

How to Use Box

Box is an online, cloud-based tool that is available at no additional cost to BYU employees, students, and departments. Box provides secure file storage and enables users to collaborate with others by sharing files and folders. It is secure and the preferred method for storing electronic department records and day-to-day files.

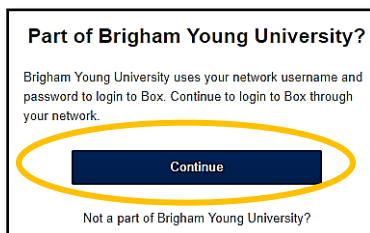
When using Box to manage records, day-to-day work files should be stored in the department's Box service account and not the user's personal area. Box service accounts tie work related files to the department and not to the individual. Box service accounts are setup by the department/college CSR. A Box service account (University Records) has also been shared with the Records Liaison of each department, for the management of finalized records. Record Liaisons are expected to move finalized records from the day-to-day work area into the managed University Records area of Box at least annually. Moving records to the University Records area will provide the following benefits:

- ownership of the records is tied to the university during department turnover,
- records cannot be altered,
- retention is managed, and records of historical value are preserved.

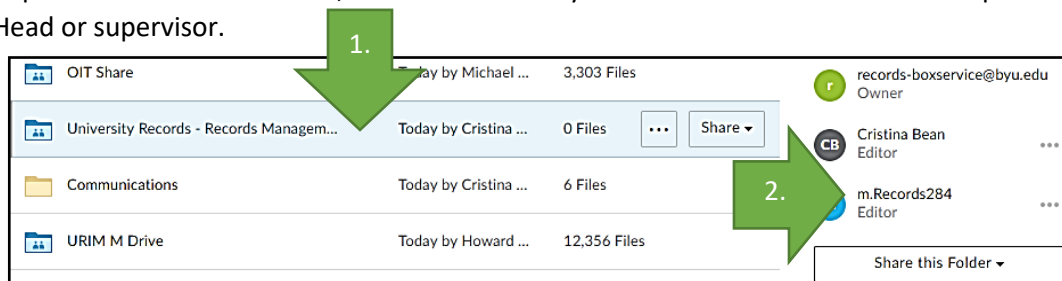
Electronic records managed in the University Records area of Box have the strictest level of security available. Only the submitting department will have access to these records until shared with others.

Please use wisdom when sharing confidential University information. (For more information please use the [Information Use, Privacy, and Security Policy](#))

1. To start, go to box.byu.edu, or download the mobile app. When asked if part of BYU, click "Continue."



2. Sign in with NetID@byu.edu and NetID password, click "Sign in," and go through the DUO authentication.
3. Click next to the name of the University Records - <Department Name> folder to select it (1). From the list on the right, select m.Records (2). This will show the full-time employees in the department that have access, which will normally be the Record Liaison and the Department Head or supervisor.



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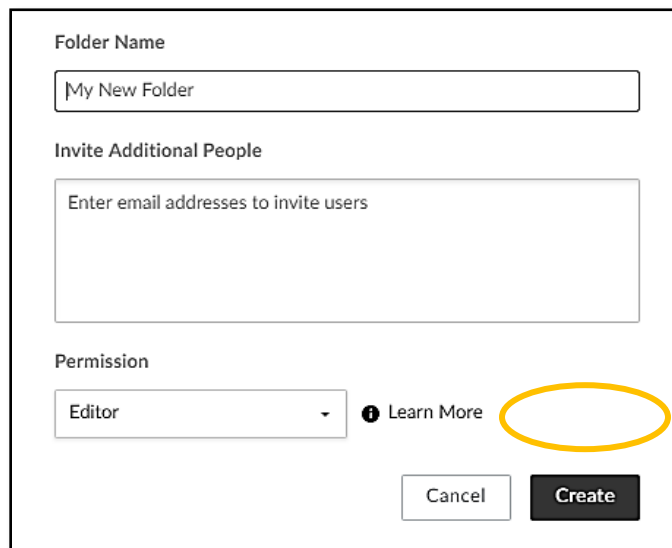
(If you're just logging in for the first time, the folder may not be visible. Please notify our Office Assistant at 2-1670 (urim.officeassistant@byu.edu) that you have logged in, so we can share the University Records folder with you. Please contact the Office Assistant if the department name or the Department Head/supervisor is not correct.)

Sharing ownership between two full-time employees within a department and the University Records folder (records-boxservice) ensures that the department will always retain ownership of and access to the records, even when employees leave the department. If only one full-time employee is listed, please contact urim.officeassistant@byu.edu to let us know who the second should be. For more information about the University Records folder please see the "Using the Managed Area of Box" Sheet found at recordsmanagement.byu.edu/electronic-records/box/

4. To add a folder anywhere in Box, click on 'New,' then select 'Folder.'

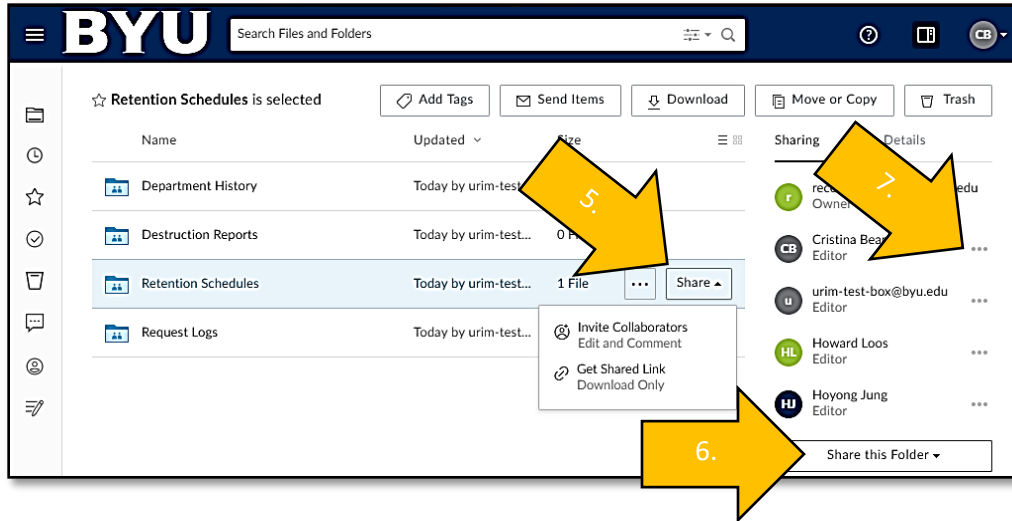


- a. A dialog box will pop up, asking for the new folder name, enabling the ability to share with users, and what permissions the user should have. Click 'Create.'

A screenshot of the 'Create Folder' dialog box. It has three sections: 'Folder Name' with a text input field containing 'My New Folder'; 'Invite Additional People' with a text area containing 'Enter email addresses to invite users'; and 'Permission' with a dropdown menu set to 'Editor'. To the right of the dropdown is a 'Learn More' link with an information icon, which is circled in yellow. At the bottom are 'Cancel' and 'Create' buttons.

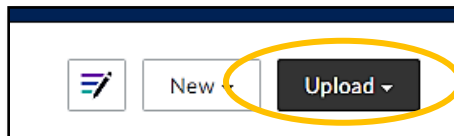
5. **Records Liaison can NOT currently share folders or change permission levels in the University Records Folder, to invite collaborators or change permissions to your University Records folder please email haley_dunkley@byu.edu.**

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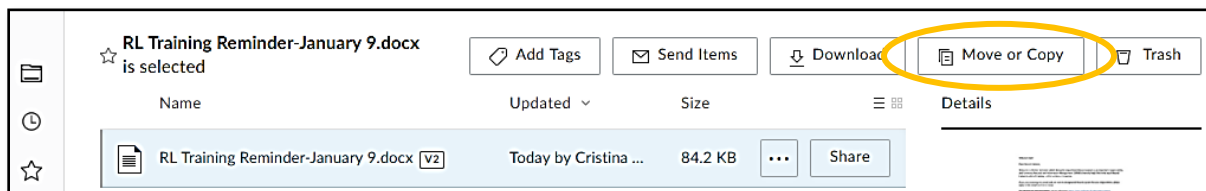


6. To add documents, drag and drop from the computer to Box, or click 'Upload.' By clicking on 'New,' users may create a document within Box.

*Documents cannot be added via the mobile app.



7. To move folders or documents to the managed area of Box, select the item, use the 'Move' button, and select the appropriate University Records folder. Users may also use drag and drop to move items within Box.



Please note:

8. For help with managing permissions in Box, please contact your CSR or the OIT Helpdesk at 2-4000.
9. Each department should complete a Department Retention Schedule (DRS), which will provide information on which records should go into Box. For a DRS appointment, please contact the Office Assistant (urim.officeassistant@byu.edu).