WA State GEAR UP
Box Account Instructions & File Naming Conventions

Using your Box Account

You will receive an invitation from "Box" to collaborate within the system. You will accept the invitation to access the shared content within your Box account. This allows you to upload, view, edit, or comment on documents with other users.

Key points about receiving a Box invitation:

- **Email notification:** The invitation will arrive as an email from Box, usually with a link to accept the collaboration.
- **No Box account?** If you don't have a Box account, the invitation will prompt you to create one before accessing the shared content.
- **Welcome Message:** When you log in for the first time, Box displays a message introducing you to Box functionality.

Based on your GEAR UP role, you will have access to one or more of the folders below:

- A19 and EDF Submission
- Field Trip Requests
- Ineligible Student Verification
- Match Documentation
- Onboarding Certifications
- Portal Documentation

**There are two ways to upload files to Box:**

- from the *File Browser;* or
- by *Drag-and-Drop.*

Both methods are acceptable, and detailed instructions are provided on the next page. Whichever method you choose, <u>you must also rename your files after uploading them</u>. The instructions for this are outlined on the following pages.

1. Upload to Box with the File Browser

While browsing all files and folders in Box, uploading a new file or folder is straightforward:

1. Choose the folder you will be uploading to from the list of pre-named folders in your Box account and click the **New +** button in the upper-right corner.
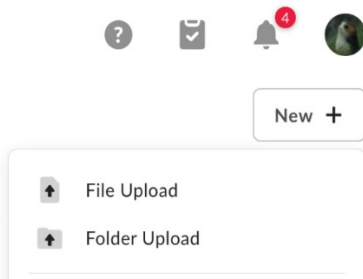
2. Select **File Upload** or **Folder Upload,** depending on what you'd like to upload.

3. From your computer files, select the file(s) or folder you want to upload.

4. You can select multiple files for upload by holding the **Command** or **Control** key (Mac or Windows, respectively) while selecting files. However, you can only choose one folder at a time for upload.

5. Click **Open** or **Upload**.

6. After uploading your file into Box, use the naming conventions below to rename the uploaded file. These naming conventions ensure consistency and clarity in file names, making it easier for you and your collaborators to find and identify files.

2. Drag and Drop Files into Box

1. You can drag files directly from your desktop to the appropriate Box folder. Select the file from your desktop and drag and drop it to the folder. Your files will be uploaded and appear in the folder where you dropped them.
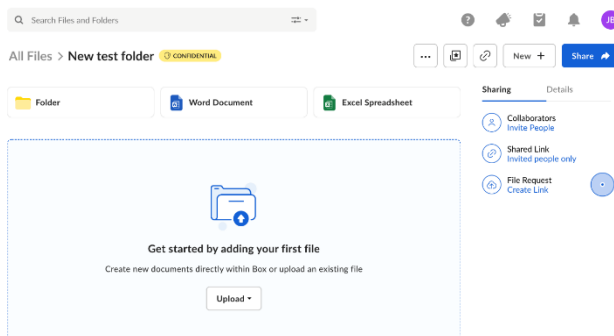
2. After uploading your file into Box, use the naming conventions below to rename the uploaded file.

3. Name According to File Naming Conventions for Box Upload

Accounting/Budget Folders

A19 & EDF Submissions: School Name Month Year
- *Example:* Aberdeen November 2024

Match Documentation: School Name Month Year
- *Example:* NorthBeach January 2025

Portal Folders

Field Trip Requests: Date of trip Activity Type – Location
- *Example:* 1.11.25 CollegeVisit - WSU
- *Example:* 1.15.25 Job Site Visit - Boeing

Ineligible Student Verifications: MonthYear School Name - Ineligible Student Verification
- *Example:* January2025 BannonHS – Ineligible Student Verification

Onboarding Documentation: Staff Name Study Lab or NCAN - Name of Course (Saved in staff folder)
- *Example* (Study Lab)**:** Hazel Basil Study Lab - Professional Skills Micromodule
- *Example* (NCAN)**:** Hazel Basil NCAN - Virtual College Advising

Portal Documentation (1:1 Support): Date Activity Type
- *Example:* 1.11.25 Counseling & Advising
- *Example:* 1.12.25 Tutoring & Homework Assistance
- *Example:* 1.13.25 Family Counseling & Advising