

How to Share Content Securely in Conceptboard



If you have any questions, please feel free to contact us at: support@conceptboard.com.

Topics covered in this adoption guide

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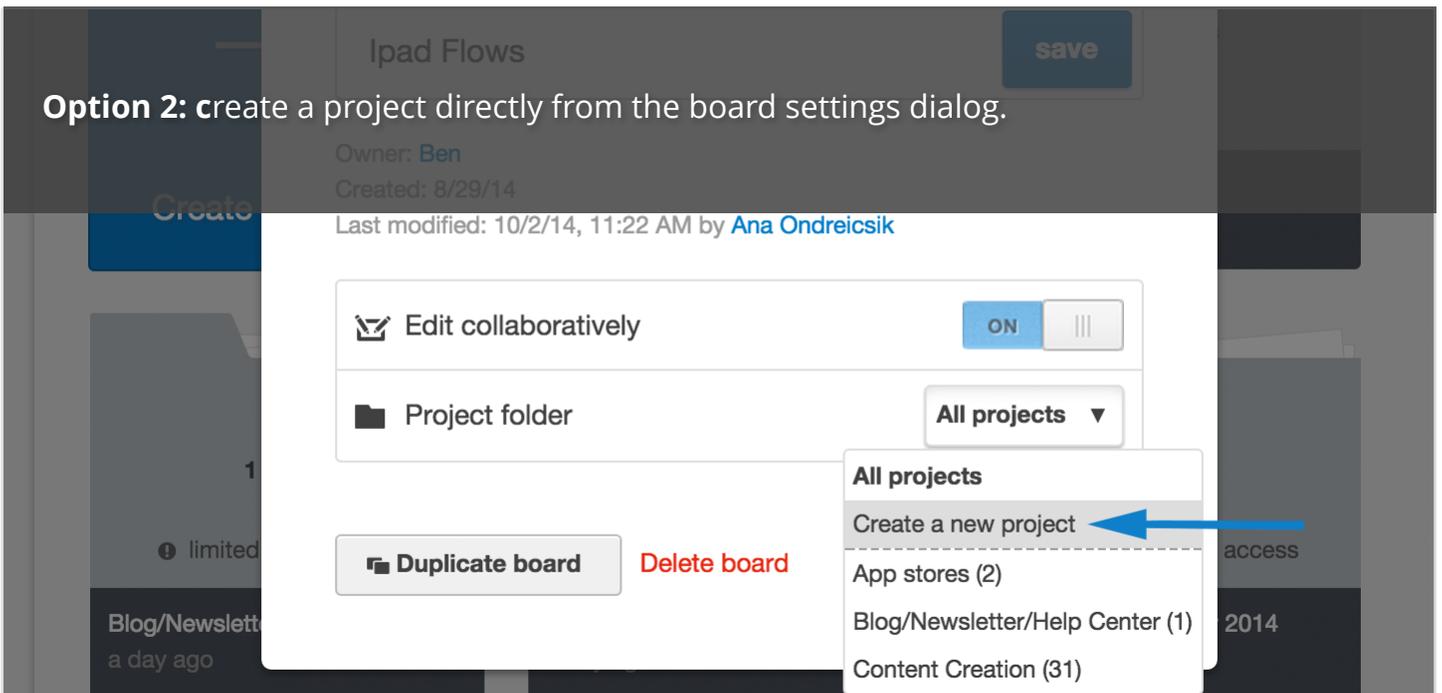
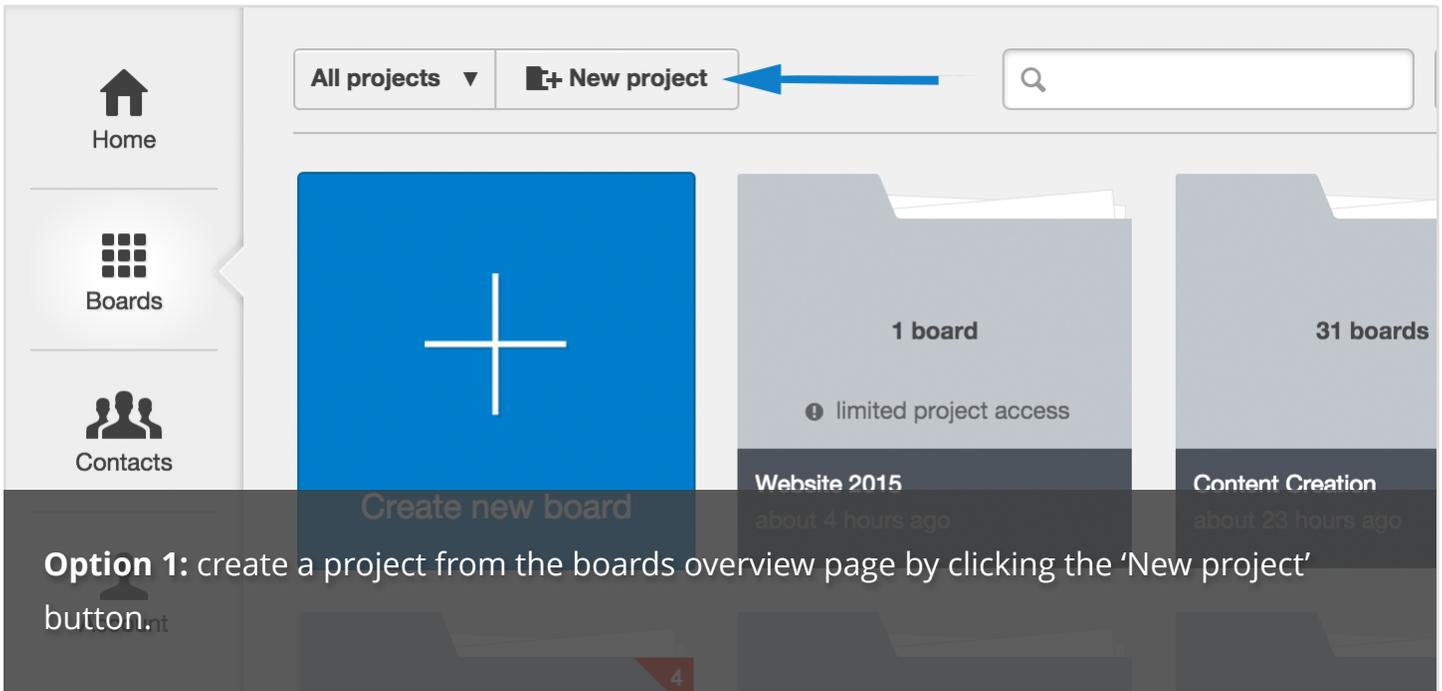
What are the benefits to knowing how to share content selectively?

- ✓ 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.



Projects 101

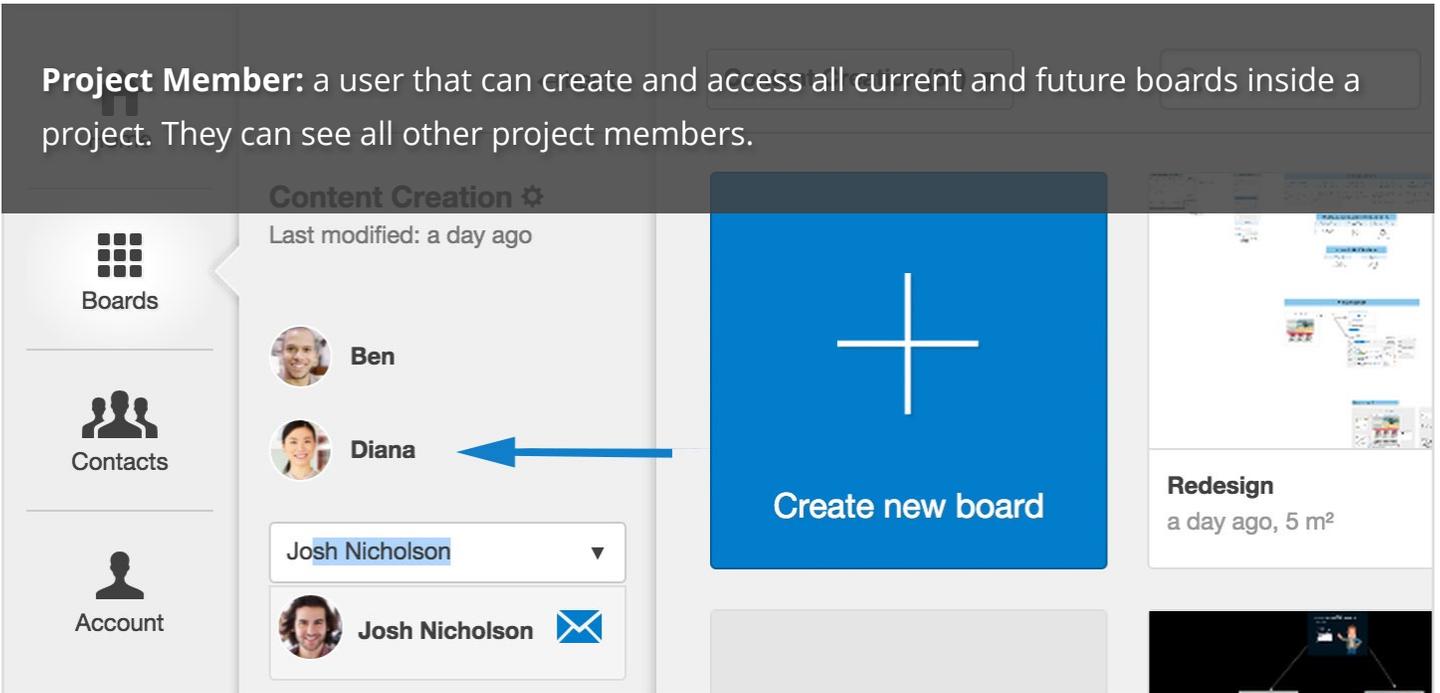
Projects are great for organizing boards together and making sure the right people have access to all the relevant project content. You can create unlimited projects and boards. Here's how to create a project:



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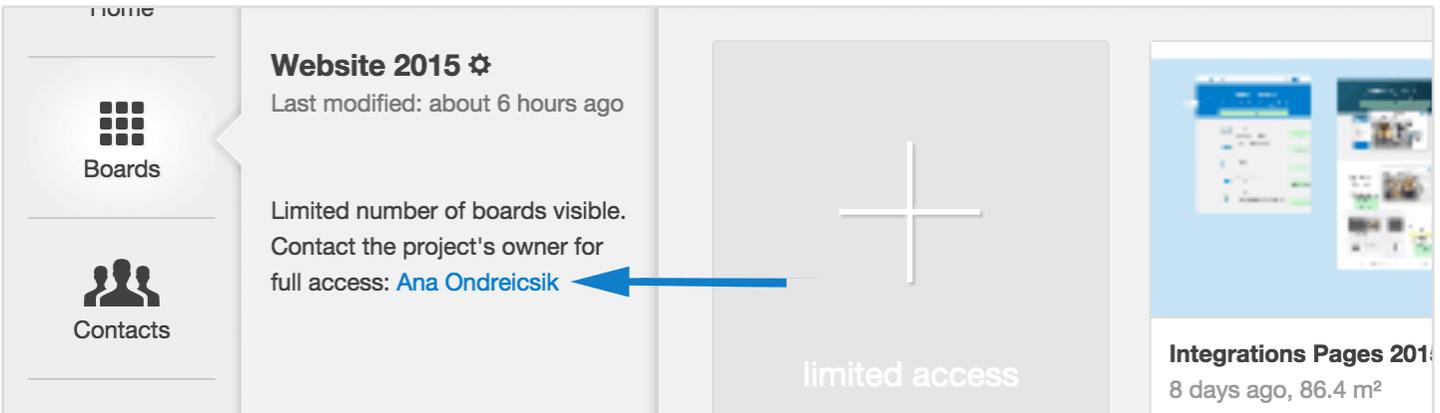
Types of users that can access projects

Project Member: a user that can create and access all current and future boards inside a project. They can see all other project members.



The screenshot shows a project dashboard for 'Content Creation' (last modified: a day ago). On the left, there are navigation options for Boards, Contacts, and Account. The main area lists project members: Ben, Diana, and Josh Nicholson. A blue button with a white plus sign and the text 'Create new board' is prominent. A blue arrow points from this button to Diana's name.

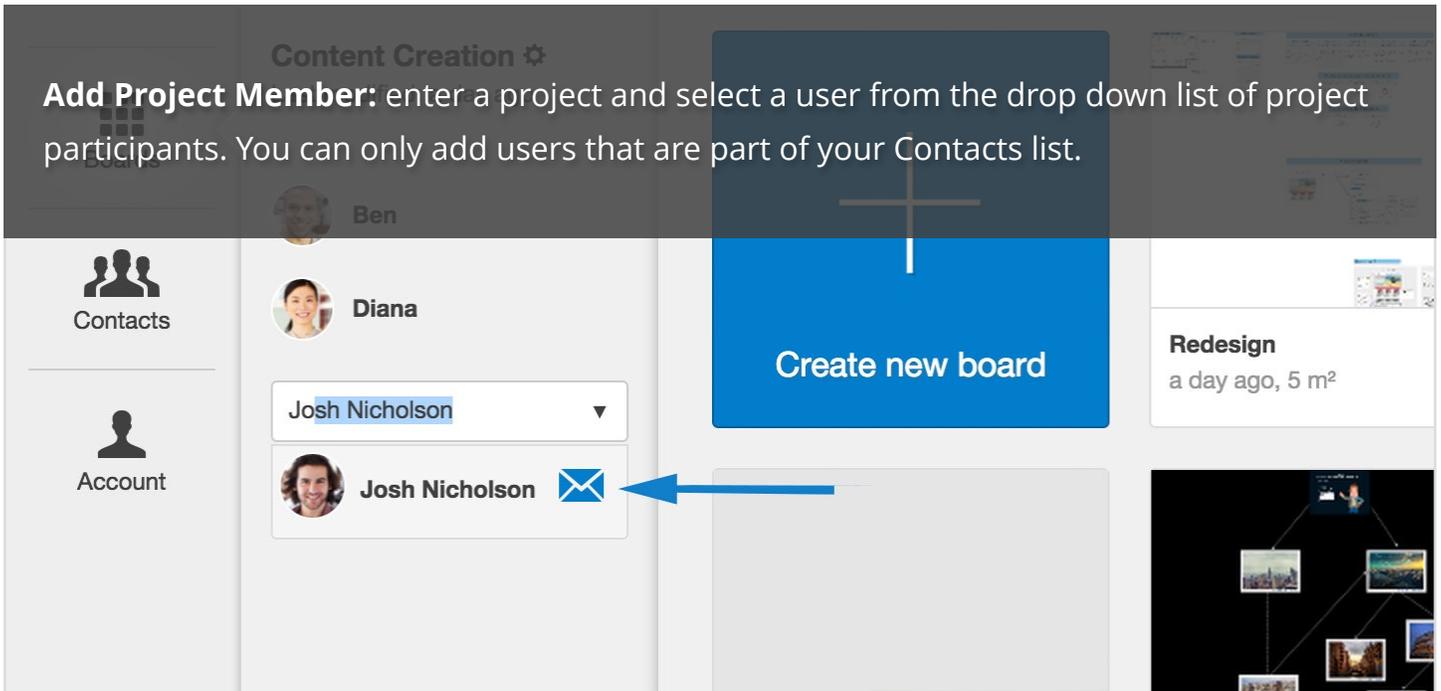
Limited Project Access: a user that can only see the individual board shared with them. They are not a project member, and can not see other boards that have not been shared with them or other project members.



The screenshot shows a project dashboard for 'Website 2015' (last modified: about 6 hours ago). The main area displays 'limited access' and a message: 'Limited number of boards visible. Contact the project's owner for full access: Ana Ondreicsik'. A blue arrow points from the name 'Ana Ondreicsik' to the right.

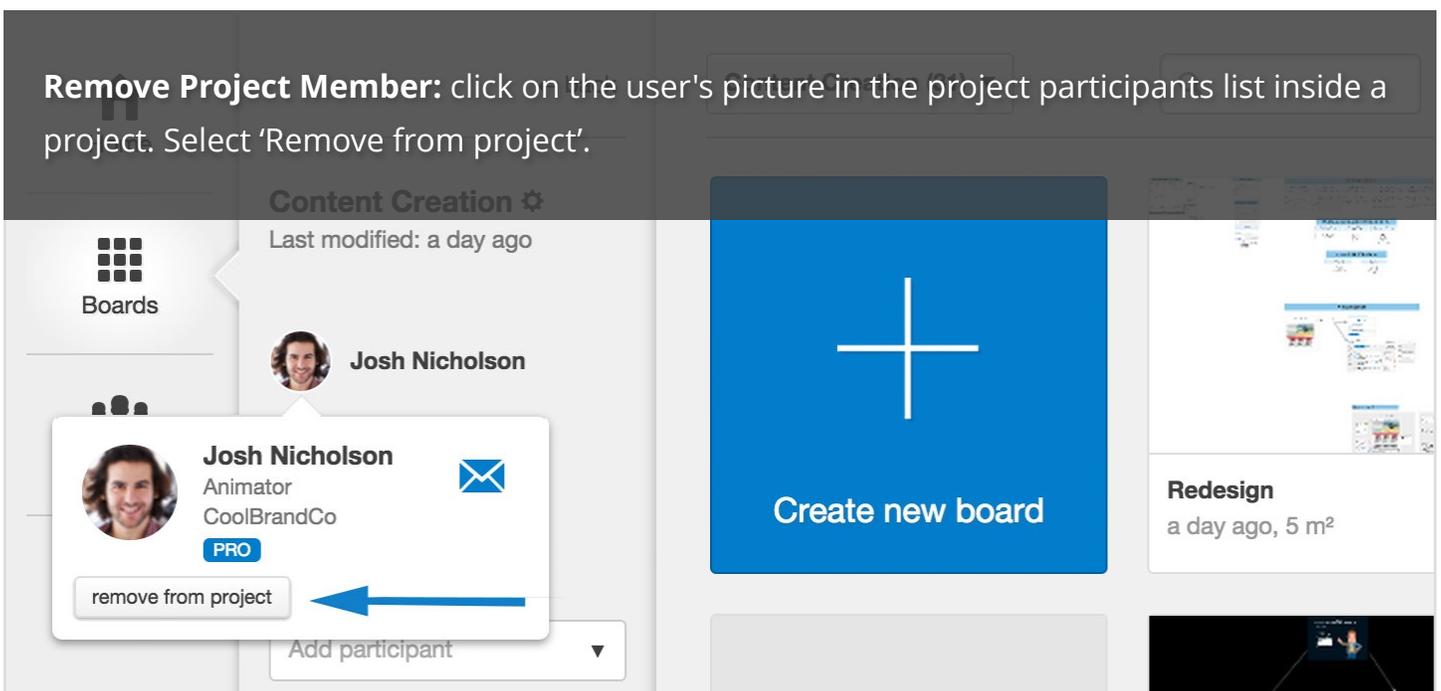
Add or remove project member

Add Project Member: enter a project and select a user from the drop down list of project participants. You can only add users that are part of your Contacts list.



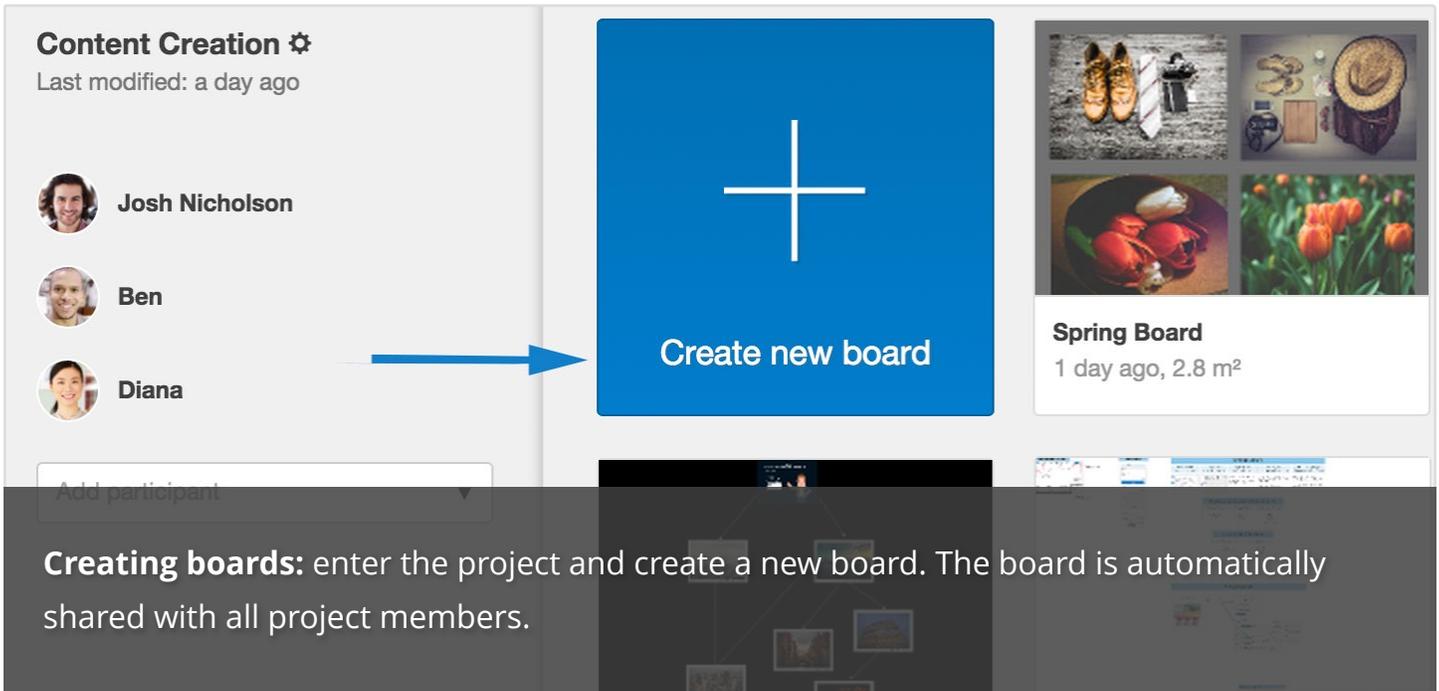
The screenshot shows the 'Content Creation' interface. On the left, there are navigation options for 'Contacts' and 'Account'. The main area displays a list of project participants: 'Ben', 'Diana', and 'Josh Nicholson'. A dropdown menu is open for 'Josh Nicholson', showing a list of contacts. A blue arrow points to the 'Add participant' button at the bottom of the dropdown.

Remove Project Member: click on the user's picture in the project participants list inside a project. Select 'Remove from project'.



The screenshot shows the 'Content Creation' interface. The 'Boards' list is open, showing 'Redesign' (a day ago, 5 m²). The main area displays a list of project participants: 'Josh Nicholson'. A dropdown menu is open for 'Josh Nicholson', showing a list of contacts. A blue arrow points to the 'remove from project' button in the dropdown menu.

Creating, moving, or removing boards from projects



Content Creation ⚙️
Last modified: a day ago

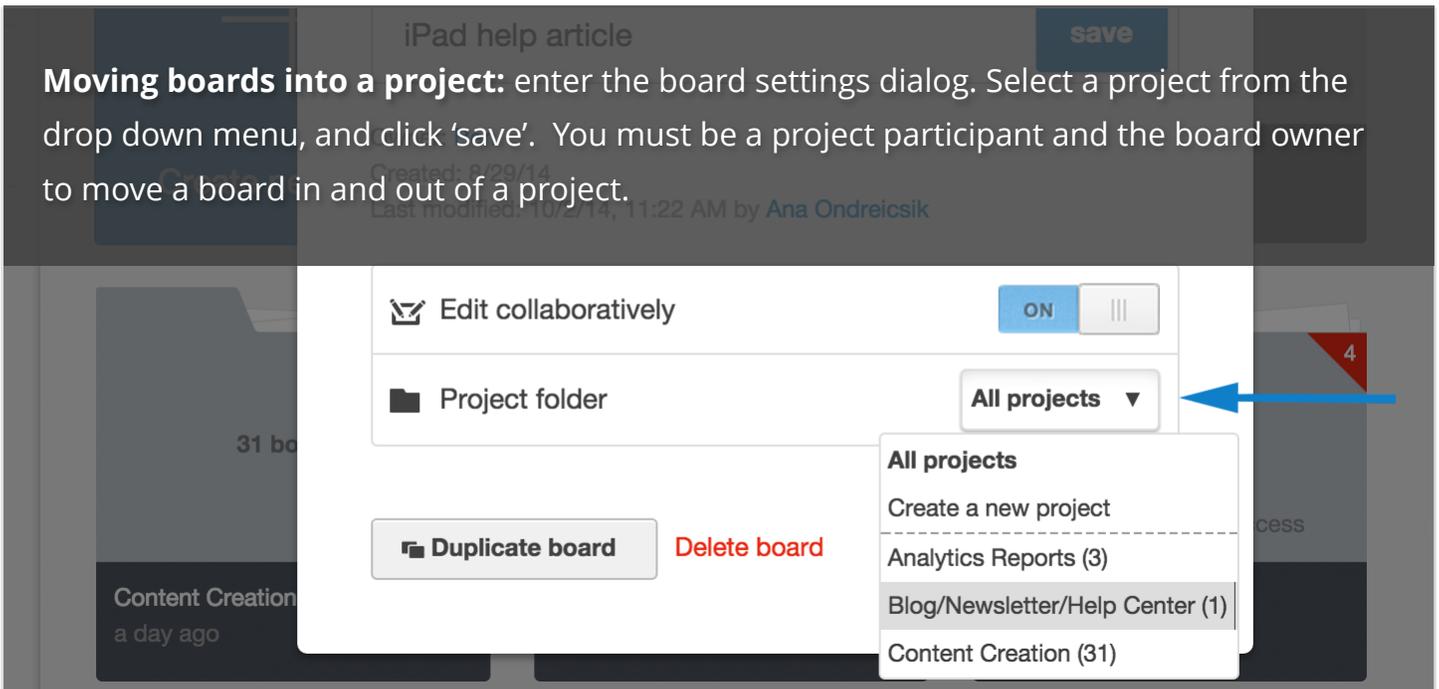
Josh Nicholson
Ben
Diana

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.

save

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

Edit collaboratively **ON**

Project folder **All projects** ▼

Duplicate board **Delete board**

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



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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.

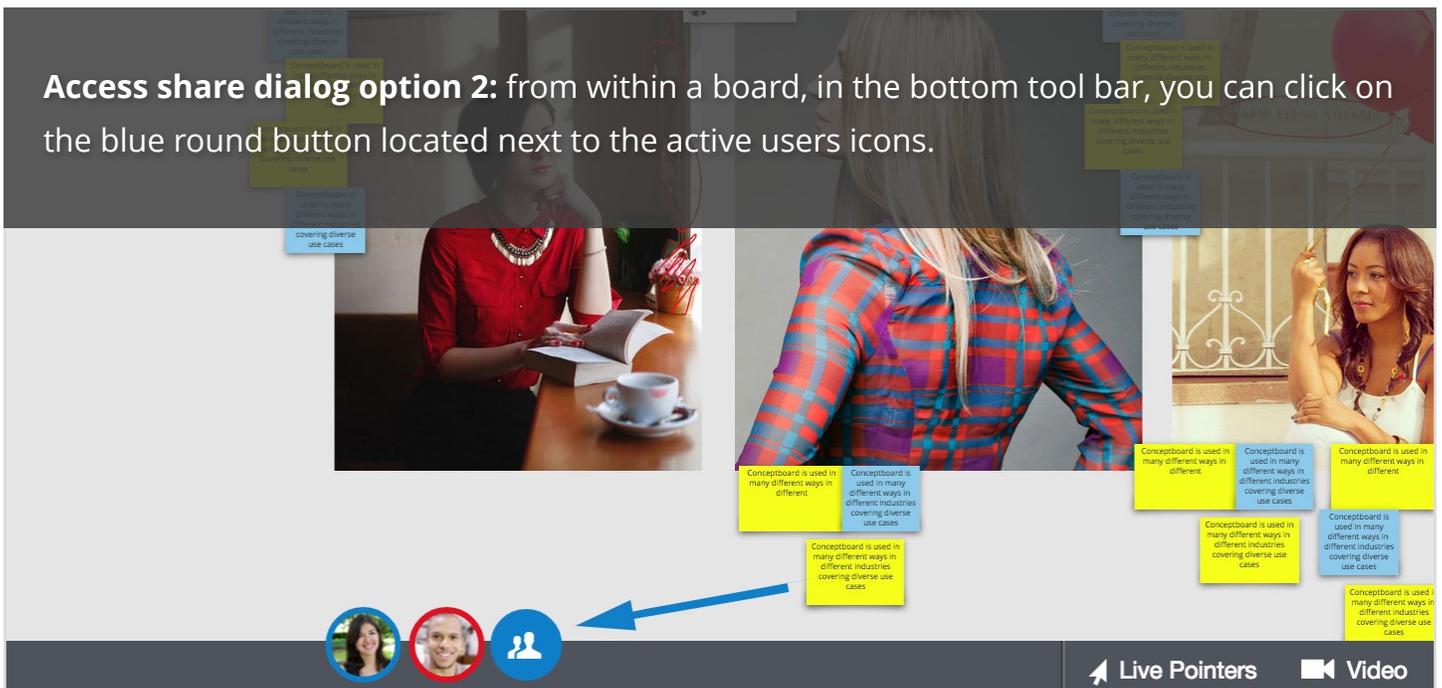
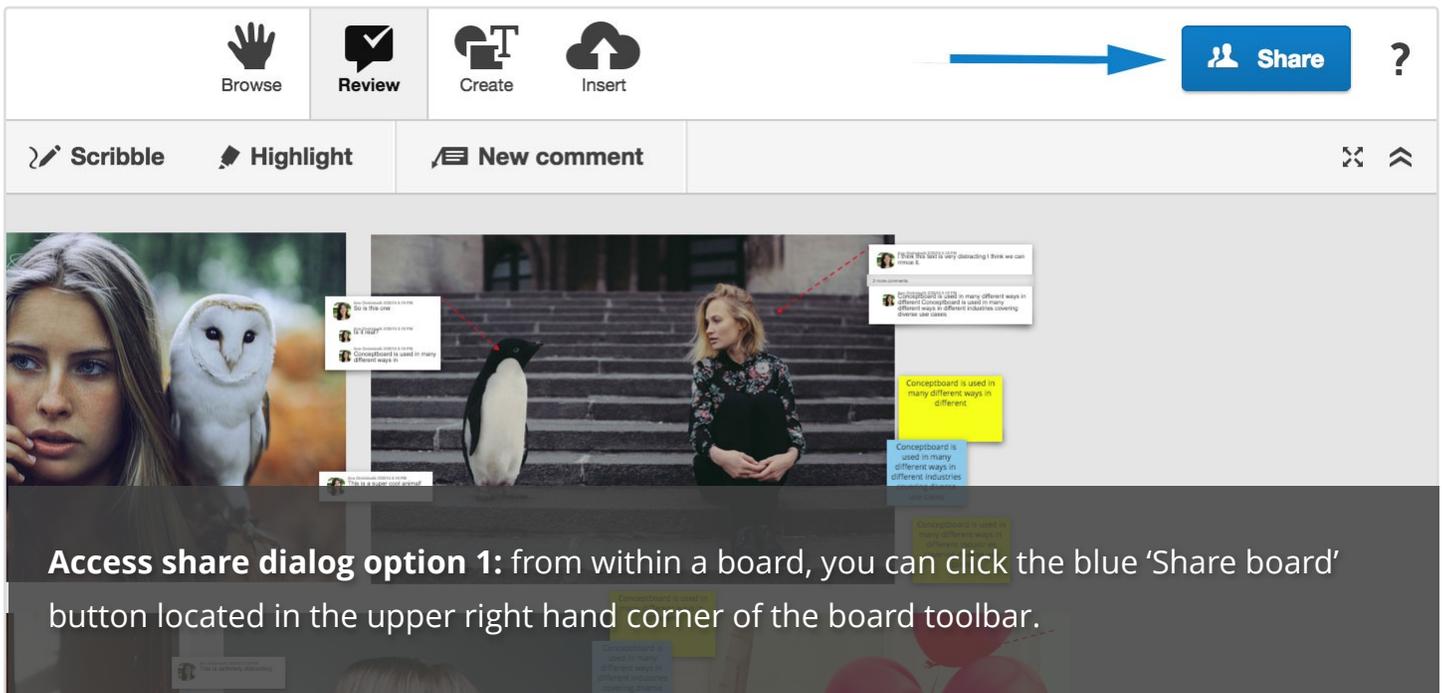
Notes:

- 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.



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How to share your board



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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

Dian

send

Diana Steve

add invitation message

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**

<https://conceptboard.com/board/x1zu-im2c-1f03-ch85-rskq>

Share publicly

Facebook Twitter Google+

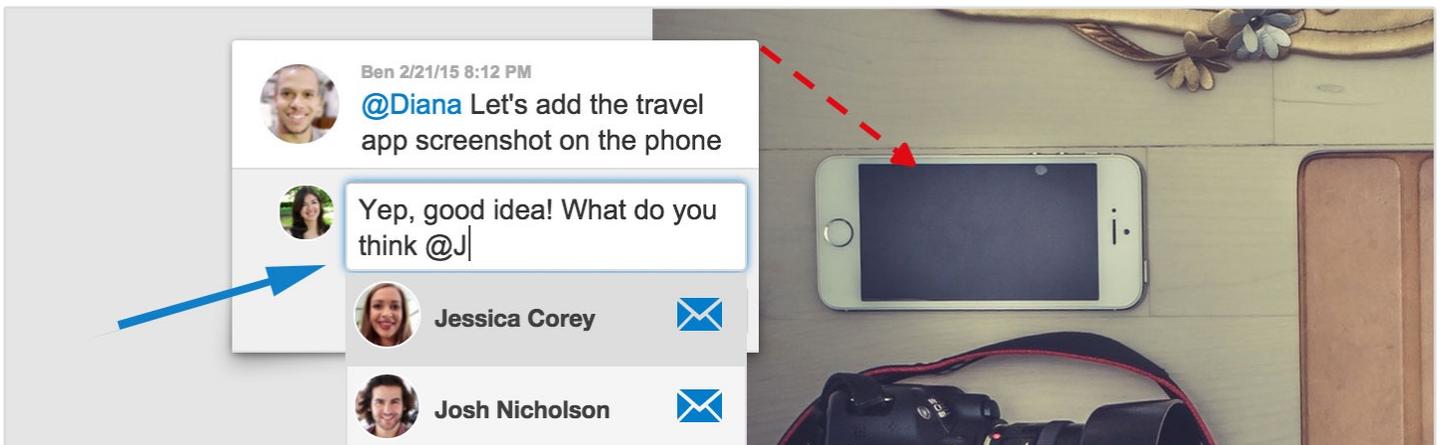
All participants can invite or remove participants.

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

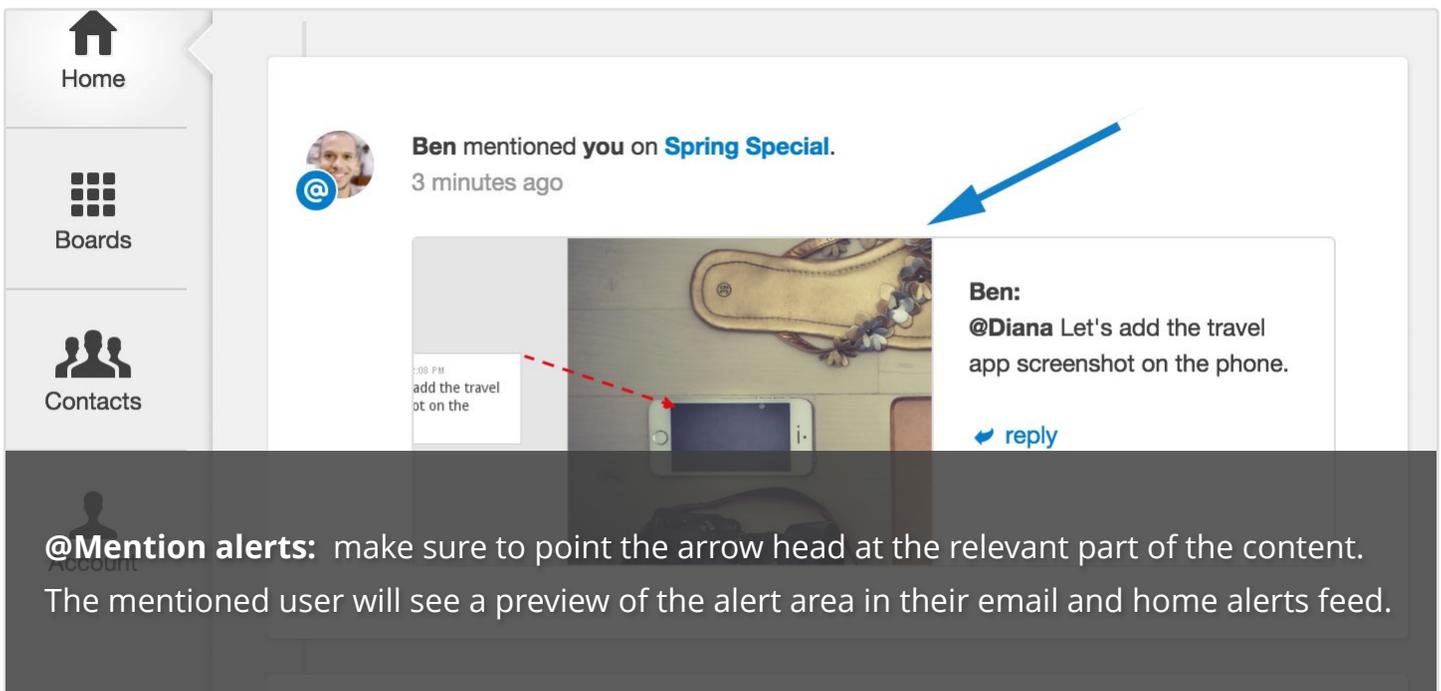


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Sharing via @mentions



@Mention a user: mention any user in a comment that is in your contact list. They will receive an alert with the comment and the board will automatically be shared with them.



@Mention alerts: make sure to point the arrow head at the relevant part of the content. The mentioned user will see a preview of the alert area in their email and home alerts feed.

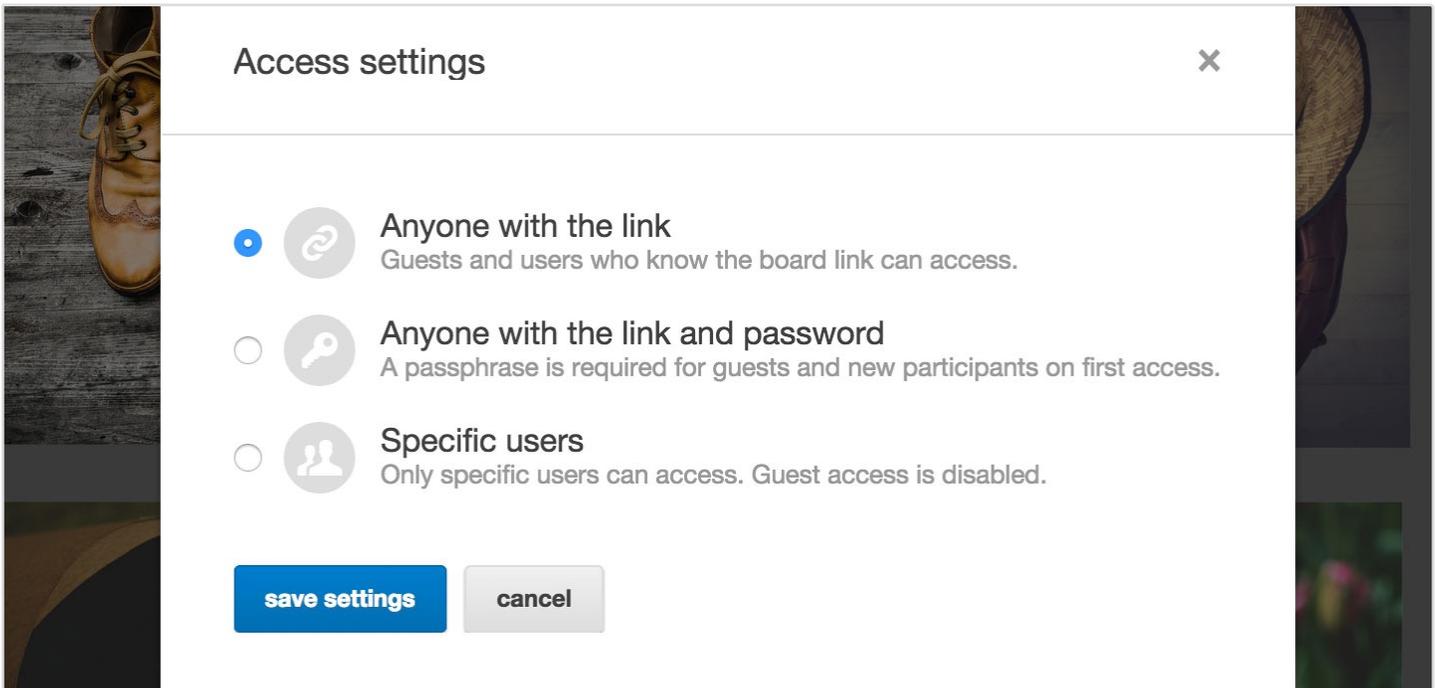


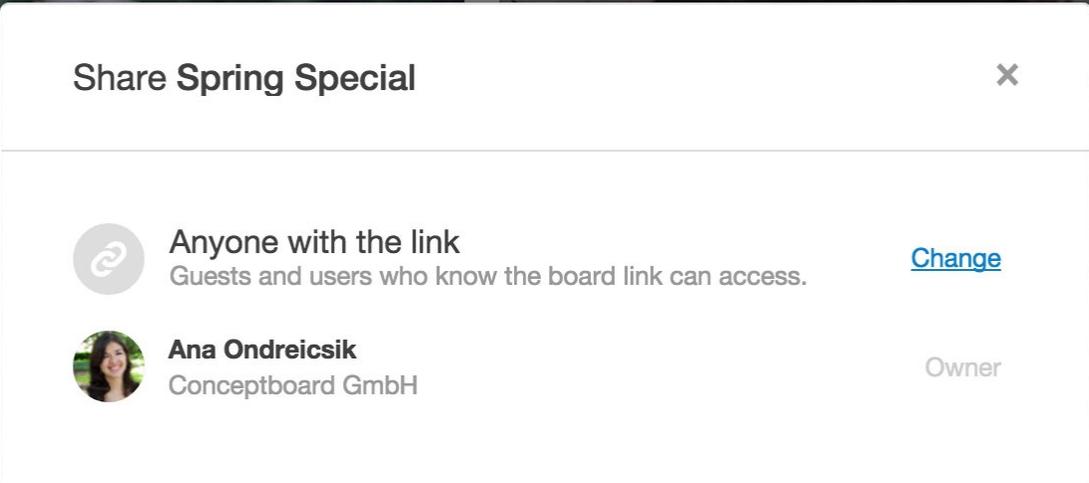
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Managing board access settings

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.



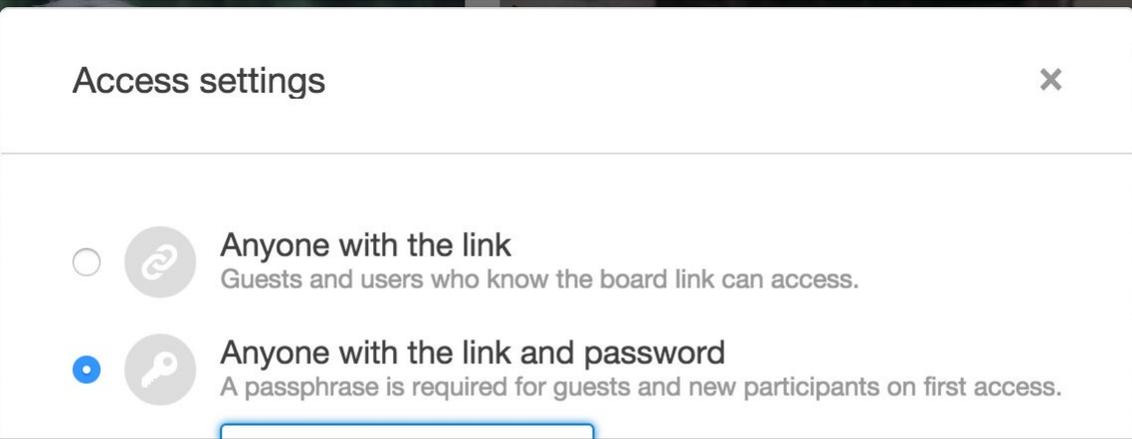


Share Spring Special ×

 **Anyone with the link**
Guests and users who know the board link can access. [Change](#)

 **Ana Ondreicsik**
Conceptboard GmbH Owner

Change board sharing settings: from the board Share dialogue, click on the 'Change' link next to 'Anyone with the link' option.



Access settings ×

 **Anyone with the link**
Guests and users who know the board link can access.

 **Anyone with the link and password**
A passphrase is required for guests and new participants on first access.

Change access settings: you have the option to password protect the board, or allow only specific users to access. Use the last setting when you need to remove a user from the board. Guest access is possible only on the first two settings.



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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'

Specific users
Only specific users can access. Guest access is disabled.

Ana Ondreicsik
Conceptboard GmbH
Owner

Ben
CoolBrandCo
x 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.

Specific users
Only specific users can access. Guest access is disabled.

Ana Ondreicsik
Conceptboard GmbH
Owner

Ben
CoolBrandCo
x remove

All participants can invite or remove participants.

Only the board owner can invite or remove participants.

How to add users to my team **gs** cancel

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](#)



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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



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