∞drive suite

User Guide

Account delegation

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T : +33 (0) 1 46 22 07 00 – F : +33 (0) 1 46 22 32 00
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Contents

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1. Delegating management of your account

If you use the Oodrive Work_share, Oodrive Work or Oodrive Meet solution, you have the option to delegate the management of your account to another user on the same workspace, provided that you have at least one shared app with this user.

By delegating your account, you are entrusting your access permissions to a trusted user and are authorizing them to act on your behalf. Depending on the apps you have access to, your delegate will be able to access your documents, shares, meetings and address book, and to manage them on your behalf.
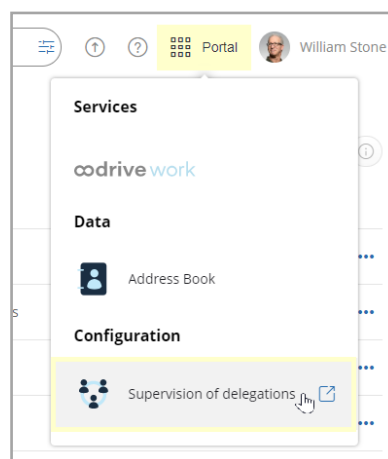
This feature is especially useful if you need to delegate some of your activities to a colleague while you are out of the office.

Please note: Your delegates will not have access to the following sections of your account:

- your "My account" record
- your delegations
- your configuration modules
- the collaboration or meeting apps that the delegate does not have access to from their own account
- your documents synchronized offline (on BoardNox and Oodrive Meet mobile apps)
- your teamspaces
- your direct or teamspace discussions.

1.1. Create a delegation

1. In the upper-right corner of the screen, click **Portal**, then select the **Supervision of delegations** module.

2. From the **Supervision of delegations** module, click **Create a delegation**.

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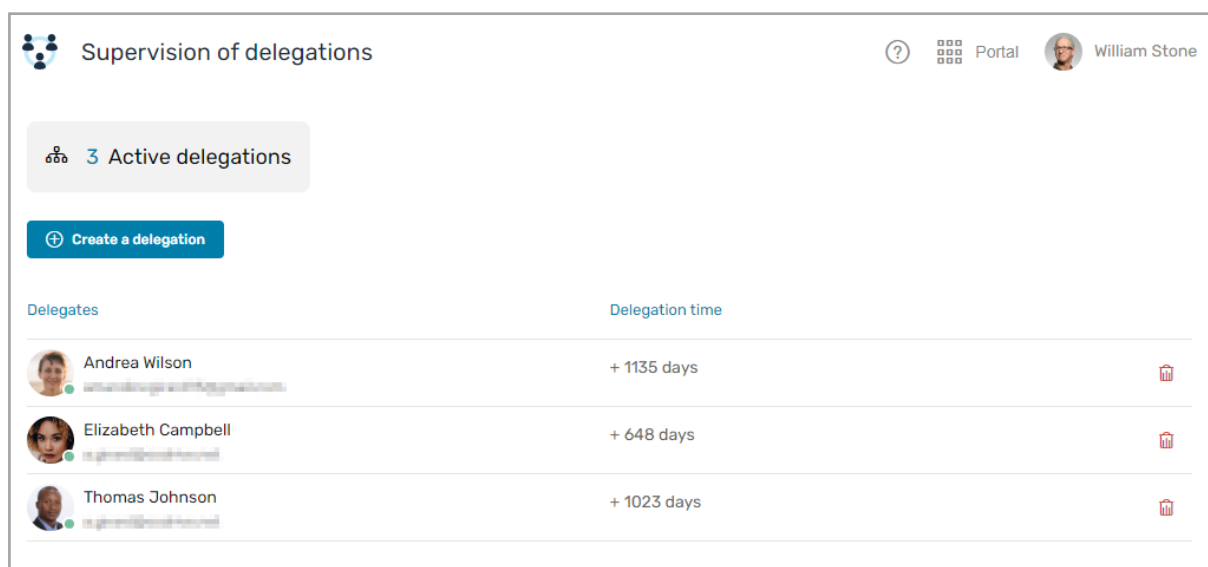
3. Use the **Delegate** drop-down list to select the user to whom you'd like to delegate management of your account.

   Use the search bar to find the user quickly.

   Note: Your contacts with usernames will not be displayed in the drop-down list, since contacts cannot act as delegates.

4. Click **Delegate** to delegate management of your account to the selected user.

5. Repeat the process to add other delegations. There is no limit to the number of colleagues to whom you can delegate your account.

Below you will find a list of your delegations. You can see the number of active delegations, the names of the delegates, as well as the time elapsed since the beginning of each delegation:

1.2. Cancel a delegation

1. In the **Supervision of delegations** module, identify the delegation you want to cancel.

2. Click the trash icon on the corresponding line, then click **Delete**.

The delegation is canceled and your former delegate will no longer be able to access your apps and data. Re-add the user as a delegate at any time by clicking **Create a delegation**.

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2. Managing another user's account

If a user appoints you as their delegate, you'll be able to manage their account and act on their behalf across all meeting and collaboration apps you have in common. This option will be available to you directly from your account.

When you act as a delegate, your name will display below the account holder's name.

William Stone acting as **delegate** on behalf of
Elizabeth Campbell
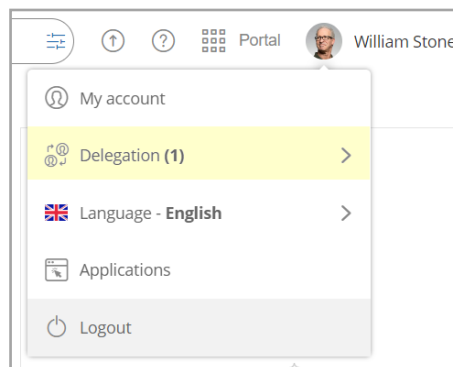
Elizabeth Campbell
(William Stone)
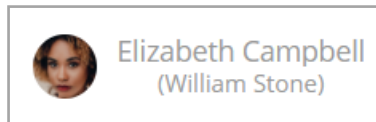
Note: When logged in as a delegate, you won't be able to access the following account holder sections:

- their "My account" record

- their delegations

- their configuration modules

- the collaboration or meeting apps that you do not have access to from your own account

- their documents synchronized offline (on BoardNox and Oodrive Meet mobile apps)

- their teamspaces

- their direct or teamspace discussions.

2.1. Act as a delegate

1. From your collaboration or meeting app, click on your name in the upper-right corner of the screen, then click the **Delegation** button.

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2. Select the name of the user for whom you'd like to act as a delegate. If several people have added you, you'll see several accounts available for delegation.

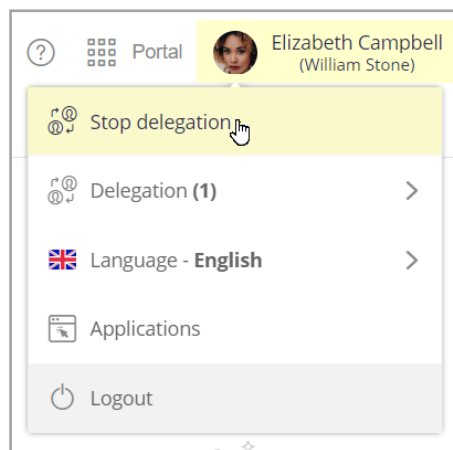Below, William Stone (delegate) is acting on behalf of Elizabeth Campbell (account holder).
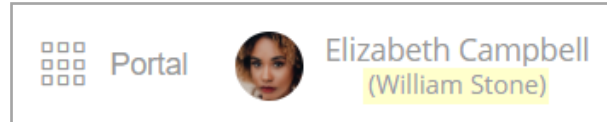
Please note: If several people have added you as a delegate, you'll be able to change delegations at any time by returning to the list of available delegations.

2.2. Stop acting as a delegate

You can return to your account without logging out from the workspace.

1. Click the account button in the upper-right corner of the screen.

2. In the drop-down menu, click **Stop delegating**.

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