## Contents

1.1 Welcome to Secure File Sharing

You have been in contact with an RBC representative that wishes to share files with you. You may already have received an e-mail from your representative and Box (Secure File Sharing provider) inviting you to collaborate on a file or folder.

If you have not received this e-mail, please reach out to your RBC representative to confirm the collaboration invitation.

1.2 Receiving the Sharing Invite Email

- Click 'Accept Invite' link from the email

From: S Smith <noreply@box.com>
Sent: August 21, 2021 2:19 PM
To: mrsjessicajones2021@gmail.com
Subject: S Smith has invited you to collaborate on Box
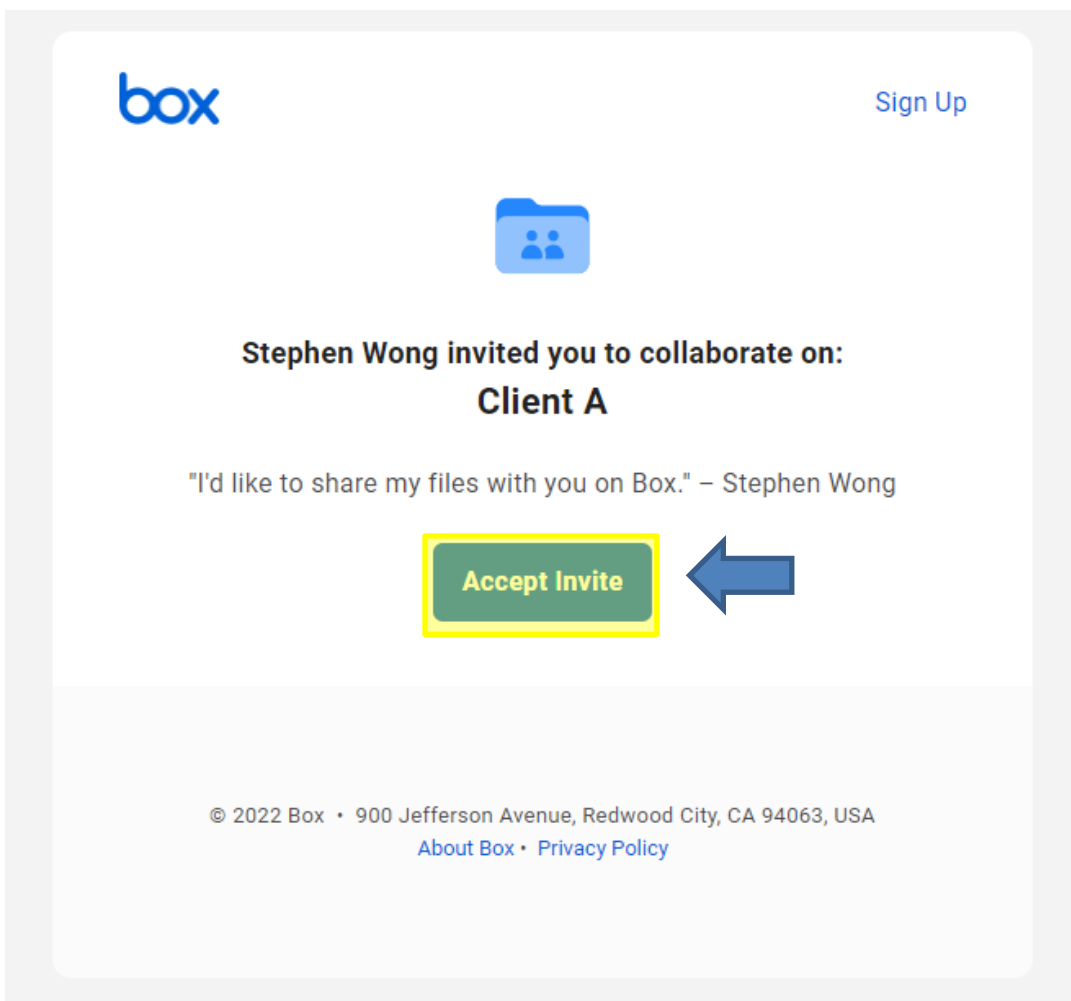
1.3   Accepting the Sharing Invite: As a new user

- Register for a **free** Box account by providing your name, e-mail, and password. Click 'Submit'

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- Navigate through the confirmation steps within the Box email and review the information screens
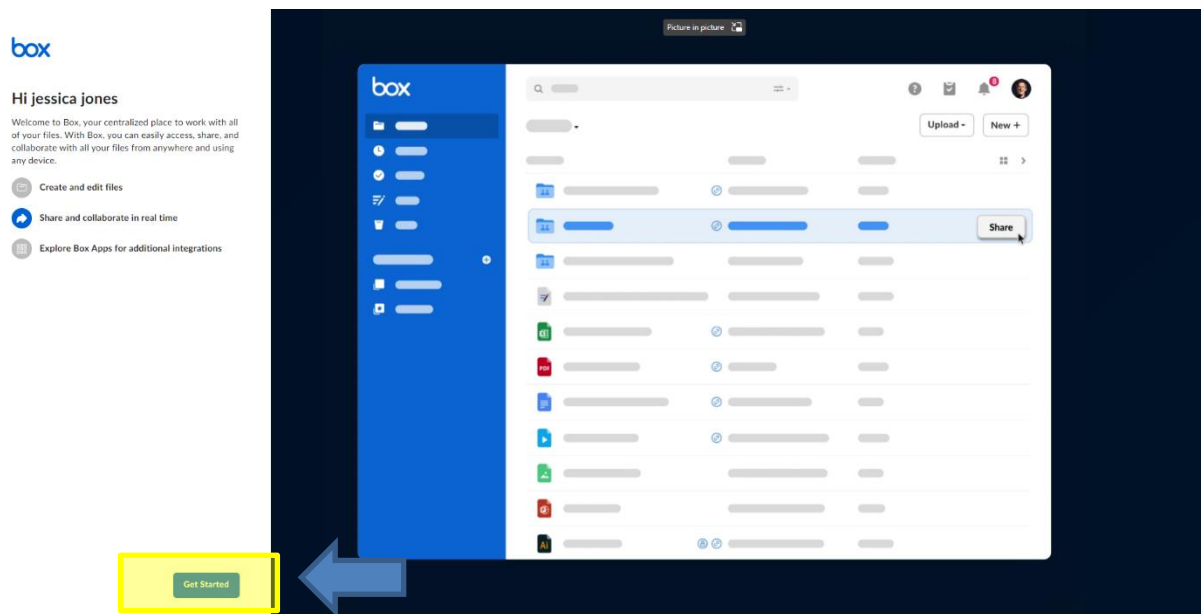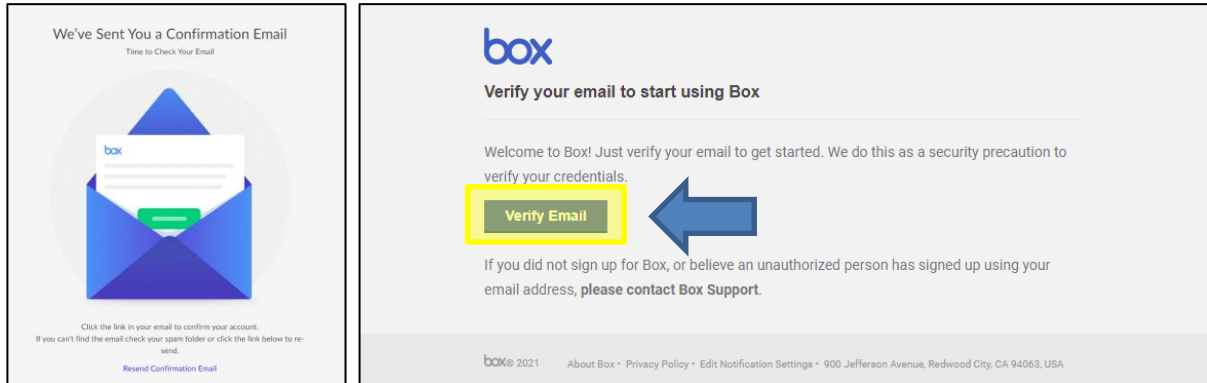
1.4 Accepting the Sharing Invite: When you have a pre-existing Box account
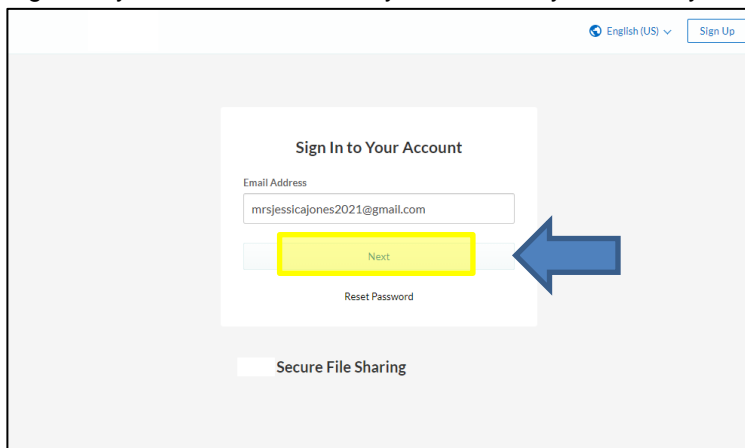
- Sign into your Box account with your email as you normally would

- Enter your password and click 'Log In'

1.5 Accepting the Terms and Conditions

After logging into your Box account you will be prompted to accept the Terms and Conditions

- Review the terms and conditions
- Click 'Accept'

1.6 Setting up Multifactor Authentication

- This configuration is setup between yourself and Box and is an additional security measure that is required before you can access the shared information
- Once you choose either a supported Authenticator application (e.g. Google Authenticator, Microsoft Authenticator) or use Short Message Service (SMS) you will proceed through a series of setup screens
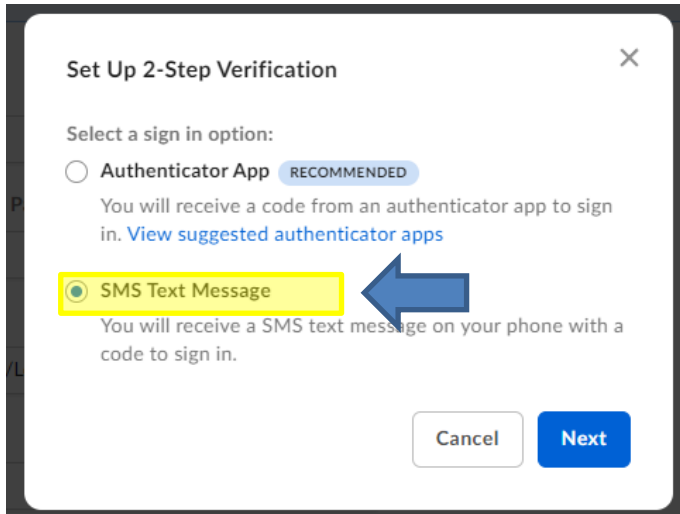
- Once completed, you will also need to review and agree to the terms and conditions before accessing shared folders and files
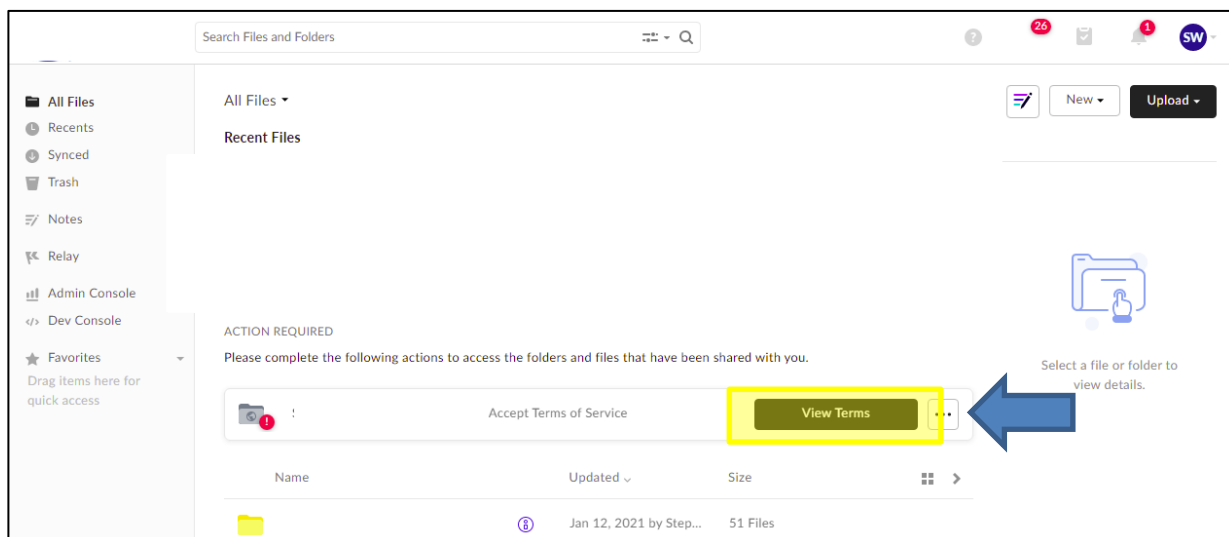
1.7 Navigating the Home Page

- You are now on the Box home page. Click into the gray folder that has been shared with you
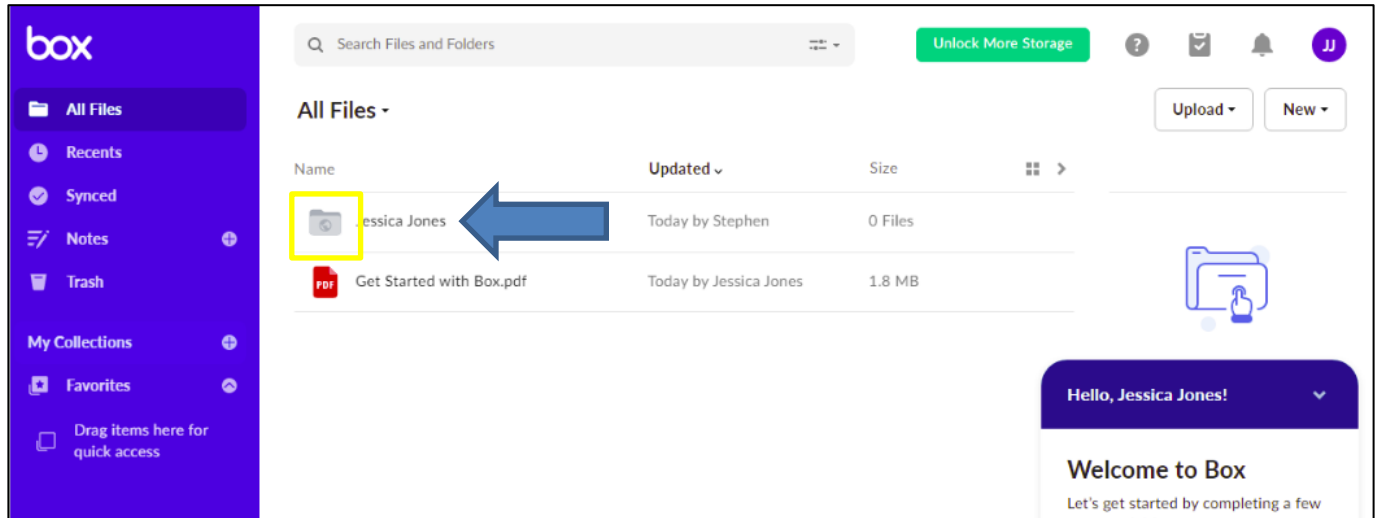
- Confirm you are inside the shared folder by checking the folder path at the top before uploading. You should see All Files > [Folder Name] at the top.   Inside the folder your will see the RBC logo at the top right.

1.8   Downloading Folders and Files

- To download the entire contents of a folder:
    - Hover over the ellipsis ('…') in the upper right hand corner and select 'Download' from the drop down options or
    - Select 'Download' at the top to download all the contents within the folder
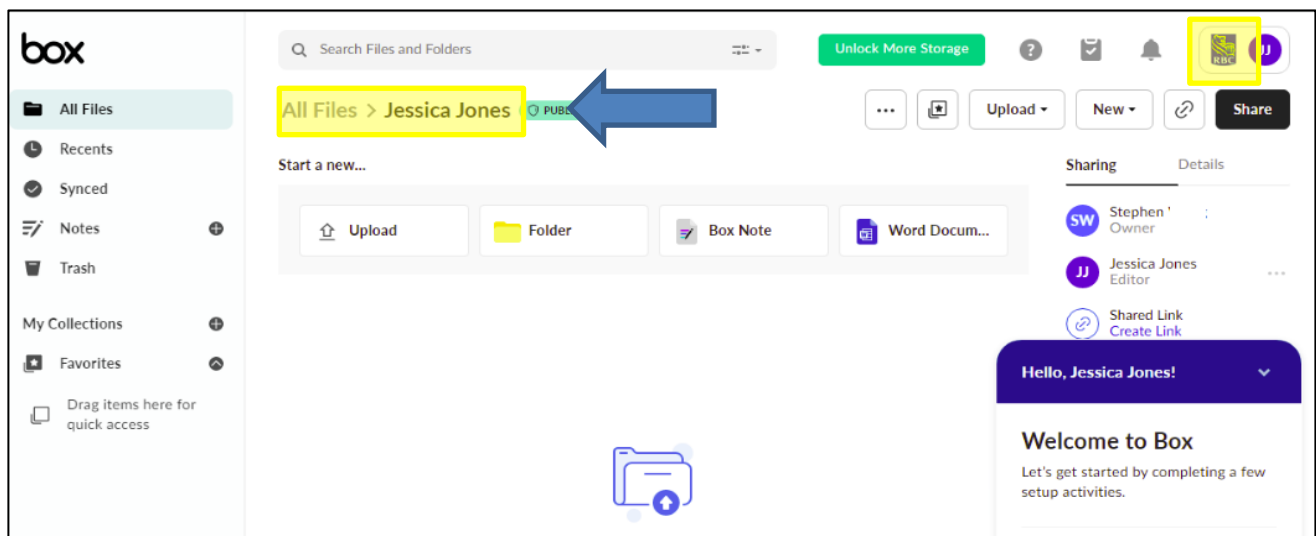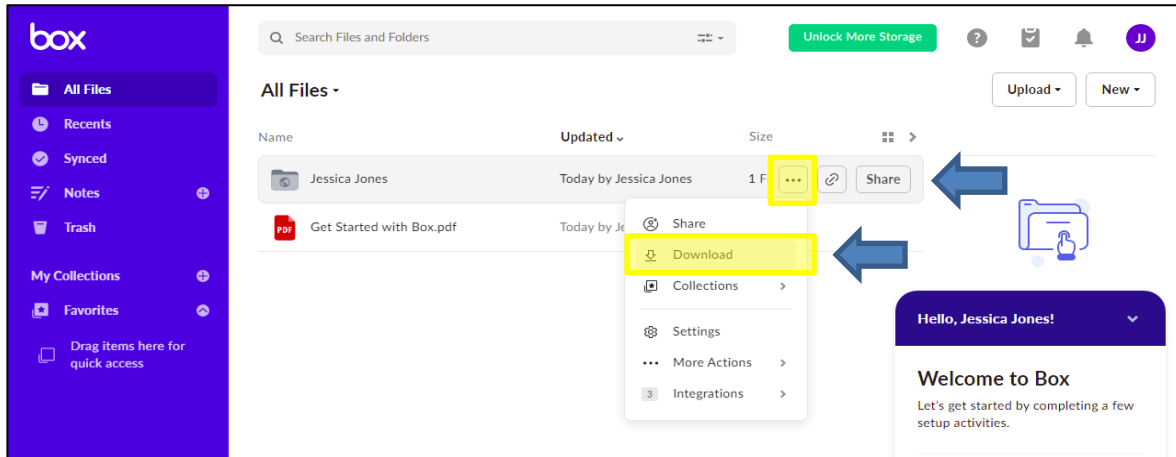

- To download a single file or item in a folder, select the file, hover over the ellipsis ('…'), and select 'Download' from the drop down options.

1.9 Uploading Folders and Files

- Click into the folder level where you would like to upload
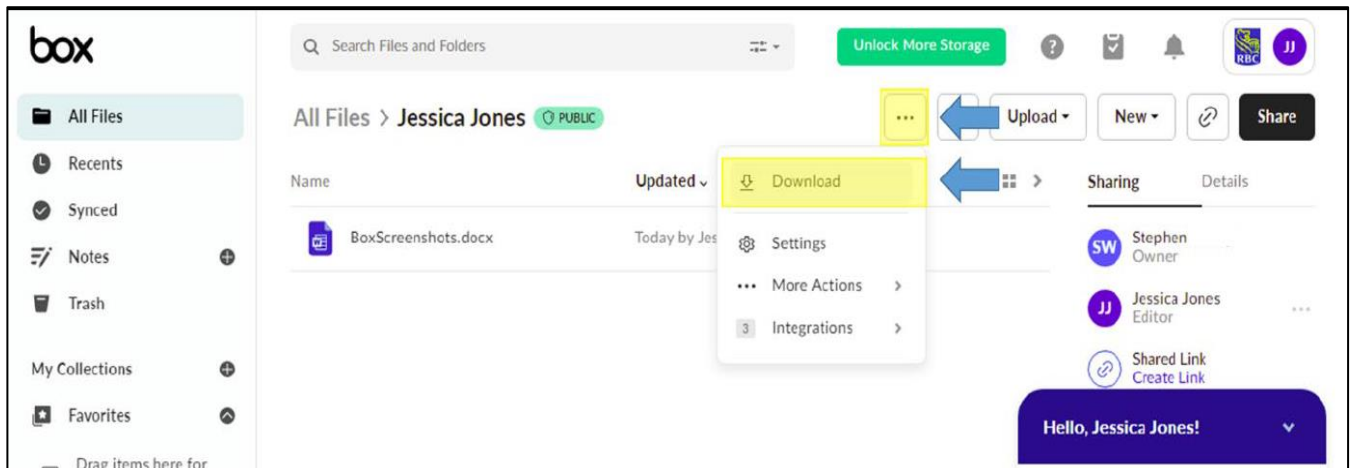- Click 'Upload' and select either 'Files' or 'Folders' to search your desktop for your documents.
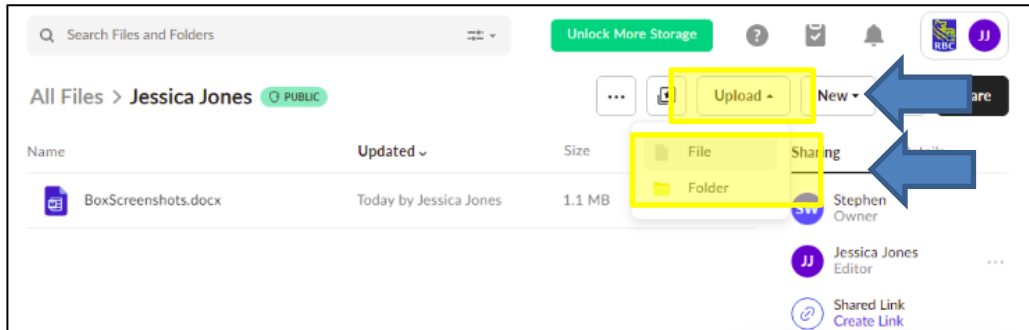
- Navigate to your desired folders or file and click 'Open'.
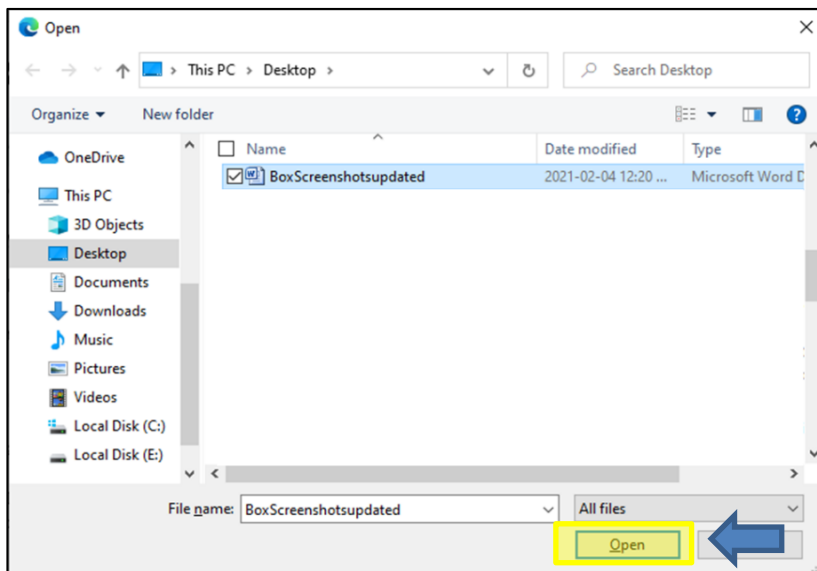
- A confirmation notification will appear at the top of your screen when the file or folder has uploaded.

* If you are experiencing technical difficulties, please reach out to your contact

1.10 Troubleshooting

- I see an 'Invalid Credentials' error at the log in screen.
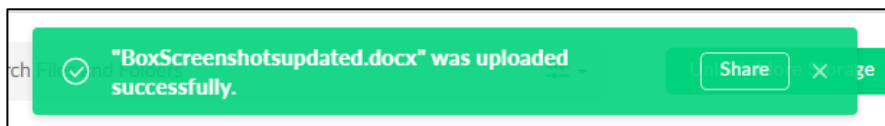   - a) On the sign in page, you must select 'Not a part of RBC?'
    - b) Do not select 'Continue'
- I am getting prompted to pay when signing up for an account.
    - a) Invited clients and vendors do not have to pay for their Box accounts.
    - b) If your email address was previously associated with a Box enterprise license, contact billing@box.com for support.
- My contact cannot see the file I uploaded.
    - a) Ensure you uploaded the folder/file inside the gray folder shared with you. You can confirm by checking the top folder path and seeing 'All Files > [Folder Name]'. If you uploaded to the home page and not the folder, simply drag and drop the file into the correct folder.
- I do not see the folder shared with me on my home screen.
    - a) Click 'Notifications' on the left side of your Box screen. Under your pending invites, click 'Accept'.
- I cannot view a PDF shared with me.
    - a) Ensure Adobe Reader is installed
    - b) Switch to another browser (Google Chrome/Microsoft Edge) OR
    - c) Download the PDF to your desktop
- I cannot invite anyone to the folder or delete a file.
    - a) Your contact has determined what permissions you have inside the folder. In most cases, for privacy and security reasons, you will not be given permission to invite others or delete content.

If any of these errors persist, please reach out to your contact.