

Box Quick Reference Guide External Users

Purpose

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.

Access

Box contains folders for entities with which OSSE regularly shares data protected by the Family Educational Rights and Privacy Act (FERPA). This includes District of Columbia local education agencies (LEAs) (both District of Columbia Public Schools, or DCPS, and public charter LEAs), the District of Columbia Public Charter School Board (PCSB), and community-based organizations. OSSE grants permissions to folders and any subfolders on a project-specific basis.

Users approved for access will receive an email from OSSE with a link to login to Box. If an external user does not have a Box account, the user will be prompted to create one. Once the fields are complete, select the **Submit** button.

All users must have passwords that meet the minimum requirements of at least eight characters, with either a combination of numbers, uppercase letters, or special characters (i.e., \$#@&!).

Box Collaborator Sign Up			
DC Government' Has Invited You to Collaborate on 'From OSS			
Your Information			
Full Name			
Test user			
Email Address			
Testuser@LEA.edu			
Password			
Good			
Phone Number			
202-000-0000			
Submit			
By registering you agree to Box's Terms of Service and Privacy Policy.			



Next, the window below will appear. Select **Skip this and go straight to Box**.

Welcome to Box, Te Let's personalize y What do you mostly p	est User our experience. lan to use Box for?
FOR PERSONAL USE	FOR WORK
Next Skip this and go st	raight to Box

Figure 2: Welcome Message

The main dashboard will appear with invitations in the Messages folder. The user will click on **Messages** to view pending invitations.

box	Search Files and Folders	tere v Q	Upgrade ? 📑 LG -
 All Files © Recents ☆ Favorites ⊘ Synced to Desktop ♡ Trash ○ Messages 4 ② Collaborators 	All Files -		
⊐g⁄ Box Notes	There are Drag files and folders he files fr	no items in this folder. are to upload, or click here to browse rom your computer.	Get Box Sync Now Work from your desktop while keeping files in sync. Download

Figure 3: Main Dashboard

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.

nding	Invites -	Mark All as Re
	OSSE Box invited you to collaborate.	Mark a
DB	November 20, 2017 at 1:56 PM on To OSSE	FOLDER
	Before you accept this invite, you must agree to the following terms.	
	Terms of Service	
	I acknowledge and agree that:	
	Records management, privacy of records and computer security must be maintained in accordance with District government regulations, policies, procedures, guidelines, and other applicable District and federal laws and regulations.	
	Furthermore. Lagree that the computer resources available through this system are to be used only for legitimate District of	
	Columbia government business for which I am explicitly authorized, and I attest that I will not use this confidential	
	information for any unauthorized purpose.	
	Agree and Accept Reject	
	OSSE Box invited you to collaborate.	Mark a
DB	November 20, 2017 at 1:55 PM on From OSSE	FOLDE
	Before you accept this invite, you must agree to the following terms.	
	Terms of Service	
	I acknowledge and agree that:	
	Records management, privacy of records and computer security must be maintained in accordance with District government	
	regulations, policies, procedures, guidelines, and other applicable District and federal laws and regulations.	
	Furthermore, I agree that the computer resources available through this system are to be used only for legitimate District of	
	Columbia government business for which I am explicitly authorized, and I attest that I will not use this confidential	
	information for any unauthorized purpose.	
2	Agree and Accent Reject	

Figure 4: Pending Invitations

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



Figure 5: Collaboration Accepted

The main dashboard will now display all program folders.

box	Search Files and Folders	-a Q		Upgrade (?) 📑 LG -
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☆ Favorites	Name 🗵	Updated	Size	
 ⊘ Synced to Desktop □ Trash 	CEIS Project from OSSE to Organization External	Yesterday by OSSE	0 Files	×
Messages	CEIS Project from Organization External to OSSE	Yesterday by OSSE	0 Files	
 Collaborators Box Notes 	Attendance Project from OSSE to Organization Exter	Yesterday by OSSE	0 Files	
	Attendance Project from Organization External t	Yesterday by OSSE	0 Files	Cat Day Gran Navy
	AssessmentProject from Organization External t	Yesterday by OSSE	0 Files	Work from your desktop while
	Assessment Project from OSSE to Organization Exter	Yesterday by OSSE	1 File	keeping mes in sync.

Figure 6: Main Dashboard with Program Folders

To OSSE

In the "To OSSE" folder, the user has Editor permission. As an Editor, the user can upload and delete files (see **Appendix A: User Permissions** for further guidance). To send files to OSSE, the user will upload files to the appropriate "To OSSE" program folder.

Note: Files will be set to expire and be deleted after 60 days by default.

box	Search Files and Folders			Upgrade ? 📑 LG -
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☆ Favorites ⊙ Synced to Desktop ☐ Trash	CEIS Project from OSSE to Organization External	Yesterday by OSSE	0 Files	×
💬 Messages 🕲 Collaborators	CEIS Project from Organization	Yesterday by OSSE	0 Files	
च∕ Box Notes	Attendance Project from OSSE to Organization Exter Attendance Project from Organization External t	Yesterday by OSSE Yesterday by OSSE	0 Files	



To upload data to a folder:

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



Figure 3: Upload "To OSSE" Folder

To remove a file or folder, click on the file or folder:

- 1. Click on the More Options icon.
- 2. Click on **More Actions.**
- 3. Click on **Trash**.



Figure 4: Remove a File

A pop-up window will appear, click **Okay** to confirm deletion.

From OSSE

OSSE uses the "From OSSE" 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 "From OSSE" folder.

Up			Q	Search Files and Folders	box
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	= 88	Size	Updated	Name 🗸	☆ Favorites
		0 Files	Yesterday by OSSE	CEIS Project from OSSE to Organization External	 Synced to Desktop ☐ Trash
		0 Files	Yesterday by OSSE	CEIS Project from Organization External to OSSE	Messages
		0 Files	Yesterday by OSSE	Attendance Project from OSSE to Organization Exter	 Collaborators Box Notes
		0 Files	Yesterday by OSSE	Attendance Project from Organization External t	<i>y</i>
		0 Files	Yesterday by OSSE	AssessmentProject from Organization External t	
		1 File	Yesterday by OSSE	Assessment Project from OSSE to Organization Exter	
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Figure 5: "From OSSE" Folder

Creating Files

Users can create files in the "All Files" and "To OSSE" folders. To create a file in the "All Files" folder:

- 1. Click on New.
- 2. In the dropdown menu, select the type of item to create.
- 3. The file or folder will appear on the **All Files** page.

box	Search Files and Folders	-are ▼ Q	Upgrade ၇	LG -
🗅 All Files	All Files 👻		New 🖌	Upload -
 Recents Favorites 	Name 🖌	Updated Size	Folder	
 Synced to Desktop Trash 	CEIS Project from OSSE to Organization External	Yesterday by OSSE 0 Files	Bookmark	· · ×
💬 Messages	CEIS Project from Organization External to OSSE	Yesterday by OSSE 0 Files		
Collaborators	Attendance Project from OSSE to Organization Exter	Yesterday by OSSE 0 Files	Word Document PowerPoint Presentation	
-/ DOX NOLES	Attendance Project from Organization External t	Yesterday by OSSE 0 Files	Excel Spreadsheet	
	AssessmentProject from Organization External t	Yesterday by OSSE 0 Files	Google Doc	nc Now Jesktop while
	Assessment Project from OSSE to Organization Exter	Yesterday by OSSE 1 File	Google Sheet	in sync.
 All Files Recents 	All Files 🕶			
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 ⊘ Synced to D □ Trash 	esktop Test.docx	Table in call the		
Messages	CEIS Project from OSSE to Organization	on External Yesterday by OSS	0 Files	
(a) Collaborator a Box Notes	CEIS Project from Organization Extern	al to OS Yesterday by OSS	0 Files	
	Attendance Project from OSSE to Org	anization Ext Yesterday by OSS	0 Files	
	Attendance Project from Organization	Externa Yesterday by OSS	0 Files	
	AssessmentProject from Organization	External Yesterday by OSS	0 Files	
	Assessment Project from OSSE to Org	anization Ex Yesterday by OSS	1 File	

Figure 6: Create a File

Note: A file or folder created may be moved to the "To OSSE" or ""'From OSSE" folders. To move a file or folder, click on the item and drag it to either the OSSE "To OSSE" or "From OSSE" folders.

🗅 All Files	$rightarrow extsf{Test.docx}$ is selected	Add Tags	⊠ Send Items	🕂 Download
③ Recents☆ Favorites	Name \vee	Updated	Size	≡ 88 (
 Synced to Desktop Trash 	Test.docx			
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Collaborators Image: Solution of the second secon	CEIS Proj. t from Organization External to OS	Yesterday by C	DSS 0 Files	
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	AssessmentProject from Organization Exernal	Yesterday by C	OSS 0 Files	(
	Assessment Project from OSSE to Organization	rday by C	DSS 1 File	L L
				L

Figure 7: Moving a File

A pop-up window will appear, informing the user that moving items to the OSSE-created folders will transfer the ownership of those files to OSSE.



Figure 8: Notification of Change of Ownership

Reset Password

To reset a password, click **Reset Password** on the sign-in page. Follow the instructions provided and select **Reset Password**.

Sign In to Your Account	
Email Address	
Enter Your Email	
Next	
Reset Password	
We've sent you an email to reset your	
password	
You will receive an email from us in the next few minutes. Click on the link in the email to change your password.	
If you don't see an email from us in your inbox, please check your junk mail folder as it may have been mistakenly categorized as spam or try a different email address.	
Sign In	
Figure 9: Password Reset	

Appendix A: User Permissions

Box users have one of two permissions: Editor or Viewer. Users in the "To OSSE" folder will have Editor Permission. Users in the "From OSSE" folder will have the Viewer Permission.

Permissions				
	Editor	Viewer		
Download	Y	Y		
View / Add Comments*	Y	Y		
Delete Files/Folders	Y			
View / Create Tasks	Y	Y		
Add / Edit Tags	Y			
View Tags	Y	Y		
View Metadata	Y	Y		
Edit Metadata	Y			
Invite People	Y			
Edit Folder Name	Y			
Create Subfolders	Y			
Edit Folder Settings				
Preview	Y	Y		
Lock/Unlock File	Y			
Send View-Only Links	Y			
Upload	Y			
View Item List in Folder	Y	Y		
Sync Folder	Y			
Set Access Permissions	Y			
Restrict Invitations				
View Access Stats	Y			
Move	Y			
Сору	Y	**		

* Comments can only be deleted by the folder owner or the creator of the comment.

** A Viewer cannot copy a file within Box, but be aware that Viewers have the ability to download the file and upload it somewhere else, or they can open the file and copy and paste the content into another file.