


WORKING WITH FILES

Access files from anywhere: Web app, Box Sync and mobile app (iOS).
The steps vary between platforms.



TIP! Use [Box Capture](#) to take photos using your mobile device and save them directly to Box.

VIEW

Web app: Navigate to folder location and click the file to preview the file.
You can then **Open, Download, Share** or **Close** the file.

Box Sync: Open Box Sync on your desktop, navigate to folder location and click the file to open (this is the same experience as opening any file in File Explorer in Windows).

SAVE

Web app and Box Sync: Drag & Drop
Navigate to folder location where you would like to save the file; drag & drop file from your local drive to the Box folder.

Web app: Upload button (upper right)

1. Navigate to the applicable folder and click **Upload**
2. In the pop up dialog box, click **Add files** or drag & drop files in designated box
3. Click **Upload**

EDIT

Web app: Navigate to folder location and click the file to preview the file. You can edit using Office 365 – two options:

- online without downloading, using Office Online apps (limited functionality).
- in native MS Office programs (full functionality)- make edits and save.

Box Sync: Open Box Sync on your desktop, navigate to folder location and click the file to open. Make edits and save.

SEARCH

Web app:

1. Navigate to the project folder and enter keywords in the **Search** field at the top of the screen
2. Apply filter to **Only search inside of “current folder”**.
3. Other available filters: file type, size, date updated and owner

Box Sync: Open Box Sync on your desktop, navigate to folder location and use File Explorer (Windows) search functionality.

ADDITIONAL RESOURCES:

Procedures & Other Reference Materials

- [OM 07.02 Standard Filing Procedures](#)
- [Project File Index](#)
- [QRG – Getting Started](#)
- [QRG – Sharing Links and Collaborating](#)

User Guides

- [Working with Files](#)
- [Adding and Removing Folders in Box Sync](#)
- [Uploading Files via Email](#)

Training

- [LEARN: Box Overview](#)