

Dropbox Resource Guide

A guide to your CSB's and OMNI's shared Dropbox folders



What is Dropbox and why do we use it?

Dropbox is an online or 'cloud-based' file hosting service. Your CSB has a **shared Dropbox folder** with OMNI to securely and confidentially exchange files that contain personally-identifying information, such as client IDs or birthdates. OMNI generates weekly GPRA tracking sheets in your Dropbox folder on Mondays that document when follow-up windows open and close for every client.



Who has access to the folder and how do I request access?

Who has access?

Anyone at your CSB who would need to review the GPRA tracking sheets should have access to the shared Dropbox folder.

How do I request access?

Email SORSupport@omni.org to request access or submit a *TA Request* on the SOR Support website.



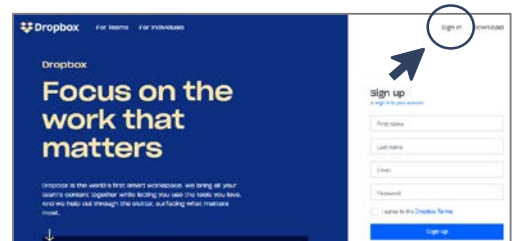
How do I access my Dropbox folder on a regular basis?

How do I access my CSB's Dropbox folder?

Dropbox requires you to set up a free account (instructions later in this document). Once you have set up the account, follow these instructions to access your CSB folder and files on a regular basis.

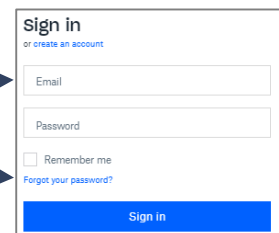
1

- Type in www.Dropbox.com into any internet browser.
- Click "Sign in" in the top right corner of the page.



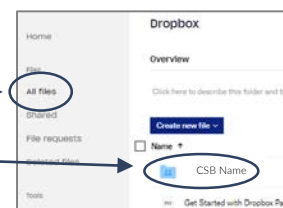
2

- Next, sign in using the email address that was given access to the folder and your password.
- If you forgot your password, select "Forgot your password?" to reset your password.



3

- You will be brought to your Dropbox account.
- Click on "All files" in the left-hand column.
- You will see a blue folder icon next to the name of your CSB. Click this and you will be brought to your CSB's shared folder and files.



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Setting up your Dropbox account and folder

How do I set up my CSB's Dropbox folder if I do not have a Dropbox account?

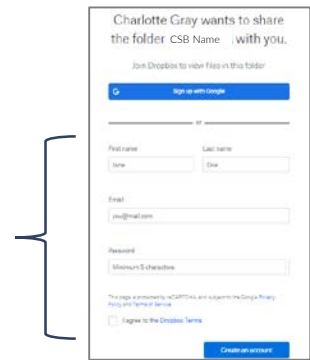
1

- Once you've requested access to the folder, you will receive an email from Dropbox notifying you that a member of the SOR TA Team has "invited you to edit" your CSB's folder with you.
- Click "Go to folder".



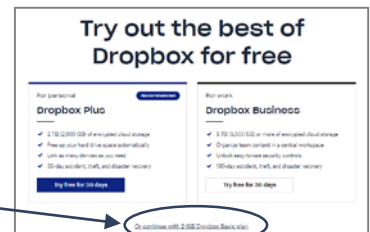
2

- You will be brought to an internet browser where you will be prompted to create a Dropbox account. To create your Dropbox account:
 - a) Enter your name, the email address that was given access to the folder, and create a password.
 - b) Click "I agree to the Dropbox Terms" and click "Create an account" at the bottom.



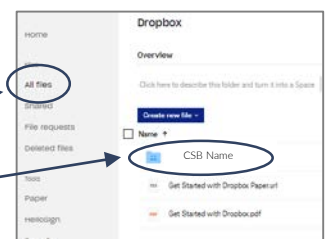
3

- Alert! You will be brought to a page asking to sign up for a paid-subscription to Dropbox. **You do not need a *Dropbox Plus* or *Dropbox Business* account.** Instead, select the underlined sentence at the bottom, "Or continue with 2 GB Dropbox Basic plan" (this plan is free).



4

- You will be brought to your CSB's shared Dropbox folder.
- Click on "All files" in the left-hand column.
- You will see a folder with the name of your CSB. Click this and you will be brought to your CSB's shared folder and files.



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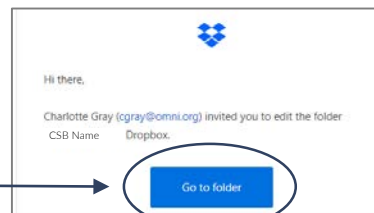


Setting up your Dropbox account and folder

How do I set up my CSB's Dropbox folder if I already have a Dropbox account?

1

- Once you request access to the folder, you will receive an email from Dropbox notifying you that a member of the SOR TA Team has “invited you to edit” your CSB's folder with you.
- Click “Go to folder”.



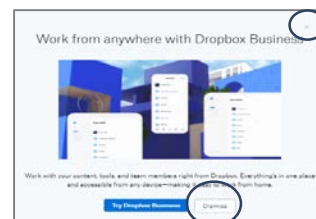
2

- You will be brought to an internet browser where you will be prompted to sign in to your Dropbox account. Sign in using the email address that was given access to the folder, and enter your password.
- If you forgot your password, select “Forgot your password?” to reset your password.



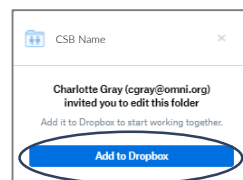
3

- You will be brought to your CSB's Dropbox folder.
- Alert! You *might* be prompted to sign up for paid-subscription to Dropbox. **You do not need a *Dropbox Plus* or *Dropbox Business* account.** Instead, click “Dismiss” at the bottom or “X” in the upper right corner.



4

- You will then be prompted with a pop-up saying that you were invited to edit your CSB's shared folder.
- Select “Add to Dropbox”.



5

- Your CSB's shared Dropbox folder will be added to your list of other Dropbox folders.
- Click on “All files” in the left-hand column.
- You will see a folder with the name of your CSB. Click this and you will be brought to your CSB's shared folder.

