



Box for Higher Education

Use Case Blueprint
Box Customer Success
success.box.com

Abstract

Faculty, staff and students can use Box to collaborate internally and externally, by creating workspaces for research, students to upload assignments to and access resources and support staff administrative workflows. This is an ideal use case for higher education institutions that need an easy-to-use solution for collaboration and storing and accessing content from anywhere on any device, while maintaining a high level of security around the content.

Table of Contents:

Table of Contents:	1
Executive Summary	2
Your New Work Process	4
Create a shared workspace with faculty, staff and students	4
Create a forum to help students collaborate with each other	7
Manage versions of documents	9
View and share content	11
Edit content directly on Box using native applications	13
Find the content you're looking for fast	14
Enable mobile productivity	15
Takes notes on your iPad with Notability	17
Print or fax with Breezy	18
Access files from your Gmail account using Attachments.me	20
Empowering Your Higher Education Team & Common Roadblocks	21
FAQ	22
How do I track versions of files?	22
How should I name files?	22
Can I access this content when I am traveling?	22
What forms of advanced search does Box support?	22
GAPS – What are we missing?	23
Additional Information	24
How CUNY Hunter College Uses Box	24



Executive Summary

Educational institutions, from small liberal art colleges to globally distributed universities, need to access, collaborate and share content among students, faculty and staff. Educators need to quickly and easily access student assignments, provide feedback and distribute learning materials and collaborate on research with faculty across different institutions. At the same time, students are constantly on the go and more connected than ever; with an average of 4.3 devices per student, today's generation is constantly using the Internet to access email, connect with other students and learn information.

With Box, your institution has a solution that is easily adoptable by students, staff and faculty to share all the documents, presentations and content used every day in school. Departments and classrooms use Box to share and collaborate with students, while still providing a secure solution to manage copyrighted material. Students can collaborate on projects together and manage version history, comment and assign tasks, and work together on an important presentation or essay. Better yet, Box allows anyone to share, open and edit a document from anywhere, whether it's the campus computer lab, a faculty's tablet, or a student's iPhone.

Common use cases for students, faculty and staff:

- **Share files with faculty, staff and students:** Share important presentations, turn in assignments, and work with other faculty, staff and students just by emailing a link. With one click, send a file or even entire folders to keep everyone on the same page.
- **Secure Online Workspaces:** Turn any folder into an online workspace to facilitate distributed research and protect your intellectual property. Workspaces allow you to exchange documents, edit team projects, assign and manage tasks and more. Students can also easily collaborate on community and class projects together.
- **Increase staff workflow productivity:** allow easy collaboration and file exchanging with external parties to on-board new vendors, process student and faculty applications and managed departmental processes and procedures.
- **Mobile Access:** With Box's robust mobile apps, view important content on the go, sharing comments and feedback, edits and new versions – anywhere, from any device. Students can access important reading on their iPad or phone, and can edit, comment and create documents on the go from anywhere.

Benefits:

- Improved visibility and communication on projects and assignments
- Access all documents on any device
- Preview files in your browser without the need for native applications
- See the detailed history of all files and versions

Securely share content with external parties without resorting to email

"The biggest benefit has been having a way to manage projects in a more organized manner...I love being able to be on top of not only our projects, but also what's happening in other areas of the program."



-- Erica Baker, Educational Consultant, Pacific Education Institute

This use case is ideal for higher education teams who:

- Need to securely collaborate on documents, presentations and other material internally and externally
- Share and receive materials from students regularly
- Require a secure solution that is easily accessible on mobile and tablet devices
- Rely on email or clunky education portals to share and work on large files
- Are frequently updating content and need more effective version control

Key benefits:

- **A user-friendly and secure workspace for everyone**
Higher education portals are sometimes clunky and restrictive for students and faculty. A student can use them only for submitting assignments or accessing classroom material, but not both. There sometimes isn't a place to actively work or store current projects, so students resort to emailing copies to themselves. Faculty members don't have a collaboration space within their department or other departments or to securely collaborate on and protect research with faculty from other schools. With Box, everyone can work independently or collaboratively in the same workspace on any piece of content.
- **Drive true collaboration and communication**
With Box, students, faculty and staff stay connected in a secure workspace available from the cloud, anytime, anywhere. Communication is normally scattered across emails and servers, but with Box's social workflow tools, versioning, and extensive app platform, everything can stay in once centralized location.
- **Tools that students, faculty, staff and IT love**
As your organization grows and changes, it is critical to effortlessly share information and collaborate across different groups of users. Legacy platforms prevent the productivity on mobile platforms, and personal sharing applications introduce security threats. With Box, you get simple, powerful collaboration tools, with the control and security required by IT.
- **Centralize content and processes**
Different departments or entire schools? Hundreds of courses and thousands of students? Terabytes of storage? Each department can spin up large teams, reams of research and countless revisions. Box removes the inefficiencies of outdated systems and arms you fast, flexible, secure sharing.
- **Improve confidentiality, monitoring and control**
Box makes the security and confidentiality of your data top priority. Robust auditing and reporting capabilities allow you to monitor who's storing what on Box and track the flow of files. Connect your existing User Store to leverage single sign-on and control account access.



Your New Work Process

Create a shared workspace with faculty, staff and students

1. Create your own work folder to use for your private files. This folder is where you can store personal notes, job aides and work in progress. Create your own folder and name it “John Smith Personal Workspace”.
2. Next, create a private folder for the department you are leading. Create sub-folders for different courses being taught, and invite professors and graduate student instructors as collaborators into folders for classes they are currently teaching. This ensures that only the users directly involved with that class can see and collaborate on the content. Many universities create the departmental folder within a service account (i.e. math_dept@university.edu) so that faculty can leave without impacting need for data transfer.

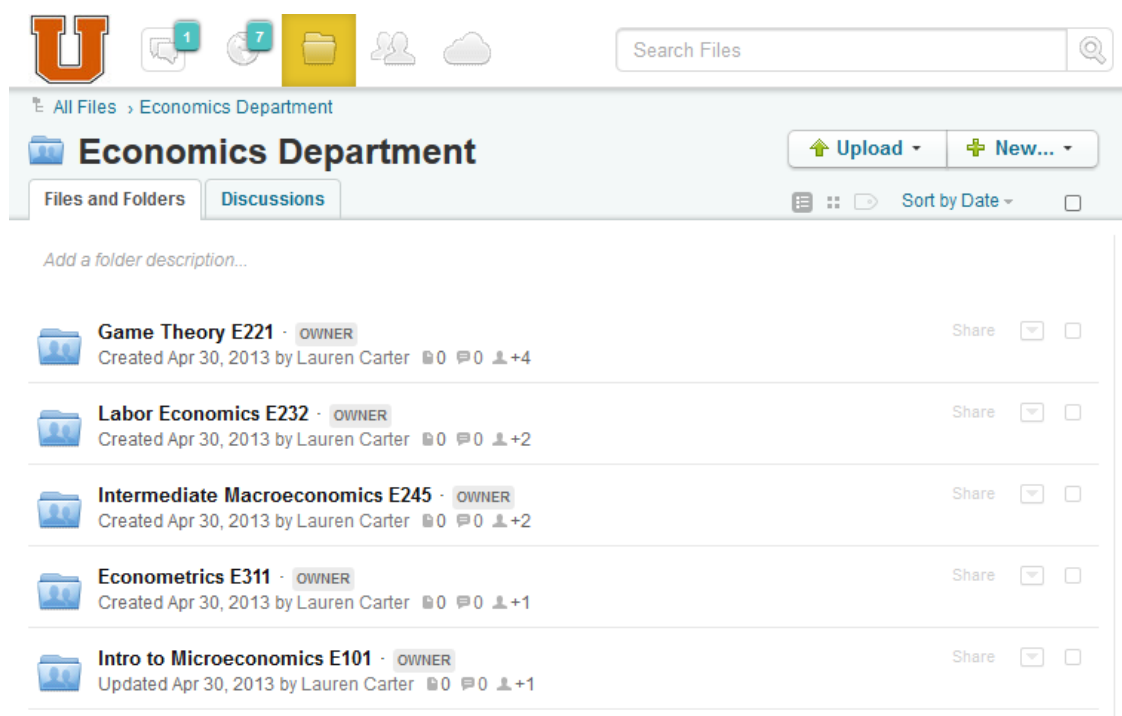


Figure 1: All content related to each course will live in a collaborative folder

3. Create an Archive folder where you can keep relevant material for previous classes and records. Tag this content by the semester and year, so it is easier to search later on. This way, you will have a cleaner folder structure in Box, and make it easier to sync only relevant content for offline access.
4. In each course's folder, the professor can create a student portal to share resources with students, and receive completed assignments. Box's granular permission settings and versioning tools will be very important when creating this layout. If your first folder includes resources that you would like students to be able to view and download, but not edit or alter, then invite



students into this folder with a Viewer permission level. Invite your students into a second folder for uploading finished assignments as an Uploader, so they will be unable to view other students' assignments or change their own once submitted, without a new version appearing.

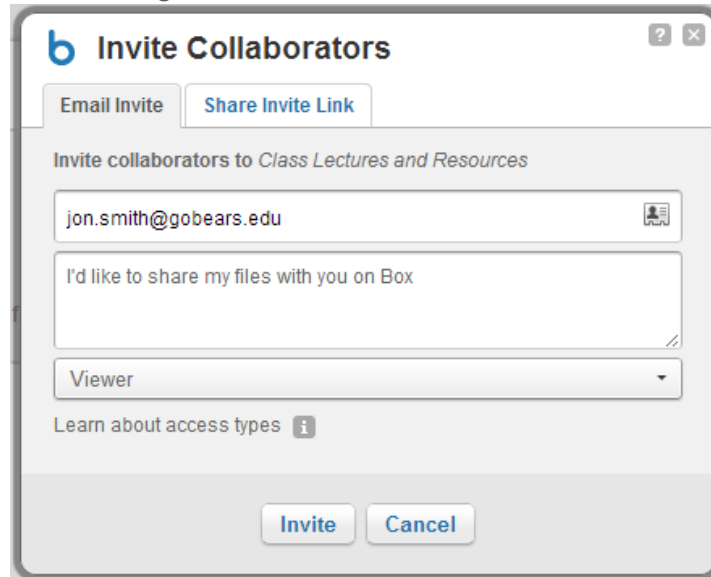


Figure 2: Invite collaborators to different folders with the appropriate permission level. Add students as Viewers for folders including resources, and Uploaders to folders you would like them to submit assignments to. Many Music schools use Box to protect copyrighted material by inviting students as a viewer only to a music folder so students can listen to music anywhere without having to physically visit a classroom to listen to music for an assignment.

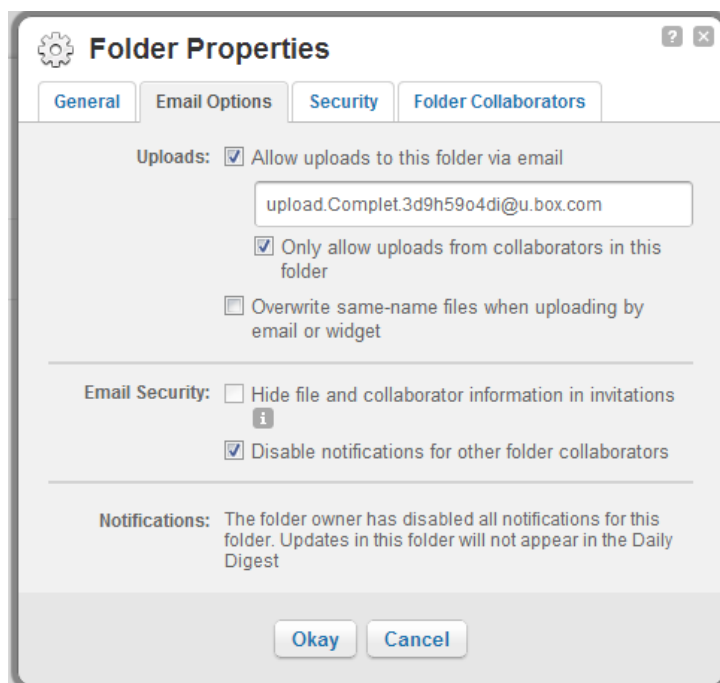


Figure 3: The Email Options tab lets you create an email address for the folder that students can submit content to. Be sure to disable notifications for your collaborators, so other students don't receive emails for their classmates submitting assignments

5. Create a department-wide folder for sharing more general content such as HR/ IT documents, guides, templates, and other common documents.

6. Assign different security properties to your folder structure and specify what rights and roles users have in your system. A professor for a class should be a folder owner or co-owner with graduate student instructors assuming an Editor role. Students should be viewers or uploaders, depending on the folder they are collaborating in. Using groups in Box will make the process of assigning users to folders easier than individually adding users to every folder they need access to.



Create a forum to help students collaborate with each other

1. Use Box's discussion feature as a way to spark conversation and debate among your students. In Box, navigate to the discussions tab in a folder, add a topic, and insert a comment. As a best practice, you can create a different discussion thread per assignment or project. Email is ineffective when classrooms range from dozens to hundreds of students, and by keeping the discussion in Box, it assures that your content is at reach.

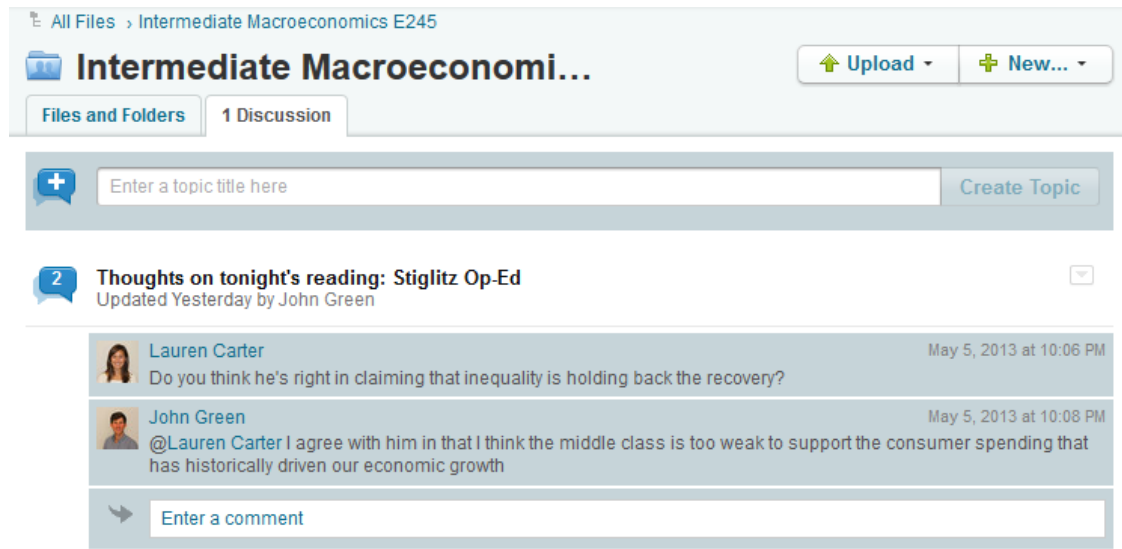


Figure 5: Keep all of the discussion around your content in one place instead of scattered throughout emails.

2. As content is uploaded to Box, you can comment on information the same way you did in discussions. If one of your students has a question or wants to make a clarification on a particular file, he can simply type @ and mention the person he is collaborating with. This is a great productivity tool for your students to use on group projects to decide action steps and help answer questions.



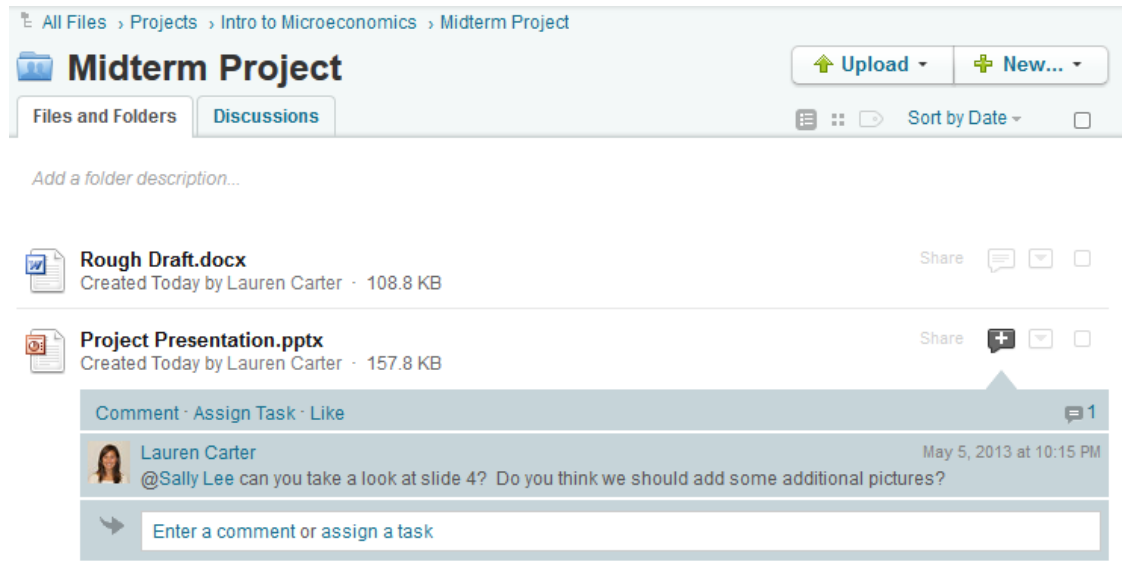


Figure 2: Tagging users with the @ symbol will generate an email notification, notifying them that they've been mentioned.

3. What about reminding students about due dates, and setting deadlines within project groups? In Box, you can comment on an assignment for an update or a reminder to students about an assignment.

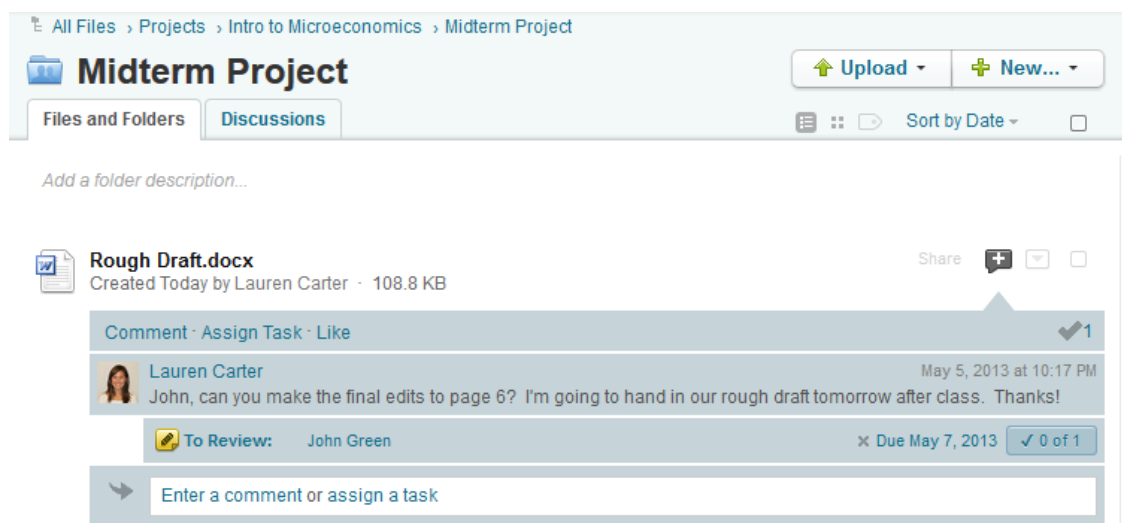


Figure 3: You can create tasks for review, approval, and updates

4. Are you unsure about what you need to do meet a deadline? Use the task manager at the top left of your Box account to see what tasks have been assigned to you, see what tasks you created that are waiting on other people. You can also track deadlines associated with content. This is particularly valuable if you would like to see what assignments are past overdue



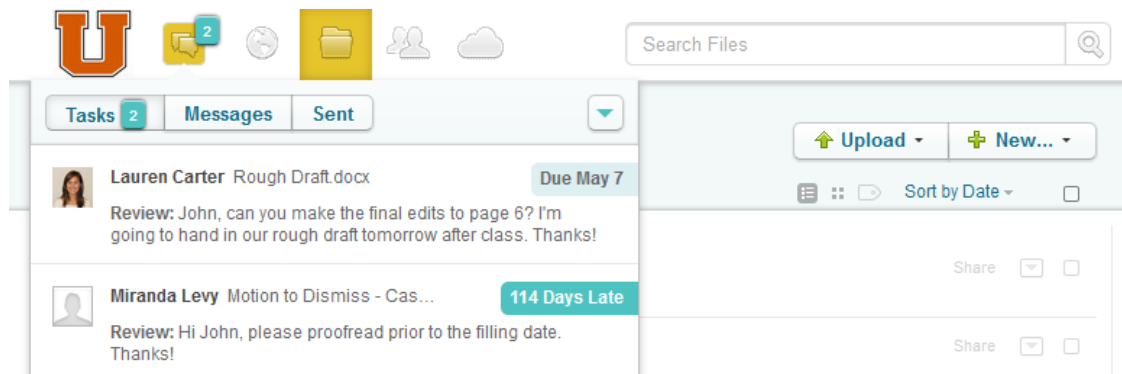


Figure 4: Overdue tasks will be highlighted

Manage versions of documents

1. Have you ever saved 15 versions of the same file while you worked on revisions? Before Box, your versions may have looked like EuroProject_111212_JohnUpdates_v5.doc, and each reviewer would 'save as' to try and track changes around shared files. In Box, all versions are saved with Box's integrated version control system that tracks changes and updates automatically. You can view the version history of any file by clicking on the version button below any file name. This is a useful feature for both faculty and students when updating new content and working collaboratively on projects.

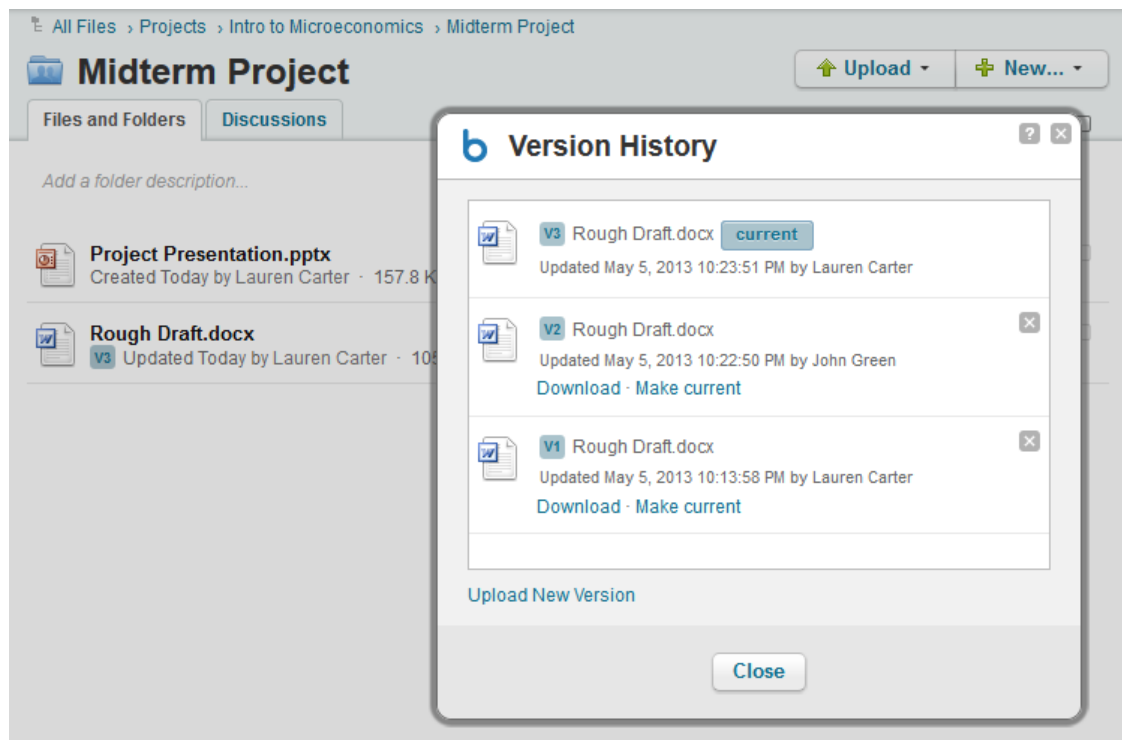


Figure 5: View who update the file and when. Make previous versions current.



2. If you make a mistake, don't worry. You can easily roll back to a previous version of a file and make it the current one. In Box, select a document, click on the version button, and make the previous version your current one. This is helpful if you made a bad edit and need to revert to a previous copy. You can also see who last made a change on a file if you are working collaboratively on a project to submit.

3. Lock content so work isn't overwritten. If you need to work on content and don't want anything being changed, you can lock a file to prevent any modifications while you are editing it. On a file, select 'More Options,' and choose 'Lock File.'

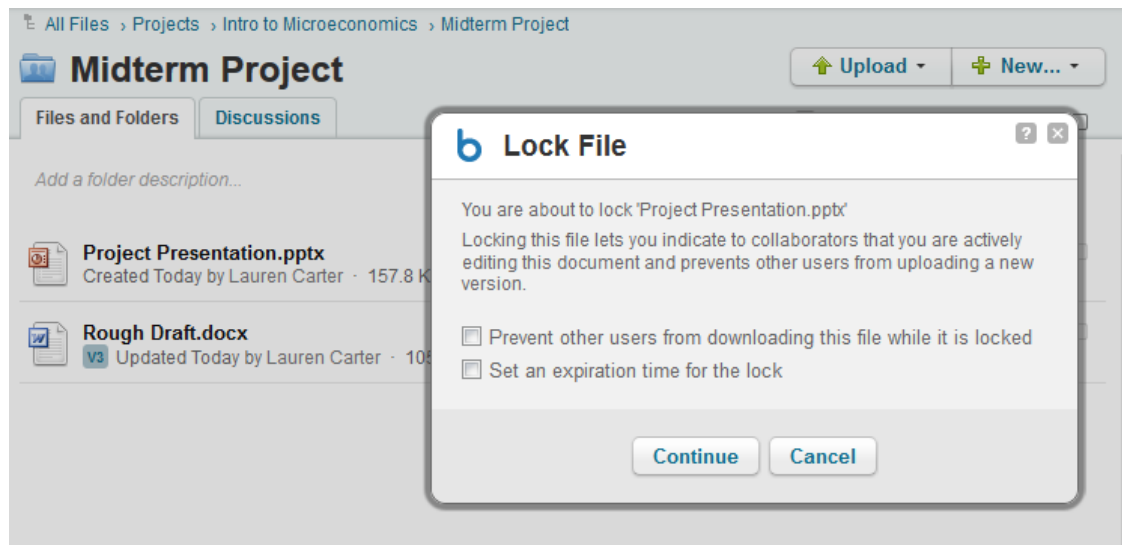


Figure 6: The duration of the lock is configurable



View and share content

1. Use Box's previewing functionality to view your documents without having to download the content and re-open in its native application. Box has the ability to preview most file types, including PDFs, videos, graphics, videos, audio, and images. From the preview, you can use the buttons in the lower right-hand corner to toggle between different viewing modes, or even send the document to print.

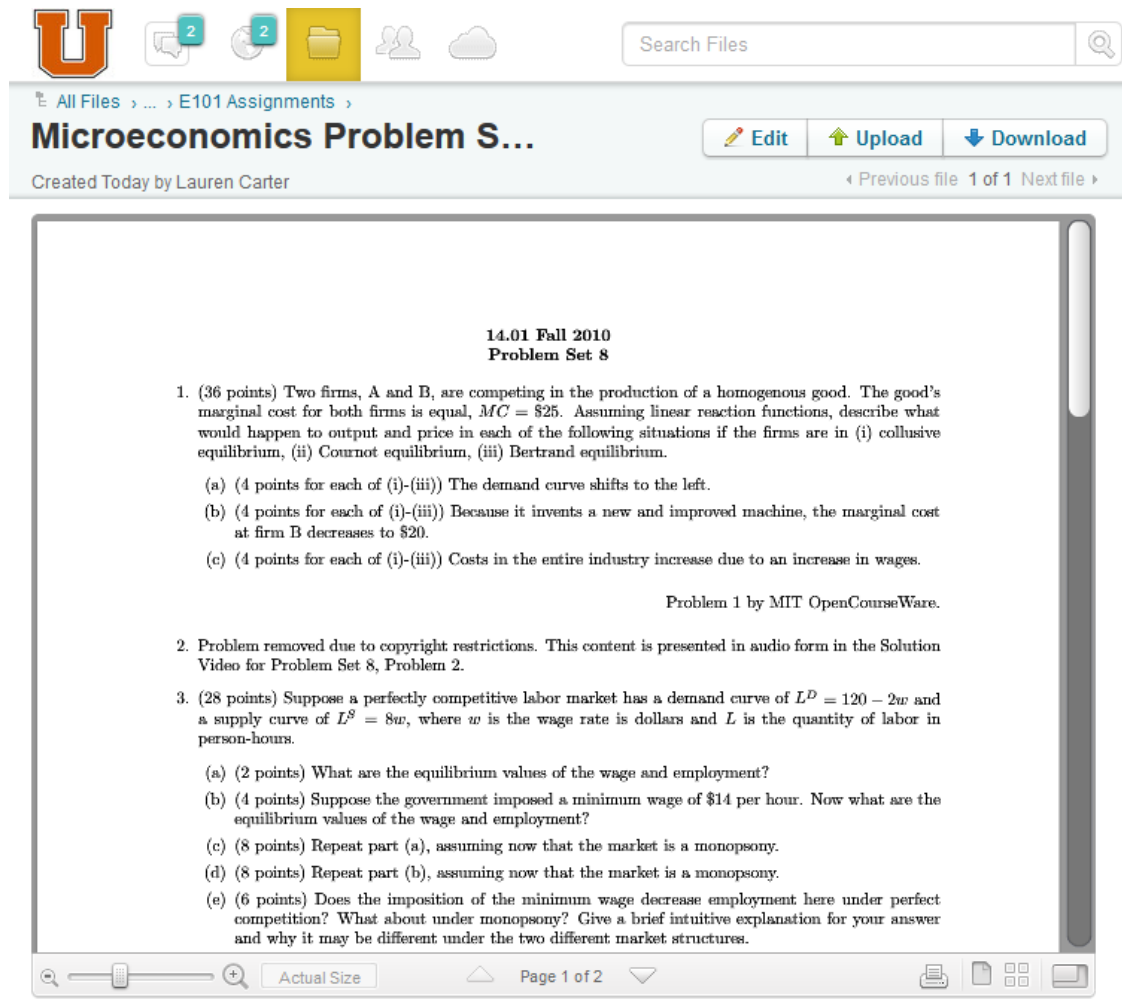


Figure 7: Use the magnifier in the lower-left corner for zoom.

2. Share links to files or folders without sending email attachments. Box allows you to send links to files and folders using a URL. To get a shared link, select the 'sharing' button in the right-hand pane and copy and paste the link. You can also set passwords, expirations dates, and restrict the rights that people have when you send them the link. If you live out of your email, you can also use Box for Outlook and Attachments.me to access Box files from your Outlook or Gmail email environments.



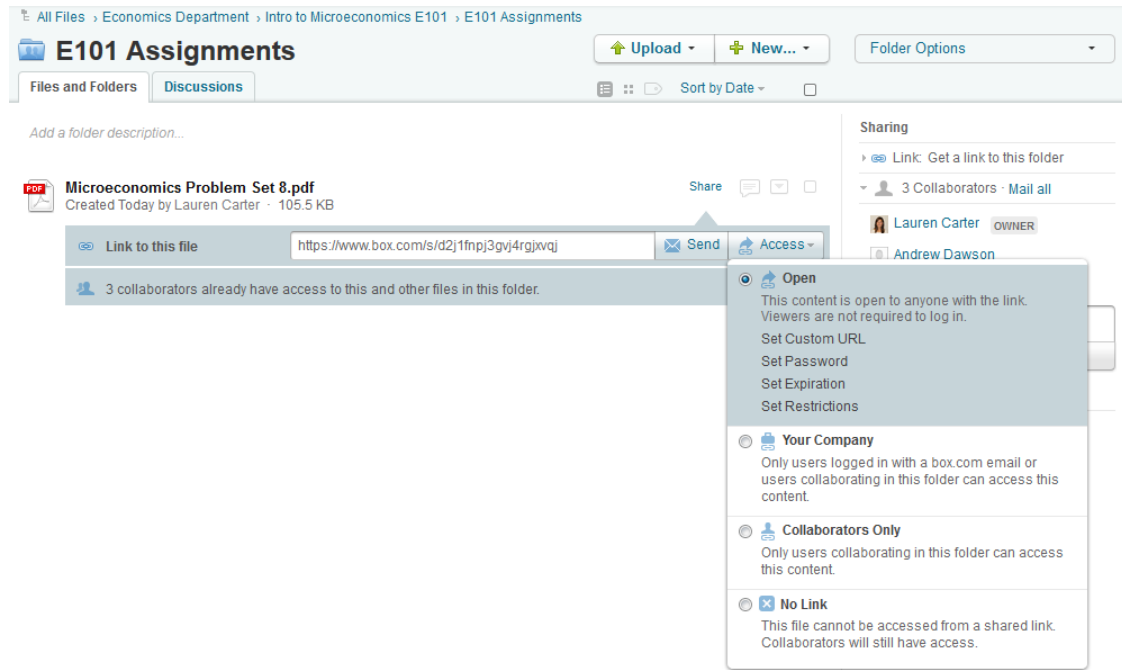


Figure 8: Customize access to the shared link

4. You can send anyone a shared link to a file or folder without even opening your email. Select the 'Send' tab, enter the recipient's email and add a personal note. This can be really helpful for students collaborating on projects, or one-way sharing from professors or graduate student instructors to students.

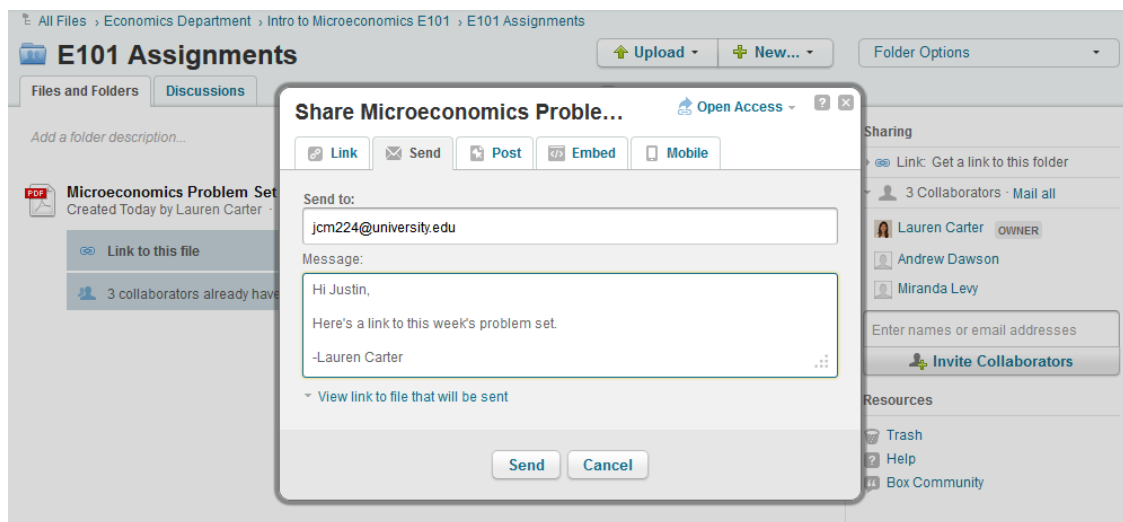


Figure 9: Configure the shared link options before sending your email



Edit content directly on Box using native applications

Box Edit is a free download that lets Windows and Mac users edit content directly on Box using the native applications installed on their computer. If you can edit it on your desktop - Excel, PowerPoint, Photoshop, iMovie, you name it - you can edit it on Box.

With Box Edit, you can:

- Edit files quickly: Open a file directly from the preview page on Box, make edits instantly and save the new version back to Box automatically
- Forget about file types: PSD files, presentations, images, Illustrator files - any file you can edit on your computer's desktop you can now edit without leaving Box
- Easy installation: Download and install Box Edit once and it'll work on all your browsers, including Chrome, Firefox, Internet Explorer (Windows) and Safari (Mac)
- Edit and access information without having to keep a local copy of your device

How to install Box Edit:

1. Visit <http://www.box.com/boxedit/> and download the appropriate installer for your computer.
2. Go to https://www.box.com/services/browse/search/box_edit and 'Add' it to enable editing in preview.
3. Restart your browser
4. On Box preview pages, an 'Edit' button will replace the 'Upload' button for compatible files. Click 'Edit File' to edit in your native applications.

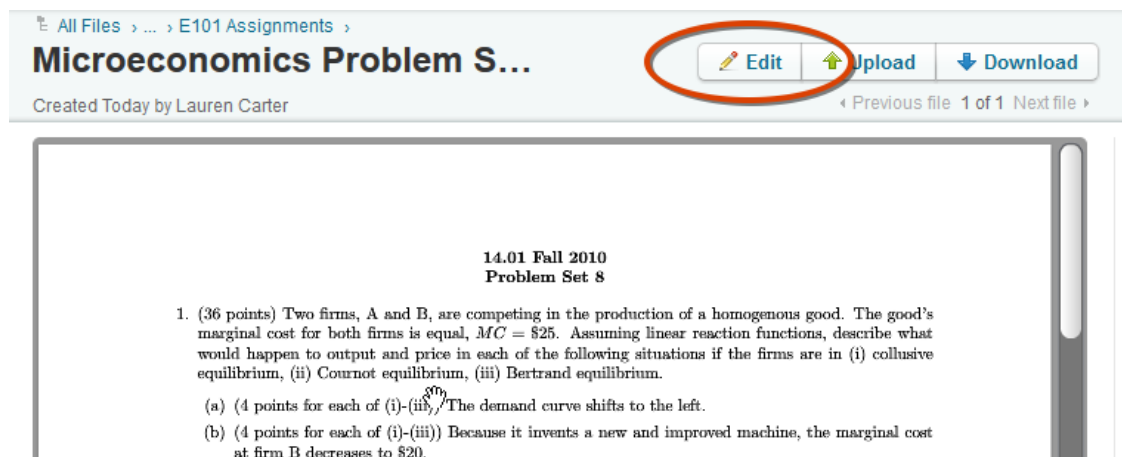


Figure 10: Box Edit uses the default application associated with the file type on your operating system



Find the content you're looking for fast

Find the project, essay or syllabus you're looking for without sifting through stacks of files or drilling down into folders of classes. Box has features that make it easy for your students and faculty to discover exactly the content they're looking for.

- **Full text search.** The easiest way to find content from a previous project or shared document is to leverage Box's full text search engine. Start by typing what you remember about the content, such as the filename, folder name, text from the document, or information in the description. Box's search engine will refine and filter the results, and point you to the information you are looking for.
- **Advanced search.** You can refine search results by files, folders, date, size, name, and location in Box. Additionally, you can search by type of file, and isolate images versus PDFs versus audio files.

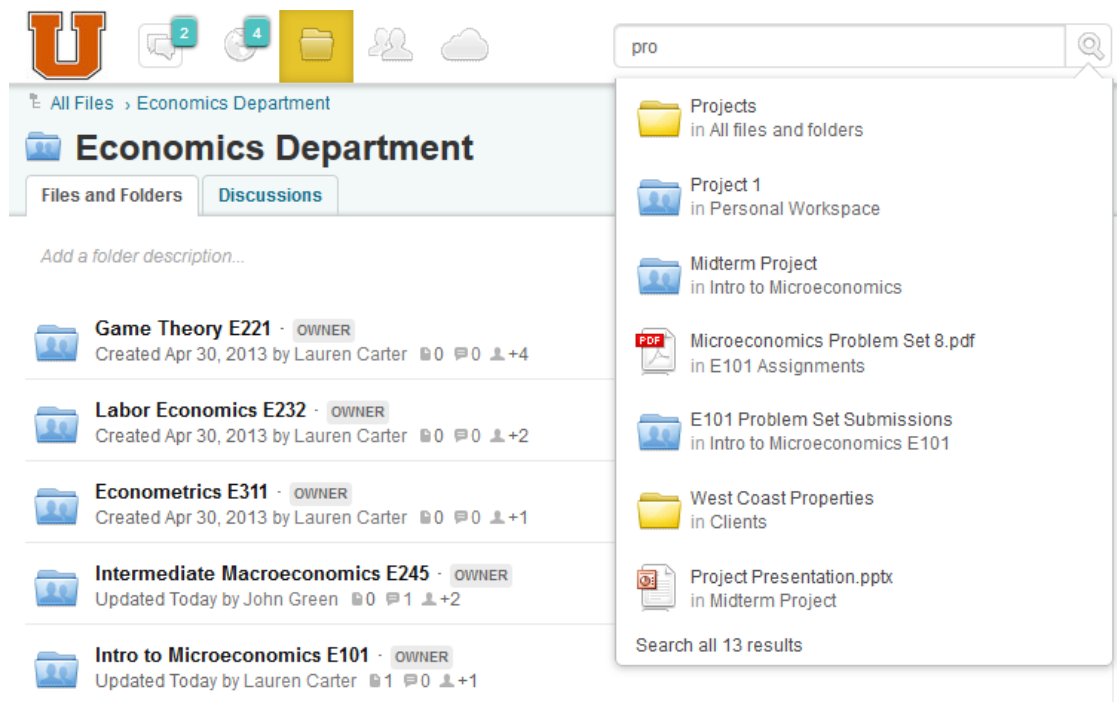


Figure 11: Instead of drilling down into your folders to find a file, use the search bar for quick discovery



Enable mobile productivity

1. Download Box for your mobile phone and tablet to have all of your Box files with you wherever you go.



Figure 12: Box for iPhone and iPad can be downloaded from the iTunes Store

2. Once you log into the app, you'll have access to all of your Box files no matter where you are. Students can favorite entire folders of lecture materials to review offline. If you need to collaborate or share files while on the road, just send a project partner or group a shared link from your mobile phone or tablet. Click on the '...' icon and choose 'Share.'

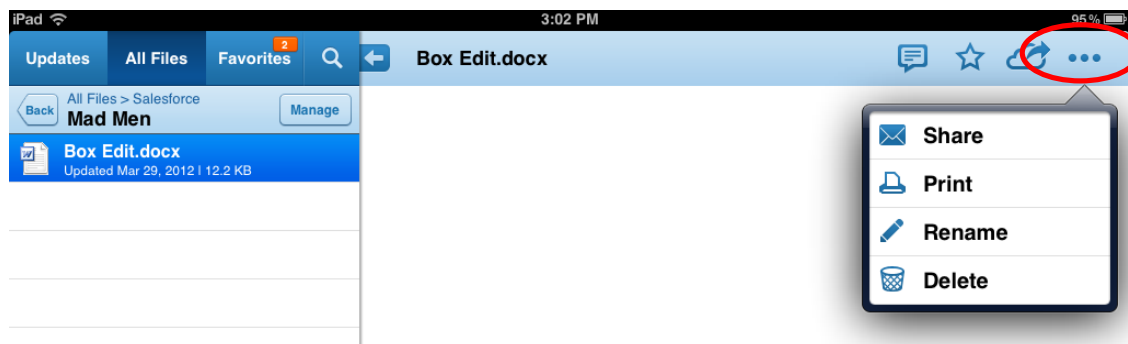


Figure 13: You can also use this button to send a document to a wireless printer

Create and Edit files on your iPad with CloudOn

1. Download the CloudOn application for free from the iTunes store to create or edit any Microsoft Office document directly from the Box application on your iPad. Once you have launched the app and created an account, select 'Box.com' as your storage account and sign-in to your Box account.





Figure 14: CloudOn allows you to connect directly to your Box account

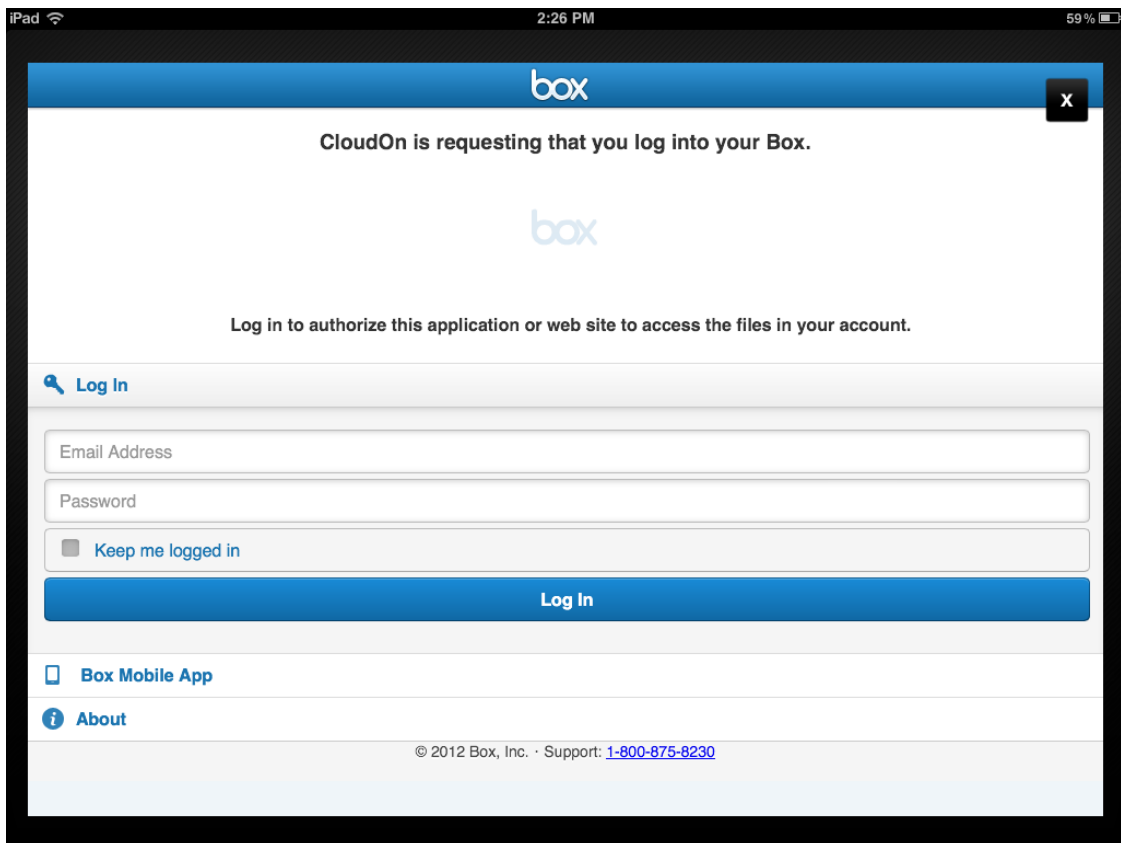


Figure 15: If your university has Single Sign-On (SSO) solution to log into your Box account, type in your email address only and click 'Log In.' This will re-direct you to your school's login page for sign-in.



2. With CloudOn installed, you can now create and edit Microsoft Office files directly from your Box for iPad app. Open the Box app and navigate to a file for editing. Choose the cloud icon in the upper right-hand corner and select Open In 'CloudOn.'

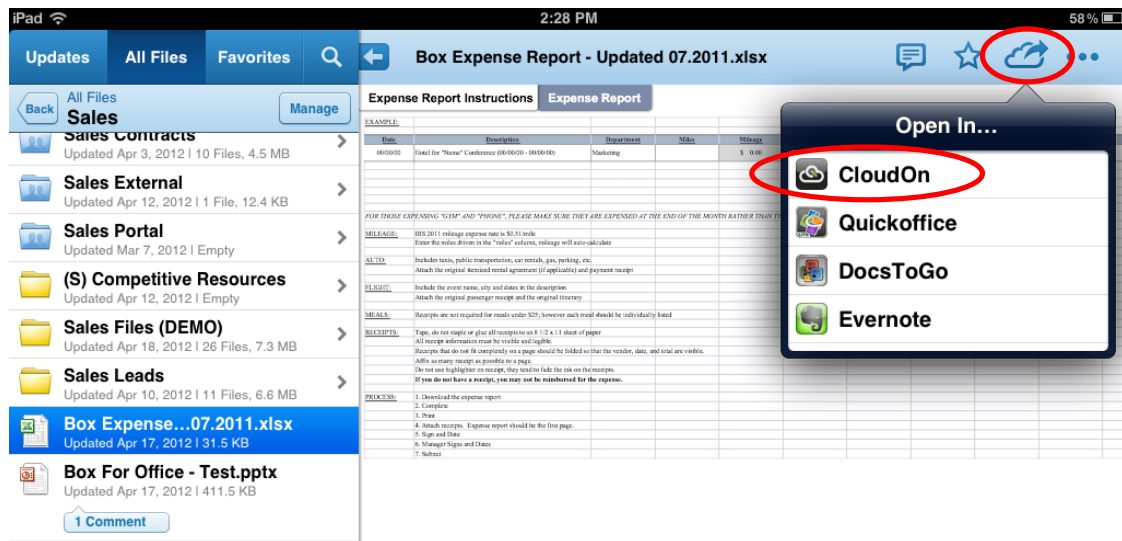


Figure 16: Open and edit a Word, PowerPoint, or Excel file and save directly back to Box

Takes notes on your iPad with Notability

1. Notability is a versatile app that allows students to capture all kinds of notes while on the go with handwriting, text and drawing tools. Students can use Notability in lecture halls and save directly back to Box, so all their content is centralized and easily accessible. With Notability, your university's students can:

- Open and annotate PDF files, and save them back to Box
- Use bullet points, numbered lists and spellcheck to take accurate and organized notes for sharing
- Click the "record" button to record voice notes
- Import existing notes and documents from your Box account into Notability for editing



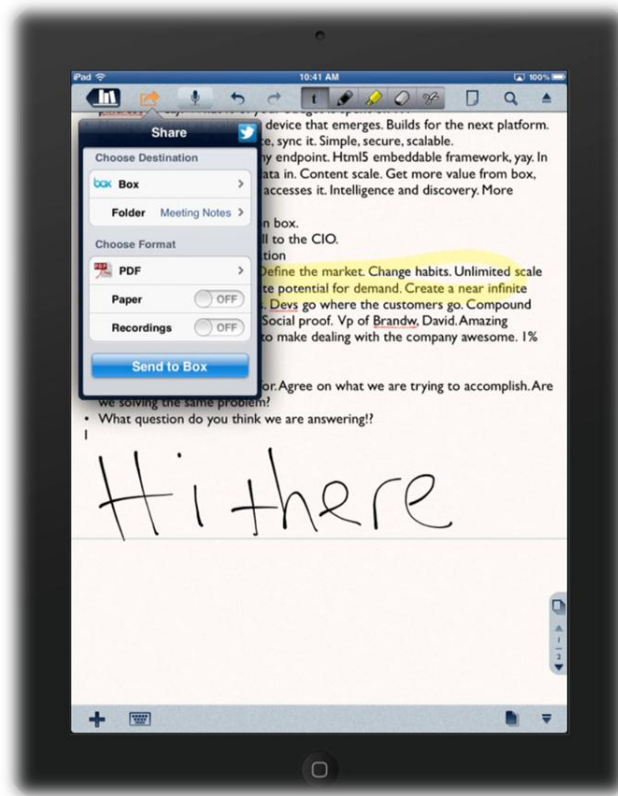


Figure 17: Notability is available in the iTunes App Store and integrates with your Box account

Print or fax with Breezy

1. Students and faculty are constantly running to and from classes, and often need to print a document or presentation last minute. With the Breezy app installed, users can print directly from their mobile device to any wireless-enabled printer on campus. simply tap the Cloud icon on your Box file and select "Print and Fax with Breezy" to start the printing process. You'll then be able to select from among your own or your university's wireless printers, the thousands of locations in the Breezy Partner Network, or even send your document as a fax.



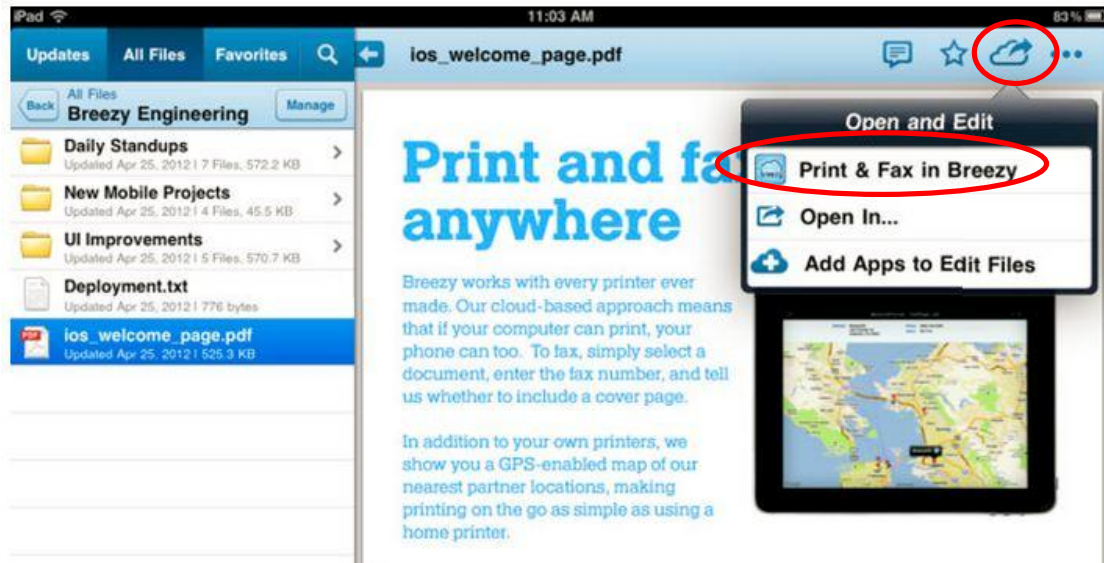


Figure 18: Initiate actions directly from within your Box app



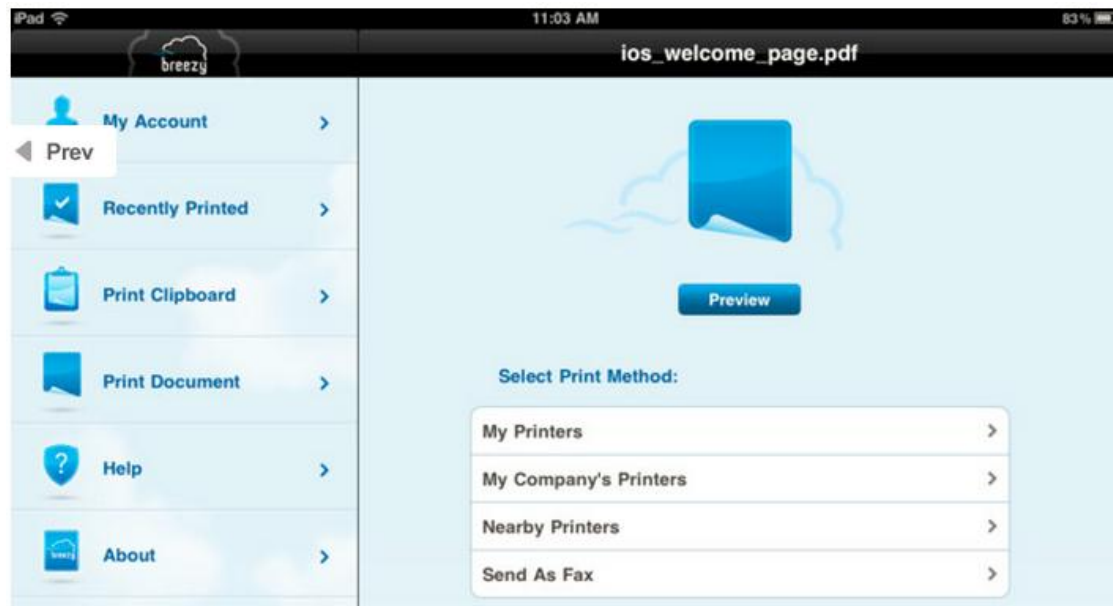


Figure 19: Breezy supports the world's largest secure network of on-location printing partners

Access files from your Gmail account using Attachments.me

With Attachments.me, students and faculty can navigate their Box account inside their email client, and generate a shared link to send out to others. You can also create a default folder, and have any attachments sent to you via email automatically uploaded to your Box account.

When sharing files back and forth through email, students frequently don't have the time to download and re-upload anything to a different workspace. With Box acting as a content layer for different programs and processes, it will be easy to get your users quickly onto and excited about Box. To get this app, click on the apps tab in your Box account and search for Attachments.me.

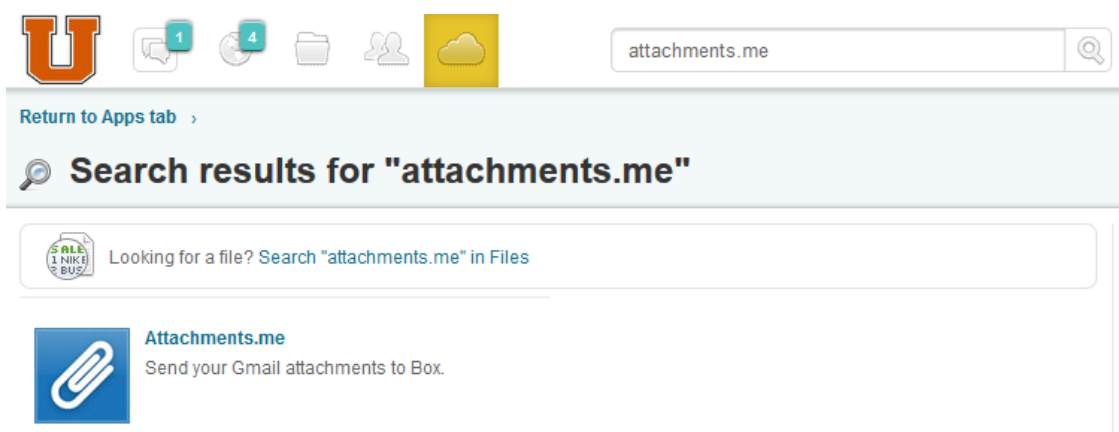


Figure 20: Use the apps tab to search for productivity apps to add to your Box account



Empowering Your Higher Education Team & Common Roadblocks

What is the easiest way to have your university transition from another system or a shared network drive to Box? The critical success factor for using Box within higher education is focusing on the benefits that come from a simple and enhanced work process -- namely enhanced collaboration, accessibility of content and social workflow tools. As you launch and communicate this with your leadership, test this with a pilot group to deal with any organization specific issues before rolling this out to everyone.

When you get ready to launch this with your institution, make sure you provide ample training and support, and communicate what the new expectations are. If you would like an example launch template, visit the [Box support portal](#) and open a new ticket with your request.



Figure21: Additional resources are available at success.box.com



FAQ

How do I track versions of files?

You can track the versions of documents in Box natively, so there is no need to 'save as' and create tons of different versions of the same file. As you create new versions, Box will append a version number to the file automatically, and you can roll back to a previous version if you make any mistakes. This also enables you to make sure you are working on the latest version of a file.

How should I name files?

Use descriptive names rather than numbers or symbols to improve discoverability. For example, "John Smith Deposition" is a better file name than "Deposition #12." Including the client's name in the file title makes it easier for you to find the file using Box's robust search engine.

Can I access this content when I am traveling?

Absolutely. Install Box Mobile for your preferred device, or navigate to m.box.com. If you anticipate working offline for an extended period of time you can favorite a folder for offline access in the Box Mobile app that allows you to store a local copy of the content on your mobile device. When combined with a strategy for Box Sync, you can ensure that you always have access to your content while on the road.

What forms of advanced search does Box support?

The Box search field supports the following:

- ["phrase search"] – finds the exact phrase
- [word word] -- finds files that contain both these words, in any order.
- [full OR text] -- finds files that contain either of these two (or more) words
- [this -that] -- finds files with "this" but not "that"
- [air*] -- finds "air", "airplane", "airplanes," etc.



GAPS – What are we missing?

- Some institutions have affiliate or “satellite” schools which may operate in conjunction but have entirely different campuses, brands, or security requirements. In cases such as these, you may want to consider more than one Enterprise Box Account. If this is something you need to consider, talk with your Box Sales Representative or Customer Success Manager to figure out whether or not multiple instances is the correct solution.
- While Box allows users to browse and download the apps that help make them more productive, it may be beneficial (from an IT admin perspective) to automatically provision some apps for the users. For instructions on how to provision Box official apps at scale, visit this support page: <https://support.box.com/entries/22974452-Instructions-for-IT-for-Large-Scale-Silent-MSI-DMG-Installations-Of-Box-Desktop-Applications-And-Ins>
- What if you’re a paper department or office? How can you migrate your physical documents to Box? Like many universities, physical documentation was (and still is) a large part of how administrative work is done. For lightweight document conversion, Box integrates with eDocScan to scan your physical documents directly to your Box account. For higher volume scanning, Box is currently working on a partnership with a leading scanning service to offer more robust conversion, so stay tuned!



Additional Information

For additional information visit success.box.com to watch video tutorials, signup for training, and review best practice guides. Please note that all applications and guidelines here are for reference purposes, and do not constitute a recommendation from Box of any particular vendor or strategy.

You are encouraged to thoroughly test and verify all applications and strategies before deploying them.

How CUNY Hunter College Uses Box

Hunter College, located in the center of Manhattan, is the largest college in the City University of New York (CUNY) system and one of the oldest public colleges in the country. Well known for its research pursuits, a Hunter research team received the “Rehabilitation Research and Training Center on Disability Statistics and Demographics” grant, funded by the National Institute of Disability and Rehabilitation Research in the U.S. Department of Education.

The Challenge

With researchers both at Hunter College and other institutions, the Rehabilitation research group was constantly emailing files back and forth and holding conference calls in order to sync the efforts of its geographically distributed team members. The team had previously been using Blackboard, an education software package, to collaborate, but new versions stopped allowing researchers outside of the Hunter College network to access files—hindering progress on the team’s group work.

John O’Neill, a professor of counselor education at Hunter and member of the research group, started looking around at other solutions, but found that they didn’t need “all the bells and whistles” that most solutions provided. When a colleague at another CUNY college recommended Box, John decided to give it a try.

The Solution

John’s 12-person team began posting files for group discussion and realized that Box was a perfect fit. Founded in 2005 with the mission to help people access their information easily from any location, Box now has over 9 million users from over ten thousand businesses that look to Box to help replace FTP software, simplify file management, and accelerate team productivity. “It’s quite easy to upload materials and create new folders. It’s very intuitive,” said John. Now during conference calls, the group uses Box to post minutes, agendas, relevant documents and timelines for future progress. “It serves its purpose as a net-based workspace, allowing us to share our files as we’re conducting our business,” he explained.

With the opportunity to quickly and easily share files in group settings, the research group is able to collaborate more efficiently during its conference calls. “You can’t collaborate if you can’t share files,” John explained. “You can’t collaborate if you can’t centralize your materials somewhere and access them when you’re not together as a group.”



When documents need quick edits, the research team makes changes to the documents online using Box's built-in Zoho editing functionality which allows anyone on their team to open a document, spreadsheet or presentation, make changes and then save directly back to Box.

"Box is very reliable. It's never been down, and our old solution was often down. Box does what we need it to do."

-John O'Neill, Professor of Counselor Education, CUNY

Apps mentioned in this document:

1. Box Edit- box.com/boxedit/
2. CloudOn - <https://www.box.com/services/cloudon>
3. Notability - <https://www.box.com/services/notability>
4. Breezy - <https://www.box.com/services/breezy>
5. Attachments.me - <https://www.box.com/services/attachmentsme>
6. eDocScan - <https://www.box.com/services/edocscan>

