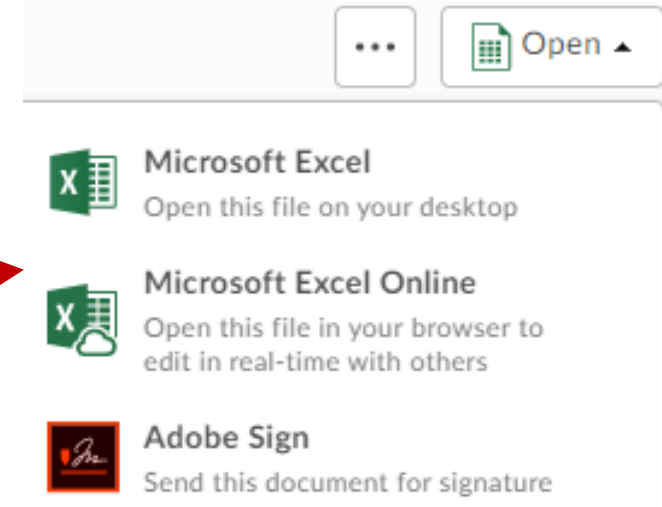
Box Edit allows you to open and edit files stored in Box.

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, etc.

You may open files within the default program or in the online integration of the program.

If the document is opened in the program, the document is locked to other collaborators, and all features of the program are available.

If the document is opened in the online version of the program, not all program features are available. However, the online version of the program allows multiple individuals to concurrently edit the document.



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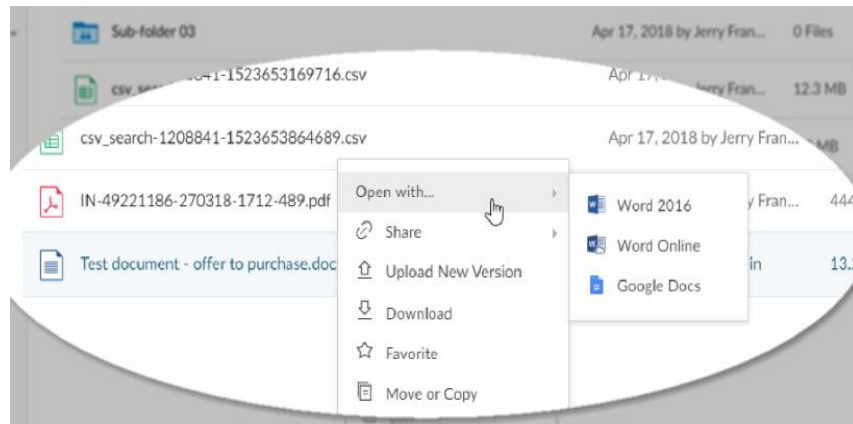
Box Edit

To open a document:

1. Click the file and open it in preview.
2. Click the **Open** button (upper-right corner).
3. Click one of the first two options
 - i. the program or
 - ii. the online browser version of the program.

You may also

1. Right-click a file or click the ellipsis (...) to open the *More Options* menu.
2. Click **Open With...** If there is more than one application with which you can open the file, this option allows you to select the appropriate application.



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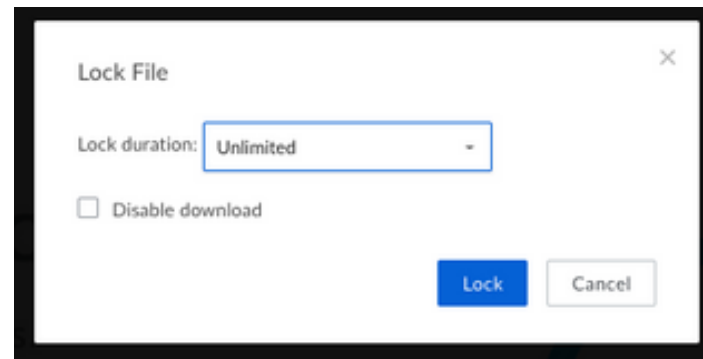
Lock File

File locking will prevent a file from being changed while you are working on it. Locking files is not currently supported on Box mobile applications.

Note: When a file is locked, you will see a lock icon by the file name. The individual who locks the file will be able to edit the file; however, other collaborators will not have access to the file until it is unlocked. *If needed, any collaborator with Co-owner, Editor, or Viewer Uploader access can also unlock a file.*

To lock a file

1. Right-click a file (or click the (...) icon to open the *More Options* menu).
2. Click **Lock**
3. Choose a duration of the lock. If you choose unlimited, the file will be locked until you unlock it manually. You may also choose to prevent users from downloading the file while you are editing it.



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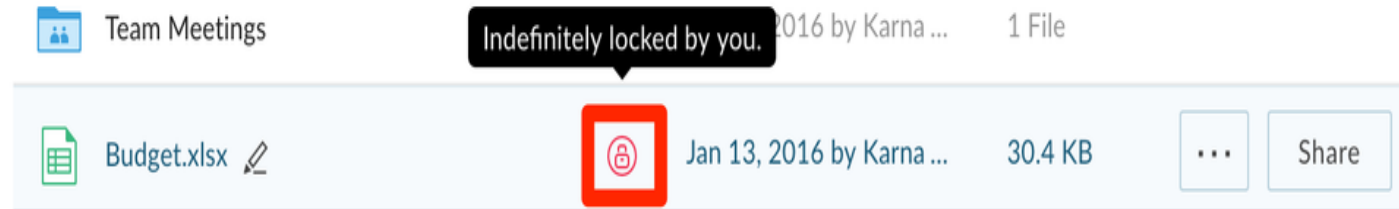
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Lock File

4. A lock icon to the right of the file name will indicate that the file has been locked.



To unlock a file

1. Right-click a file (or click the (...) icon to open the *More Options* menu).
2. Click **Unlock**

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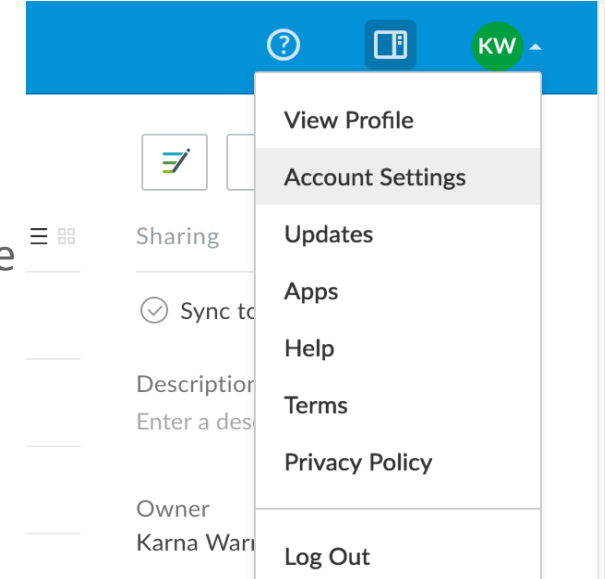
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Enable Tags

Tags enable you to mark, sort, and easily search for related files.

You can enable or disable Tags in your **Account Settings**.

1. To enable tags in your account, click your profile icon in the upper-right corner of the screen. (The default icon is your initials). Click **Account Settings**.
2. In the **Account** tab, check **Display Item Tags**.



Account Settings

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Integrations

General Options

Your user profile information will be accessible to anyone that you are collaborated with in a folder.

Home Page

All Files

Files and Folders Per Page

20

Time Zone

GMT-08:00 America/Los Angeles PST

Language

English (US)

☒ Display Item Tags



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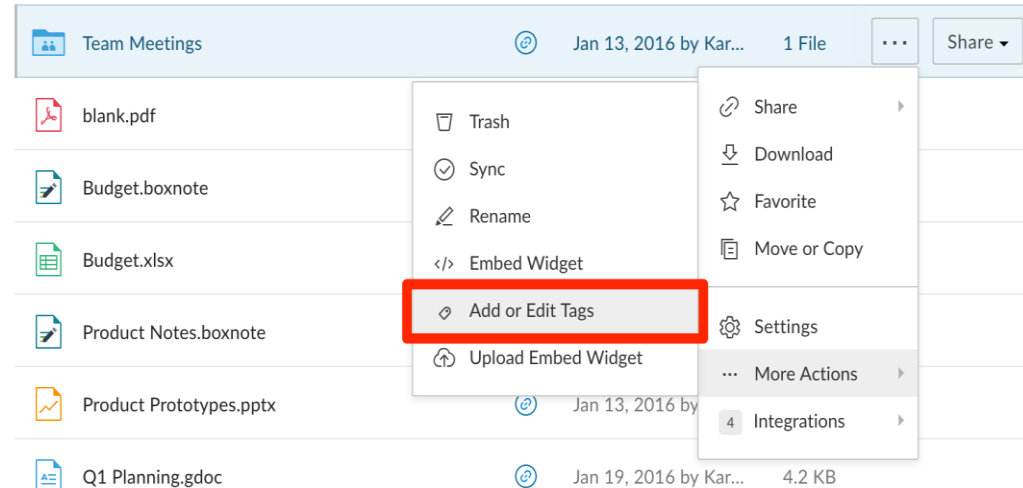
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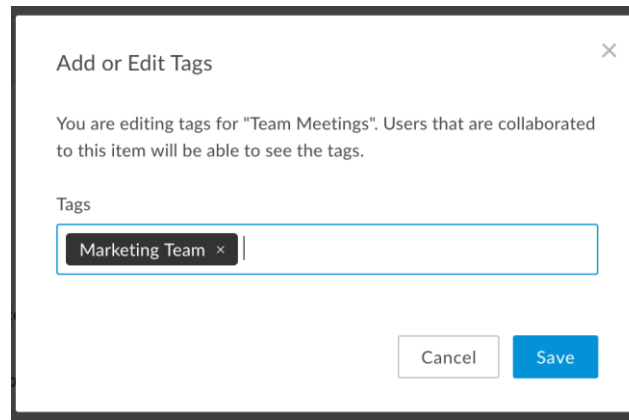
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Tag Files and Folders

1. To tag an item, mouse over the item you want to tag, then click the (...) button to open the *More Options* menu. [Alternatively, you can **right-click** the item.] From the menu, select **More Actions** then click **Add or Edit Tags**.



2. In the dialog box that display, enter the tags you want to add to this item. You can add multiple tags, separated by a comma. Click **Save**.



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Tag Files and Folders

Tags display below the item name.

	Marketing Material - 2016 Marketing Team		Today by Karna War...	2 Files
	Team Meetings Marketing Team		Jan 13, 2016 by Kar...	1 File

Note: You must have folder permission level of "Editor" or higher to create tags for a folder.

There is no character limit for tagging. But generally shorter tags are more useful because they are easier to scan and identify.

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Search and Filter with Tags

1. To search for all files with a specific tag, click the tag below a file name.

	Marketing Material - 2016 Marketing Team		Today by Karna War...	2 Files
	Team Meetings Marketing Team		Jan 13, 2016 by Kar...	1 File

Search results will appear.

Search Results for [Marketing Team](#)

Any Type ▾ Any Size ▾ Any Time ▾ Any Owner ▾ Metadata ▾ 1 Tag ▾ Any Folder ▾

Sort by Relevance ▾



	Marketing Material - 2016  Modified today by Karna Warrior · 2 Files · Marketing Team All Files > All Files > Marketing Material - 2016
	Team Meetings  Modified Jan 13, 2016 by Karna Warrior · 1 File · Marketing Team All Files > All Files > Team Meetings

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Search and Filter with Tags

2. To filter tags, click the tags filter and enter the tag(s) you want.

Search Results for [Marketing Team](#)

Any Type ▾

Any Size ▾

Any Time ▾

Any Owner ▾

Metadata ▾

1 Tag ▾

Any Folder ▾

Sort by Relevance ▾



Marketing Material - 2016 ⓘ

Modified today by Karna Warrior · 2 Files · [Marketing Team](#)

[All Files](#) > [All Files](#) > [Marketing Material - 2016](#)



Team Meetings ⓘ

Modified Jan 13, 2016 by Karna Warrior · 1 File · [Marketing Team](#)

[All Files](#) > [All Files](#) > [Team Meetings](#)

Marketing Team ×

Apply

Note: You can start typing a tag in the search view, and Box autofills possible tags. However, it does this only for content you own. It will not autofill tags that belong to content you do not own or the content on which you collaborate.

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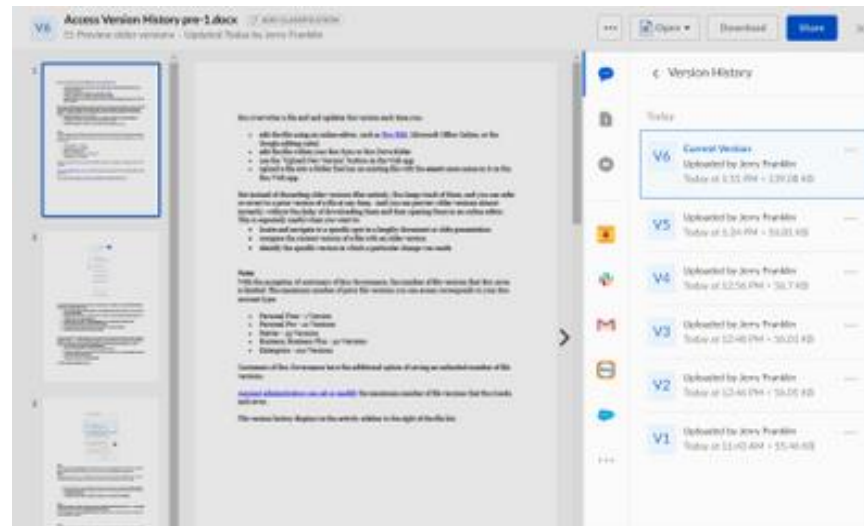
Version History

The Box Version History feature is like a time machine, ensuring you never lose your previous work.

Box overwrites a file and updates the version each time a user:

- edits the file using an online editor, such as Box Edit or Microsoft Office Online.
- edits the file within your Box Drive folder.
- uses the **Upload New Version** button.
- uploads a file into a folder that has an existing file with the **exact** same name.

Box tracks the older versions, allowing you to refer or revert to a prior version. The file version history displays in the activity sidebar to the right of the file preview.



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Version History

1. To open this sidebar and access any file version history, navigate to your Box **All Files** page and do either of the following:
 - a. Click the version number icon displayed to the right of the file name. This badge is available only when multiple versions of the file exist.
 - b. Click the name of the file. Box opens the file in Preview mode. Click the (...) icon, then select **Version History**.

When the list of file versions displays, each version has a separate listing. Click a version, and Box displays a thumbnail image. If no thumbnail is available, Box displays the icon specific to the file type (e.g., Word icon, Adobe PDF icon).

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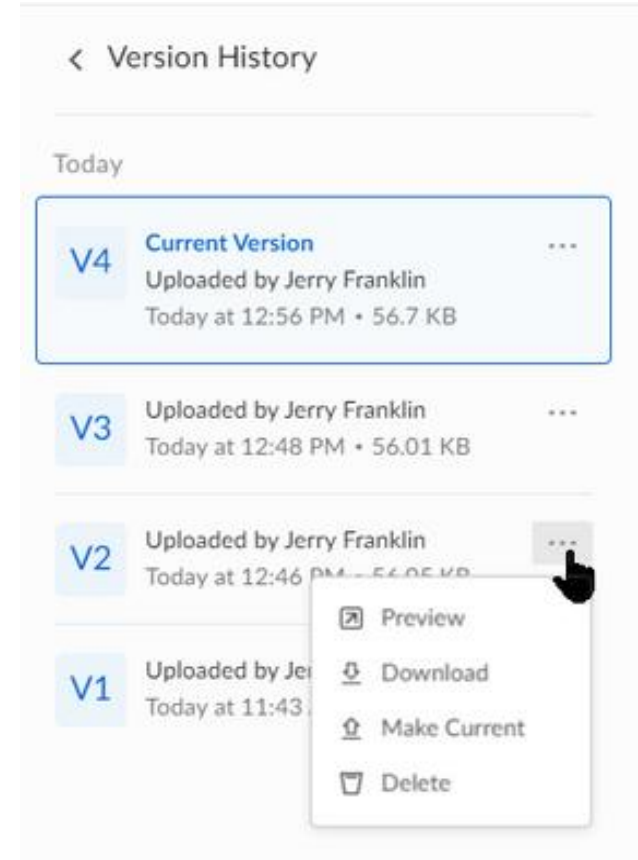
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Version History

Each file version also displays with a (...) button. Click the (...) to display a menu of available actions. The actions you can take varies based on your permissions, but typically, you can

- preview a prior version by clicking **Preview**.
- download a specific file version by clicking **Download**.
- promote an earlier version of the file to be the most current version by clicking **Make Current**.
- delete a file version by clicking **Delete**.

Note: When you delete a version, it continues to display in the version history list, but is otherwise unavailable. If you need to view or download it again, you can restore it. To restore a deleted version, click on the version's (...) button and click **Restore**.



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Version History

There are two known issues with Version control:

- (1) previews of Excel online files are not supported and*
- (2) previews of watermarked files are not supported.*

When you delete an older version of this file, the deleted version is retained as determined by the trash policy for your account. You cannot restore a deleted version after the trash policy expiration date.

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Open and Edit Files with Box Edit

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Tag Items in Box

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Assess Version History

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Module 4: Account Settings

CONTENT

Use Email Notifications

Set Folder Properties

Manage Trash

Access Trash

Recover Items

Permanently Delete Items in Trash

Enable Email Uploads

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Notifications

To stay informed of the events in your account, Box has an email notification system that informs you when your collaborators access or edit your files. You select the actions for which you would like notifications.

1. In the upper-right corner of the main blue menu bar, click your **Account** icon—the icon is either your initials or a picture, whatever you have set in your account profile. Next, select **Account Settings**, and select the **Sharing** tab.
1. Scroll to the **Notifications**. In this area, you can adjust the default email notification settings for your account. Once finished, click **Save Changes** in the upper-right corner of the screen.

Account Settings

Account **Sharing** Security Profile Diagnostics Integrations

Email Notifications

Select for which actions and on what type of content you would like to be emailed.

Notification Email
susan.jones@usu.edu

Select Notifications to Recieve

	In Items I Own	In Items I've Joined
Downloads	☒	☐
Uploads	☒	☐
Comments	☒	☒
Previews	☒	☒
Deletes	☒	☒

General Emails and Notifications

Keep me updated with

- ☒ Login Activity: Get notified when your account is accessed from a new device.
- ☒ Box Relay Classic: Get notified with Box Relay Classic activity and updates.

Note: Your default email notification settings can also be overridden at the *Folder Properties* level.

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Folder Properties

As a folder owner, you have a suite of advanced settings available to you. These properties control how your collaborators view and manage the files in your folder. To access these properties:

1. Place your pointer over the desired folder, and click the (...) icon. Click **Settings**.
2. A menu will appear, allowing you to adjust the folder settings for options relating to
 - a. collaboration
 - b. commenting
 - c. shared links
 - d. user privileges
 - e. watermarking
 - f. email uploads and notifications
 - g. auto-deleting/unsharing

Review the options available and tailor data protection settings to your specific needs.

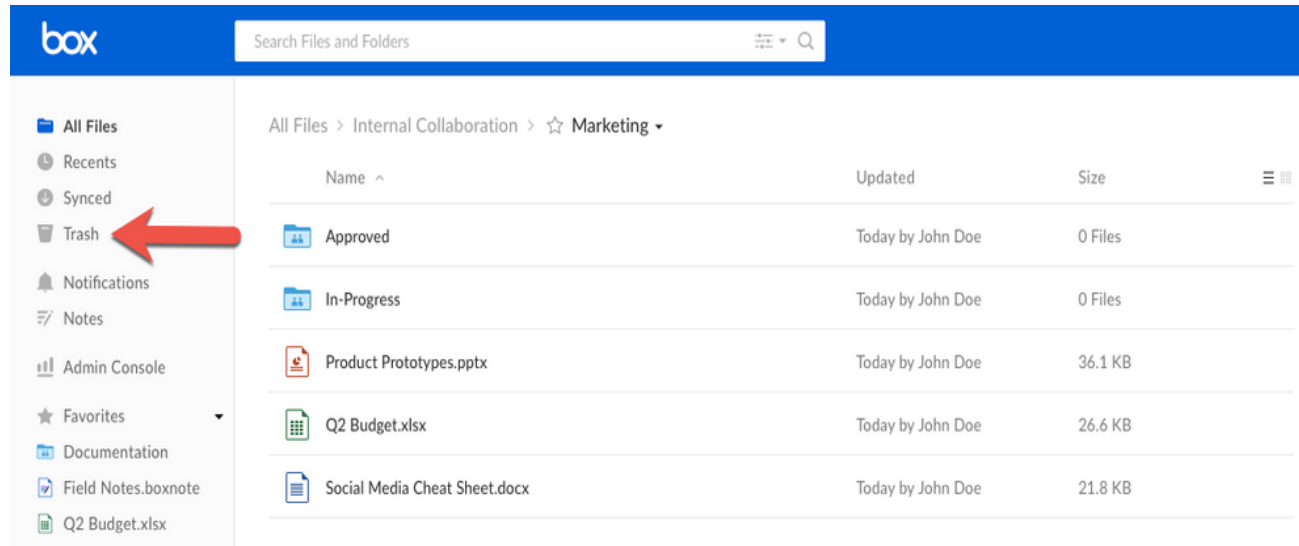
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Trash

For your convenience, Box stores deleted items for a 30-day period. Deleted items, which have been moved to the Trash, count towards total storage allocations. Until the item is permanently removed from the trash, the item is still a part of the owner's storage.

When items are deleted from a collaboration folder, both the owner and the user who deleted the item will be able to recover the items from the Trash.

To open the *Trash* page, simply click **Trash** in the left-hand sidebar.

The screenshot shows the Box web interface. On the left sidebar, the "Trash" option is highlighted with a red arrow. The main content area shows a breadcrumb trail "All Files > Internal Collaboration > ☆ Marketing" and a table of files. The table has columns for "Name", "Updated", and "Size".

Name	Updated	Size
Approved	Today by John Doe	0 Files
In-Progress	Today by John Doe	0 Files
Product Prototypes.pptx	Today by John Doe	36.1 KB
Q2 Budget.xlsx	Today by John Doe	26.6 KB
Social Media Cheat Sheet.docx	Today by John Doe	21.8 KB

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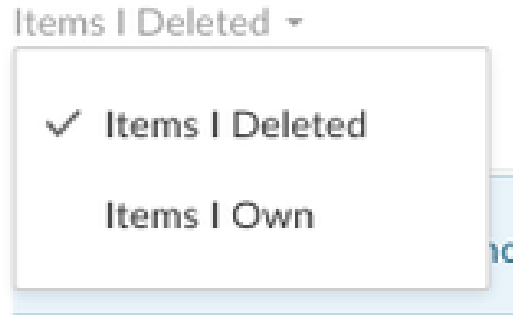
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Trash

Box allows you to sort and filter items within the trash folder.
You can filter content by **Items I deleted** and **Items I own**.



The **Items I deleted** filter will display all items deleted by you, regardless of who created or owns the item.

The **Items I own** filter will display all deleted items that you own, regardless of who deleted the item.

Tip: Filtering by "Items I Own" is helpful when trying to track content that may have been deleted by a collaborator in a folder you own.

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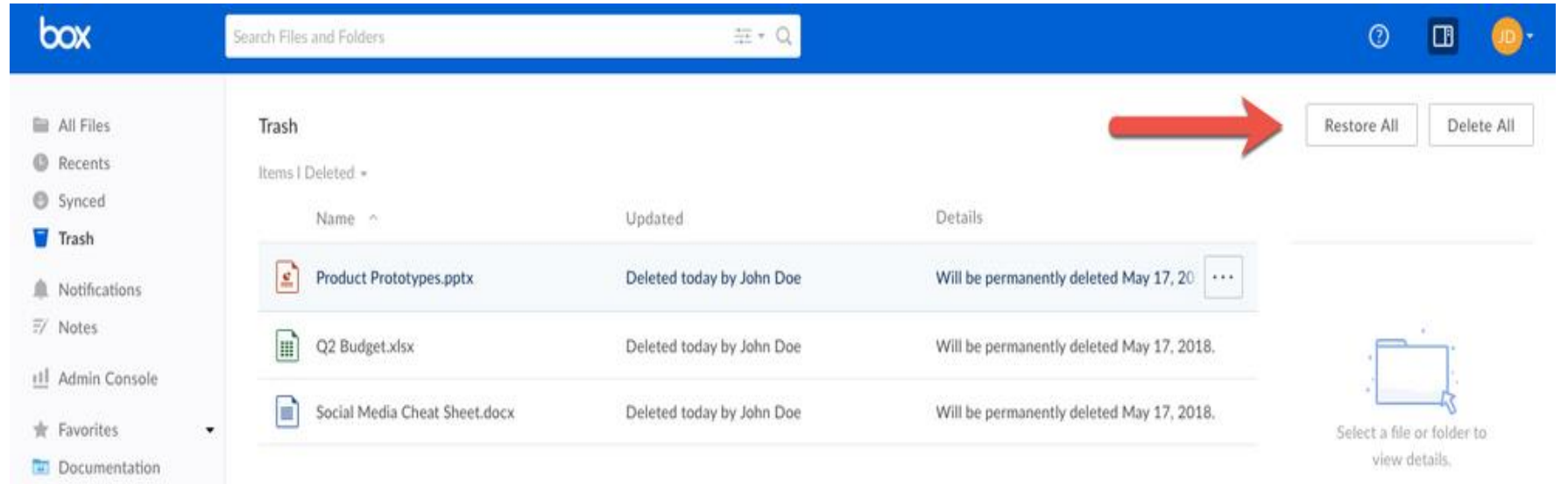
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Trash Recovery

The Trash folder allows you to recover or empty the entire Trash folder or perform actions on a few items as needed.

To recover the entire folder in Trash, select **Restore All** from the top of the page. Recovered files and folders will be restored to the location from which they were deleted.



The screenshot shows the Box web interface for the Trash folder. The left sidebar contains navigation options: All Files, Recents, Synced, Trash (selected), Notifications, Notes, Admin Console, Favorites, and Documentation. The main area displays a table of deleted items:

Name	Updated	Details
Product Prototypes.pptx	Deleted today by John Doe	Will be permanently deleted May 17, 2018. [More options]
Q2 Budget.xlsx	Deleted today by John Doe	Will be permanently deleted May 17, 2018.
Social Media Cheat Sheet.docx	Deleted today by John Doe	Will be permanently deleted May 17, 2018.

At the top right of the Trash view, there are two buttons: **Restore All** and **Delete All**. A large red arrow points to the **Restore All** button. Below the table, there is a prompt: "Select a file or folder to view details."

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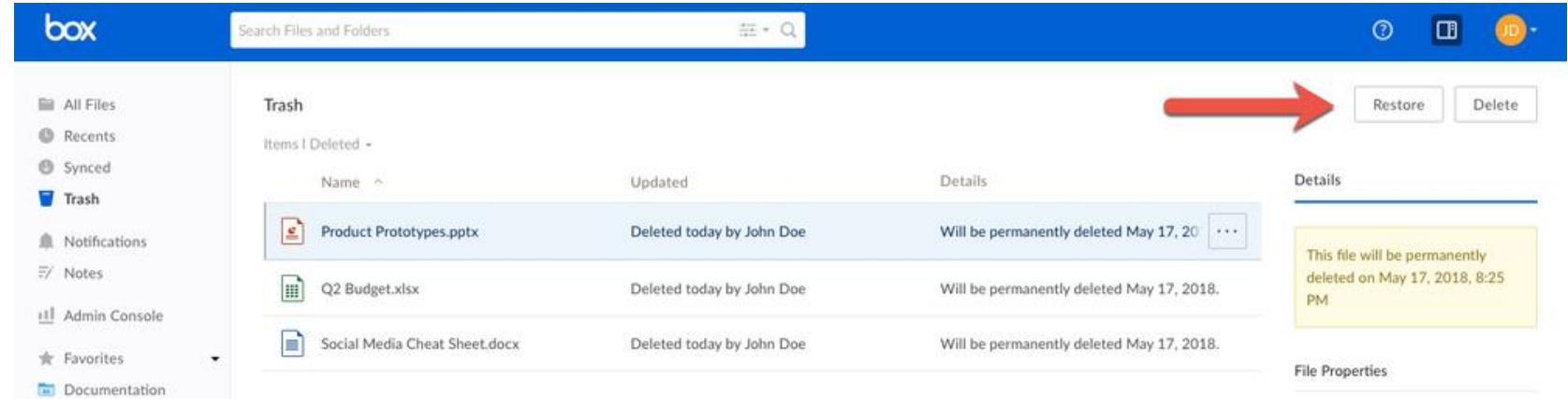
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Trash Recovery

To recover specific items from the trash, the click to select an individual item (or Shift + Click to multiselect), and click the **Restore** icon.



The following details are restored along with the file:

- Description
- Tags
- Comments
- Tasks
- Share state (whether the shared link is enabled or disabled)
- Collaborators

The following details are **not** restored:

- Expiration setting on shared links
- Expiration settings for deletion

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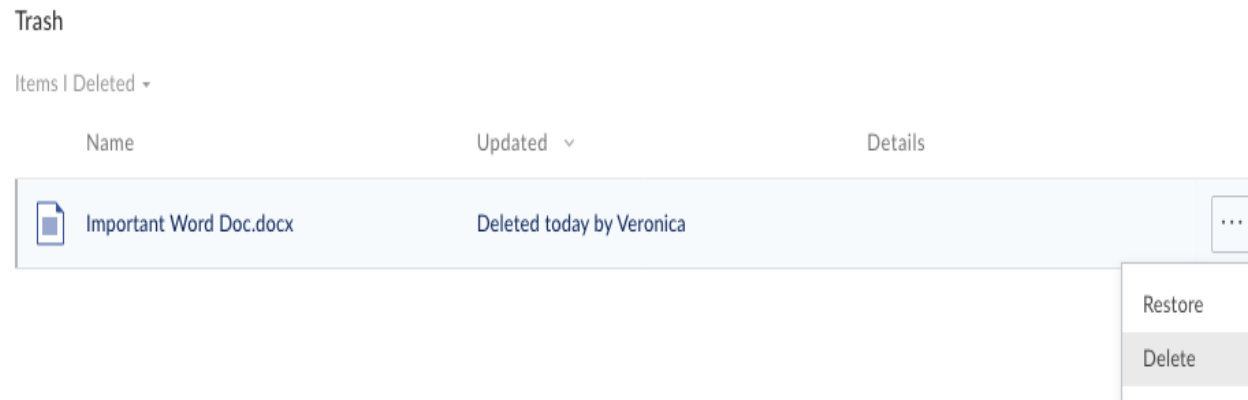
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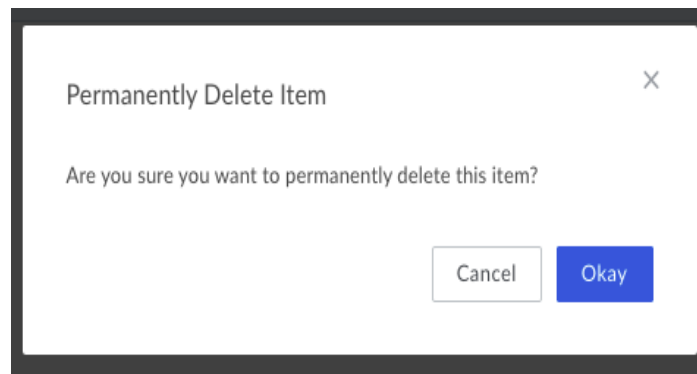
Permanent Deletion

File owners can manually remove items from the Trash by following these steps:

1. Go into **Trash**.
2. Find the file you want to delete, and click the (...) icon.



3. Click **Delete**.
4. Click **Okay** when asked "Are you sure you want to permanently delete this item?"



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Email Uploads

You can enable email uploads on a per-folder basis. This feature allows anyone with the Box folder email address to upload to the folder. It is very useful if you are collecting documents (e.g., forms) from multiple individuals OR if you are scanning documents and transferring them to the Box environment.

Important: This feature **must not** be used with documents containing sensitive personal information, such as Social Security Numbers, Credit Card Numbers, Birthdates, and Protected Health Information. Email is not a secure platform for sensitive information, and not all email providers support encrypted transmission. Therefore, the information is at risk of unauthorized disclosure during the email transmission.

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Email Uploads

To enable email uploads for a folder

1. In the **All Files** window, right-click the folder and select **Settings**.
2. Scroll to the **Uploading** section, check **Allow uploads to this folder via email**.
3. Under **Upload Email Address**, Box displays a unique email address. To upload files into the folder, send files to this address. You can copy this email address to your clipboard and enter it as a contact in your email address book, or simply paste it into the "To" line of an email with attachments.
4. In the top-right corner of the window, click **Save Changes**.

Uploading

Email Uploads

Allow people in this folder to upload files via email.

☒ Allow uploads to this folder via email [i](#)

Upload Email Address

Karna_s.z32ika1cfr5kqtd@u.box.com

☐ Only allow email uploads from collaborators in this folder

☐ Overwrite files with the same name when uploading by email or widget

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Email Uploads

Note

- Upload via email only works for file attachments. Content in the body of an email is not uploaded to Box.
- The cumulative size of the message body and attachments (including signature) cannot exceed 50MB.
- Both the folder owner and sender will receive a notification that files were uploaded successfully.
- Collaborators will also receive a notification if upload notifications are enabled for the folder.
- **Known issue:** Email uploads of .msg/.eml files through Microsoft Outlook desktop application fail due to the way Outlook handles attachment of these file extensions. As a workaround, it is recommended that you compress these attachment types into a zip file before emailing.

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Box Best Practices: Institutional Data Storage

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Box Best Practices: Institutional Data Storage

To ensure that institutional data stays with the university as positions change, USU strongly recommends that all institutional data be managed from a non-personal (an account not associated with one A Number) Box account, such as a Group or Departmental account.

Group and Departmental accounts provide the following benefits:

- **Minimize Operational Disruptions when Personnel Turnover:** Upon the departure of an employee, or a leader of a group, access to shared data in folders owned by the personal account of the person leaving may be lost. By storing this group/departmental data within a folder owned by a non-personal account, you avoid that disruption.
 - In the Protected Health Information (PHI) areas, it is critical that all patient records are stored in one location for data quality, patient care, and patient access requests.
- **Data Inventory:** As privacy and data protection regulations expand, companies need to demonstrate how they reduce and manage risk. An inventory of sensitive institutional data is not only a compliance requirement, it ensures information is accurate, accounted for, and protected properly.
- **Clarity of Ownership:** The group or department owns the files, not any one individual.
- **Permission Flexibility:** Because account ownership is not directly tied to any one individual, it is easier to assign users the appropriate collaborator permissions.

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Box Best Practices: Institutional Data Storage

Note: USU recommends that each department or group separate data accounts for the following:

- One account for Protected Health Information (PHI), which must be the only authorized Box storage location for PHI outside the EMS. Provisions for this account:
 - Folders must be properly tagged
 - Additional safeguards must be placed on the account
 - Access permissions must go through a documented request process
 - Access activity must be monitored and periodically audited
- One account for other USU Restricted Data (regulated data) with proper tagging and identification
- One account for one for other group/departmental data

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Box Best Practices: Naming Convention

A Naming Convention is important in Box because users will collaborate on many files and folders. An effective naming convention, along with the use of Box features such as Favorites and Tags, will make the management of your Box Content more efficient.

Visit Data.Management@USU for more information on file naming.

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Box Best Practices: Retention and Archiving

To keep pace with the increasing document creation, a retention schedule is a must for effective document management. The “save everything” document retention policy exposes you and the University to unnecessary risk and non-compliance with data privacy laws. The following benefits are associated with a successful records retention schedule:

- Control of the exponential growth of records
- Compliance with regulatory and contractual requirements
- Quick and efficient location and retrieval of documents
- Minimization of risks

To assist you in your implementation of an effective records retention practice, please follow USU policy and contractual requirements.



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Box and Related Resource Links

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Resources for Box Training and USU Data Handling

Box Community

[Box Community Knowledge Base and Forums](#)

[Box User Training Videos](#)

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USU Sensitive Data Policies

[CEHS Record Retention Policy and Procedure](#)

[USU Policy 558: Protecting Private Sensitive Information and Critical Institutional Data](#)

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USU Data Management Guidance

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[Data Storage](#)

[Data Handling Requirements](#)

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USU Knowledge Articles

[Box@USU](#)

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