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Logging into U-M Box through Single Sign-On

To access your files on Box, go to https://umich.app.box.com/login. You will see a prompt asking you to confirm your affiliation with the University of Michigan:

![Part of University of Michigan?](image)

Clicking the CONTINUE button will redirect your browser to the standard U-M weblogin page. After you login, you will be taken to the ALL FILES view of your U-M Box account.

Navigation tools

All Files drop-down

![All Files](image)

Clicking the downward pointing arrow to the right of ALL FILES lets you scroll through the entire list of folders, allowing you jump to folders before or after those showing on the current page. Note: This only works at the ALL Files level in the folder hierarchy. Subfolder levels will display an abbreviated menu of actions you can take on the folder.

Using breadcrumb links

If a folder has many sublevels, you can use its “breadcrumb” links (pictured below), to quickly navigate from deep within the hierarchy to a higher level:

![Breadcrumb Links](image)

Note: If you click on a file or folder in the list, the breadcrumb links are replaced with a notice showing the file or folder name, to tell you that it has been selected. Clicking elsewhere to deselect the file or folder will redisplay the breadcrumb links.
Sorting by column headings
You can sort the list of files and folders by their names, the date they were last updated, or file sizes. Clicking the appropriate column changes the sort between ascending and descending order.

Locating files
There are several ways to make finding specific files and folders easier than scrolling and paging through all of your folders and files in U-M Box. You can designate those you work with frequently as FAVORITES, or click RECENTS in the shortcut menu to the left of the file and folder list. You can also tag files and folders with keywords to make searching easier.

Favorites
Using the Favorites feature in U-M Box gives you a quick and easy way to access files and folders that might otherwise be hard to find. Please note that U-M Box Favorites are separate from browser favorites, Windows Explorer favorites, and Mac Finder favorites.

- Move your mouse pointer over the file or folder. You can either right click while hovering over an item in the list, or click the ellipsis (…) that appears toward the right end of the listing:

- Choose the FAVORITE menu item to store a shortcut to the file or folder in your U-M Box Favorites. The interface will briefly display a message confirming this action.

(continue to next page)
Accessing files and folders marked as U-M Box favorites

U-M Box shows a list of the files and folders you have marked as favorites below the FAVORITES icon in the menu at the left. Note: You may need to use your browser’s zoom out function to see items that otherwise appear to be hidden at the bottom of the list.

Clicking on a folder in this menu list will open the folder. Clicking on a file in this menu list will display a preview of the file. You can also view your favorites in an expanded list, with full access to the usual file and folder functions, by clicking the Favorites icon:

![Favorites Icon](image)

*Note: U-M Box favorites are listed in alphabetical order, with files and folders mixed together in the list.*

You can also click the FAVORITES link in the left sidebar to view the expanded list of files and folders you have marked as U-M Box favorites.

Removing a file or folder from your U-M Box favorites

- You can remove a favorite from the menu list below FAVORITES by hovering over it, and clicking the X symbol at the right end of the file or folder name. *Note: This does not remove the actual file, only the shortcut to it in FAVORITES.*
- To remove a favorite from the expanded list view:
  - Click the FAVORITES link in the left sidebar.
  - Move your mouse pointer over the file or folder. You can either right click while hovering over the item in the list, or click the ellipsis (…) that appears toward the right end of the listing:

  ![File Details](image)

- Choose REMOVE AS FAVORITE in the drop-down menu. The interface displays a brief message confirming removal of the item’s shortcut from your U-M Box Favorites. (see screen capture on the next page):
Recents
If you have developed a long list of FAVORITES, the RECENTS menu item provides an alternative for quick access to your twenty most recently used files, sorted in reverse chronological order.

- Click on the file name in the list to preview the file.
- Alternatively, you can go to the folder in which the file resides by clicking the folder link immediately below the file name.
  
  Note: The RECENTS list does not provide access to the ellipsis or right-click action menus.

Tagging
Adding tags
Tagging a file or folder with relevant keywords can make it easier to find later when searching. You can tag multiple files or folders with the same set of tags, at the same time. Note: Tags are not personal; anyone with permissions to a file can see its tags, regardless of who added them.

To add tags:

- Click the desired item(s) in the list.
- A menu of buttons displays for performing common tasks. Click the ADD TAGS button.
- A dialog will pop up, with a box for entering the tags. Separate each keyword or phrase with a comma, as shown below:
Tags appear in blue below the file or folder name in the list, preceded by a tag symbol:

- **GrandmasMolassesCookies.pdf**
  - molasses cookies, recipe, grandma burnett

### Editing tags

The steps to edit tags are very similar to adding them.

- Click the desired item(s) in the list.
- A menu of buttons displays for performing common tasks. Click the ADD TAGS button.

  ![Add Tags](image)

- The Add or Edit Tags dialog will display. Existing tags will be reverse highlighted in black with white text:

  ![Add or Edit Tags](image)

  You are editing tags for "GrandmasMolassesCookies.pdf". Users that are collaborated to this item will be able to see the tags.

  Tags

  - molasses cookies ×
  - recipe ×
  - grandma burnett ×

- To delete a tag, click the X at the right end of the tag.
- Click SAVE when finished.

### Searching

**Basic searches in U-M Box**

When you begin typing in the search box (located to the right of the box logo), a short list of some matching files drops down, with an option at the bottom to SEE ALL RESULTS.

![Search](image)
Clicking on a file in the list will open a preview of the file. If you choose to view all results, U-M Box provides additional filtering options above the list of found files:

Any Type - Any Size - Any Time - Any Owner - Metadata - Any Tags - Any Folder - Search Within

Sort by Relevance

Commonly used options include filtering results further by:

- File type
- Files used within the past day, week, month, or year
- Tags
- Files within a specific folder
- Limiting results solely to matches on file or folder names, comments, descriptions, contents, or tags.

Filter results are cumulative. For example, you could choose to limit the results by file type, then further restrict those results by choosing a time period for when the file was last updated.

*Note: To use a different filtering scheme, you must set any filters already applied back to showing “any” match for those filter types. There is no means to simultaneously reset all the cumulative filters to their defaults.*

**Exact Match Searches**

U-M Box supports searches limited to exact matches for phrases enclosed in quotation marks. Bear in mind that the results may include matches not only for document titles, but also for comments, descriptions, contents, or tags.

*(See the next page for information on the Advanced Search tool)*
Advanced search dialog
The advanced search dialog lets you get a head start on filtering by file type, the time period in which a file was updated, and/or the email addresses of file owners – all in addition to the search terms you enter. You can also mark a checkbox in the lower left corner, to limit the search to the current folder. Note: This checkbox is not shown when you are at the All Files level.

Note: After you execute a search, the columns for sorting are no longer displayed. You will instead see Sort by Relevance as the default option below the additional filter choices. You can change this to sort by Name or Updated.
Storage and file size limitations

- Departmental and current employee accounts have unlimited storage space for their business-related files on U-M Box.
- The maximum file size is 15 GB

Unsupported characters in file and folder names

There are a number of special characters that should not be used in file and folder names on U-M Box. Any file or folder name containing these characters should also be renamed before uploading to U-M Box. These include:

- < (less than)
- > (greater than)
- : (colon)
- " (double quote)
- / (forward slash)
- \ (backslash)
- | (vertical bar or pipe)
- ? (question mark)
- * (asterisk)
- File or folder names ending with a period or a space
- File or folder names that begin with a space

Use Google Drive apps for collaborative, simultaneous document editing

Collaborative, simultaneous editing by multiple persons in U-M Box is limited to Box Notes. If you have a need for this type of collaboration when working with your documents, we recommend using the apps available in Google Drive for that purpose.

Things you can do with your files and folders through the web interface

Adding a new folder

Observe the breadcrumb links at the top of the page before adding a new folder, to be sure you are placing the new folder in the right location within the hierarchy.

- Click the New button
- Select Folder from the drop-down menu
• Enter a name for the folder
• If desired, add collaborators under INVITE ADDITIONAL PEOPLE.
  o If the collaborator is part of the University, begin by typing their uniqname. A list of possible matches displays.
  o Select the matching item from the list.
  o For external parties, you will need to type the full email address.
  o Choose an appropriate role for the collaborator from the PERMISSION drop-down menu. If you aren’t sure which level to use, click the icon to LEARN MORE:

  ![Learn More]

  o This will display a table showing the actions permitted for each role.
• Click the CREATE button.
• You will see a message confirming that the folder has been created.

Creating new Microsoft Office documents

Note: The Box Tools app is required for creating Microsoft Office documents directly from U-M Box. If you do not see the options for creating a new document in Excel, PowerPoint, or Word when clicking the New button, please submit a [General InfoTech Work Request](#) to have the Box Tools app installed.

• Click the New button.

• Choose the desired document type from the drop-down menu.
• Enter a name for the document.
• Click the Create button. A message displays to advise that the application is launching.
• If desired, click the link to lock the file:
• Note: The prompt to lock the document may be obscured if the associated Microsoft Office application opens quickly. If this happens, minimize the Microsoft Office application. This should allow you to return to the prompt in order to lock the file.
• Clicking the link to lock the file displays the LOCK FILE dialog. Choose an acceptable time limit for the file to be locked from the LOCK DURATION drop-down. Note: We advise against accepting the default lock duration of UNLIMITED. We also advise that you mark the checkbox to disable downloading.

Recommended: Review the section on saving a document.

Editing existing Microsoft Office documents
• Locate the file you wish to edit. (See the sections on locating and searching for files).
• Observe whether the file is presently locked. If you see a red lock icon associated with the item, moving your mouse pointer to hover it will display a box that shows who has the file locked, and when the lock will expire.

Consult with the person who has the file locked, to determine the best course of action.
• If the file is not locked, we recommend that you lock it before commencing with editing:
  o Move your mouse pointer over the item in the list, and right-click (or click the ellipsis toward the right end of the item) to see the action menu.
  o Click the Lock item in the menu:
Clicking the link to lock the file displays the Lock File dialog. Choose an acceptable time limit for the file to be locked from the Lock duration drop-down. **Note: We advise against accepting the default lock duration of Unlimited. We also advise marking the checkbox to disable downloading.**

- Lock duration: Unlimited
- Disable download

Click the LOCK button to complete the locking action.

- Click the file name in the list. A preview page opens, allowing you to review the document to be sure it is the one you really wish to edit.
- U-M Box also displays a notification on the preview page if the file has been locked by someone else, with the OPEN button grayed out:

If the file is not locked, you will be able to click the OPEN button on the preview page, which displays options for opening the document in a drop-down menu:

- **Note:** The Box Tools app is required for editing Microsoft Office documents directly from U-M Box. If you do not see the options for editing a document in Excel, PowerPoint, or Word when opening a file, please submit a General InfoTech Work Request to have the Box Tools app installed.
- The items you see in the drop-down may vary, depending on the type of file being opened and whether there are integrations for other compatible applications.
- Click the menu item to open the document in the relevant Microsoft Office application.
Saving Microsoft Office documents created or edited using Box Tools

- When you have finished working with the document, be sure to save it. Upon doing so, you may see a brief message confirming that it is being saved to Box.
- When you close the Microsoft Office application, you will be returned to a page showing a preview of the file. You may also see the following message, near the top of the page:

  ![A new version of this file is available. Would you like to refresh the page?](image)

- You would only need to refresh the page if you intend to review the document from this preview page.
- Remember to unlock the file when finished. Look for the lock icon near the top of the preview page:

  ![Box_GoogleDrive > BoxTraining.docx](image)

- Click the lock icon to unlock the file. The UNLOCK FILE dialog will appear:

  ![Unlock File](image)

  - Click the UNLOCK button
  - You may see a brief confirmation message that the file has been unlocked.
  - You can return to the document’s parent folder via the breadcrumb links near the top of the page.

File versioning

U-M Box automatically preserves the earlier versions of a file when a new one is uploaded, or when the file is edited. If there are previous versions of a file, an icon is shown after the title, indicating the number of the current version:

![BoxTraining.docx V26](image)

*(this space is purposely left blank – please continue to the next page)*
Clicking the version icon displays the VERSION HISTORY:

Things to notice within the VERSION HISTORY dialog box:

- Below the file name for each version is information telling you when it was created and who created it.
- The current version displays the current icon after the file name, and has a link for downloading. The current version cannot be removed via the version history dialog, but it can be replaced by an earlier version using that version’s MAKE CURRENT link.
- Each earlier version of a file likewise has a link for downloading, as well as these additional links:
  - MAKE CURRENT – Clicking this link creates a copy of the desired version, restoring it as the current version while preserving the original. In the history it will show the date it was restored, the version from which it was restored, and the name of the person who took that action.
  - REMOVE – Removing a version marks it for permanent deletion in 30 days. It can still be restored within this 30 day buffer.

Note: While the image above demonstrates what you would see if a version were removed from the version history, there is normally no need to do this. U-M Box allows up to 100 entries in the version history.
Renaming files or folders
To rename a file or folder:

- Move your mouse pointer to hover near the file or folder name. A pencil icon will appear:

- Clicking the pencil icon will open the RENAME dialog:

  Rename file

  Please enter a new name for the file.

  Test File Db

  [Cancel] [Okay]

- Enter the new file or folder name.
- Click OKAY to accept the change.

  Note: Renaming a file does not create a new version of the file. The new name simply replaces the old name in the VERSION HISTORY.

Uploading files
You can upload a single file or multiple files to U-M Box. Note: This document addresses uploading folders in a later section, due to differences between the two operations.

- Begin by navigating to the folder where the files to be uploaded will be stored on U-M Box.
- Click the Upload button:

- Choose FILES from the drop-down menu.
- Your file explorer program will open. Locate the file(s) to be uploaded.
  - You can select multiple contiguous files in the list by clicking the first desired file, holding down the SHIFT key, and clicking the last desired file to automatically also select all of the files between them in the list.
  - To select non-adjacent files in the list, hold down the CTRL key while clicking the individual files (or on a Mac, by holding the Command key (⌘) while clicking).

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When all of the desired files have been selected, click the OPEN button to upload them. You will see a scroll bar at the bottom of the screen to indicate the progress of the upload, and a confirmation message at the top of the screen when uploading has completed.

Note: You can also upload items by dragging them from your computer directly into the U-M Box web interface. However, you cannot drag item from the U-M Box web interface to your computer.

Uploading folders

You can upload a single folder and its entire contents, including its subfolders and their contents, using the U-M Box web interface.

- Begin by navigating to the location in U-M Box where the uploaded folder should be placed.
- Click the UPLOAD button, and select FOLDER from the drop-down menu.

Note: You can drag multiple items from your computer directly into the U-M Box web interface. However, you cannot drag items from the U-M Box web interface to your computer.

Replacing an existing file by uploading a new version

U-M Box includes an option for replacing an existing file with a new version. The original file and replacement file can have different names.

- Move your mouse pointer over the file or folder. You can either right click while hovering over the item in the list, or click the ellipsis (...) that appears toward the right end of the listing:

    ![Options Menu]

- Choose UPLOAD NEW VERSION from the action menu that displays:
The VERSION HISTORY will be updated to show the replacement of the previous version of the file. The example below shows what you would see if you replaced a file with one having a different name:

Version History

![Version History](image)

Downloading files and folders

You can download single or multiple files and folders in U-M Box:

- Click the desired item(s) in the list.
- A menu of buttons displays for performing common tasks. Click the DOWNLOAD button.

- The item(s) will be downloaded. Note that a folder will be downloaded with its contents as a .zip file. If you download multiple items, they will also be placed in a .zip file.
- Note: There is no click & drag option for downloading files from the U-M Box web interface to your computer.

Moving and copying files

You can move or copy single files or folders, or multiple files or folders at the same time (including subfolders and their contents). To move items within U-M Box:

- Click the desired item(s), while avoiding the link associated with the file name(s).
- A menu of buttons displays for performing common tasks. Click the MOVE OR COPY button.

- The MOVE OR COPY SELECTED ITEMS dialog opens. Navigate to the desired location within the hierarchy of folders.
- Click MOVE to transfer the files to the new location, or COPY to place a separate copy of the file in the chosen location.
Deleting files and folders

Please take note: Deleted items will disappear from your Trash after 30 days. After 30 days, recovering deleted items will require making a request to U-M Box administrators within the next 7 days, or having them submit a request for recovery to administrators at box within 14 days thereafter.

To delete files and folders:

- Click the item(s) you wish to delete
  - You can select multiple contiguous files in the list by clicking the first desired file, holding down the SHIFT key, and clicking the last desired file to automatically also select all of the files between them in the list.
  - To select non-adjacent files in the list, hold down the CTRL key while clicking the individual files (or by holding the Command key (⌘) while clicking on a Mac).
- A menu of buttons displays for performing common tasks. Click the TRASH button.
- You will be prompted to affirm your desire to delete the item. Click the OKAY button.
- A message displays confirming removal of the item to the trash container.

The trash container

Files moved to the trash container disappear 30 days thereafter. The list of files shows the file name, the date a file was deleted and by whom, and the date it will be permanently deleted from the trash container. The list can be sorted by the NAME or UPDATED columns.

Restoring files and folders

To restore a single file or folder (including its subfolders and their contents), or multiple files or folders at the same time:

- Click the item(s) you wish to restore.
  - You can select multiple contiguous files in the list by clicking the first desired file, holding down the SHIFT key, and clicking the last desired file to automatically also select all of the files between them in the list.
  - To select non-adjacent files in the list, hold down the CTRL key while clicking the individual files (or by holding the Command key (⌘) while clicking on a Mac).
- Click the RESTORE button:
  - You will be prompted to affirm your desire to restore the file. Click OKAY.
  - A message briefly displays to confirm the file was restored.

Note: We advise against emptying the trash container. Deleted items disappear from it automatically after 30 days. There is a relatively short time limit on recovering permanently deleted files and folders, and doing so requires the intervention of administrators outside the Law School.
Emailing files stored on U-M Box as attachments
You will need to download files from U-M Box in order to attach them to email. Note: Email should not be used to send sensitive data.

If you have a need to share files with persons not already permitted to a folder on U-M Box, please contact Law IT by submitting a General Infotech work request.

Commenting on documents
You can add a comment to a document, and assign it as a task via its preview screen.

- Click on the file name to open the preview screen
- At the lower left you will see a box for adding a comment:

  ![Comment box](image)

  - When you click in the box, it expands to show the optional Add Task checkbox, and buttons to cancel or post the comment.

  ![Expanded comment box](image)

  - Type any comments in box, and click the POST button to save them.

You can add a notification regarding your comment by using the @mention feature:

- Type the @ symbol, and begin typing the first characters of the collaborators name or uniqname.
- A list will display of possible matches. Click the desired match to add it as an @mention.

The person(s) you have added using the @mention feature will receive an email notification with your comment, and it will also appear in their notifications on U-M Box.

The comment will show in the activity pane on the right side of the document’s preview screen. Here is an example of a comment:

![Comment example](image)

To delete a comment, hover over it to display the trash icon. When you click the trash icon, you will be prompted to confirm your desire to delete it. Note: There is no option to edit a comment.
Creating document-related tasks

To turn a comment on a document into a task:

- Click the ADD TASK checkbox.
- Begin typing the name or uniqname of the assignee in the ASSIGNEES box. (You do not need to use the @ sign in this box.)
- A list will display of possible matches. Click the desired match to assign them the task.
- If the task will have a due date, you can click in the optional DUE DATE box to display a calendar control for selecting the date.

Assigning a task to someone will send them an email with your comment, and it will appear in their notifications on U-M Box.

The assigned task will show in the Activity pane on the right side of the document’s preview screen. Options to edit or delete the task display when you hover over it.

The options for completing a task are to mark it as Complete, or to decline it.

Here is an example of how an assignee will see the task in their U-M Box Notifications:

![Example of task notification]

@Stephen G Fuller Do this.

Complete  Decline