

# How to Share Content Securely in Conceptboard



**Conceptboard**

If you have any questions, please feel free to contact us at: [support@conceptboard.com](mailto:support@conceptboard.com).

## Topics covered in this adoption guide

Projects 101	4
Types of users that can access projects	5
Add or remove project member	6
Creating, moving, or removing boards from projects	7
How to share your board	9
Sharing via @mentions	11
Managing board access settings	12
Board access options	12
Restricting who can share your board	14
Key points to remember	15
Tips & best practices	15
Help Center	15



If you have any questions, please feel free to contact us at: [support@conceptboard.com](mailto:support@conceptboard.com).

## What are the benefits to knowing how to share content selectively?

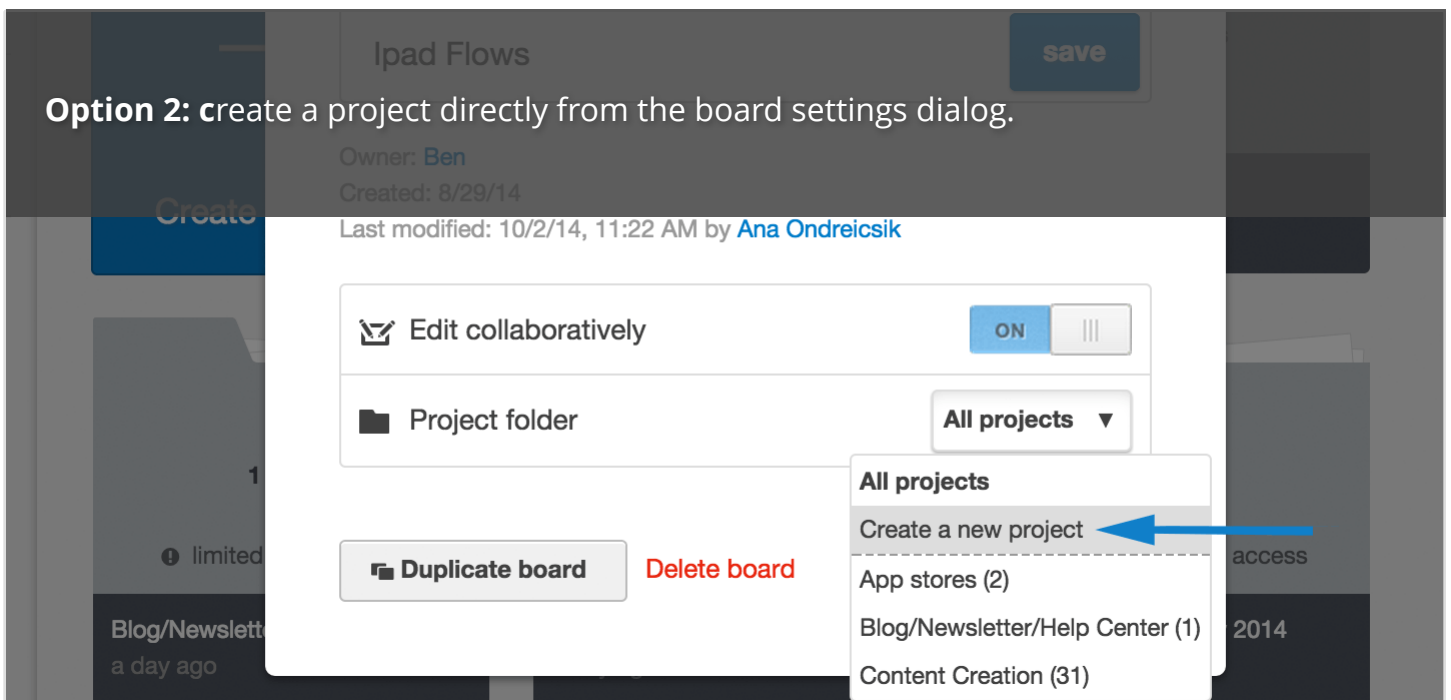
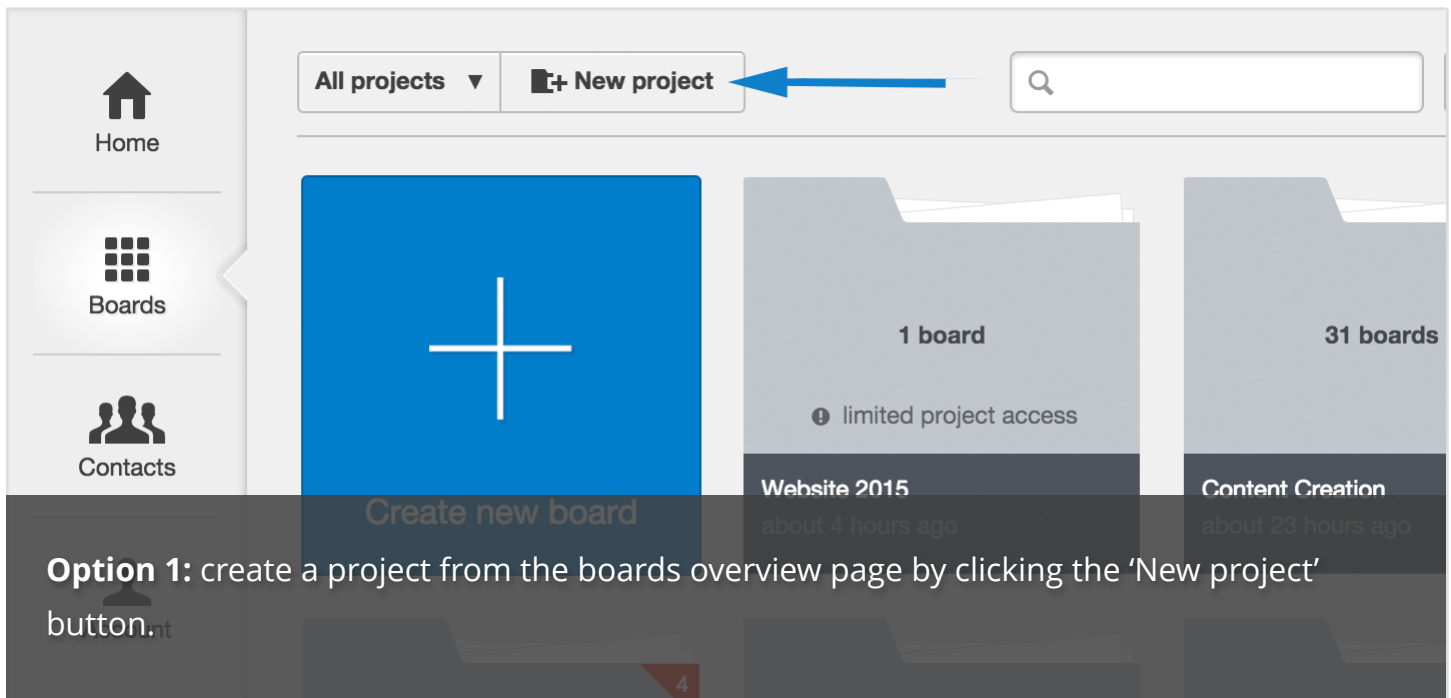
- ✓ Making sure the right people always have access to the right content.
- ✓ Give secure access to external clients or partners.
- ✓ Reduce the risk of accidental information exposure.
- ✓ Create workflows that make it easy to share work and collaborate.
- ✓ Leave feedback directly on the content for seamless discussions.
- ✓ Reduce email overload.



If you have any questions, please feel free to contact us at: [support@conceptboard.com](mailto:support@conceptboard.com).

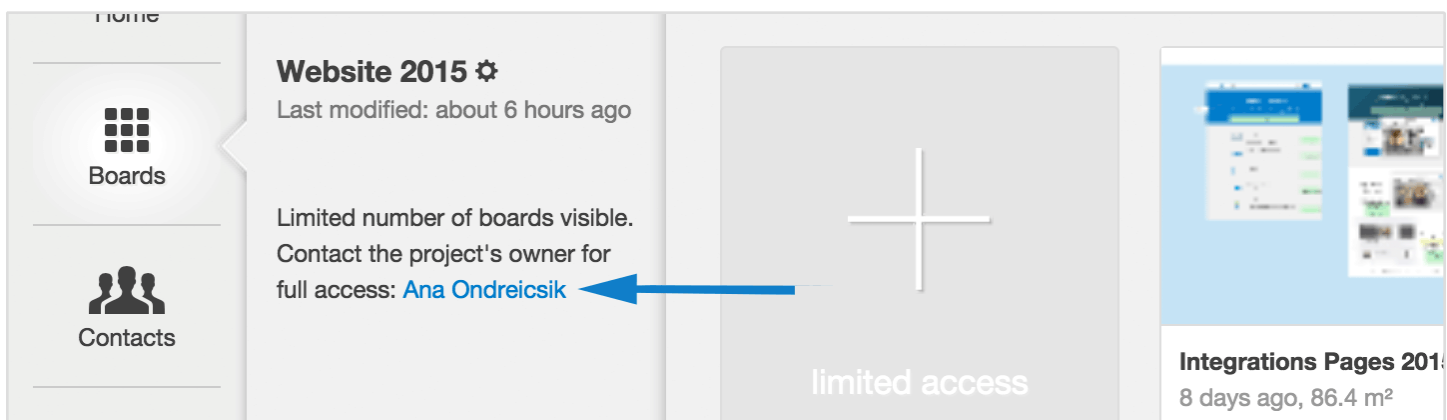
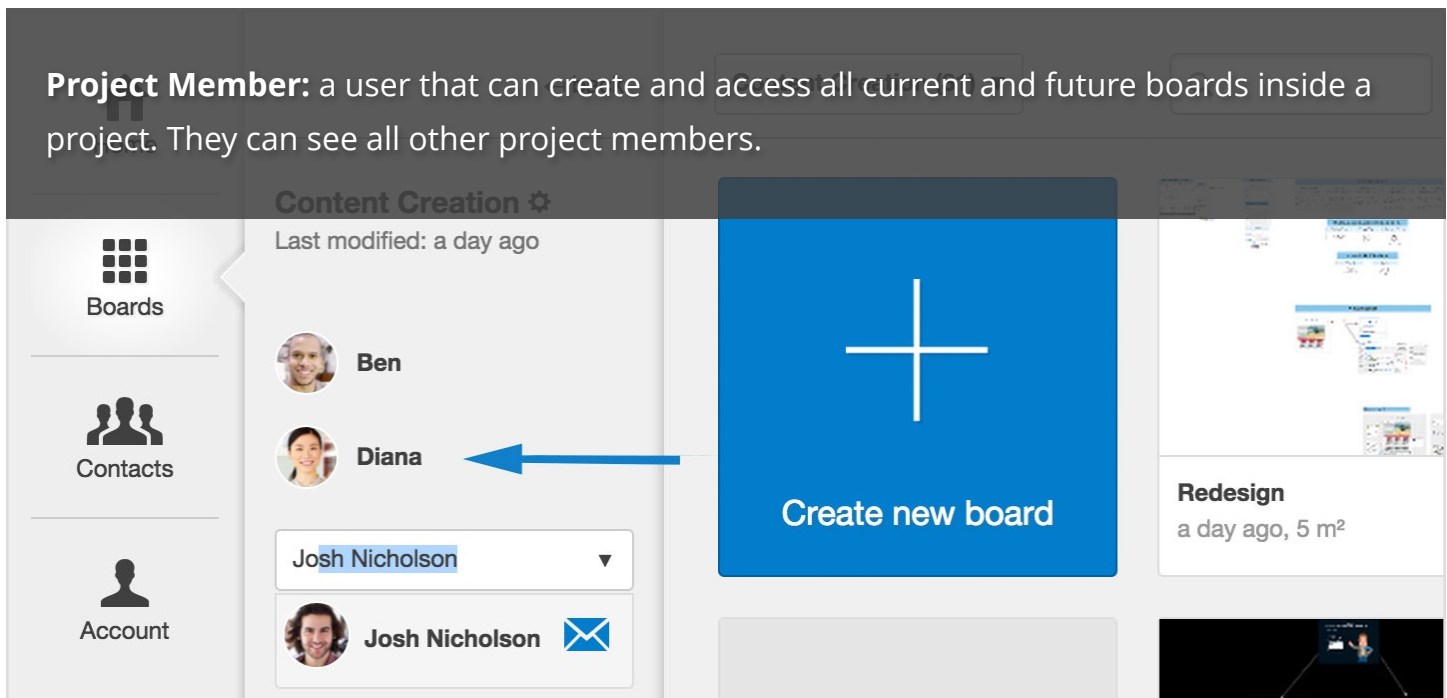
# Projects 101

Projects are great for organizing boards together and making sure the right people have access to all the relevant project content. You can create unlimited projects and boards. Here's how to create a project:

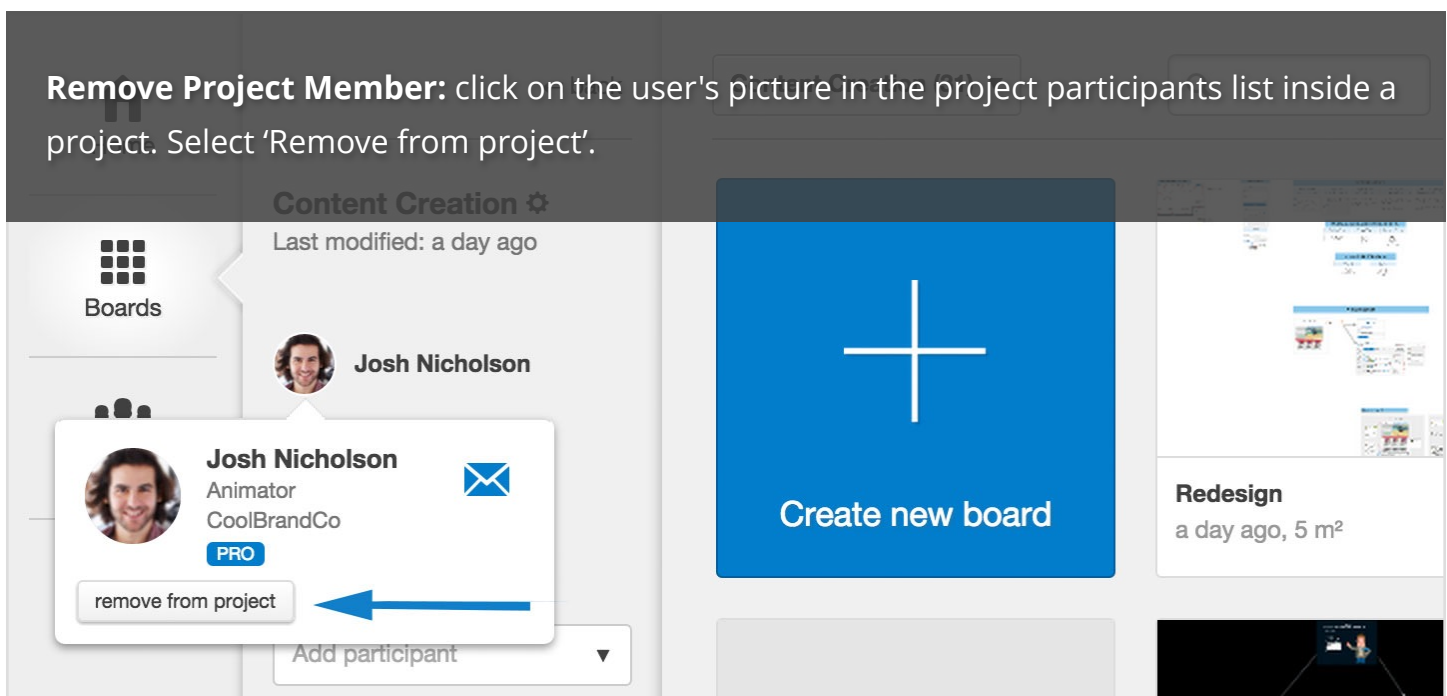
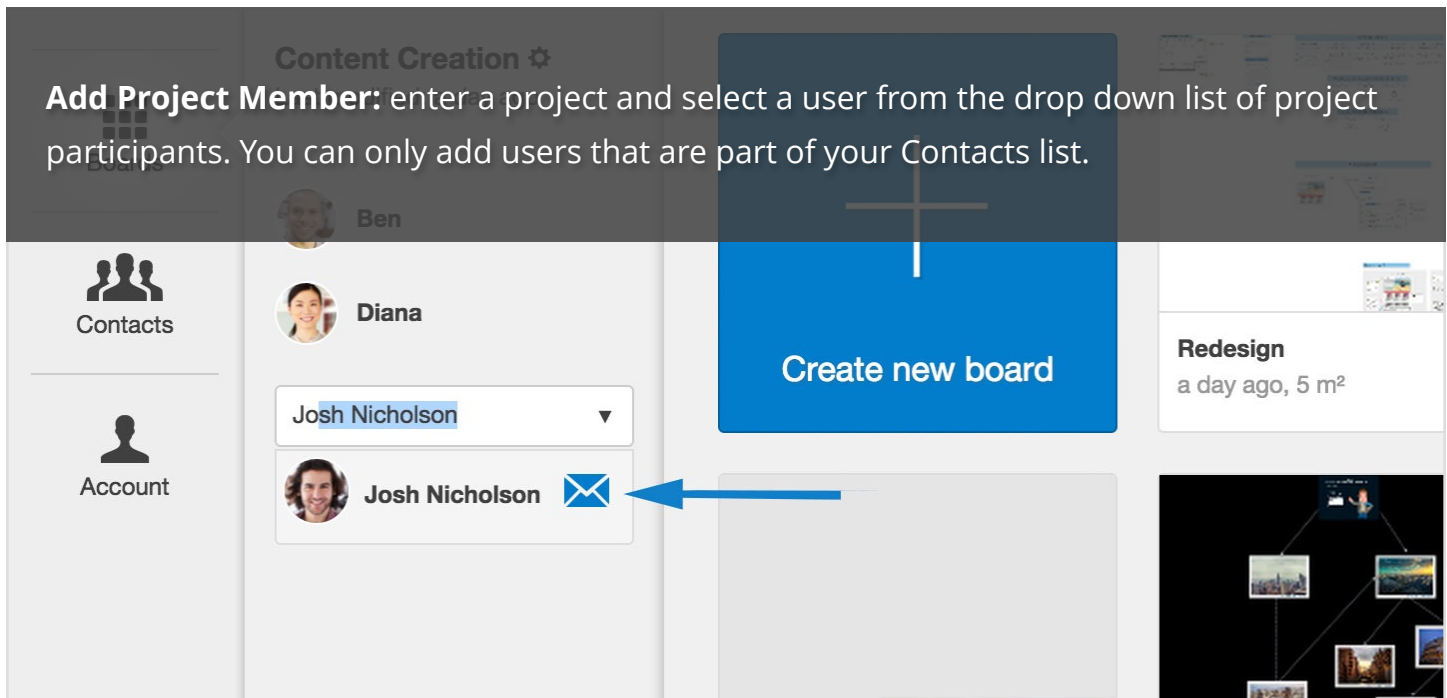


If you have any questions, please feel free to contact us at: [support@conceptboard.com](mailto:support@conceptboard.com).

# Types of users that can access projects

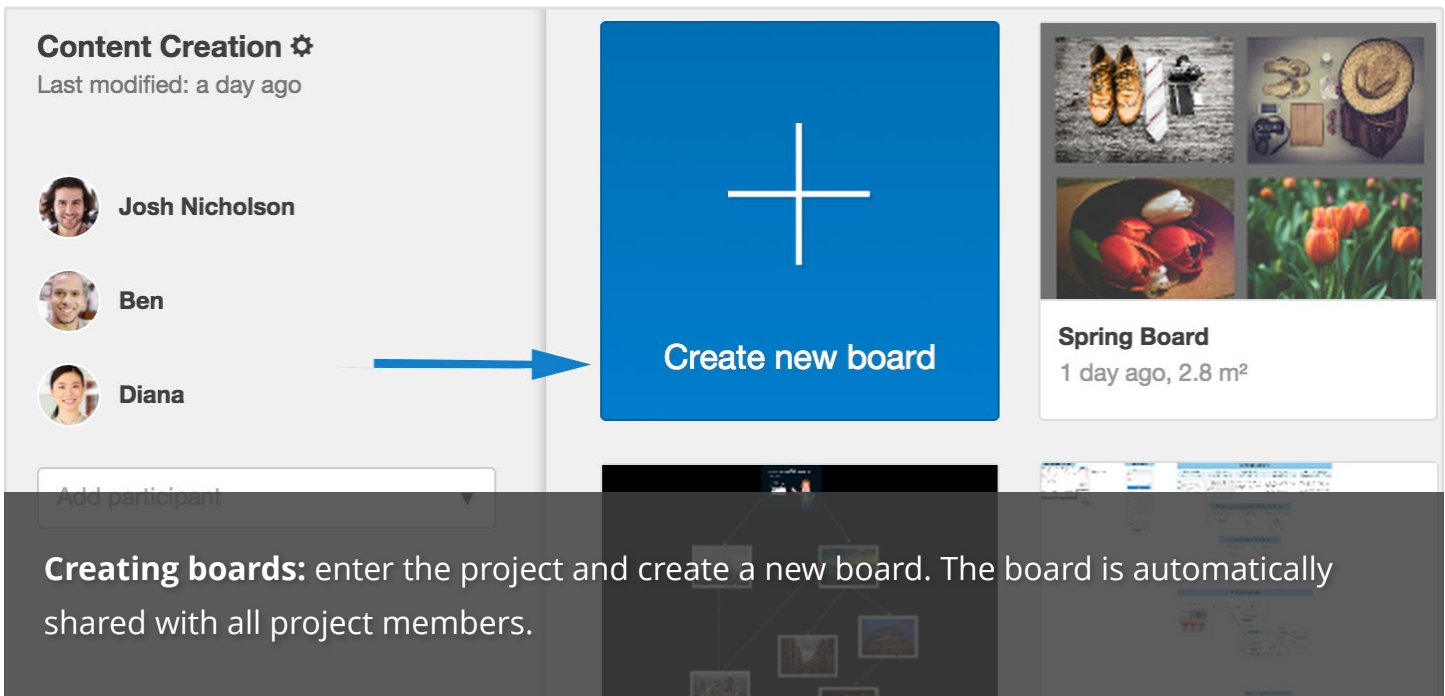


# Add or remove project member





# Creating, moving, or removing boards from projects



**Content Creation** ⚙️  
Last modified: a day ago

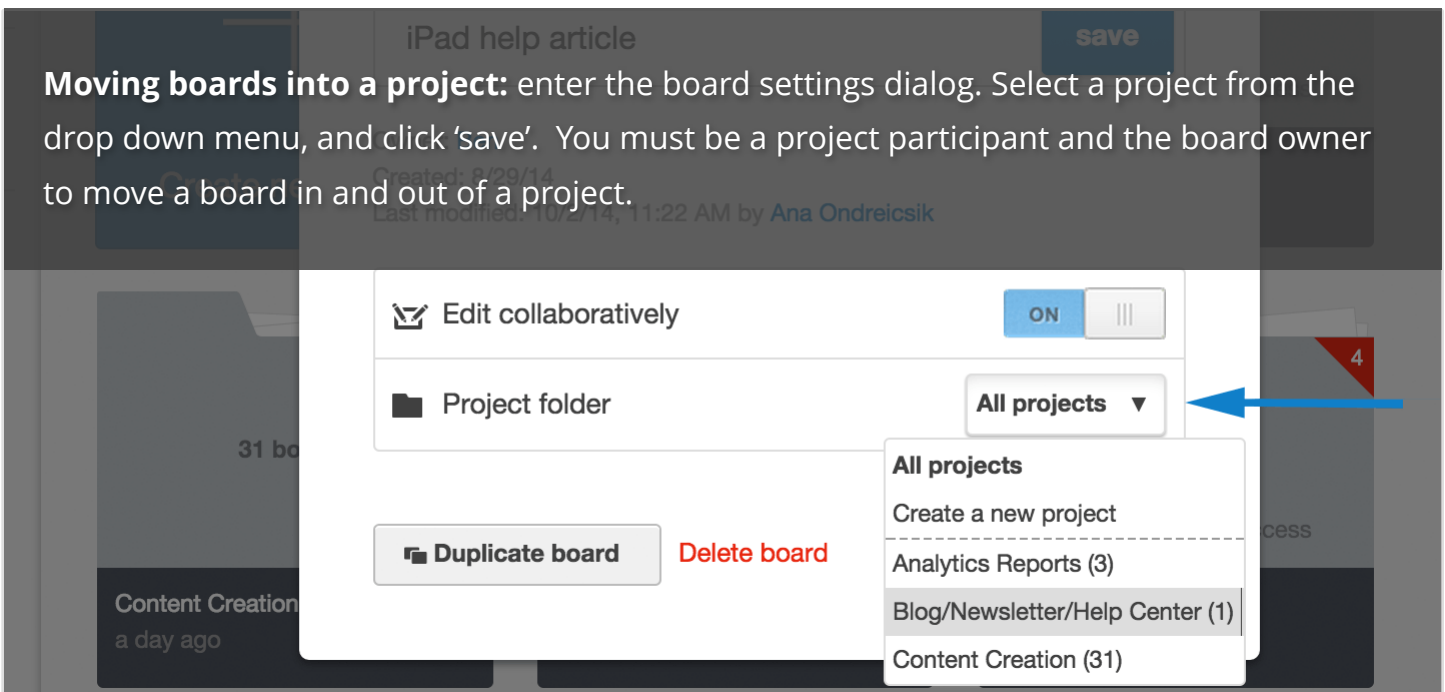
Josh Nicholson  
Ben  
Diana

Add participant

**Create new board**

**Spring Board**  
1 day ago, 2.8 m²

**Creating boards:** enter the project and create a new board. The board is automatically shared with all project members.



**Moving boards into a project:** enter the board settings dialog. Select a project from the drop down menu, and click 'save'. You must be a project participant and the board owner to move a board in and out of a project.

iPad help article  
save

Created: 8/29/14  
Last modified: 10/2/14, 11:22 AM by Ana Ondreicsik

☒ Edit collaboratively **ON**

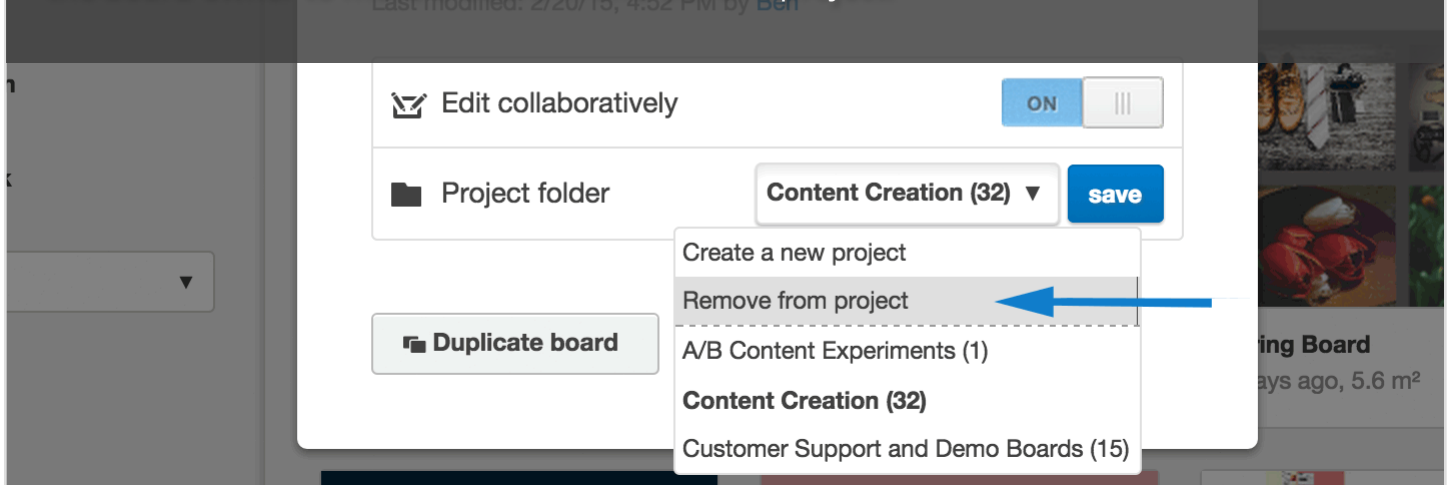
**Project folder**

**Duplicate board** **Delete board**

**All projects** ▼

- All projects
- Create a new project
- Analytics Reports (3)
- Blog/Newsletter/Help Center (1)
- Content Creation (31)

**Removing boards from a project:** enter the board settings dialog. Select 'Remove from project' from the drop down menu, and click 'save'. You must be a project participant and the board owner to move a board in and out of a project.



*Notes:*

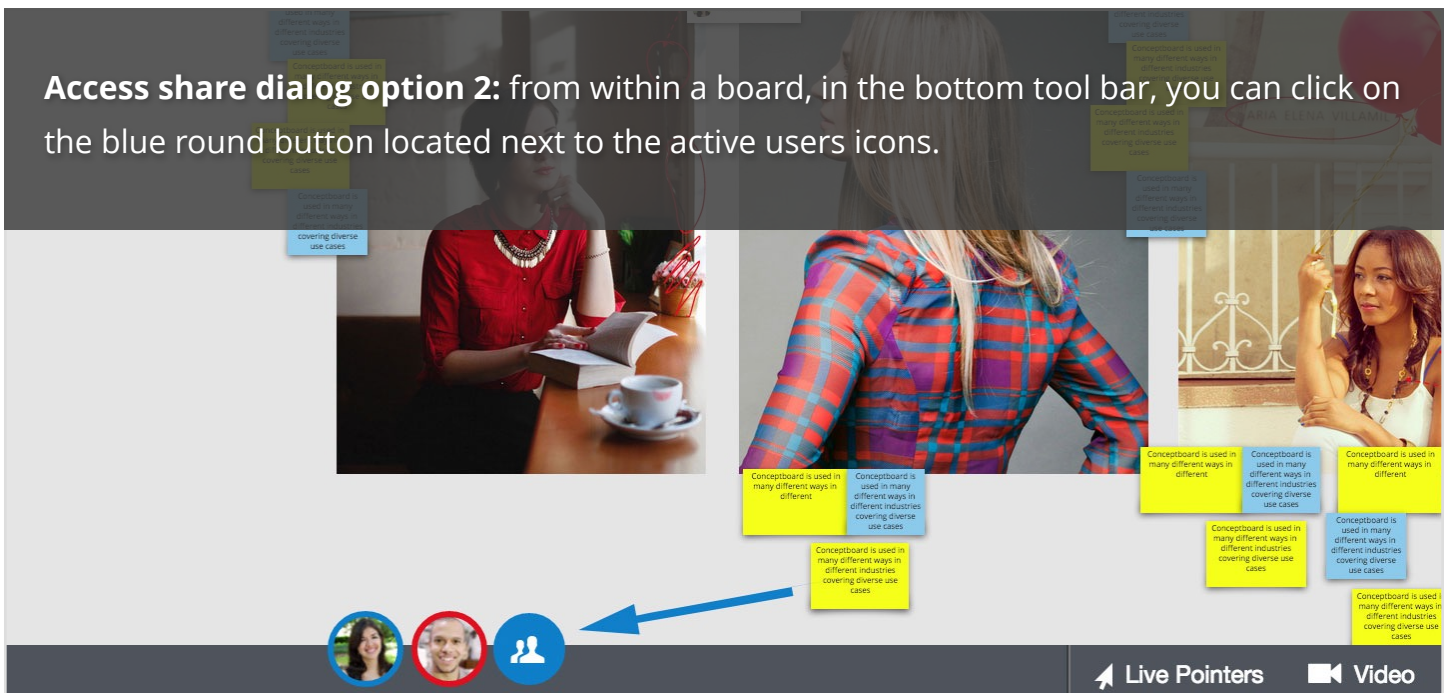
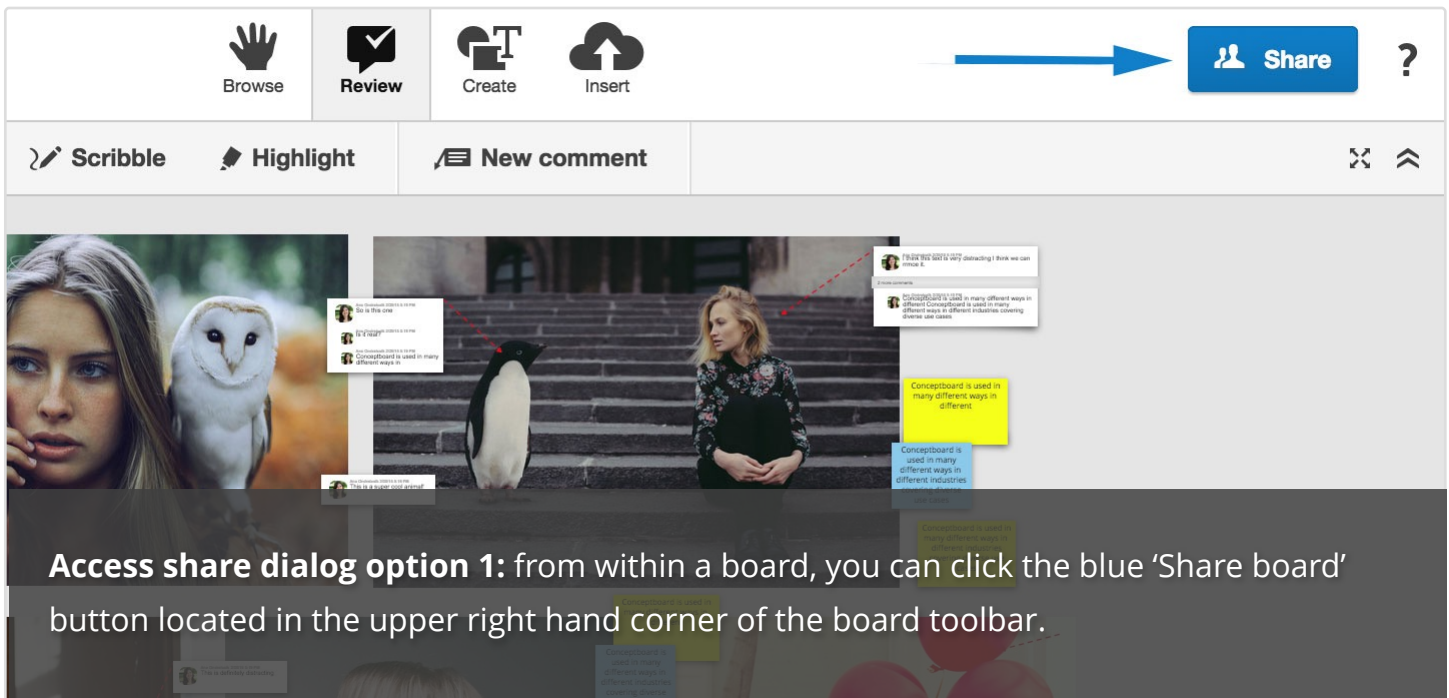
- You can remove a project member's access to a specific board within a project via the [board access management](#).
- If you've created a board in a project, it will automatically be shared with all project members.
- Project members do not receive an alert for every time a new board is created. If you wish to alert them, please @mention them in a board.



If you have any questions, please feel free to contact us at: [support@conceptboard.com](mailto:support@conceptboard.com).




# How to share your board




If you have any questions, please feel free to contact us at: [support@conceptboard.com](mailto:support@conceptboard.com).

**Share via email:** you can enter an email or select a user from the drop down menu. Separate multiple emails addresses with a comma. Every time you share the board this way, an email notification is sent to the user.

Invite new participants via: **Email · Link**




 **Diana**

 **Steve**

**Share board link:** when the board access is set to 'Anyone with the link', you can share the board simply by copying and pasting the board link.

Invite new participants via: **Email · Link**

Share publicly ☐

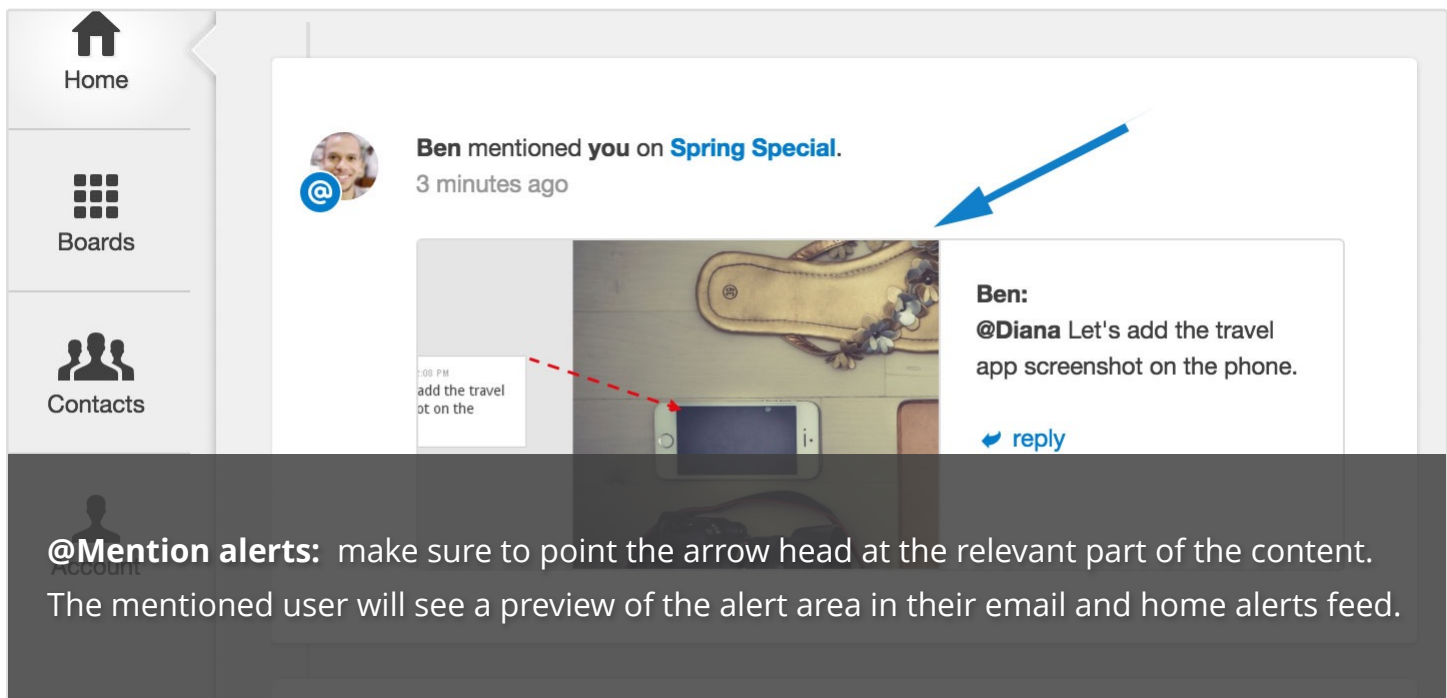
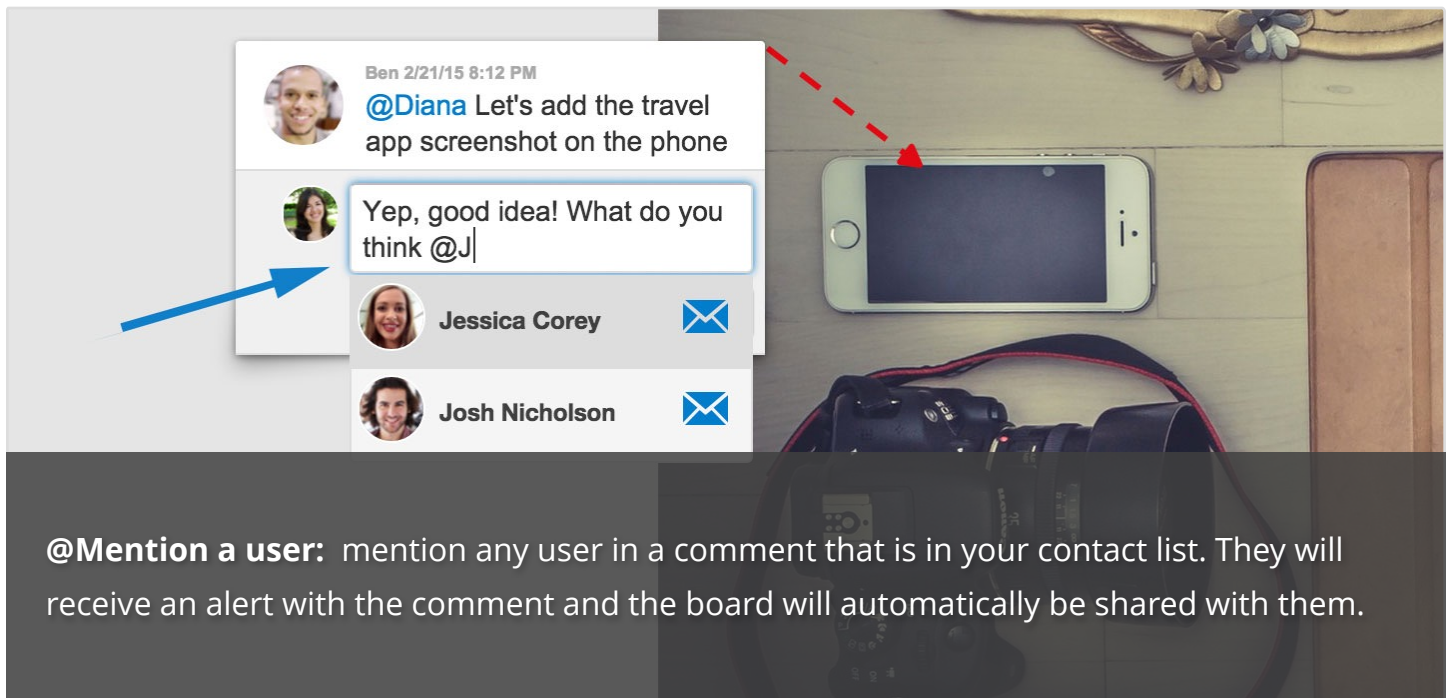
All participants can invite or remove participants.

*Note: Your projects and boards are private by default. You need to share them to provide access.*



If you have any questions, please feel free to contact us at: [support@conceptboard.com](mailto:support@conceptboard.com).

# Sharing via @mentions



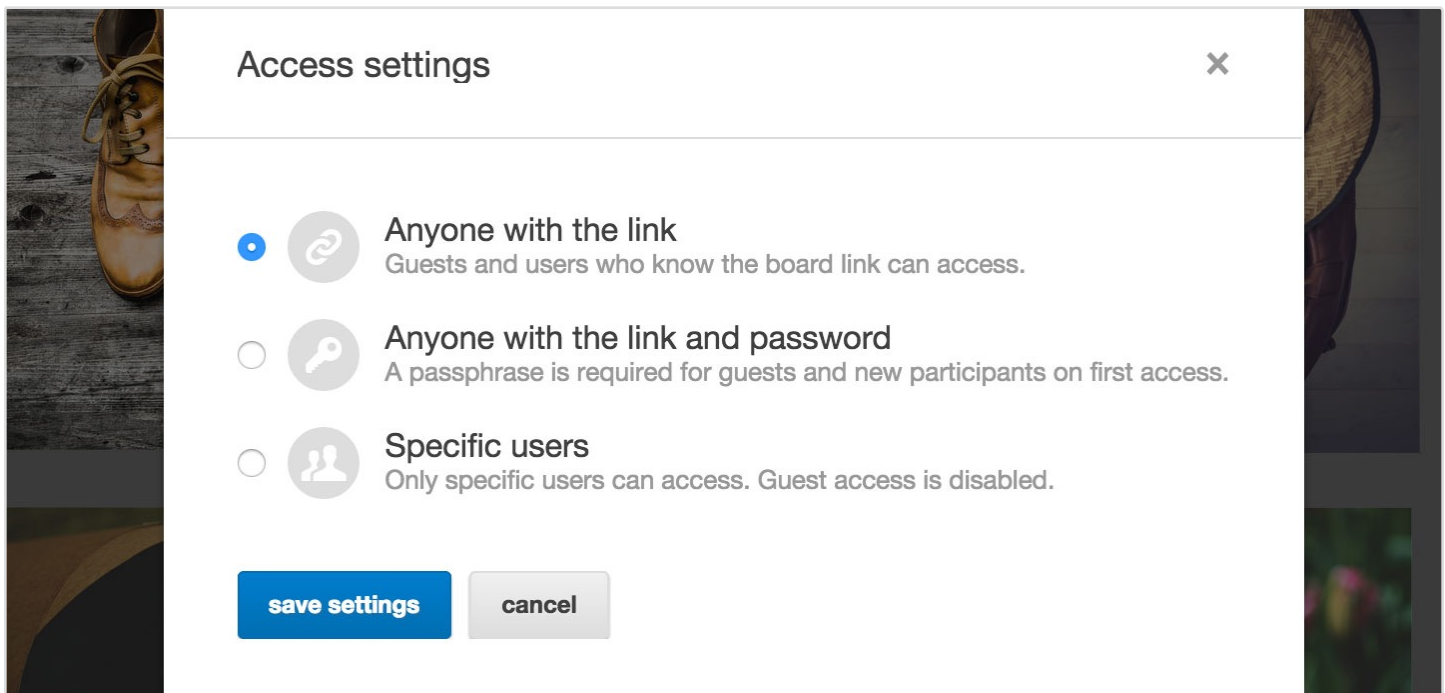
**Conceptboard**

If you have any questions, please feel free to contact us at: [support@conceptboard.com](mailto:support@conceptboard.com).

# Managing board access settings

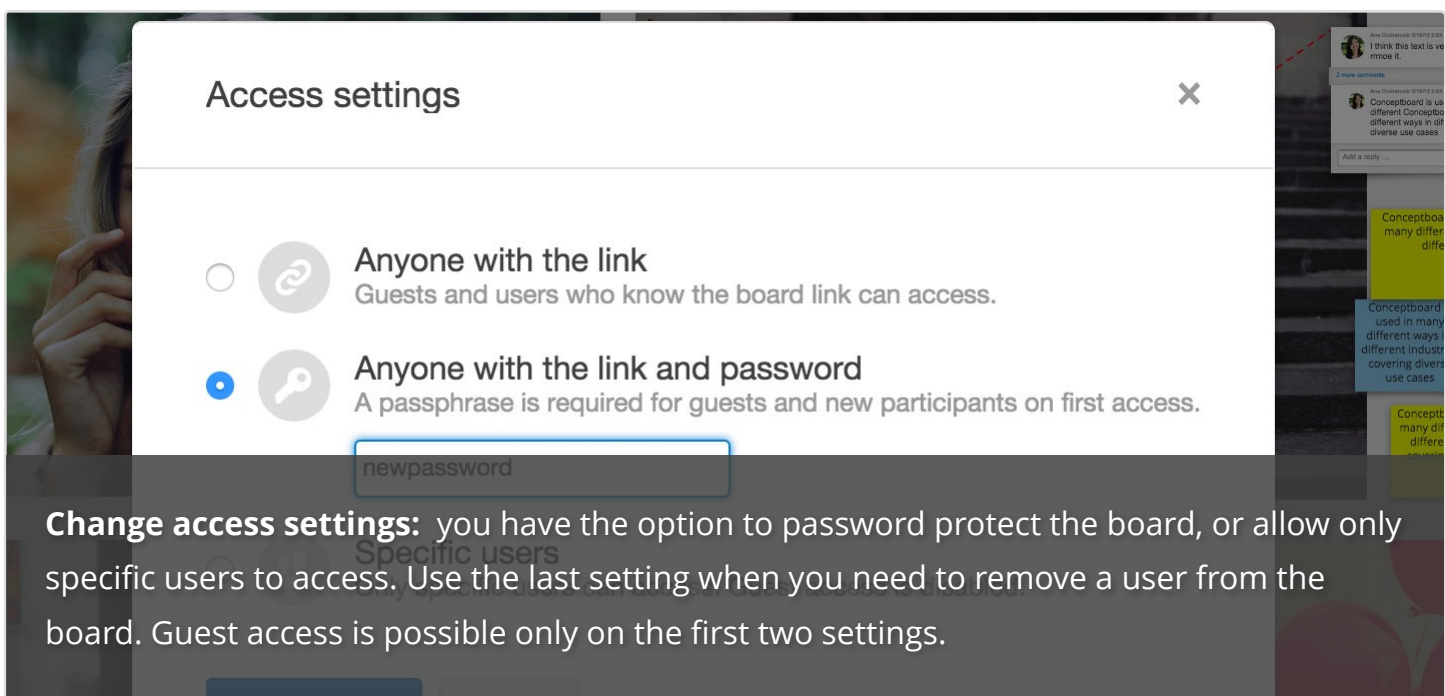
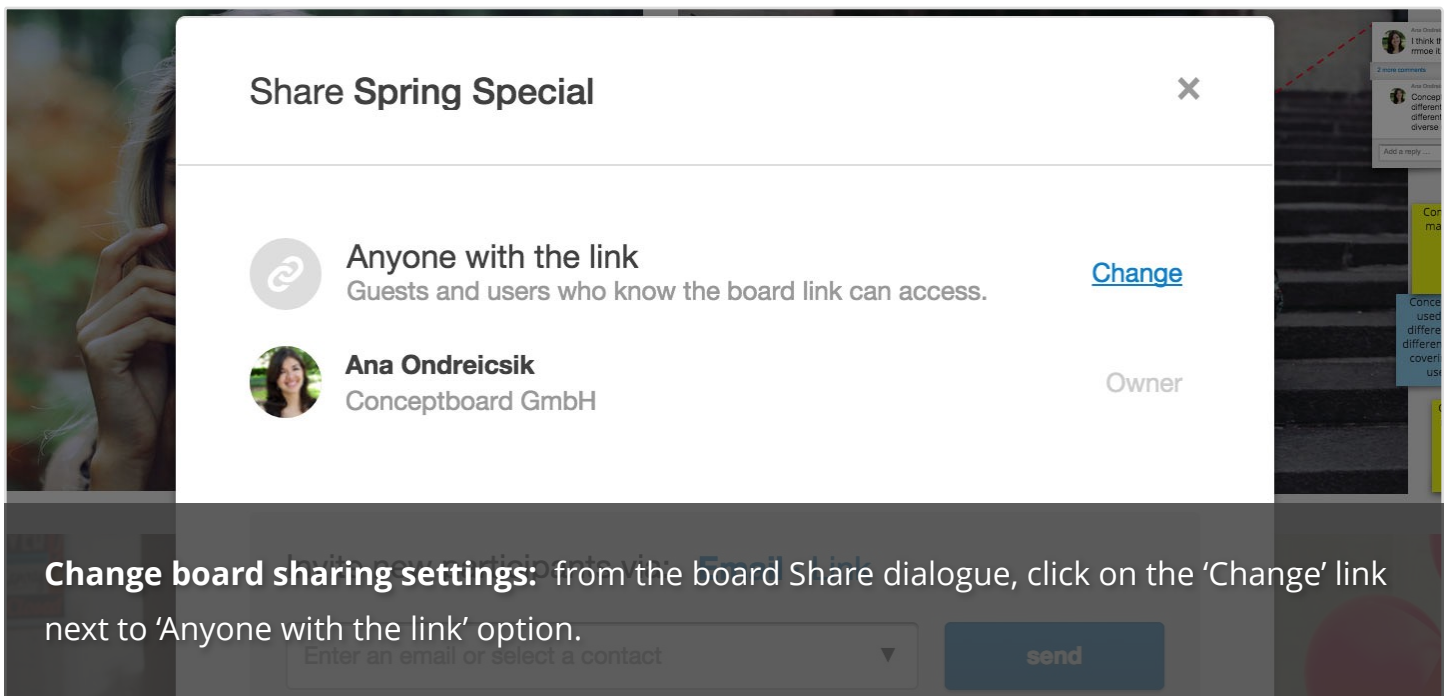
## Board access options

- **Anyone with the link:** participants who know the board link can access. Guest access is enabled.
- **Anyone with the link and password:** a password is required for new participants on first access.
- **Specific users:** only chosen specific users can access. A list of the specific users can be seen in the share dialog. You can remove users from the board via the board share dialog.



If you have any questions, please feel free to contact us at: [support@conceptboard.com](mailto:support@conceptboard.com).





If you have any questions, please feel free to contact us at: [support@conceptboard.com](mailto:support@conceptboard.com).

# Restricting who can share your board

**Change sharing rights:** when you choose 'Specific users' you can further restrict who is allowed to invite users to the board. In the Share dialog click on the 'All participants can invite or remove participants'.

Ben  
CoolBrandCo

remove

Invite new participants via: **Email**

Enter an email or select a contact

send

add invitation message

All participants can invite or remove participants. [change](#)

**Change sharing rights:** you can choose to allow all board users to invite or remove participants, or allow only the board owner to invite and remove users from the board.

Ana Ondreicsik  
Conceptboard GmbH

Owner

Ben  
CoolBrandCo

remove

☐ All participants can invite or remove participants.

☒ Only the board owner can invite or remove participants.

save cancel

[How to add users to my team](#)

[How to see the board outline and use sections](#)

[How to create projects](#)

[How to use comments, tasks, and @mentions](#)

Note: if you choose to have only the board owner control the access settings, all other board participants will only be able to @mention users already invited to the board.

[How to see my alerts: in-app and email](#)

[How do I use the tools in the board?](#)

[How do I add content in the board](#)

[How do I manage access settings](#)



If you have any questions, please feel free to contact us at: [support@conceptboard.com](mailto:support@conceptboard.com).

## Key points to remember

1. Your boards and projects are private by default. You need to share them to give your team access.
2. Set up projects to ensure that the correct members have access and can add content in the same place.
3. Only board owners may move boards in and out of a project.
4. @Mentioning users automatically alerts the user and shares the board with them.
5. You can revoke access from a board by switching the board to 'Specific users' and removing the user from the board share dialog.

## Tips & best practices

1. Make sure to activate your email upon registering to receive alerts from your team via email. You will not be notified via email if your email address is not activated.
2. Choose how often you would like to receive email notifications via your Profile tab.
3. Create a welcome section in your board to let your reviewers know how to navigate around your board or how to leave feedback (for example, show and label colors to be used in sticky notes and highlighting).
4. @Mention the relevant user when you're finished giving feedback, to let them know you are done.

## Help Center



If you have any questions, please feel free to contact us at: [support@conceptboard.com](mailto:support@conceptboard.com).