

File Repository

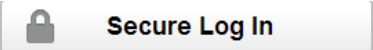
Quick Start Guide

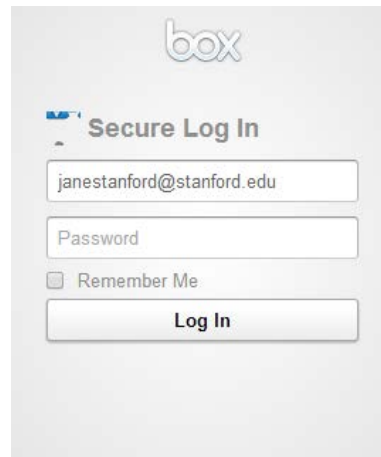
1 Getting Started

HSDO Finance provides basic document management and collaboration through the use of Box. Box is an easy-to-use sharing platform that you can log into with your Stanford credentials via the HSDO Finance intranet site.

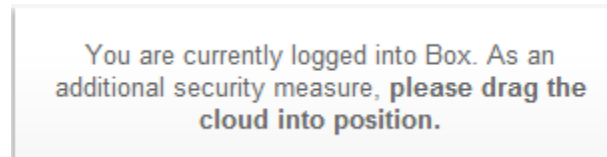
In this handy guide, we'll show you how to share, access, and manage your department's folders and files.

Initial Login

- Once the HSDO Finance team assigns security to you for your department, you will receive an email to notify that you have access to the file repository.
- Navigate to HSDO Finance and select the **Repository** option.
- Click the  button in the center of the page and enter your Stanford email address (Example: JaneStanford@stanford.edu) and click **Log In**. Do **NOT** enter your password, simply leave the field blank.



- If you have previously used the Stanford Box service, you may be presented with the following message:



Use your mouse to drag the cloud icon into position.



2 Navigation



Once your files are logged into the file repository, it's easy to access them wherever you are. The repository should have an intuitive design makes it simple to navigate your files.

Directory Description

- You may navigate the repository by clicking on any of the available directories or by using the quick select menu across the top.

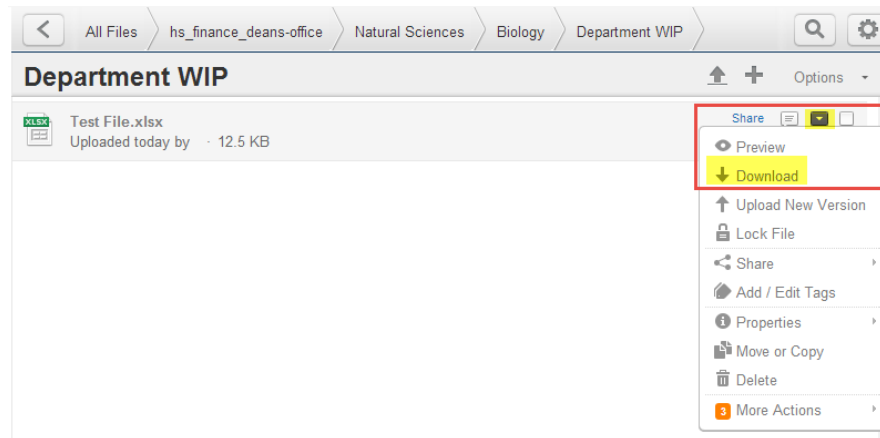


- Directory description and authority are listed below:

Directory	Description	Authority
Department WIP	Folder for files to be shared with HSDO Finance and within your unit.	Editor (Upload/Download)
Non Salary View	Folders for Budgets, Department Reserves, Funding Commitments, and Year-End Close, without detailed salary information.	View Only (Download)
Salary View	Folders for Budgets, Faculty Salaries, and Staff Salaries.	View Only (Download)

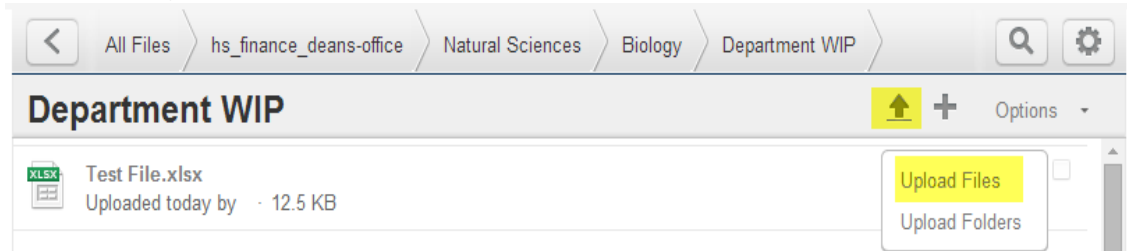
Downloading Files

- Navigate to the folder you wish to view by clicking on the folder title.
- Select the file you wish to download and select the download option in the dropdown next to the file.
- Once downloaded is selected the file we be saved to your default download location, usually your download folder on your computer.



Uploading Files

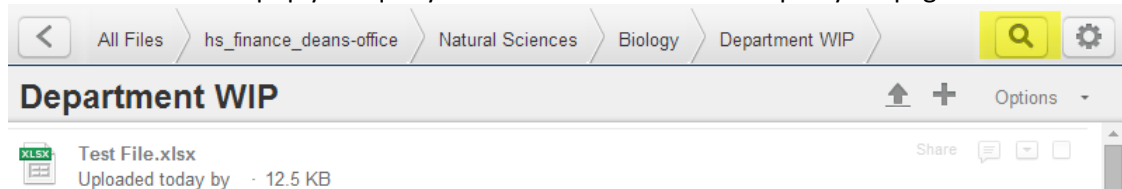
- Navigate to the folder you wish to view by clicking on the folder title.
- Select the Upload arrow next to the WIP folder title (only Finance has authority to **upload** to the other folders.)



- A pop-up window will appear, allowing you to select the specific file(s) you want to upload from your computer
- Select the specific file(s) and click the Open button

Search

- If you're looking for a certain file – or even a certain word or phrase within a file – jump right to it with the Search tool. Just pop your query into the search bar at the top of your page:




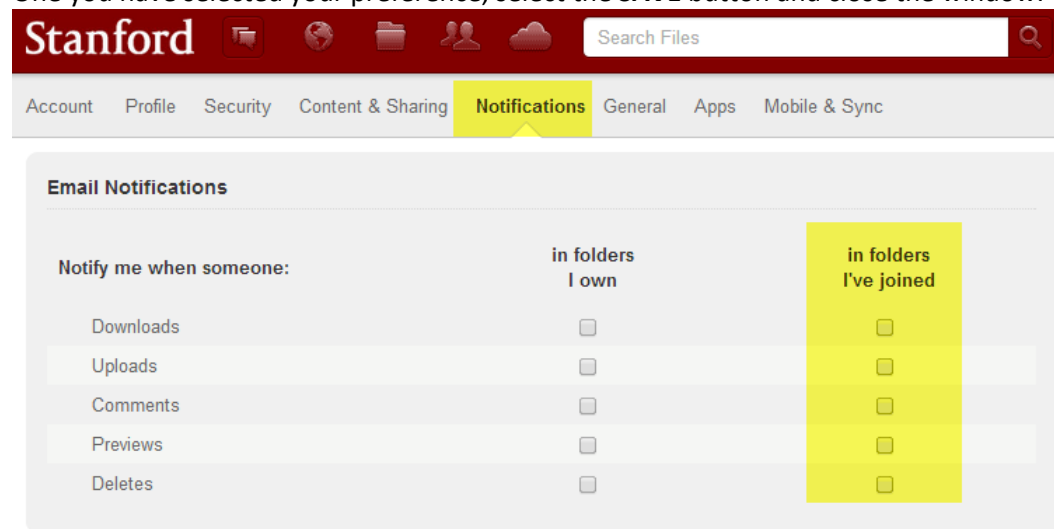
- Box will search the titles of your files and folders as well as the body of your documents. If you receive too many results, simply apply some filters. You can sort by folder, file type, date, content type, and owner.

Notification

- In order to keep users up to date when collaborators access files, the file repository will automatically send email notifications. It's up to each user to specify their notification preferences.



- To manage notifications click  icon in the corner of the repository window and select "Account Settings". A new window will open with information about your account.
- Select the Notifications option at the top of the screen and select your notification preferences. Note that the Finance folders are controlled with the "in folders I've Joined Option"
- Once you have selected your preference, select the **SAVE** button and close the window.



The screenshot shows the Stanford file repository interface. At the top, there is a dark red header with the Stanford logo and a search bar labeled "Search Files". Below the header is a navigation menu with options: Account, Profile, Security, Content & Sharing, **Notifications** (highlighted in yellow), General, Apps, and Mobile & Sync. The main content area is titled "Email Notifications" and contains a table with notification preferences.

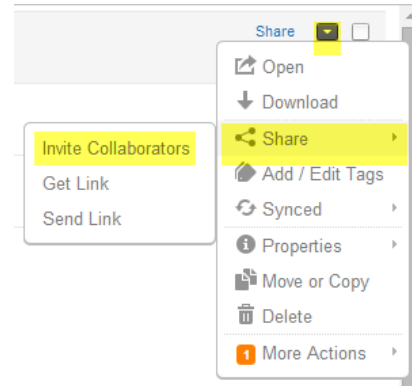
Notify me when someone:	in folders I own	in folders I've joined
Downloads	<input type="checkbox"/>	<input type="checkbox"/>
Uploads	<input type="checkbox"/>	<input type="checkbox"/>
Comments	<input type="checkbox"/>	<input type="checkbox"/>
Previews	<input type="checkbox"/>	<input type="checkbox"/>
Deletes	<input type="checkbox"/>	<input type="checkbox"/>

3 Collaborate

The file repository collaboration system works at the folder level – you'll invite users to join one or more of your folders as collaborators and define the access permissions you see fit.

Add a collaborator

- Mouse over the folder you'd like to share and click the **drop-down arrow** to the right of its name. Mouse over **Share** then click **Invite Collaborators**. New collaborators will receive a notification letting them know that you have shared a specific file or folder.



- In the pop-up, enter the email addresses of the contacts you're inviting to the folder. You'll also need to assign the invitees an access level based on the permissions you wish to provide for each collaborator. *Quick Tip: Collaborators have the same access level throughout a particular folder structure. For example, an editor in a top-level folder will be an editor in all the subfolders, too.*

The image shows a dialog box titled "Invite to 'Department WIP'" with a close button (X) in the top right corner. Below the title are two buttons: "Invite" and "Get Invite Link". The "Invite:" section contains a text input field with the email address "JaneStanford@stanford.edu" and a small icon of two people. Below this is the "Permissions:" section with a dropdown menu currently set to "Editor". The "Message:" section is a text area containing the text "Hello, I want to share my folder, 'Department WIP', on Box." At the bottom of the dialog are two buttons: "Send" and "Cancel".

- **Important Note:** The invitee must accept the email invitation to activate their access.

Delete Collaborator

Mouse over the folder you'd like to remove a collaborator and click the drop-down arrow to the right of its name. Mouse over **Properties** then click **Collaborators**. All collaborators for that folder will be specified. Click the users you wish to remove and change their editor privileges to **Remove**.

