

# User Guide for WorkSafe Box

Version: 1.0

Date: 15/10/2021

## 1. Document Control

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### 1.1. Version History

Please find the artefacts at the following location.

Date	Version	Author	Description of Change
05/10/2021	0.1	Gayle Stokes	Initial Draft
15/10/2021	1.0	Gayle Stokes	Final Version

### 1.2. Reviewers

Name	Role	Date	Comments
Anneliese Mills	Project Manager		
Pam Hough	Senior Business Analyst		
Lee Shelton	Test Manager		
Gauvrav Patel	Solution Architect		

### 1.3. Artefact Location

Please find the artefacts at the following location.

Artefact	Location
Document	

## Contents

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<b>1. Document Control.....</b>	<b>1</b>
1.1. Version History .....	1
1.2. Reviewers .....	1
1.3. Artefact Location .....	1
<b>Contents.....</b>	<b>2</b>
<b>2. Scope of this Guide.....</b>	<b>3</b>
<b>3. Getting Set up for WorkSafe Box .....</b>	<b>3</b>
3.1. Accepting the invitation .....	3
<b>4. Collaborating with WorkSafe Box .....</b>	<b>6</b>
4.1. Sharing Information with WorkSafe .....	6
4.2. Retrieving Shared Files .....	8

## 2. Scope of this Guide

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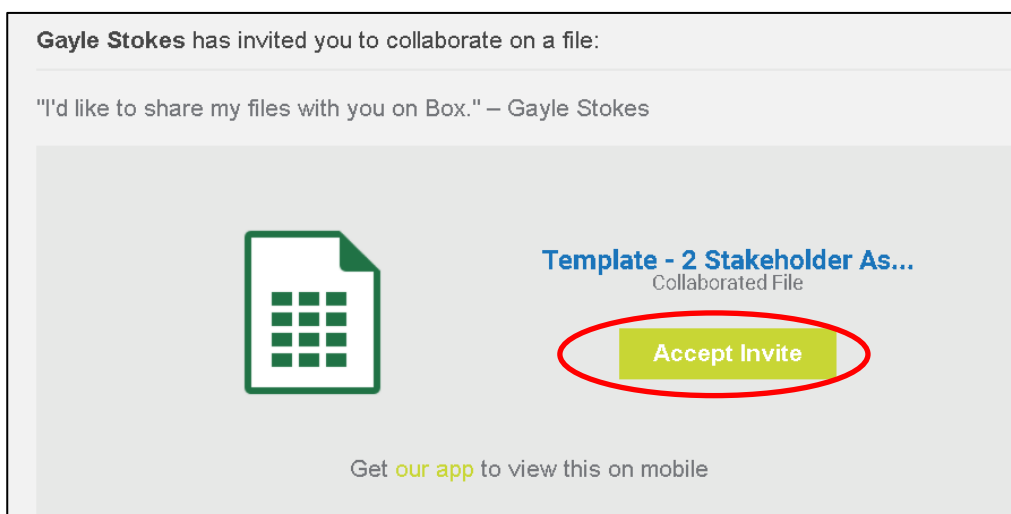
WorkSafe Box is used for sharing sensitive and large files securely with both internal and external stakeholders. When you are invited to share or collaborate on a file or folder in WorkSafe Box, you will receive an automated email with a link inviting you to collaborate.

Note: The first time you connect with WorkSafe Box you will need to set up an account and password.

## 3. Getting Set up for WorkSafe Box

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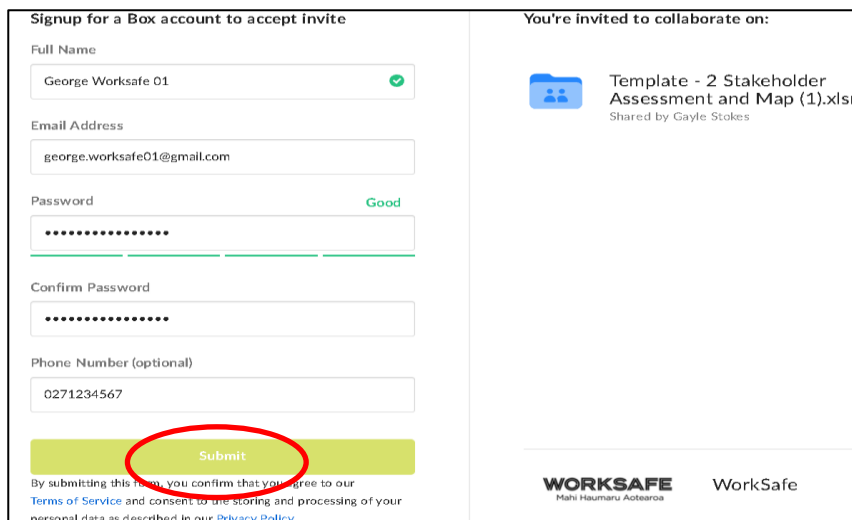
When you are invited to share information with WorkSafe you will receive an automated email:



### 3.1. Accepting the invitation

If you are connecting with WorkSafe Box service for the first time, follow the steps below to set up your account. Otherwise, you can go to **Section 4. Sharing Folders and Files**

1. Click on **Accept Invite**. You will be asked to sign up for a Box account to be able to accept your invite:

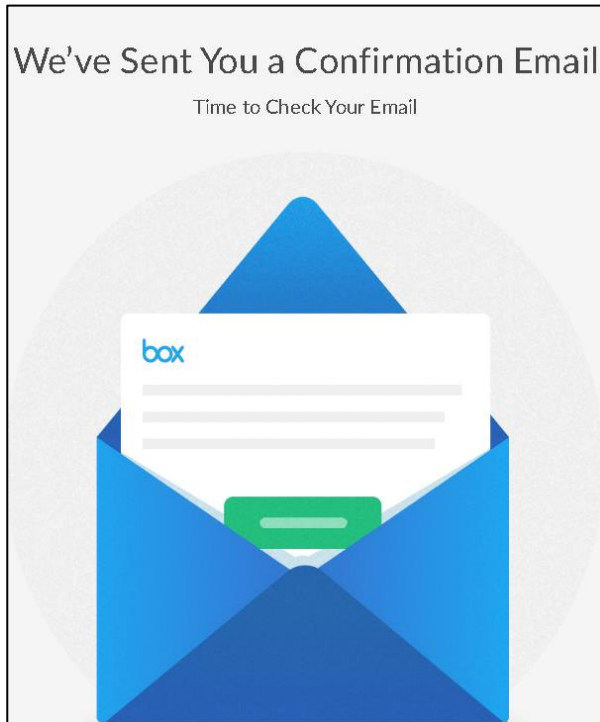


The screenshot shows a two-column form for signing up for a Box account. The left column is titled "Signup for a Box account to accept invite" and contains the following fields: "Full Name" (George Worksafe 01), "Email Address" (george.worksafe01@gmail.com), "Password" (with a "Good" status indicator), "Confirm Password", and "Phone Number (optional)" (0271234567). A green "Submit" button is at the bottom of this column, circled in red. Below the form, there is a disclaimer: "By submitting this form, you confirm that you agree to our Terms of Service and consent to the storing and processing of your personal data as described in our Privacy Policy." The right column is titled "You're invited to collaborate on:" and shows a folder icon and the file name "Template - 2 Stakeholder Assessment and Map (1).xlsx" shared by Gayle Stokes. At the bottom of the right column, the WorkSafe logo and name are displayed.

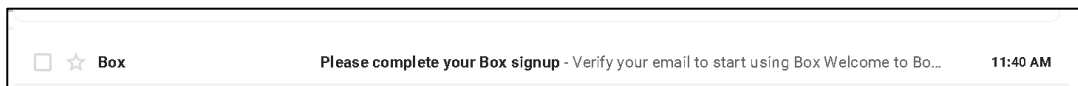
2. To create your account, enter your name and password (must be 8 characters, and include at least 2 numeric and 1 symbol)
3. Type your password in again to confirm and click **Submit**

**Note:** The email address field will already be populated

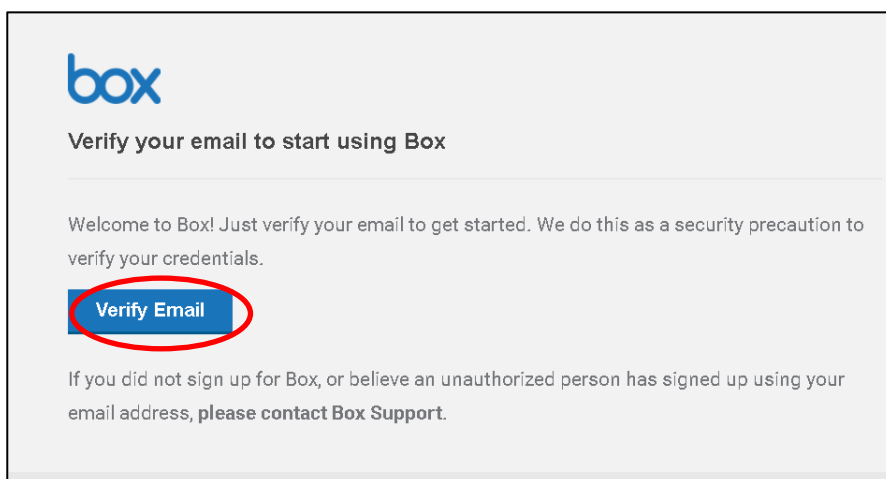
4. You will receive a message from Box advising a confirmation email has been sent:



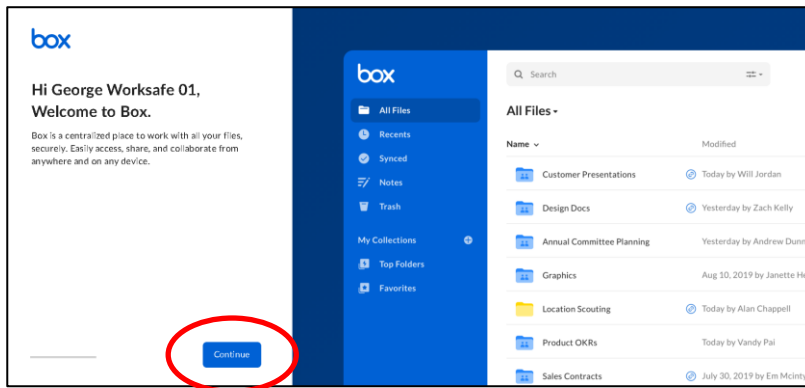
5. Check your email in box and you will see a new email in your list asking you to complete your Box signup



6. Open the email and click on the Verify Email button:



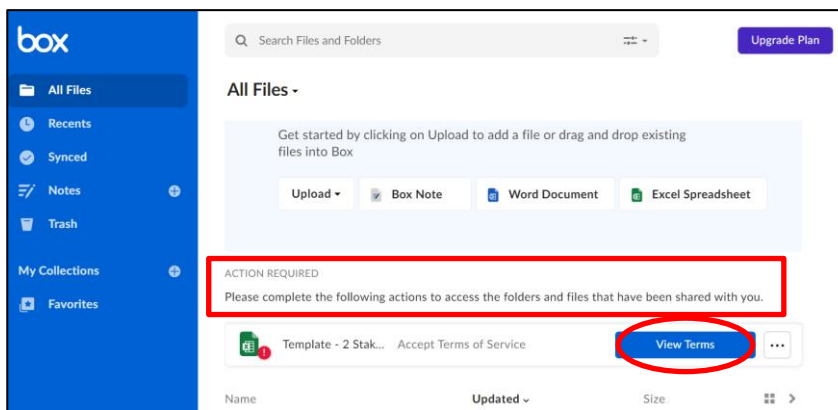
You will be presented with a Welcome to Box screen:



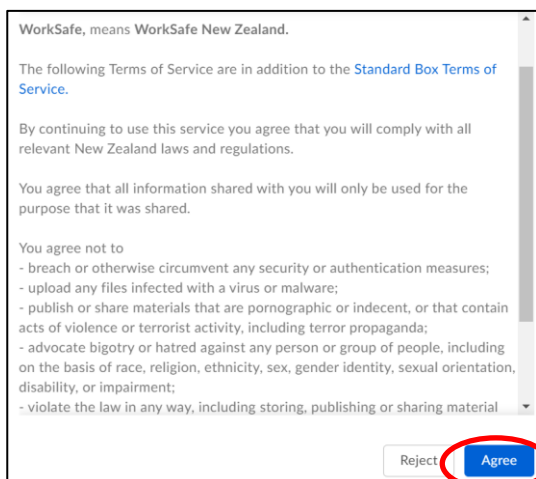
7. Click the **Continue** button to work your way through the learning screens

**Note:** For further assistance go to [The Basics of Box – Box Support](#). This is where you will find the latest information from Box.

On completion you will be presented with an Action required notice on the **All Files** screen:



8. Click on the **View Terms** button, the WorkSafe Terms of Service will be displayed:



9. Review the Terms and click the **Agree** button to proceed. You are now ready to collaborate with WorkSafe.

## 4. Collaborating with WorkSafe Box

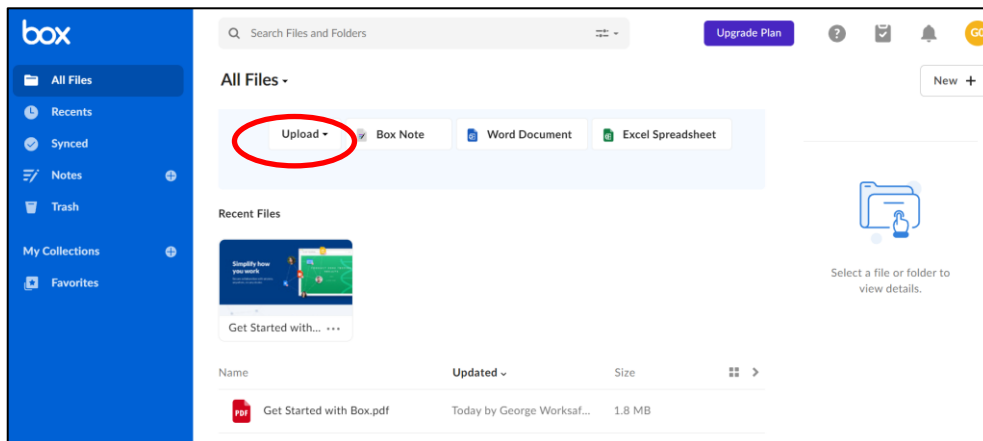
There are two ways in which you may be sharing information with WorkSafe:

1. You may have received a request from WorkSafe to provide certain information or documents, or
2. You may have requested WorkSafe to share certain information or documents with you.

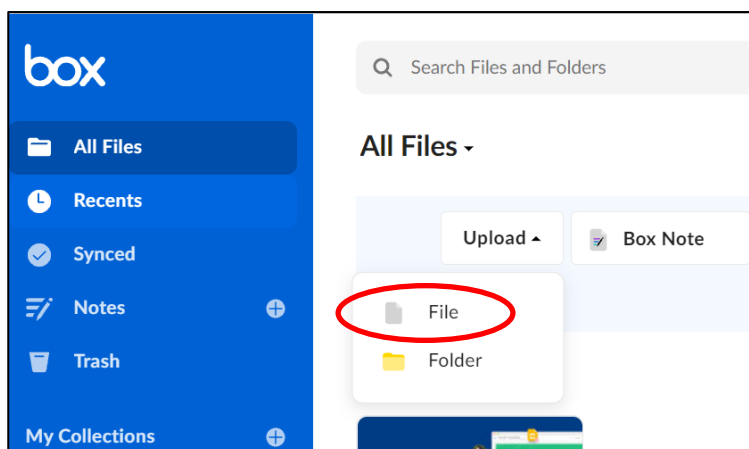
### 4.1. Sharing Information with WorkSafe

In this scenario you will have received an invitation from WorkSafe Box to provide certain information to WorkSafe.

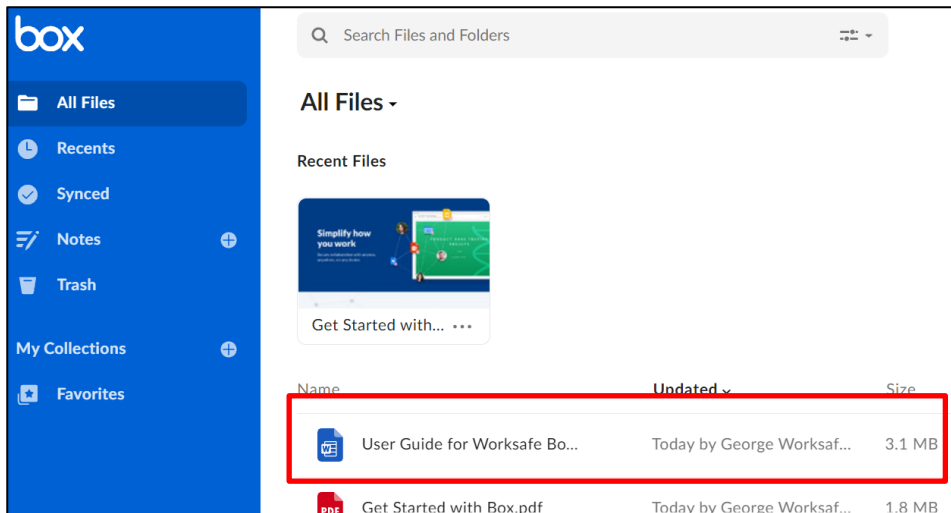
1. Login in to WorkSafe Box <https://worksafe.app.box.com/> and navigate to All Files>Your folder list (see Section 3, Steps 1 – 9 above). The **All Files** screen will be displayed:



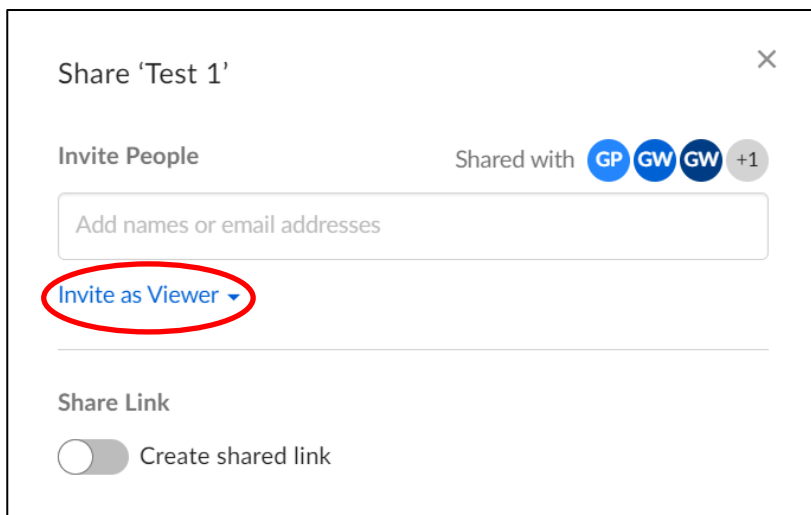
2. To start uploading your file for sharing Click on the **Upload** button and select File:



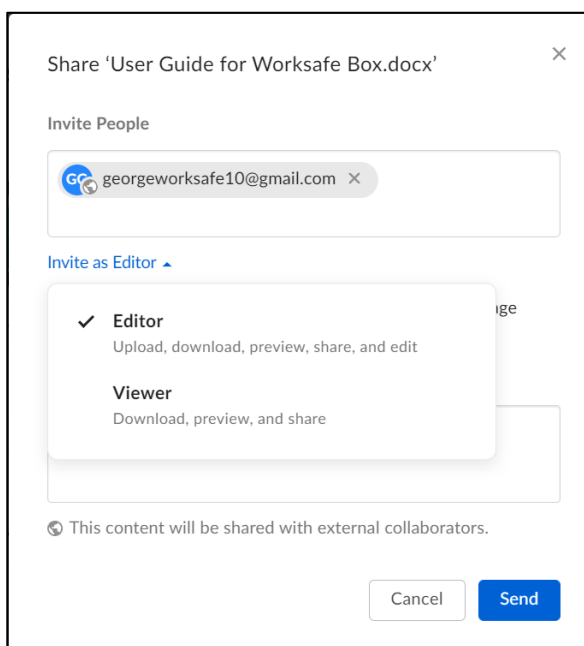
3. Navigate to your desktop to select and upload your file. A banner across the bottom of the screen will advise the upload process has started and the on completion the file will be listed in the All Files screen:



4. Hover over the file and select the Share button. A pop up screen will appear:

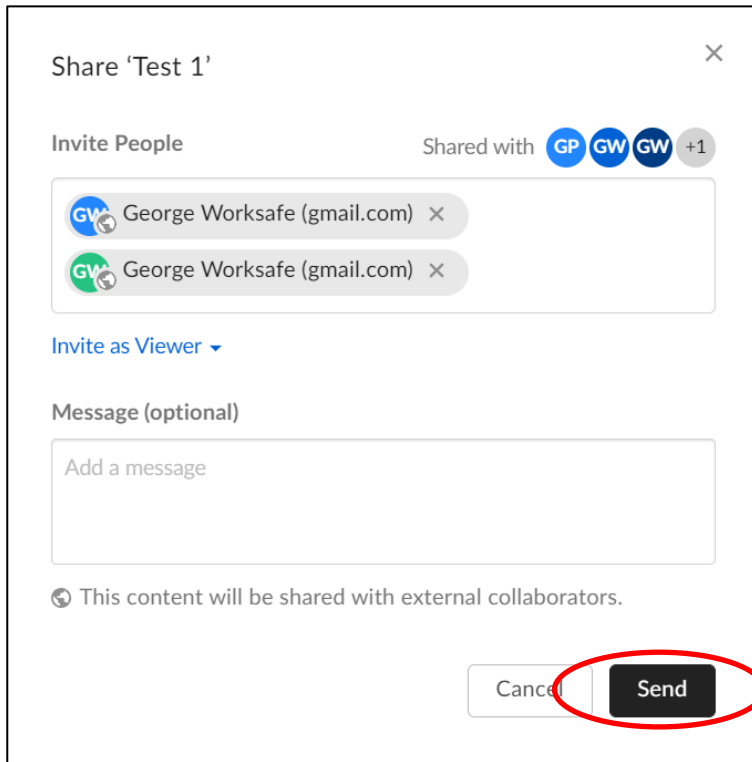


5. Enter the email address of the sharing recipient in the **Invite People** field and then click on the **Invite as Viewer** option to set their permissions level from the drop down list:

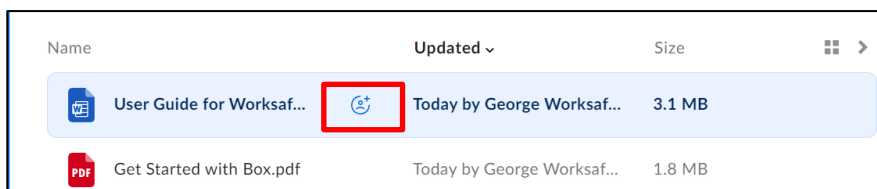


**Note:** You can enter multiple email addresses at once by simply pushing return as you enter them.

6. Click the **Send** button:



An email will be sent notifying the recipient a file has been sent to them. You will be returned to the All Files screen and a confirmation pop up message will briefly be displayed. The file will be marked in your folder list with the collaborator symbol.

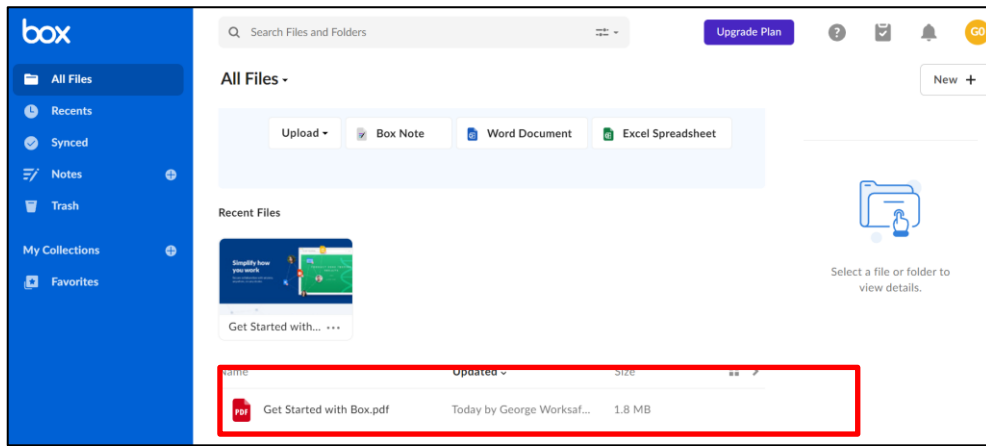


7. Click your initials in the top right hand corner to log out of Box.

## 4.2. Retrieving Shared Files

In this scenario WorkSafe will have provided you information.

1. Login in to WorkSafe Box <https://worksafe.app.box.com/> and navigate to All Files>Your folder list (see Section 3, Steps 1 – 9 above). The **All Files** screen will be displayed with the file or folder which has been shared with you appearing in the list:



2. Depending on the level of access you have been given you can either click on the file to open it for review or you can download it for further action. To download the file, click on the Download button in the top right hand corner of your screen.