

BOX: Working with Files

[PDF Version](#)

Overview

This user guide covers the following:

- [Saving Files](#)
- [Naming Files](#)
- [Re-Naming Files or Folders](#)
- [Finding Files & Search Filters](#)
- [Opening Files](#)
- [Moving, Copying, or Deleting Files](#)
- [Locking and Unlocking Files](#)
- [Using Versioning](#)
- [Viewing Version History](#)

See also [QRG Box - Working with Files](#)

Saving Files

Note: Box supports a maximum size of 5 GB for individual files. However, Ledcor uses an enterprise version of Box with unlimited total storage, so you can upload as many individual files (5 GB or less) as required.

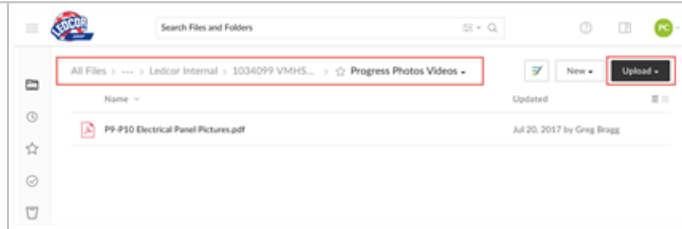
Option 1: Drag & Drop

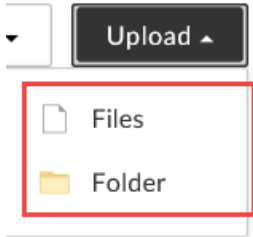
1. Navigate to the local drive where the files or folders are.
2. Navigate to the box location where to drop the files or folders:
 - **Web:** To the Files and Folders screen.
 - **Box Drive:** The folder location in file explorer.
3. Select the files or folders, hold, drag and drop them to the desired location.

Tip: Hold the CTRL key to select multiple files or folders.

Option 2: Upload

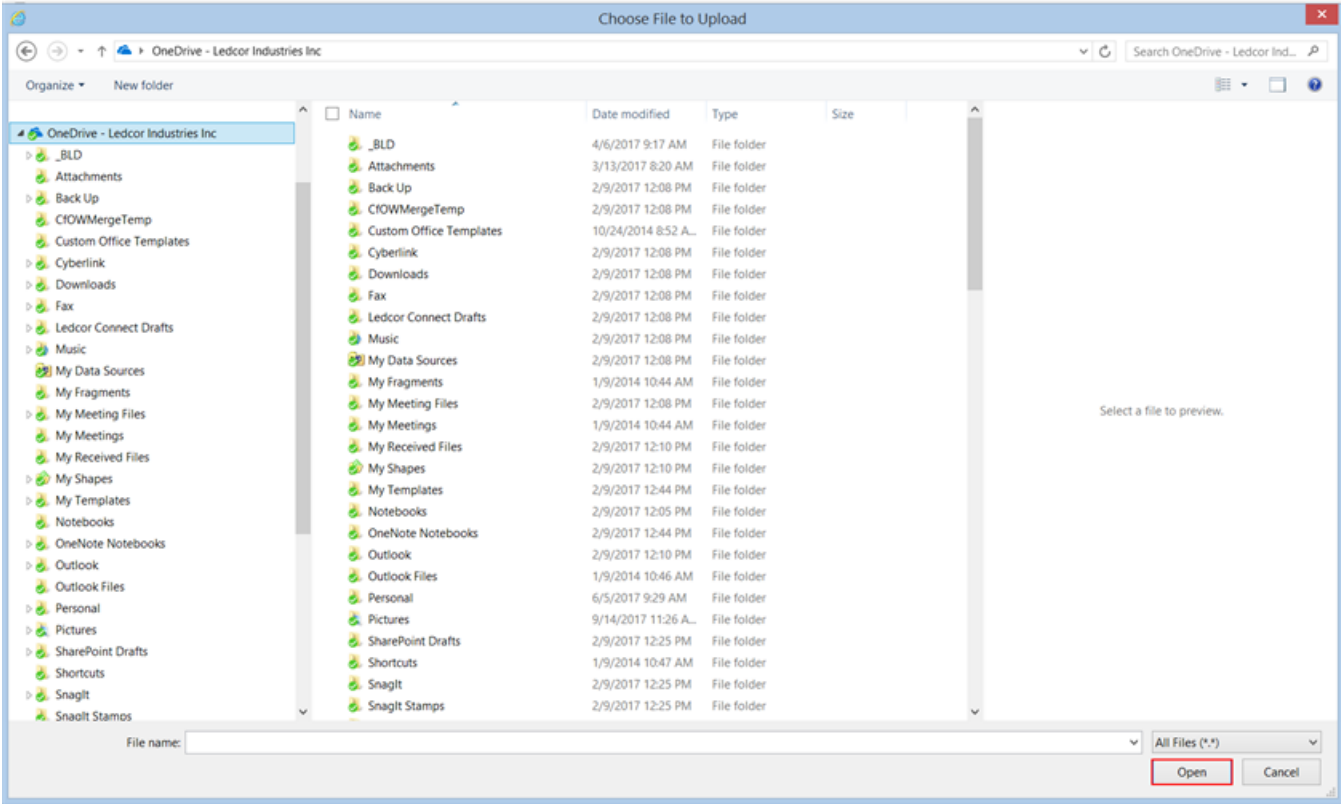
1. Navigate to the location to upload the files or folders.
2. Click **Upload**, and select **Files** or **Folder**.





For files, a **Choose File to Upload** window is displayed.

a. Select the file(s), and click **Open**.



For folders, a dialog box is displayed.

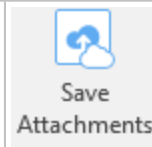
- a. Drag and drop your files to the area inside the dashed line, or click **Add files** and select your files.
- b. Click **Upload**.



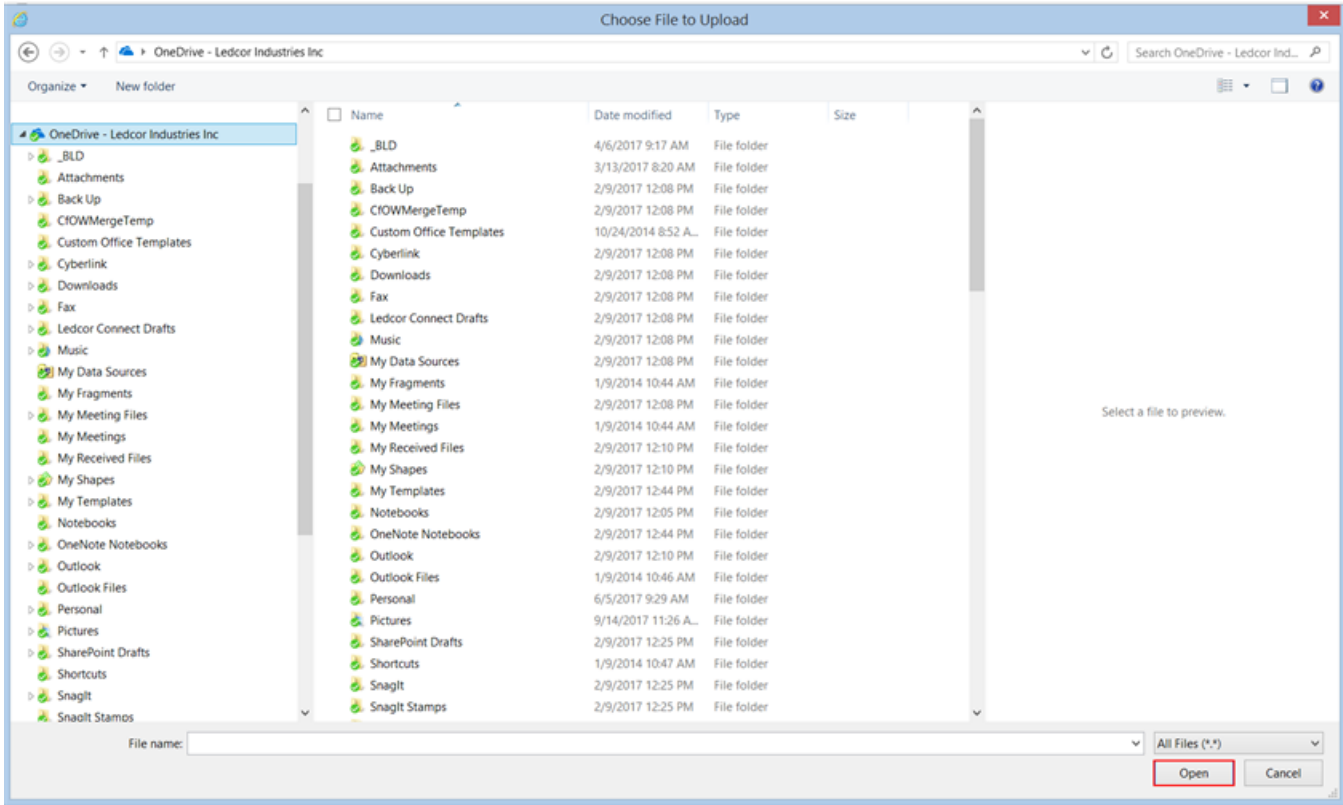
Option 3: Upload Directly from Outlook and other Office programs

(Box for Office required)

- 1. In Outlook, select an email message, or open an email message.
- 2. From the Home tab on the ribbon, click **Save Attachments**.



- 3. In the File Explorer, select the location and click **Open**.



Naming Files

Give files meaningful names. Make them descriptive and keep them simple - this will make searching for them in the future easier.

Use elements such as: Job number, type of file, division, and date.

Examples:

- **Project Quality Plan:** 1010500 PQP
- **Project Safety Plan:** 1010500 PSSP
- **Operational Review Checklist:** 1010500 ORC
- **Subcontracts:** 1010500-161000 App C
- **Application for Payment:** APP-4 SEP 17

Restrictions

Do not use special characters. Box Drive will not sync files that use restricted characters in the filename (these are restricted in Windows).

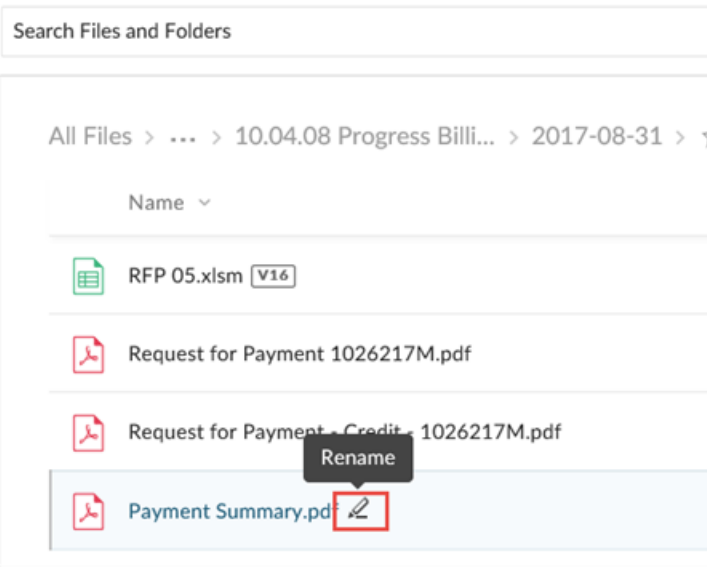
Keep file names as short as possible, and use abbreviations where possible. The full file path, including the file name, must be 255 characters or less in order to successfully sync using Box

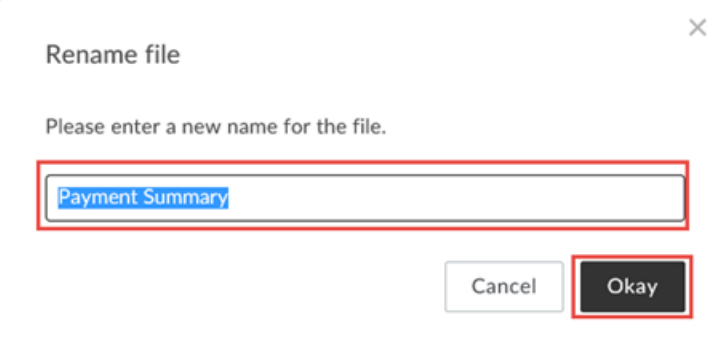
List of special characters:

- < (less than)
- > (greater than)
- : (colon)
- " (double quote)
- / (forward slash) \ (backslash)
- | (vertical bar or pipe)

Drive.	<ul style="list-style-type: none">• ? (question mark)• * (asterisk)
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Renaming Files or Folders

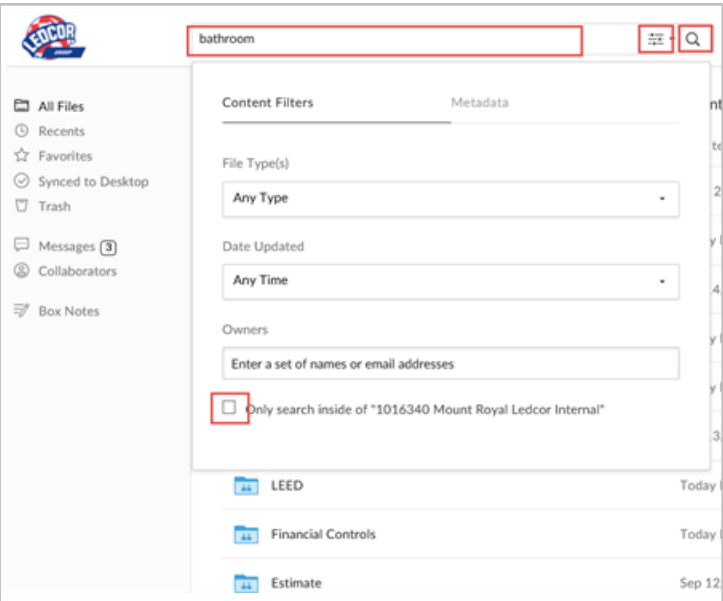
<ol style="list-style-type: none">1. Navigate to the file or folder.2. Hover over the file name until you see the Rename icon.	
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<ol style="list-style-type: none">3. Enter the new file or folder name and click Okay.	
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Finding Files & Search Filters

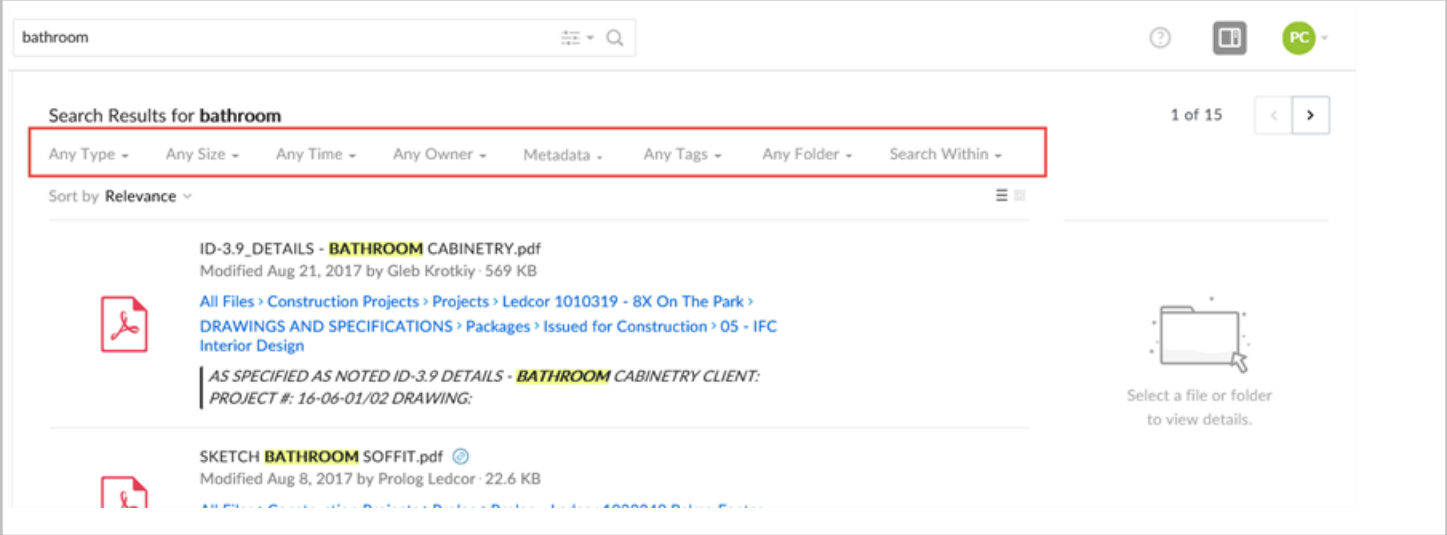
For the best search experience, navigate to your project folder before doing a search.

1. Enter a keyword in the Search field.
2. Click the Filter icon and check the **Only search inside of "[current folder]"** checkbox.
3. You can set additional filters:
 - **File Type(s)**
 - **Date Updated**
 - **Owners**
4. Press **Enter** or click the **Search** icon.
Search results are displayed.



Search Results may be further refined by using the advanced filter:

- **By Type:** Audio, Box Note, Document, Drawing, Folder, Image, PDF, Presentation, Spreadsheet, Video, 3D.
- **By Size:** 0-1 MB, 1-5MB, 5-25MB, 25-100MB, 100MB-1GB, 1GB+
- **By Time:** Any Time, Past Day, Past Week, Past Month, Past Year and Custom Range
- **By Owner:** Enter owner name
- **By Folder:** Navigate to desired folder
- **By Metadata (Do not use)**
- **By tags (Do not use)**
- **Search Within:** Everything, File and Folder Names, Comments, Descriptions, File Contents, Tags.



Opening Files














- [Option 1: From Box](#)
- [Option 2: From Box - Right-Click Menu](#)
- [Option 3: From Box Drive](#)
- [Option 4: From an Office Application](#)

Option 1: From Box

You can either open files directly from Box or download a copy for local use (note that downloaded files are not synced with Box).

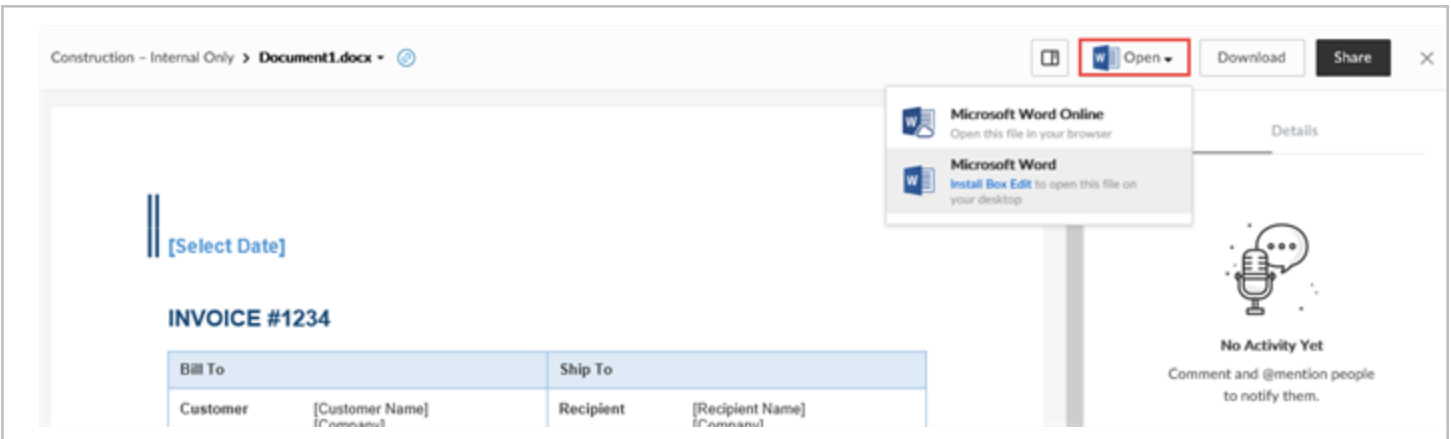
1. From the **All Files** page, navigate to the file you want to open.
2. Click the file name (the filename is underlined when you hover over it).

All Files > ☆ Construction - Internal Only ▾

Name	Updated ▾	Size	
 Vancouver	 Today by Maria Garz...	181 Files	
 Calgary	 Today by Conor Ste...	3,265 Files	
 US	Today by Erin Ryan	9,840 Files	
 Toronto	Today by Tony Earle	791 Files	
 Edmonton	Yesterday by Evan Zuk	17 Files	
 Regina	Sep 18, 2017 by Nol...	0 Files	
 <u>Document1.docx</u> 	 Sep 19, 2017 by Jae...	31 KB	 

A preview of the file is displayed.

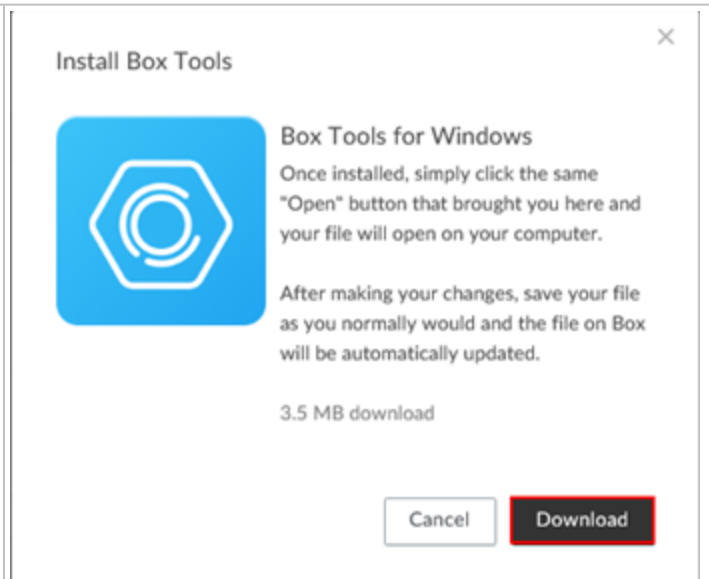
3. Click **Open**, and if you have more than one program that can open the file type, select the program you want to use (e.g. full desktop version of Microsoft Word or Microsoft Word Online).



4. If an **Install Box Tools** dialog is displayed, click **Download** and follow the prompts to install Box Edit. Click **Open** again.

The file opens in your local application.

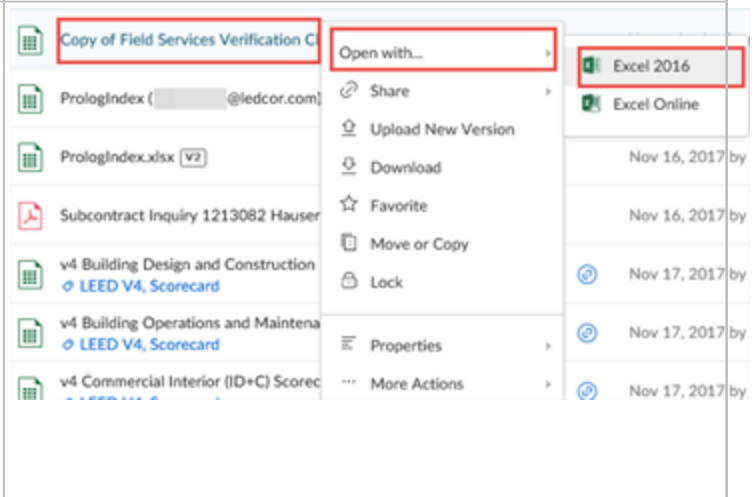
Note: If you click **Download** to download a copy of a file to your local computer, make sure to click ... (More Options) > **Upload New Version** when you upload the modified file to Box. See [Using Versioning](#).



Option 2: From Box - Right Click Menu

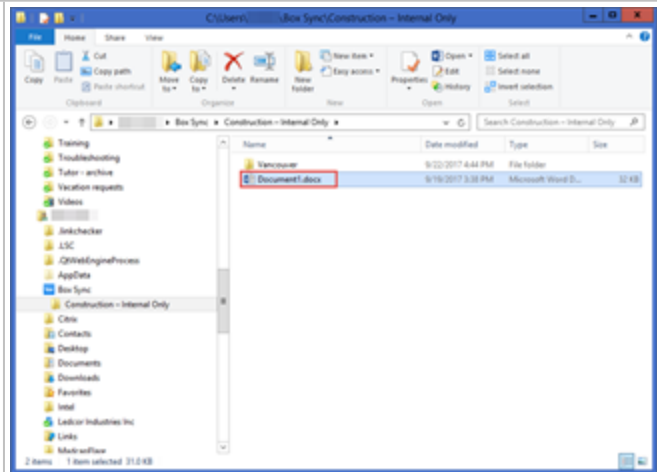
You can open files in Box using the right-click menu, allowing you to select the application to use.

1. From the **All Files** page, navigate to the file you want to open.
2. Right-click the file, hover over **Open with...**, then select the application you want to use.



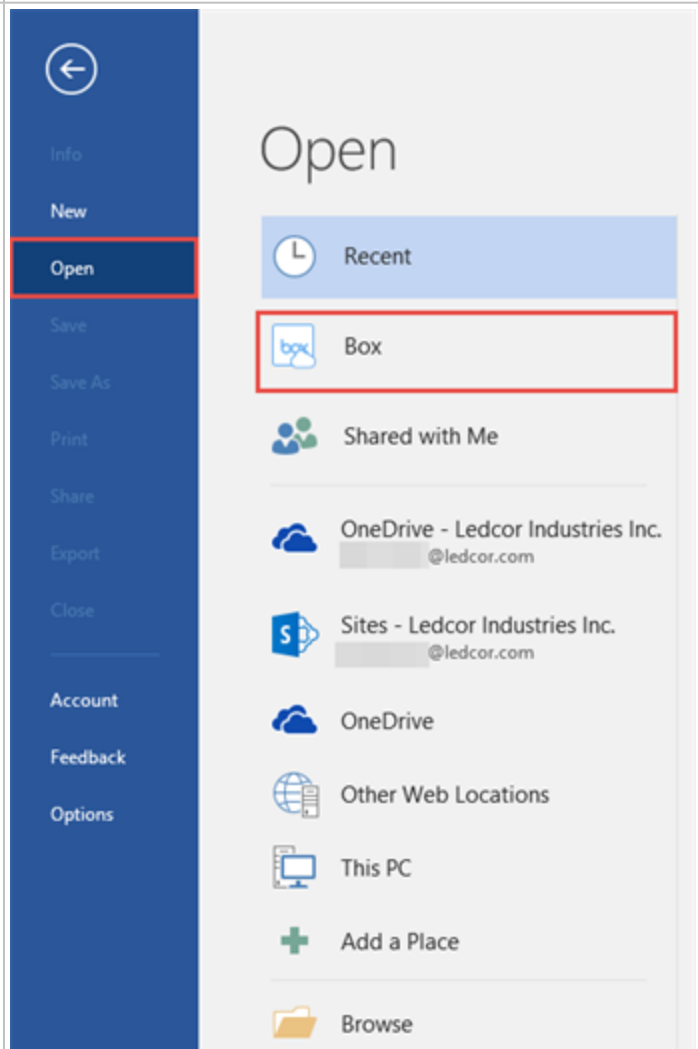
Option 3: From Box Drive

1. Open the Box Drive Folder.
2. Navigate to the file you want to open, then double-click to open it.

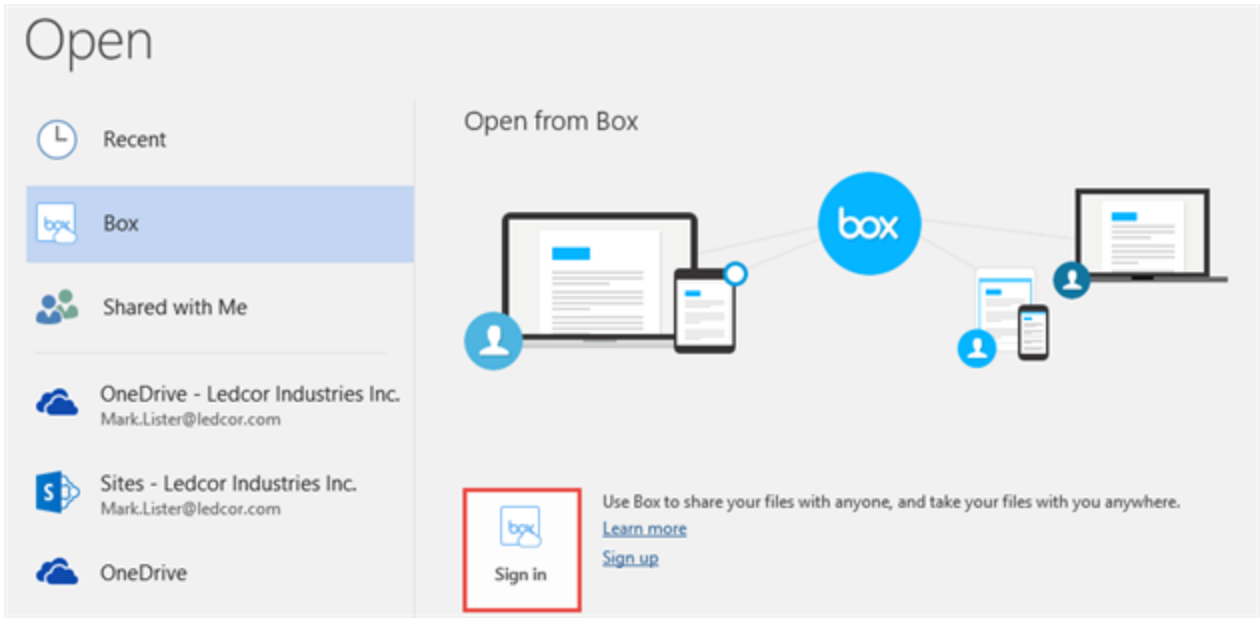


Option 4: From an Office Application

1. Click **File > Open**.
2. Select **Box**.



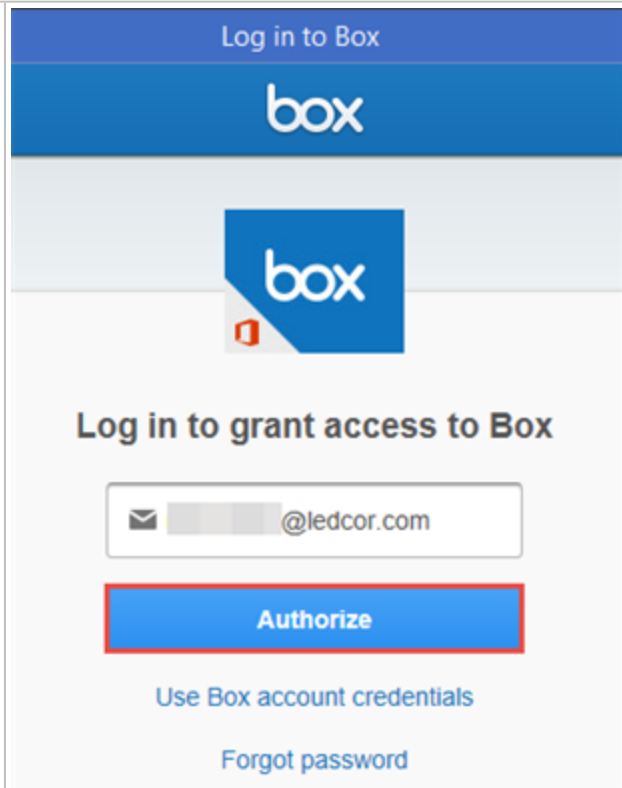
3. If this is your first time opening a file through an Office application, click **Sign in**.



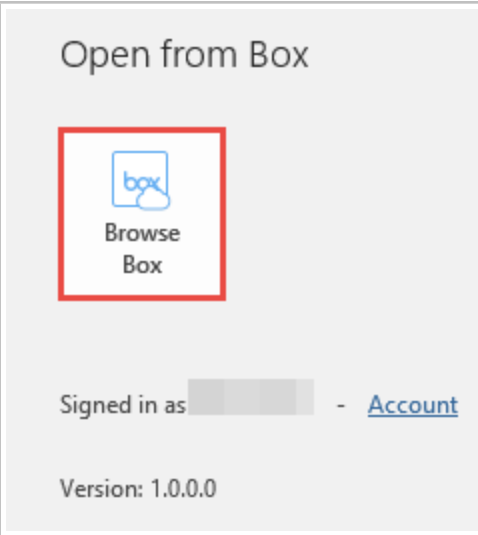
4. Click **Single Sign on**, then enter your email address and click **Authorize**.

5. On the Leducor Login page, enter your email address, and **Password** field, then click **Sign in**.

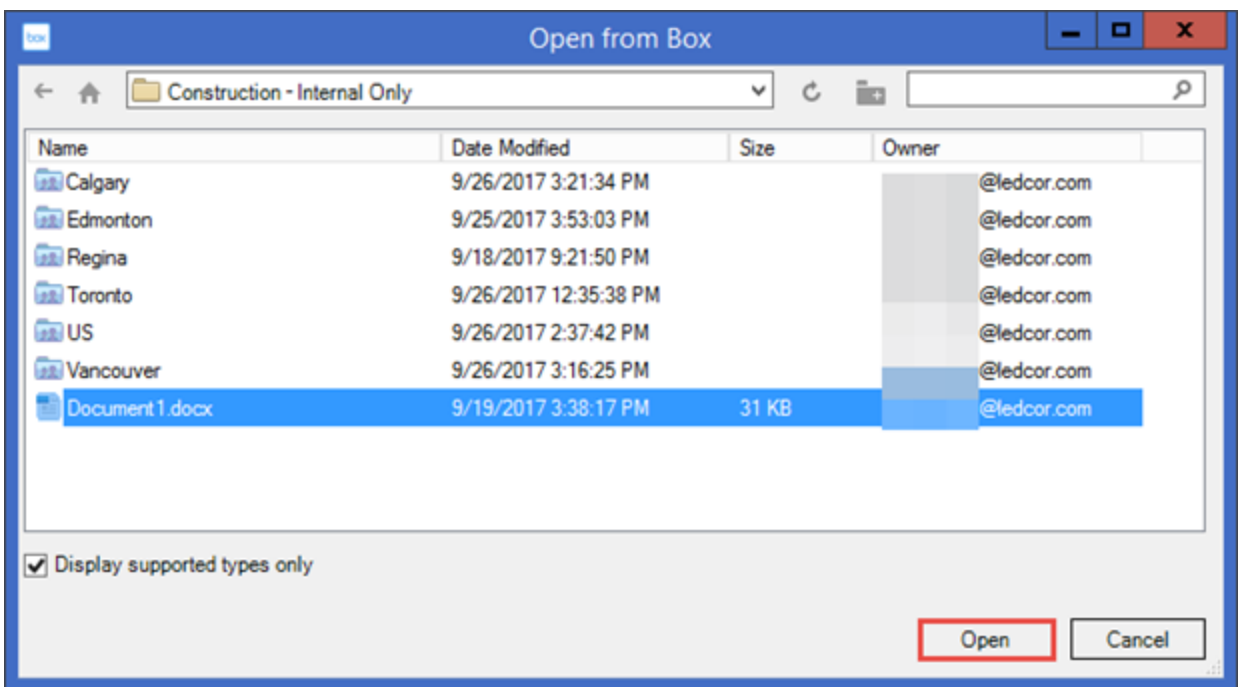
Note: You only need to sign in to Box the first time; subsequently you will be able to go directly to browsing files in Box.



6. Click **Browse Box**.



7. In the **Open from Box** dialog box, navigate to the file you want to open, select it, and click **Open**.



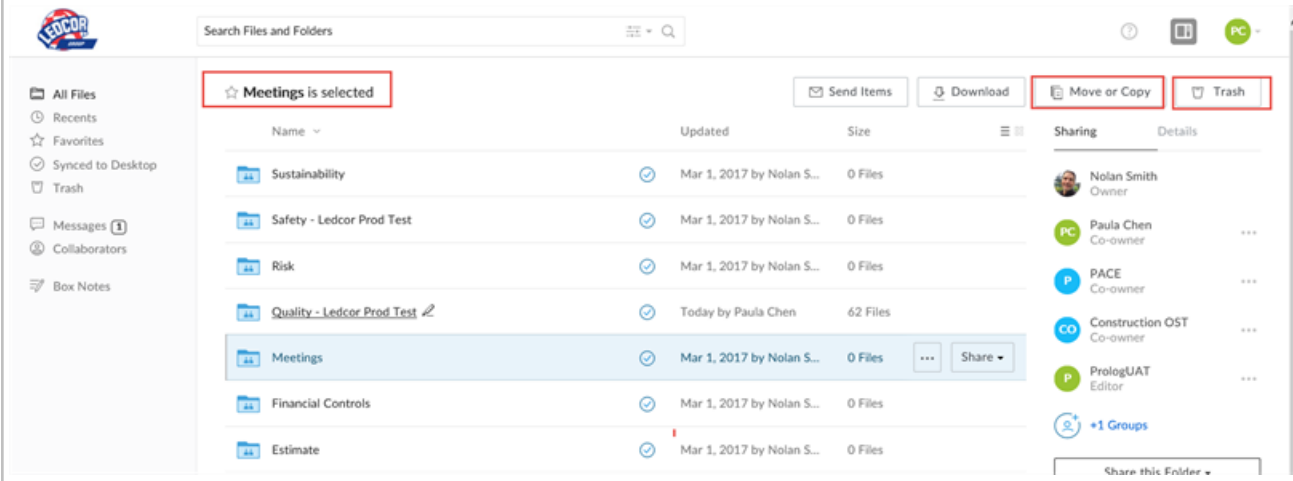
Moving, Copying, or Deleting Files

To Move or Copy files or folders:

1. Select the files or folders.
2. Click **Move** or **Copy**.

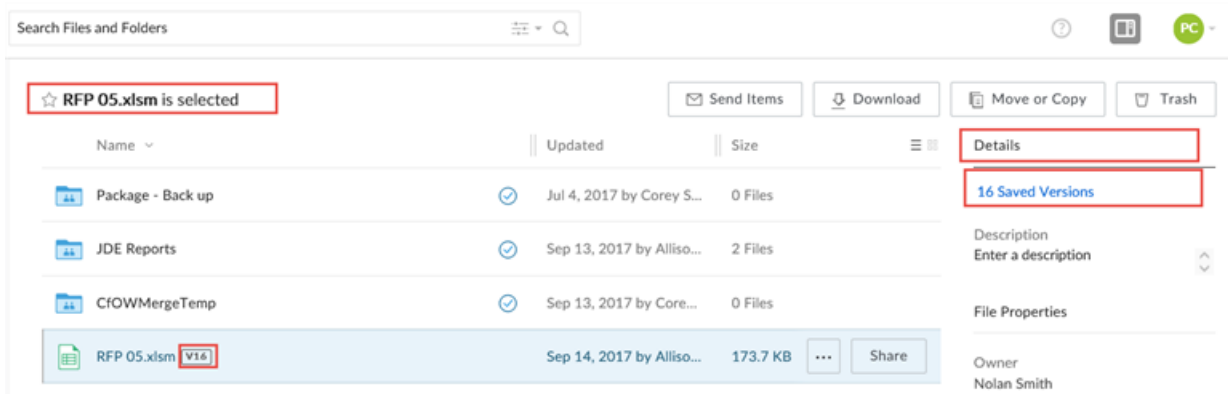
To Delete files or folders:

1. Select the files or folders.
2. Click **Trash**.



Using Versioning

Each time a file is saved, a new version of it is saved. The following example shows that the file titled RFP has 16 versions. This information is also displayed in the **Details** tab.



To save new versions of existing files, choose one of the following two methods:

Option 1: File Name

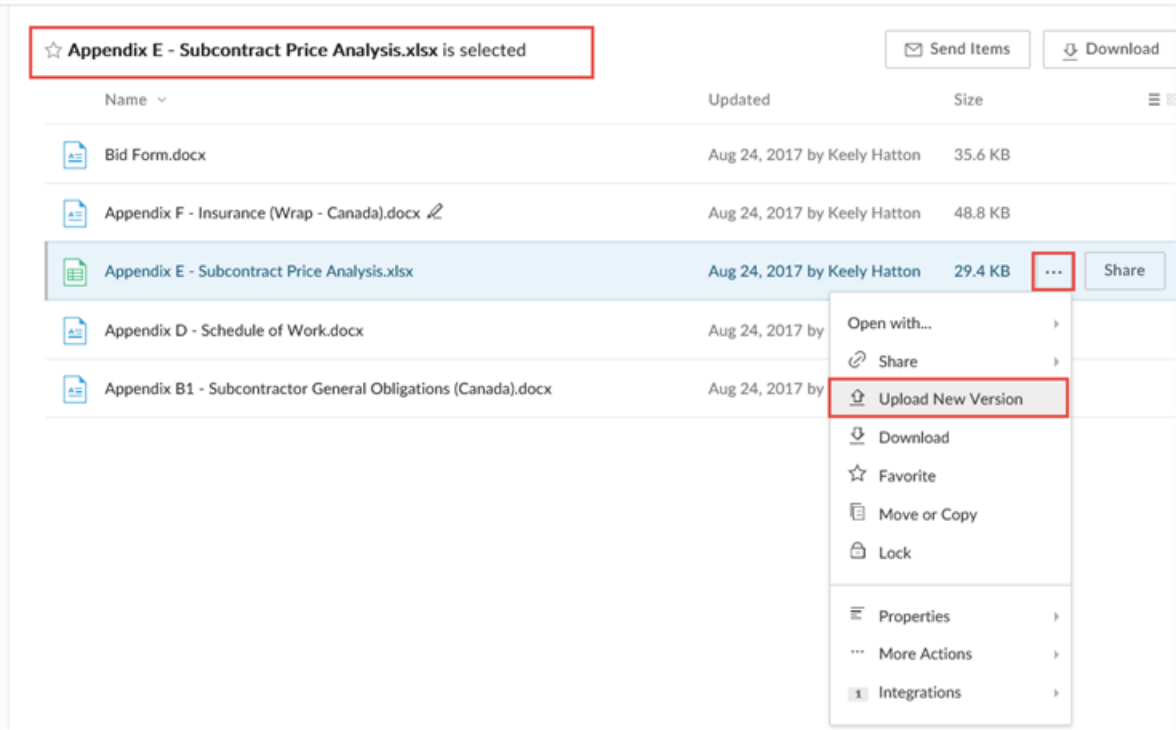
1. Save the files with the same name as the original file. This automatically creates a new version.

Option 2: Upload New Version

1. Select the file.
2. Click More Options (...).
3. Select **Upload New Version**.

4. Find the saved file and click **Open**.

Note: If the file name is different, the new version will have the new file name. Versions will be preserved with the old file name.

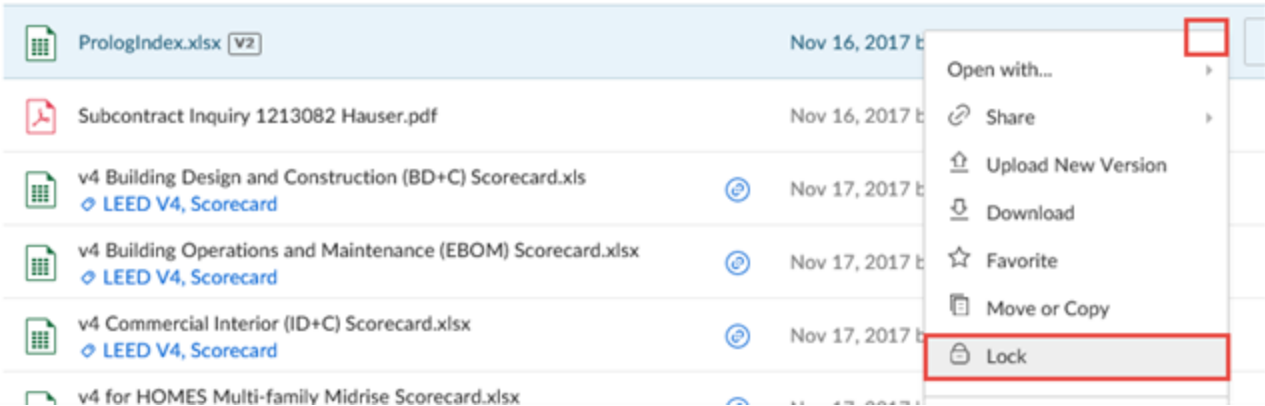


Locking and Unlocking Files

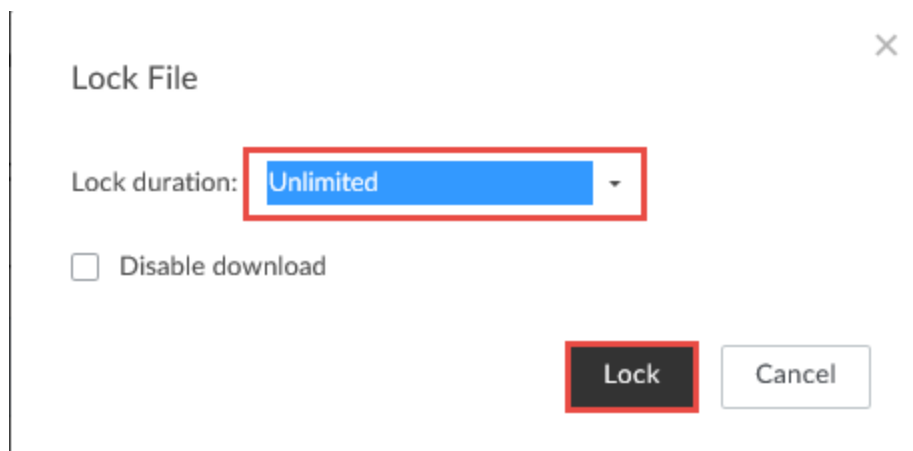
You can lock individual files on both the Box website and Box Drive to avoid conflicts when multiple users want to work on a particular file.

Locking a file in Box

1. Click **More Options (...)**, then select **Lock**.



The **Lock File** dialog box is displayed.



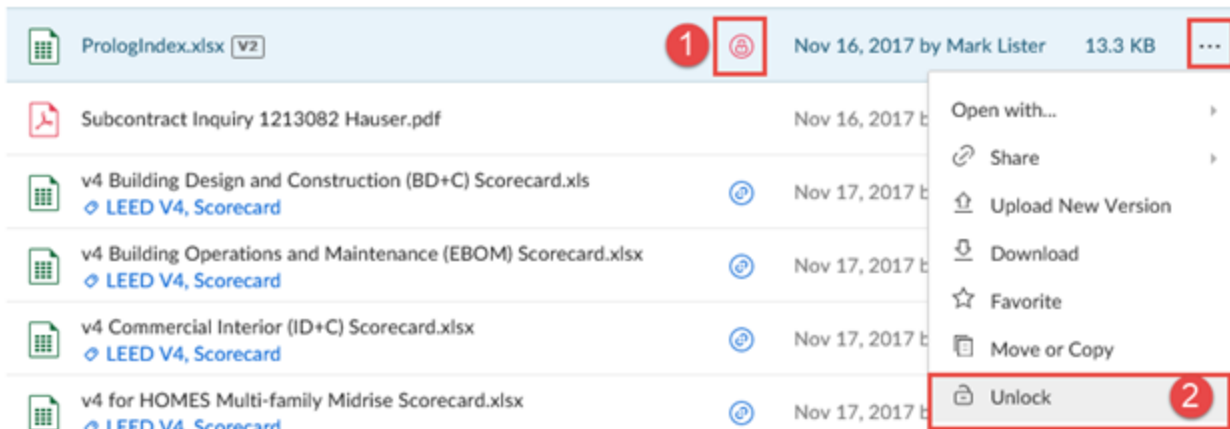
2. From the **Lock duration** drop-down, select the length of time to lock the file (generally, the length of time you plan to be working on the file).
3. (Optional) To prevent others from downloading a copy of the file being locked, select **Disable download**.
4. Click **Lock**.

A "File successfully locked" message is briefly displayed, and a red lock icon is displayed next to the file. Hover over the lock icon to see who has locked the file - contact the person to request the file to be unlocked.



Unlocking a File in Box

1. Do one of the following:
 - (1) Click the red lock icon, then in the **Unlock File** dialog box, click **Unlock**, OR
 - (2) Click **More Options (...)**, then select **Unlock**.

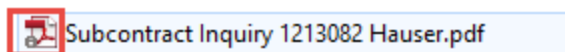


A "File successfully unlocked" message is briefly displayed, and the red lock icon is removed.

Locking a File in Box Drive

1. In your Box Drive folder, right click the file you want to lock and select **Lock File**.

A notification appears in your system tray briefly, and the file icon is displayed with a gray lock icon.



Unlocking a File in Box Drive

In your Box Drive folder, right click the file you want to unlock and select **Unlock File**.

A notification appears in your system tray briefly, and gray lock icon is removed from the file icon.

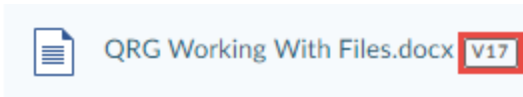
Viewing Version History

Box maintains a history of up to 100 versions for each file. You can view previous versions and reinstate any previous version as the current version of a file if required. Comments entered directly in Box notes by collaborators are part of the file and are always available.

To view version history, choose one of the three following methods:

Option 1: Version icon

1. Click the version icon next to the file name.



Option 2: Details pane

1. Select the file.
The **Details** tab displays the number of Saved Versions.
2. Click the hyperlink: (#) **Saved Versions** to view the **Version History**.

Option 3: More Options menu (...)

1. Select the file.
2. Click More options (...) > **Properties** > **Version History**.

You can do any of the following for a version of a document:

- **Download** - Download a copy
- **Make Current** - Make this the current version
- **Remove** - Delete this version

