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Box New User Training Script

Welcome & Introduction

Welcome & Introduction

Presenter: Hello and welcome to the Box New user training. Thank you for joining us for today's webinar. My name is Leah Diggs Gnatiko and I'm with the Division of Data, Assessment, and Research.

Presentation

Presenter:

By the end of this training, it is my goal that you are able to:

- 1) Know how to receive access to Box
- 2) Navigate within the Box application
- 3) Upload files to send to OSSE
- 4) Delete files that were sent to OSSE
- 5) Download files from OSSE
- 6) Know how to reach out if you have questions or need technical assistance; and
- 7) Find additional resources on OSSE's website regarding Box

Slide #	Title	Talking Points
2.	Background	<p>OSSE is transitioning from its previous secure upload site to the use of Box.</p> <p>As of February 1st, users will no longer be able to access the secure upload site. Communications were sent to existing users informing them of the change and requesting all documents to be downloaded from the secure upload site by January 31st.</p>
3.	What is Box?	<p>Box is the new secure data transfer system for the Office of the State Superintendent of Education (OSSE). This system functions as a tool to support secure data sharing between OSSE and external users.</p> <p>Please note the following:</p> <ul style="list-style-type: none">• The site is for upload, not storage.• Data files should be removed as soon as they are downloaded and no longer needed.• All files are set for automatic removal after 60 days on Box.• If a subfolder is created within OSSE program folder, the subfolder will not be deleted, but the files within will be deleted.

<p>4.</p>	<p>How to receive access to Box?</p>	<p>OSSE grants permissions to folders and any subfolders on a project-specific basis.</p> <p>All folders have a program manager. The program manager will work with you to have access granted.</p> <p>Users approved for access will receive an email from OSSE with a link to login to Box.</p> <p>If a user does not have a Box account, the user will be prompted to create one. Once the fields are complete, select the Submit button.</p> <p>LEAs will receive access to Box based on their roles in eSchoolPLUS. I will show you where you can locate a list of eSchoolPLUS roles associated with which program folder later in the presentation.</p>
<p>5.</p>	<p>Live Demonstration</p>	<p>Now I am going to perform a live demonstration within Box, but first I am going to create an account.</p> <p><u>Creating an account:</u> I received an invitation to Box from OSSE. I am going to create an account. When I create an account, the password has to meet the minimum requirements of at least eight characters, with either a combination of numbers, uppercase letters, or special characters (i.e., \$#@&!).</p> <p>Box will allow you to create a password that does not this requirement; however, you will be prompted to strengthen your password prior to accessing the OSSE folders.</p> <p>If you forget your password, you can always reset it. OSSE does not maintain passwords. You can reset your password from the Box website. On the login page, click Reset Password and follow the instructions to have your password reset.</p> <p>Once I have created my account, a new window will appear, I am going to select, Work and then Skip this and go straight to Box.</p> <p><u>Main Dashboard & Terms of Service</u> The first thing I notice is that I have no folders showing. The reason is that I have not accepted the terms of service. In order to do, I am going to go the Messages icon on the left-hand side to view my pending invitations.</p> <p>I am going to review the Terms of Service and click the Agree and Accept buttons. Once an external user has accepted the Terms of Service, subsequent invitations from OSSE will be auto-accepted.</p>

A pop-up window will appear. Click **Yes** to go to the folder.

Now when I go to my main dashboard my program folders will appear.

“Agency or Organization to OSSE” Folder:

In the Agency or Organization “To OSSE” folder, the user has Editor permission. As an Editor, the user can upload and delete files or subfolders.

To send files to OSSE, the user will upload files to the appropriate program folder.

Note: Files will be set to expire and be deleted after 60 days by default. If you create a subfolder to help manage the program folder, the subfolders will not be deleted, only the files within.

To send a file to OSSE, I am going to:

1. Click on the appropriate folder.
2. Click the **Upload** button.
3. Select either Files or Folders.
4. Locate the data on your computer.
5. Click **Open** to upload.

Deleting a file or subfolder

If I inadvertently, upload the incorrect file, I can delete it by:

1. Clicking on the file.
2. Click on the **More Options** icon.
3. Click on **More Actions**.
4. Click on **Trash**.
5. A pop-up window will appear, click **Okay** to confirm the deletion.

In the “To OSSE” folder, OSSE can only view the files uploaded and download the files. OSSE cannot delete the files or subfolders created.

“OSSE to Agency or Organization” Folder:

OSSE uses this folder to share files. Users with whom OSSE has shared folders will have Viewer permission. Users with Viewer permission cannot delete files or folders provided in the folder.

In this folder is where you will view and download files provided by OSSE.

Downloading a File:

To download a file

1. Go to the folder.
2. Click on More Options.
3. Click Download.

		<p>You can also download the file by clicking on the file and clicking download in the upper right-hand corner.</p> <p>Now I am going back to the main dashboard.</p> <p><u>Back to the main dashboard</u></p> <p>You can create files in the “All Files” dashboard. To create a file:</p> <ol style="list-style-type: none"> 1. Click on New. 2. In the drop-down menu, select the type of item to create. 3. The file or folder will appear on the All Files page. <p>Note: A file or folder created may be moved to the OSSE folders. To move a file or folder, click on the item and drag it to either the OSSE folders.</p> <p>If you move a file into an OSSE folder, OSSE will be able the information.</p>
<p>6.</p>	<p>FAQs</p>	<p>Now let’s go over some frequently asked questions.</p> <p>Q: I have a new staff member who needs access to Box, who should I contact?</p> <p>A: For access to program folders, the project manager is the point of contact. Please reach out to them. A list of project managers is available here. <i>[Will go to the webpage]</i></p> <p>If you have staff that has left, please inform the project manager as well. If the user is an LEA, please update the user role in eSchoolPLUS.</p> <p>To view the eSchoolPLUS role associated with which program folder in Box, a list is provided here (https://osse.dc.gov/publication/using-secure-data-transfer-protect-student-privacy).</p> <p>Q: How long can the files stay on the site?</p> <p>A: The site is for upload, not storage. Data files should be removed as soon as they are downloaded and no longer needed. All files are set for automatic removal after 60 days on Box.</p> <p>Q: What do I do if a file is inadvertently uploaded to the wrong folder or in the wrong place?</p> <p>A: A file inadvertently uploaded to the wrong folder or in the wrong place should be immediately removed to guard against any further potential inappropriate disclosure. Any OSSE staff becoming aware of such an inappropriate upload should immediately notify Demetrius Brown, who can provide assistance with any needed next steps.</p>

		Also- If you already have a Box account, OSSE cannot view your files unless you place them in an OSSE folder and a warning will appear if this occurs.
7.	Questions	For more information or questions on Box, please contact Demetrius Brown . For questions on the project itself, please contact the project manager. To access the user guide, please go to https://osse.dc.gov/publication/using-secure-data-transfer-protect-student-privacy
8.	Thank you	Thank you for attending today's training.