Realtime Board

Team Collaboration in RealtimeBoard

Guidelines and best practices

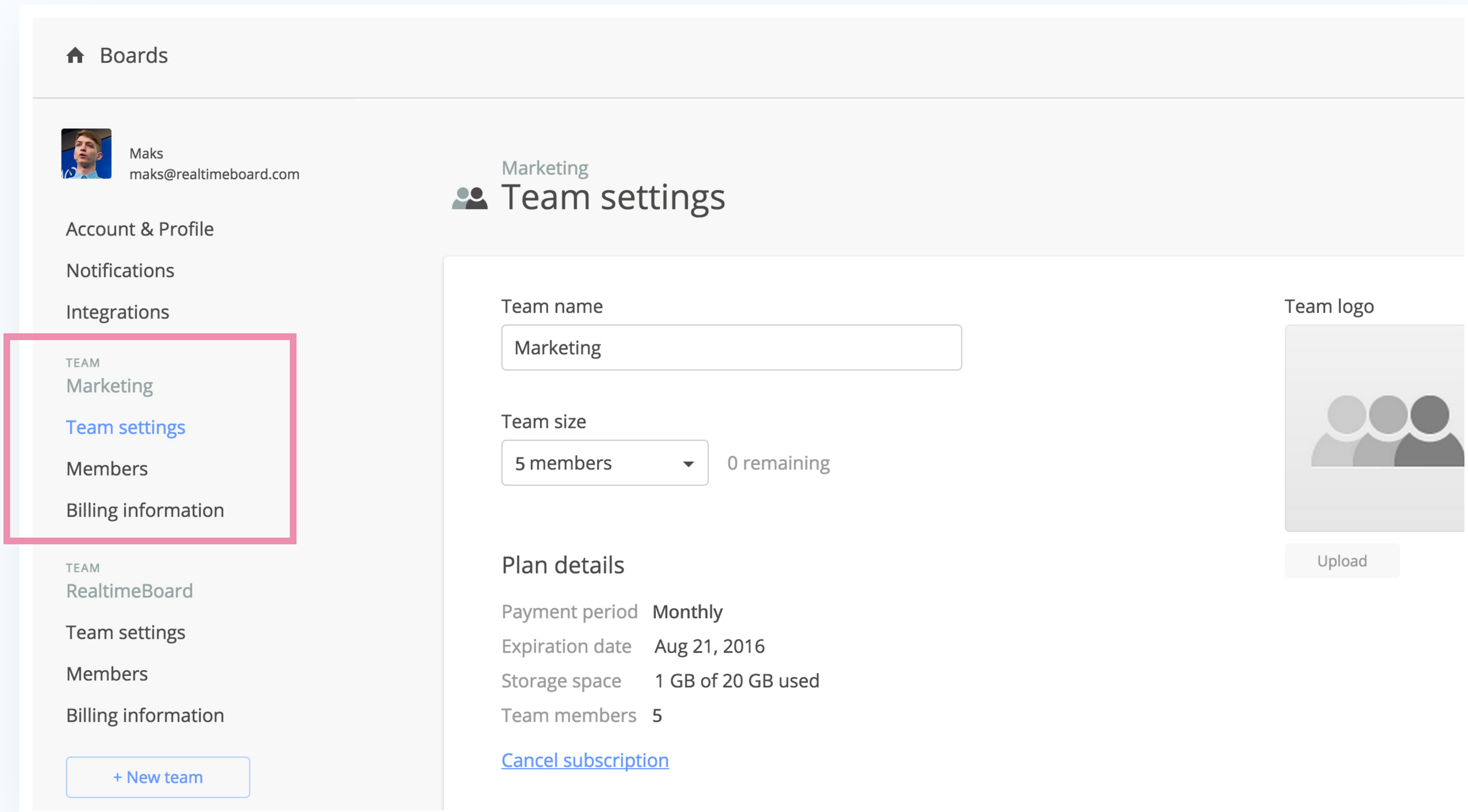
New to RealtimeBoard? Take a tour!

1 Getting started with the Team account

1.1 Setting up

Getting started with the Team account

To set up your team, go to the Team account settings and select your team in the menu.

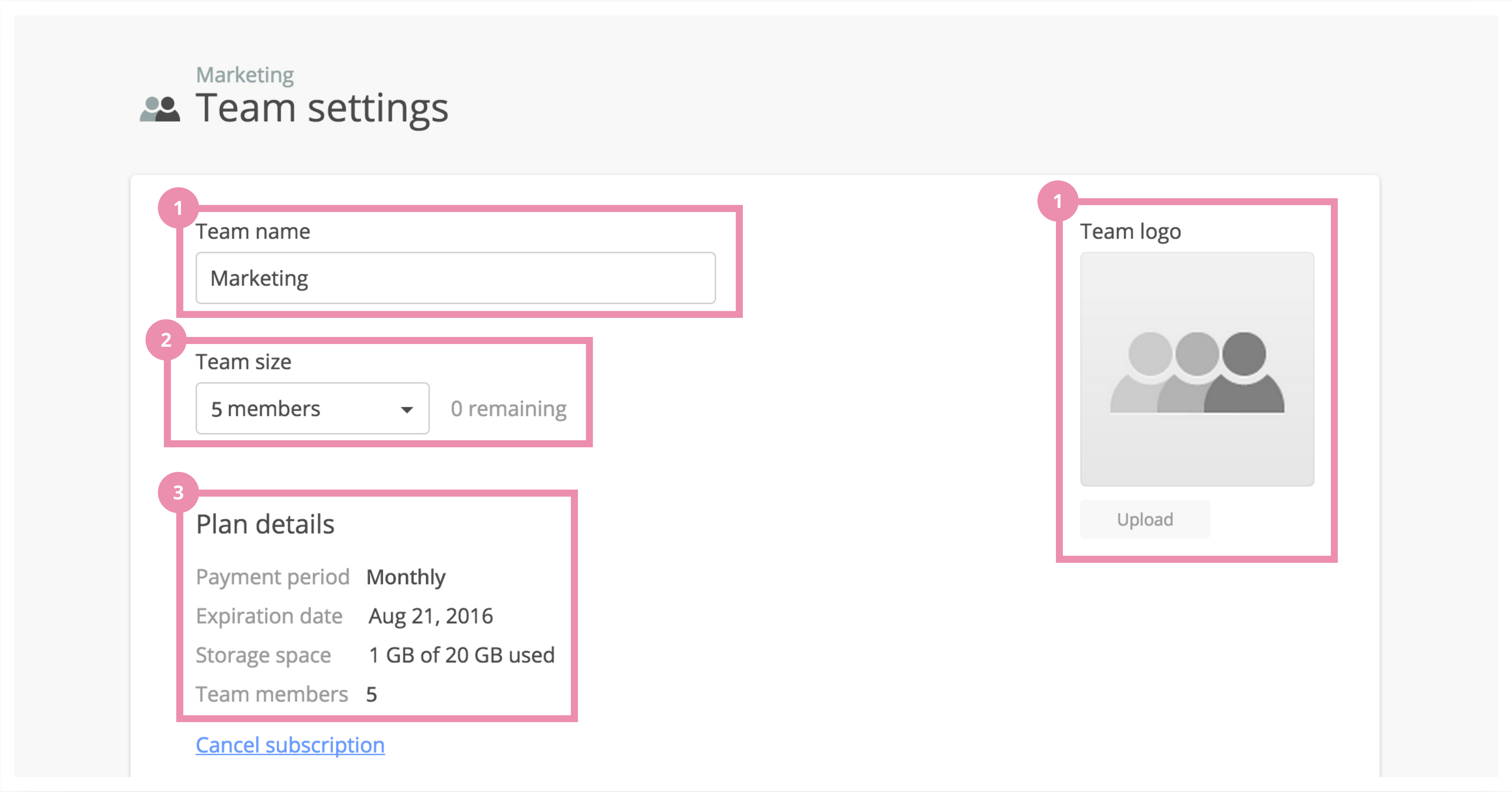


1.1

Setting up

Getting started with the Team account

1. Choose team name and logo;
2. Change team size, and see the number of remaining seats;
3. See plan details, and switch to annual billing.

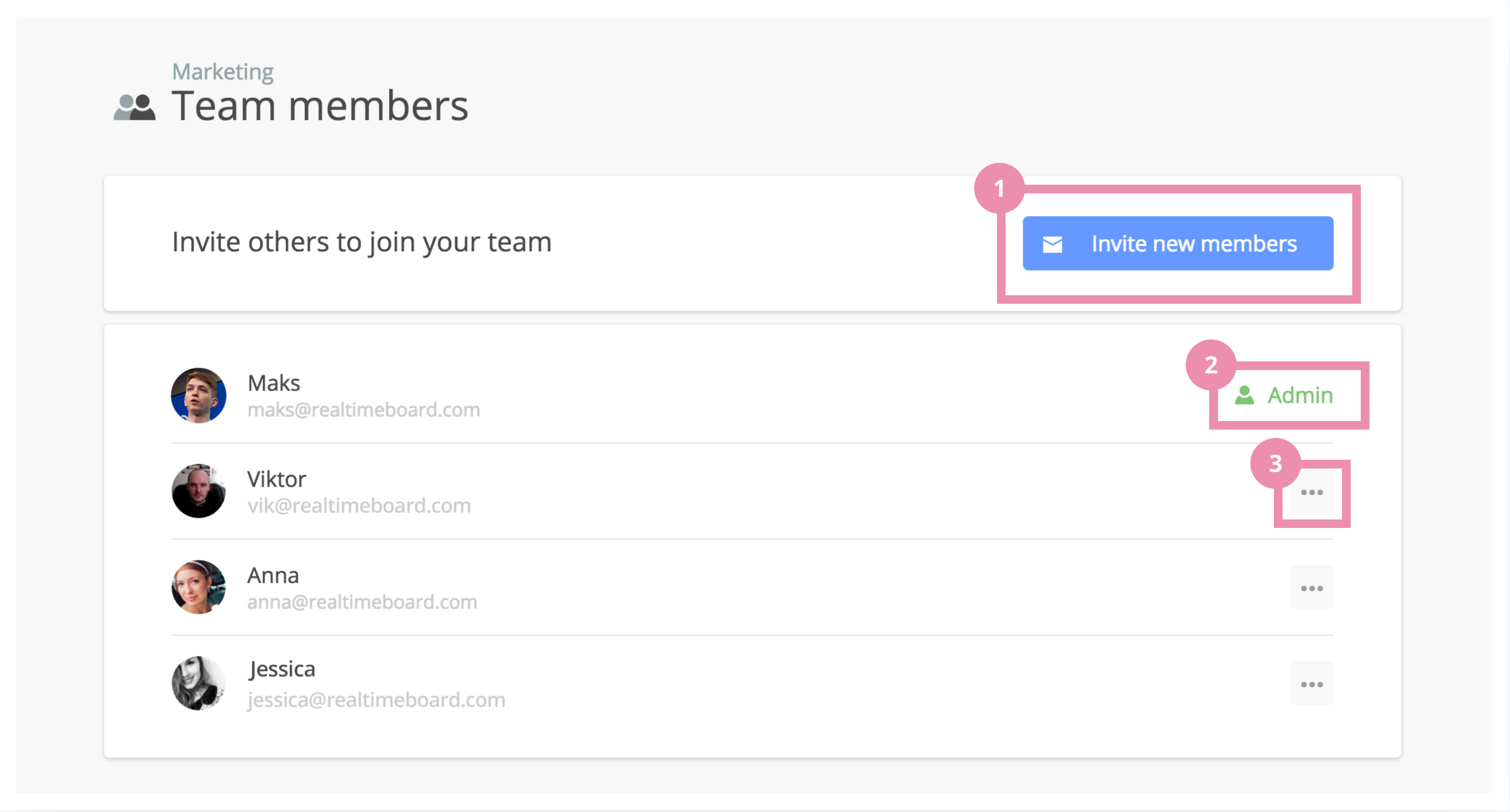


1.2 Adding team members

Getting started with the Team account

Choose the Members tab in the menu to manage your team.

1. Invite members to your team. Team members can create unlimited boards and add an unlimited number of collaborators to their boards;
2. By default, the creator of the team is the only Administrator. Users with Admin rights can add and remove other Team members, and access billing details;
3. Click here to grant admin rights, or remove members.



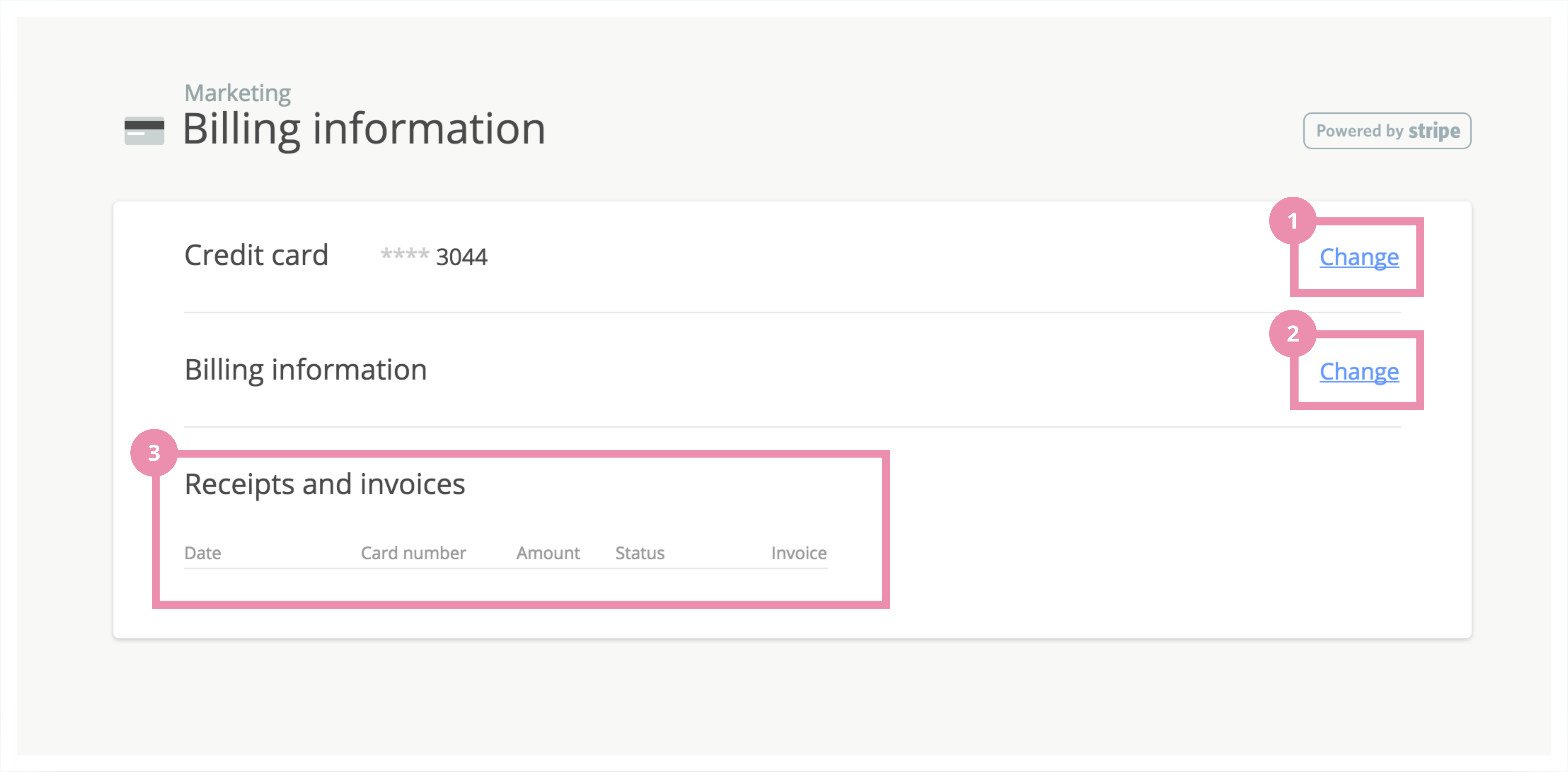
1.3

Managing billing settings

Getting started with the Team account

Choose the Billing tab in the Menu.
Only team administrators can access this page.

1. Change or update credit card;
2. Fill out the billing information to be displayed on your invoices;
3. See your paid invoices.



2 Structuring content

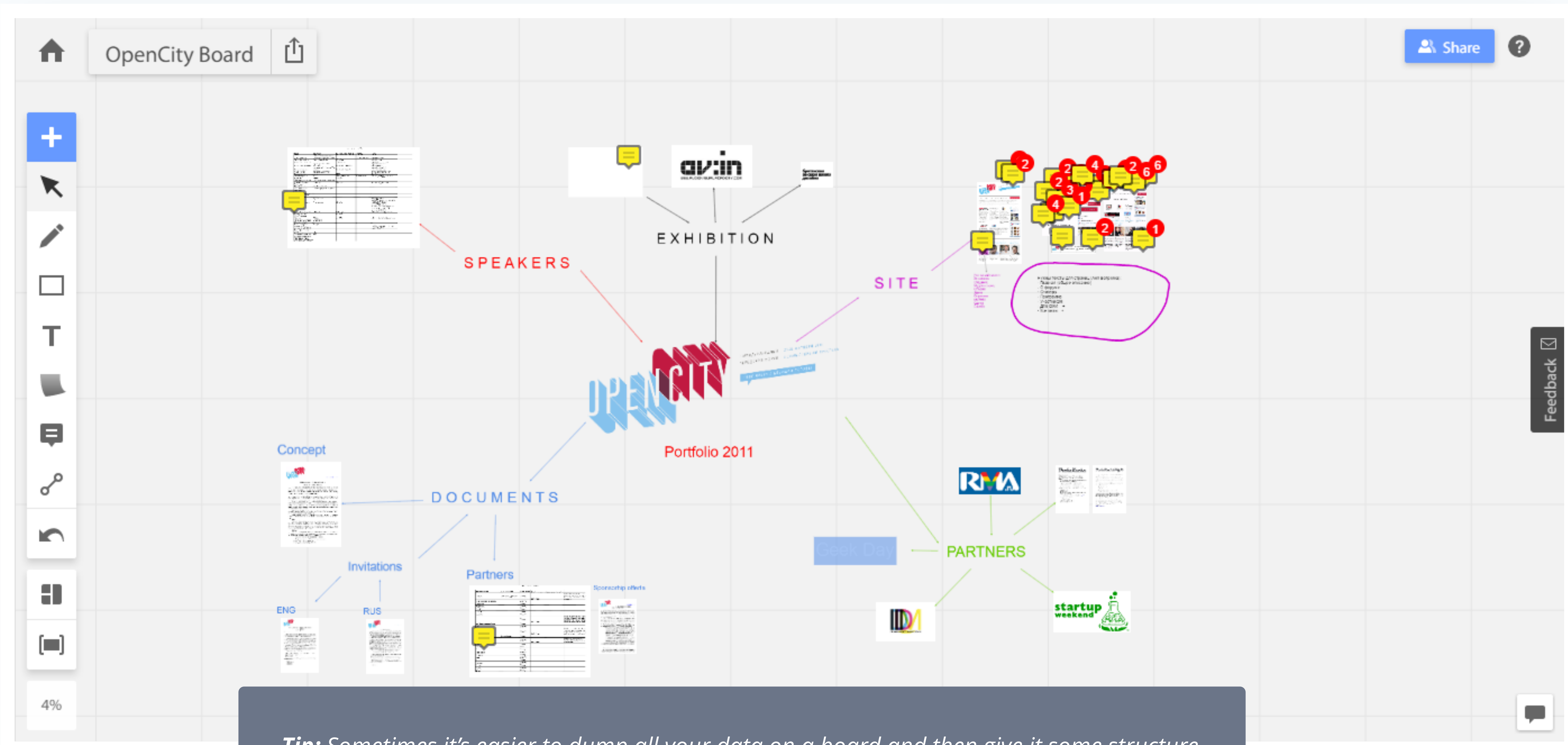
2.1

Structuring content by kind

Structuring content

There are countless ways to organise content on a board. And they largely depend on the use case. But this is what generally works best for us:

Structure by kind (documents, pictures, notes)



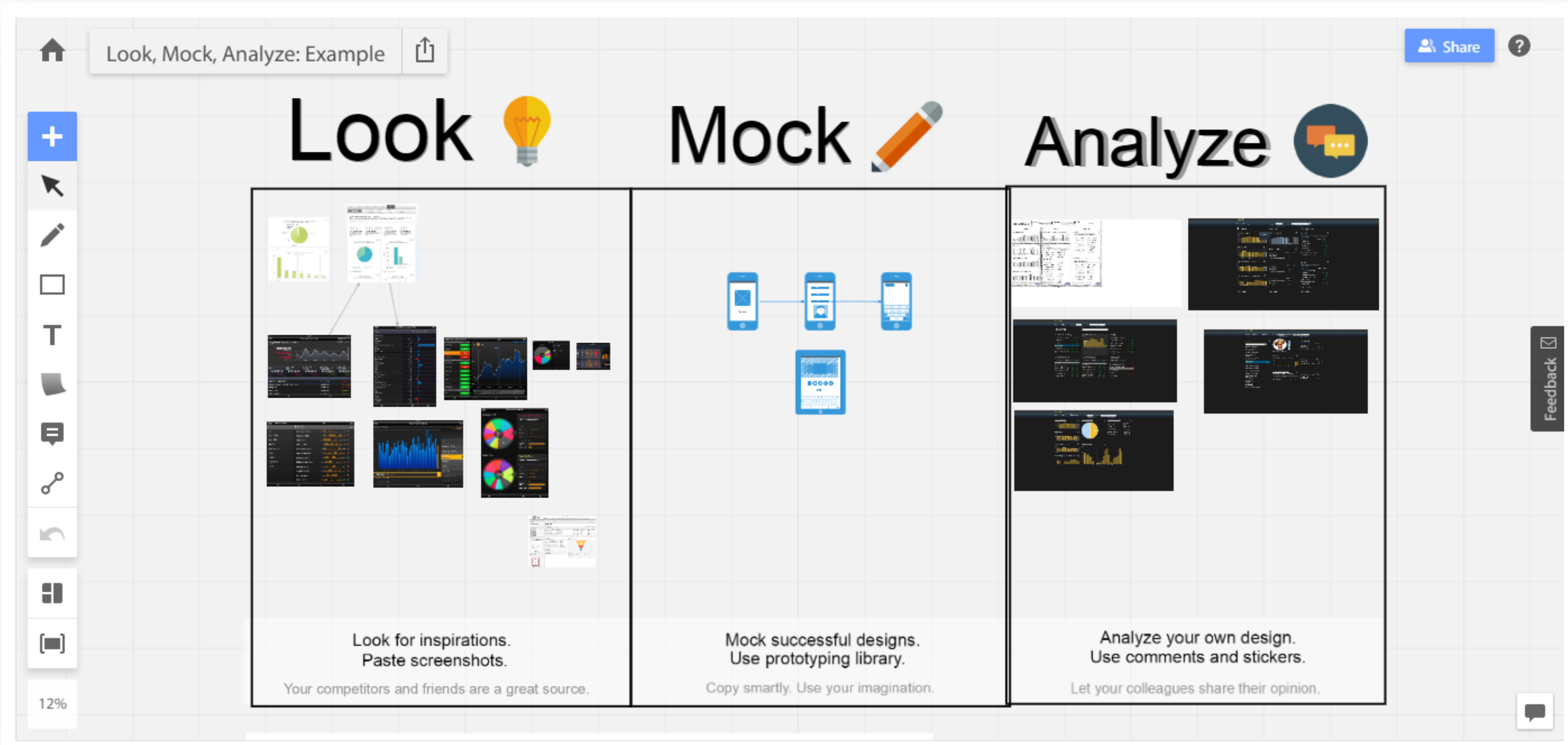
***Tip:** Sometimes it's easier to dump all your data on a board and then give it some structure.*

2.1

Structuring content by type

Structuring content

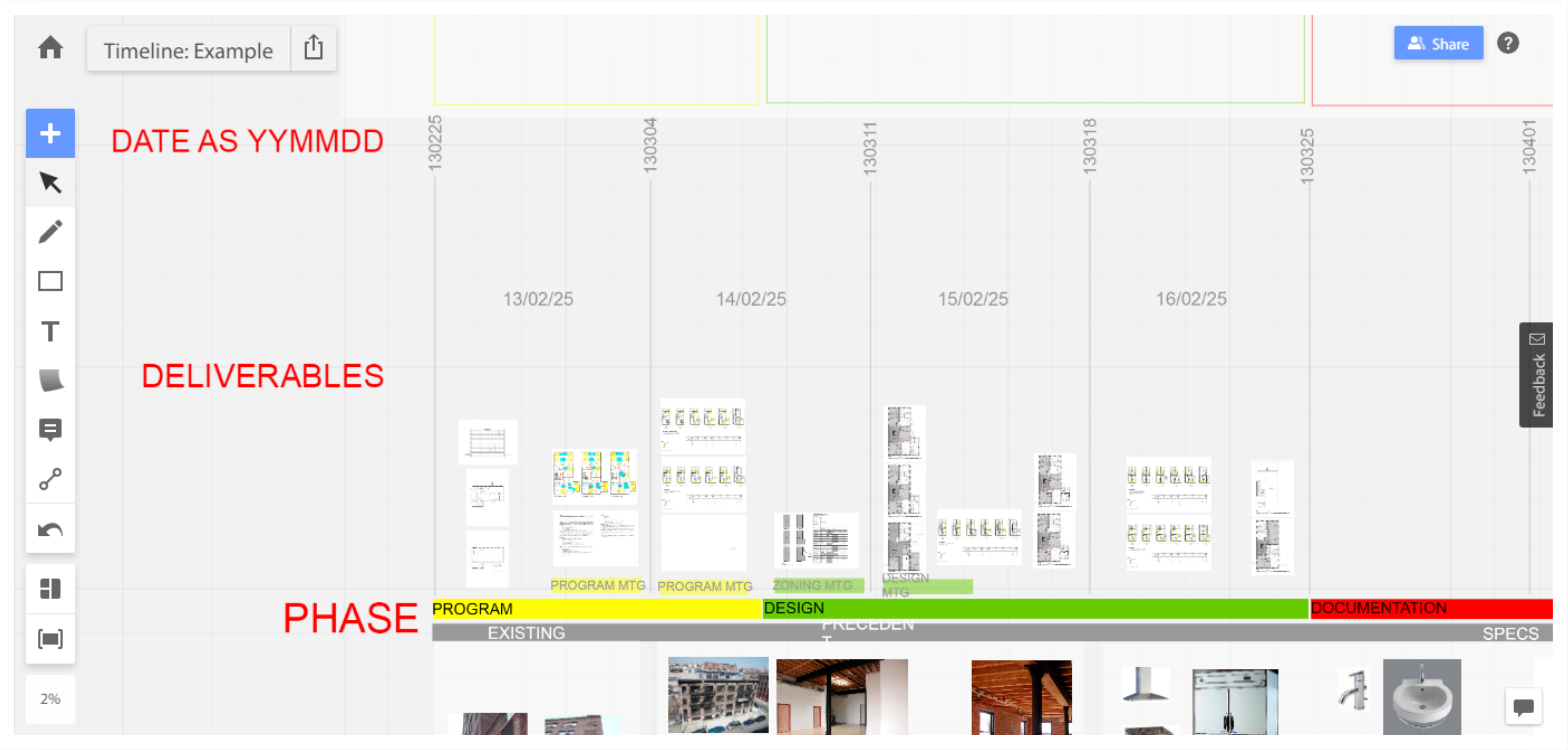
Structure by type (references, mock-ups, screenshots)



2.1 Structuring content by date

Structuring content

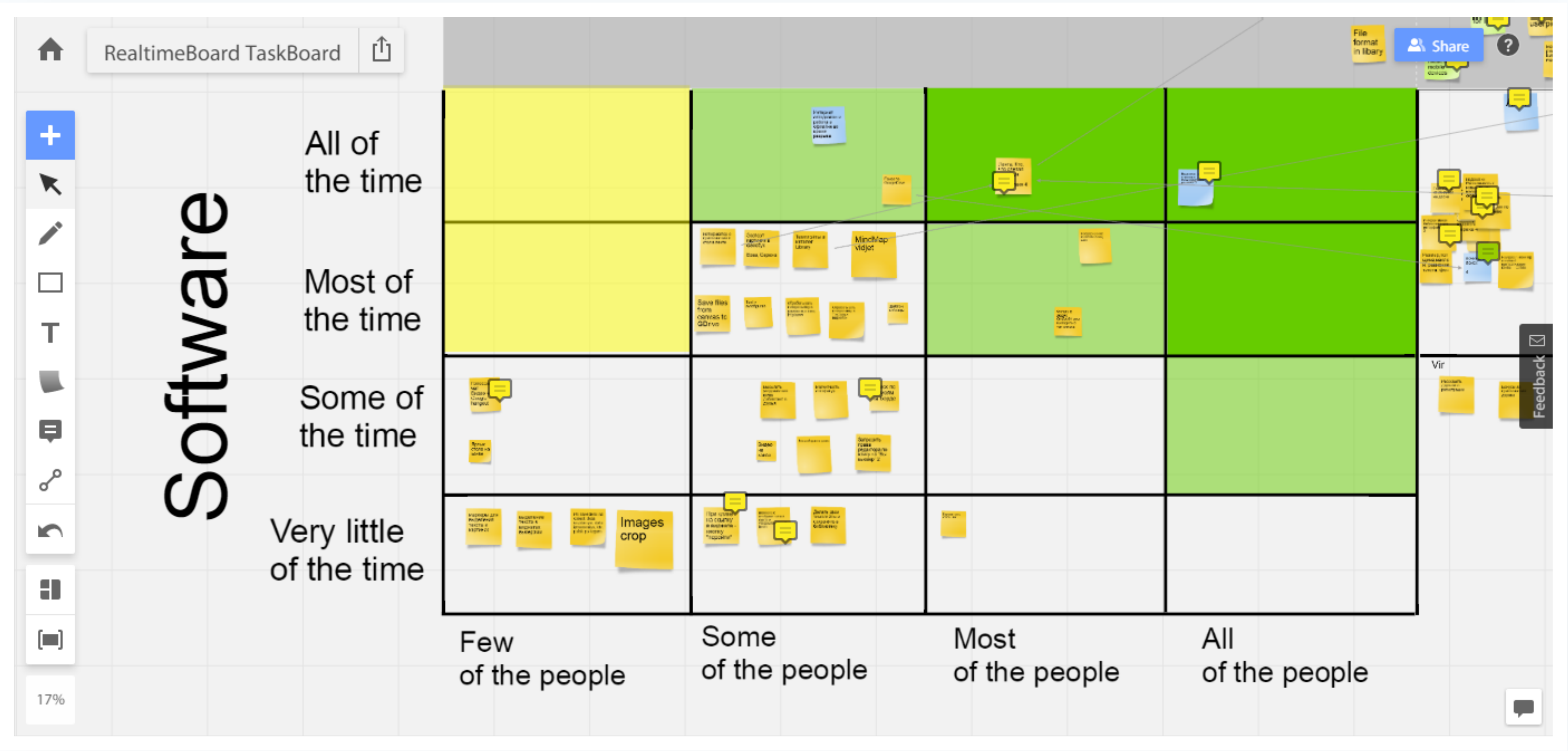
Structure by time and date



Structuring content by tasks\roles

Structuring content

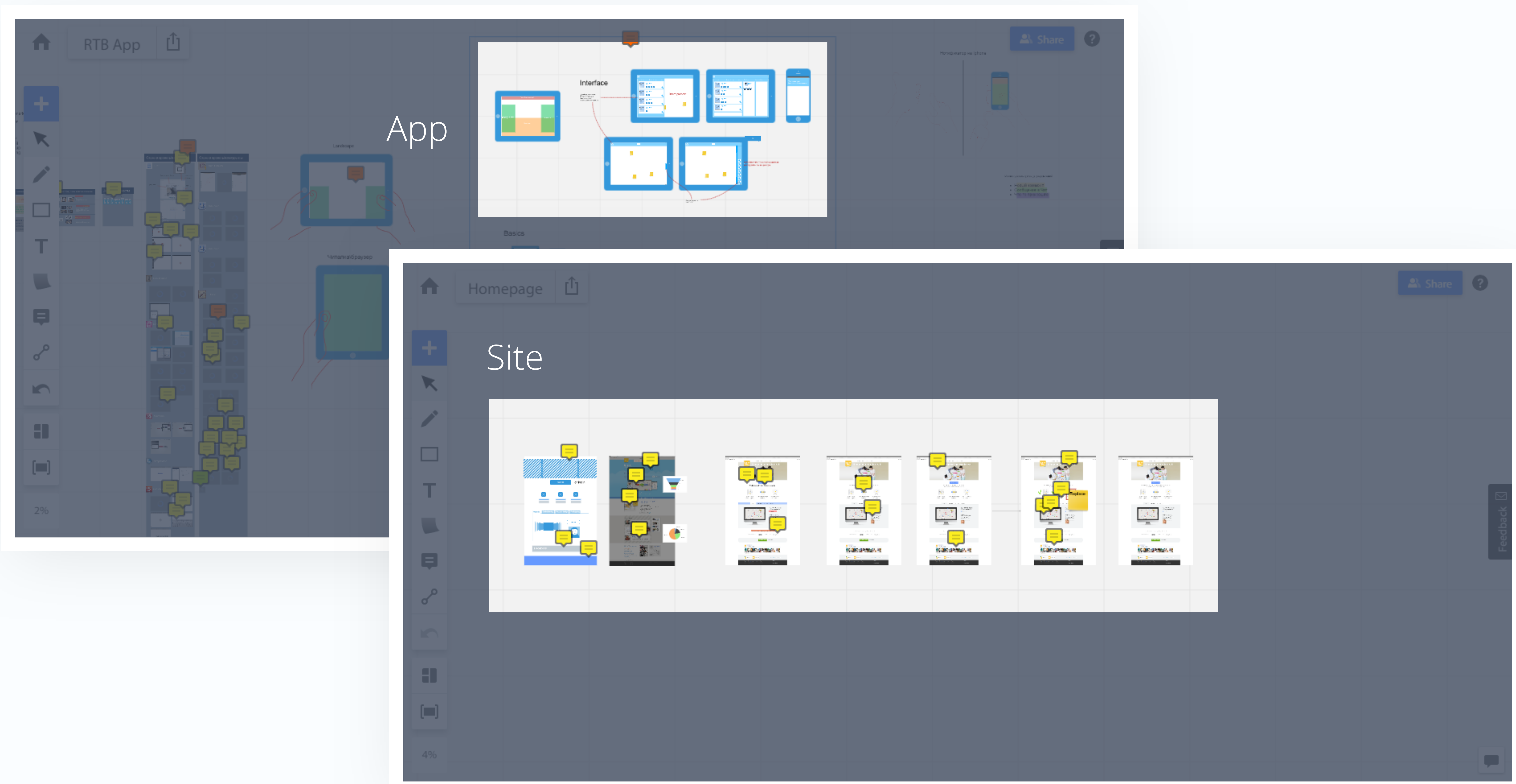
Sometimes it's easier to navigate the board when everyone is assigned their own part. For instance, have copywriters, marketers and designers work on separate parts of a single board. This approach fosters communication and lets everyone see what progress has been made so far.



2.3 Structuring content by projects

Structuring content

Each board usually represents a single project. This helps manage access rights and keeps everything organised.



3 Basics of real time collaboration

3.1 Inviting participants

3.2 Video & chat

3.3 Screen sharing

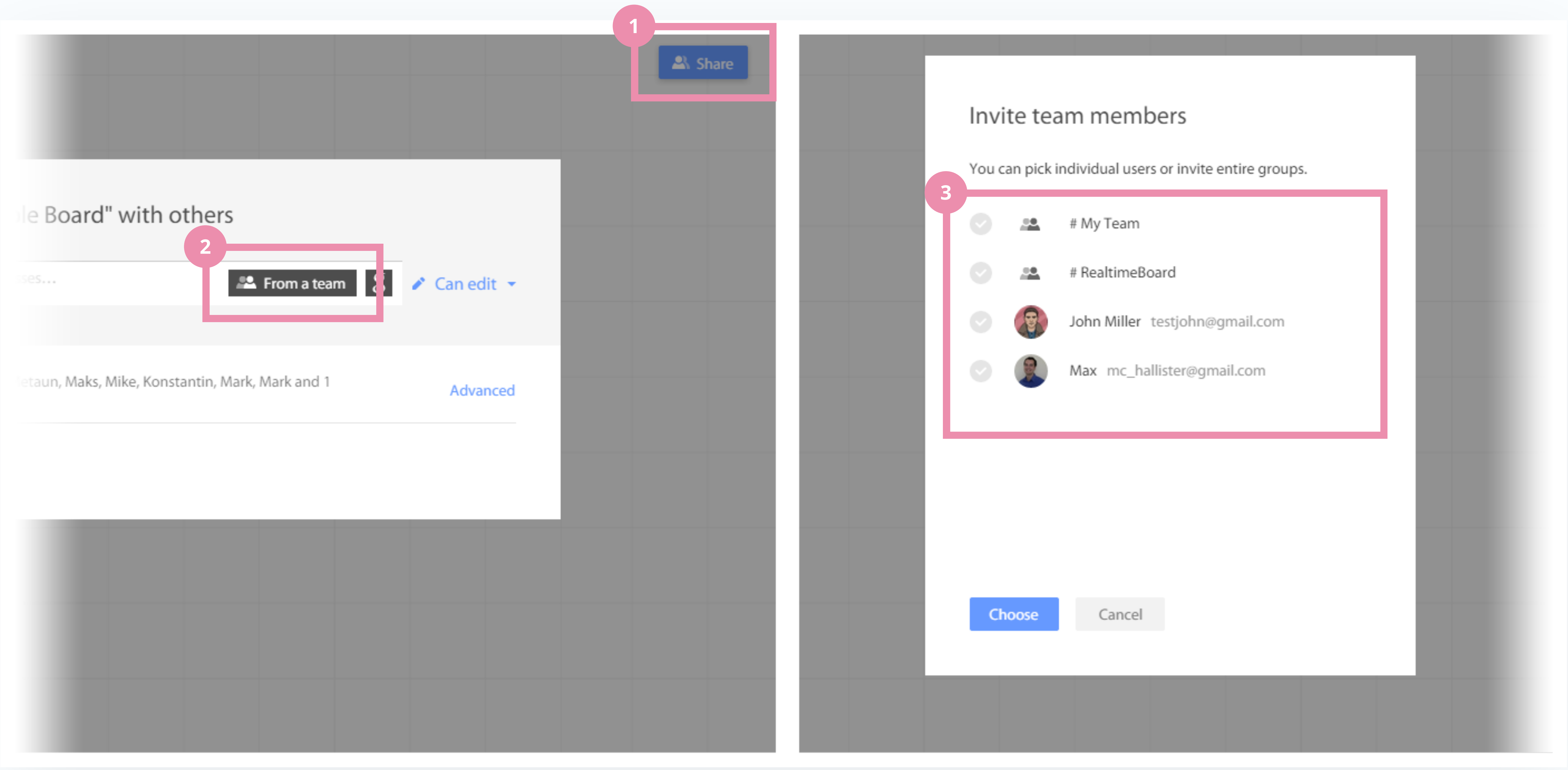
Tip: *Changes on the boards are displayed in real time for all the participants.*

3.1 Inviting participants

Basics of real time collaboration

To add team members to the board:

1. Go to the Share menu;
2. Click From a team;
3. Add the whole team or pick individual users.

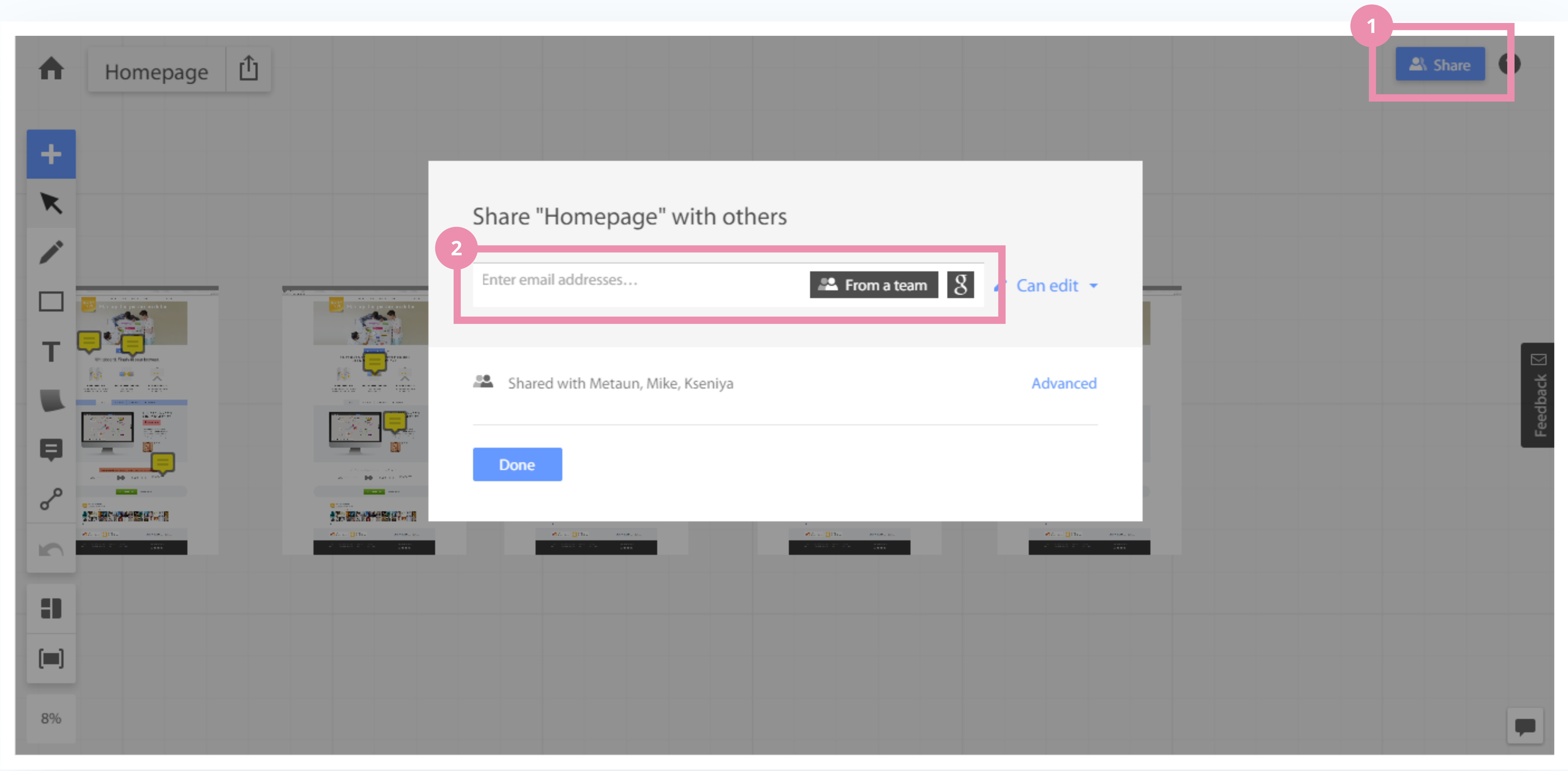


3.1 Inviting participants

Basics of real time collaboration

To add other participants to the board:

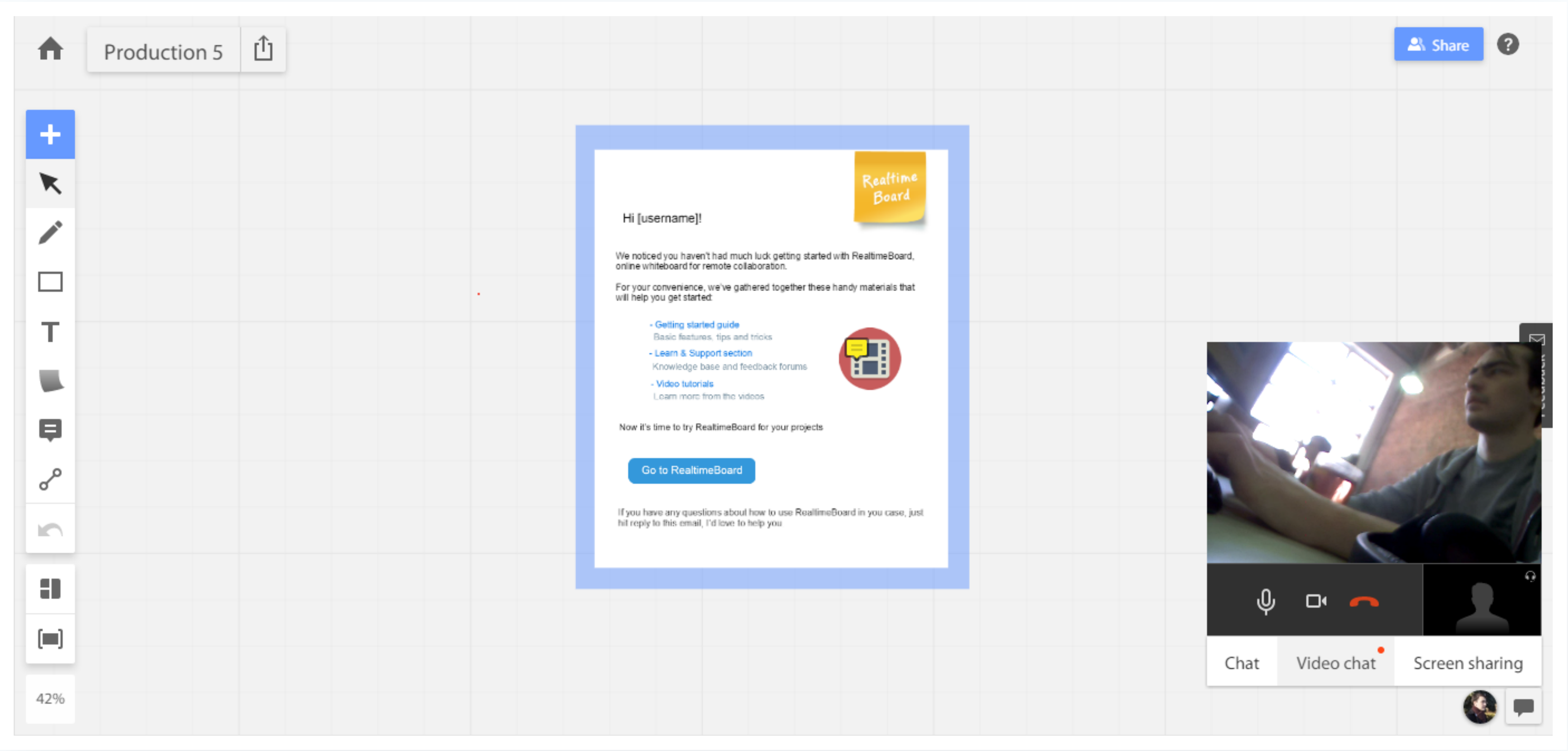
1. Go to the Share menu;
2. Enter their emails in this field and choose editor or viewer rights.



3.2 Video & chat

Basics of real time collaboration

This feature is available to all of the Team members, and users of the Premium accounts.



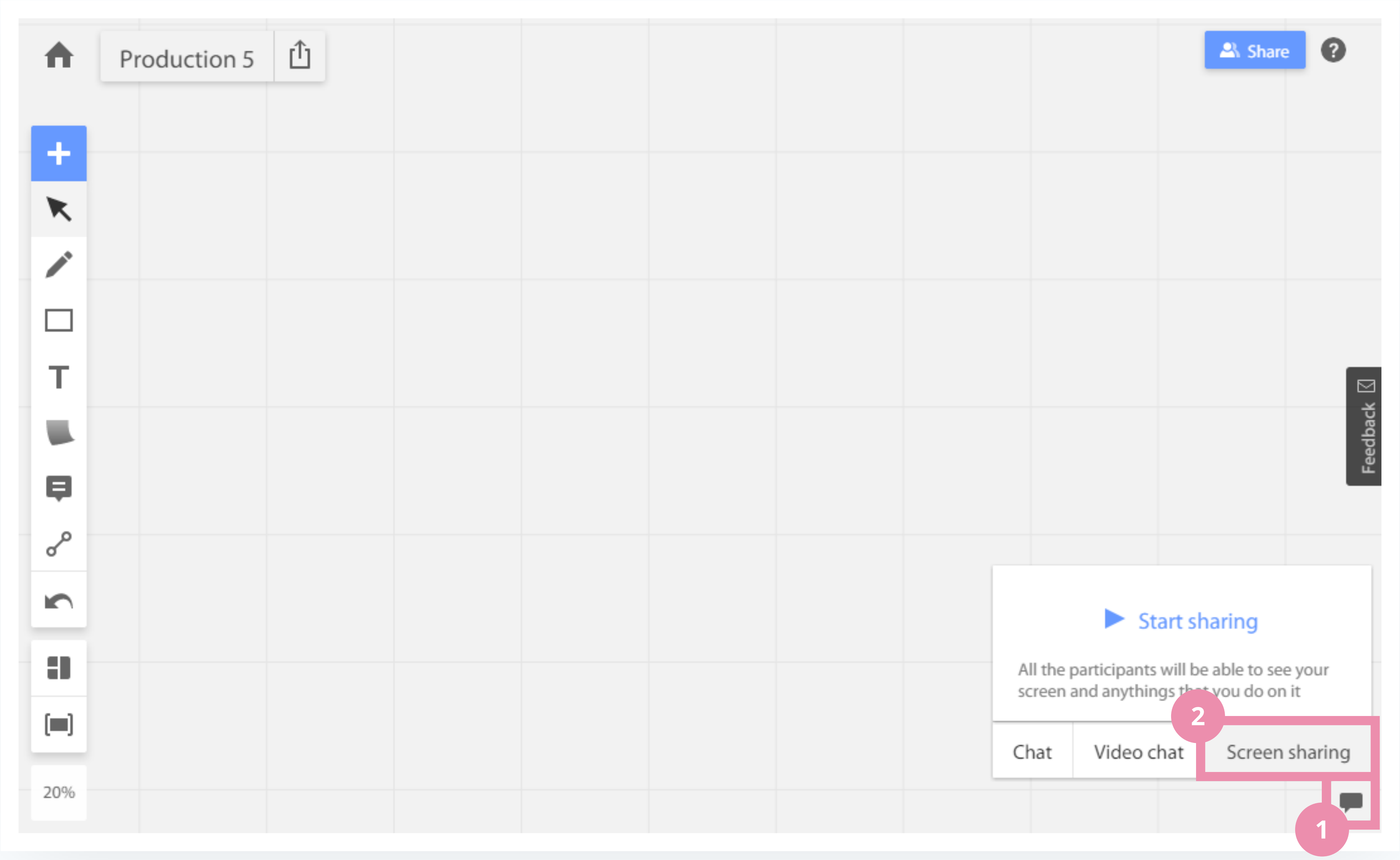
3.3

Screen sharing

Basics of real time collaboration

With the Screen sharing feature you can take the stage and present the board to other participants. To share your screen:

1. Open the Collaboration menu;
2. Choose Screen sharing to start sharing your screen, or join an active stream.



4 Insights and best practices

4.1 Task tracking and color coding

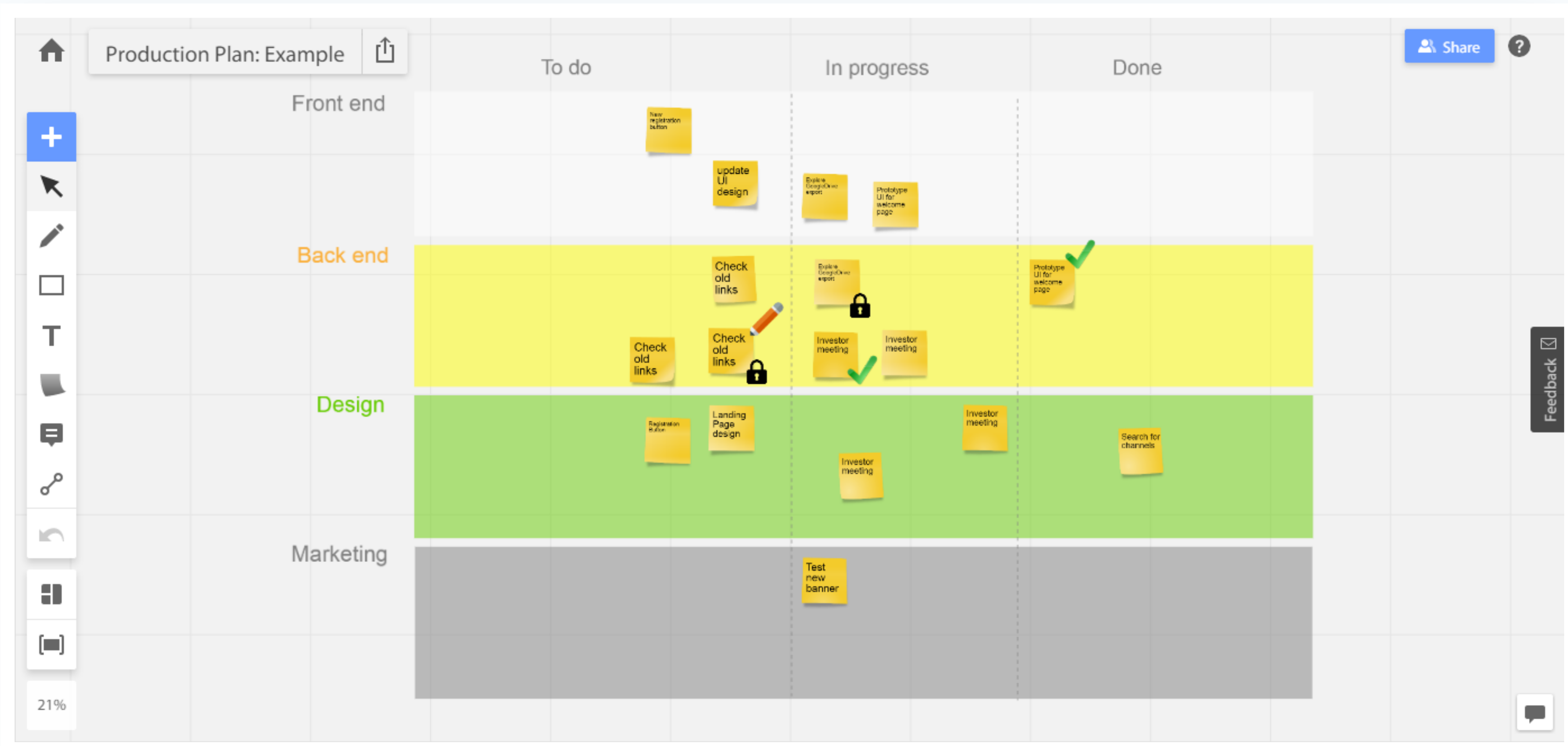
4.2 Using business canvases

4.3 Instant notifications

4.1 Task tracking and color coding

Insights and best practices

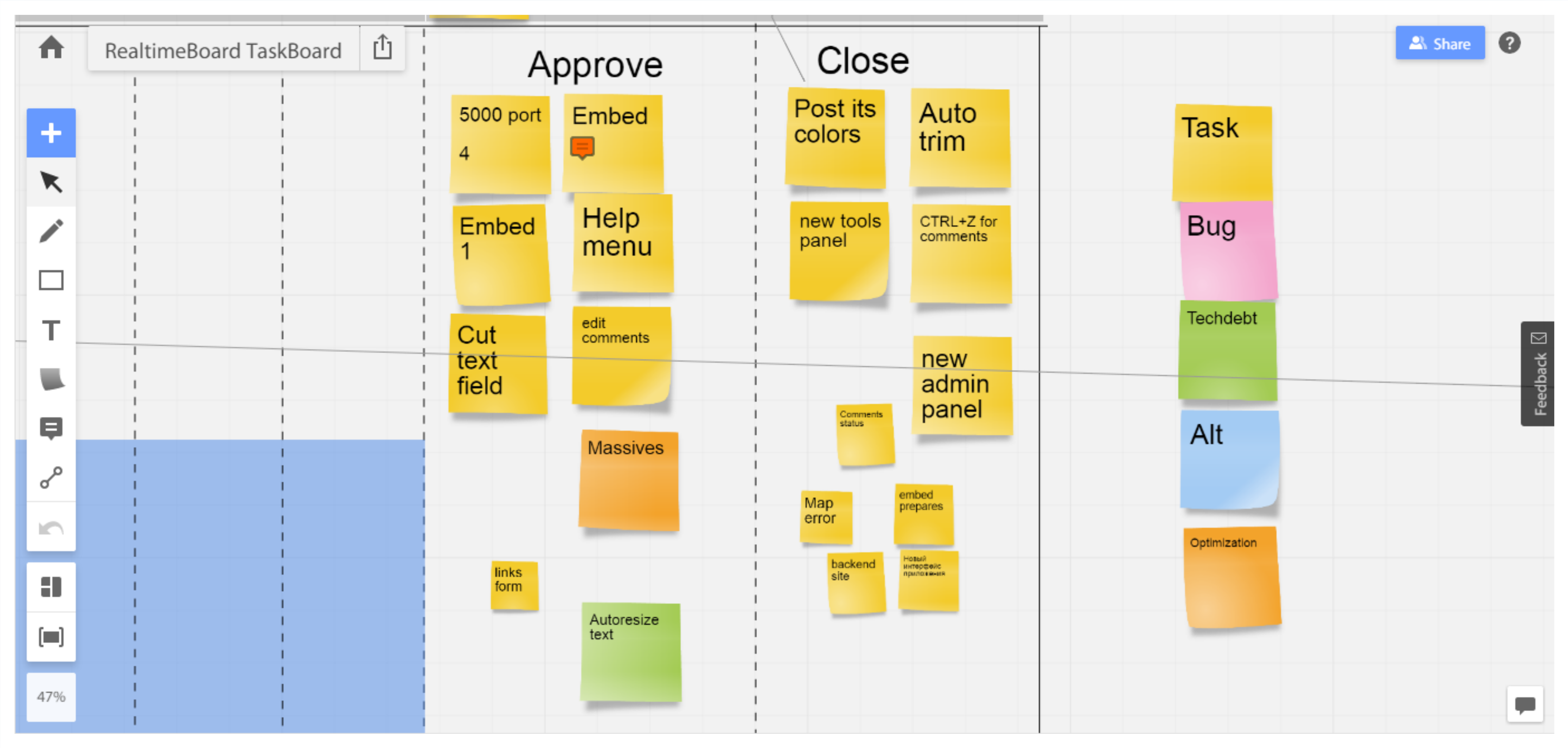
Use the Agile board board template to manage tasks within a project. It's a great way to visualize progress and see the big picture.



4.1 Task tracking and color coding

Insights and best practices

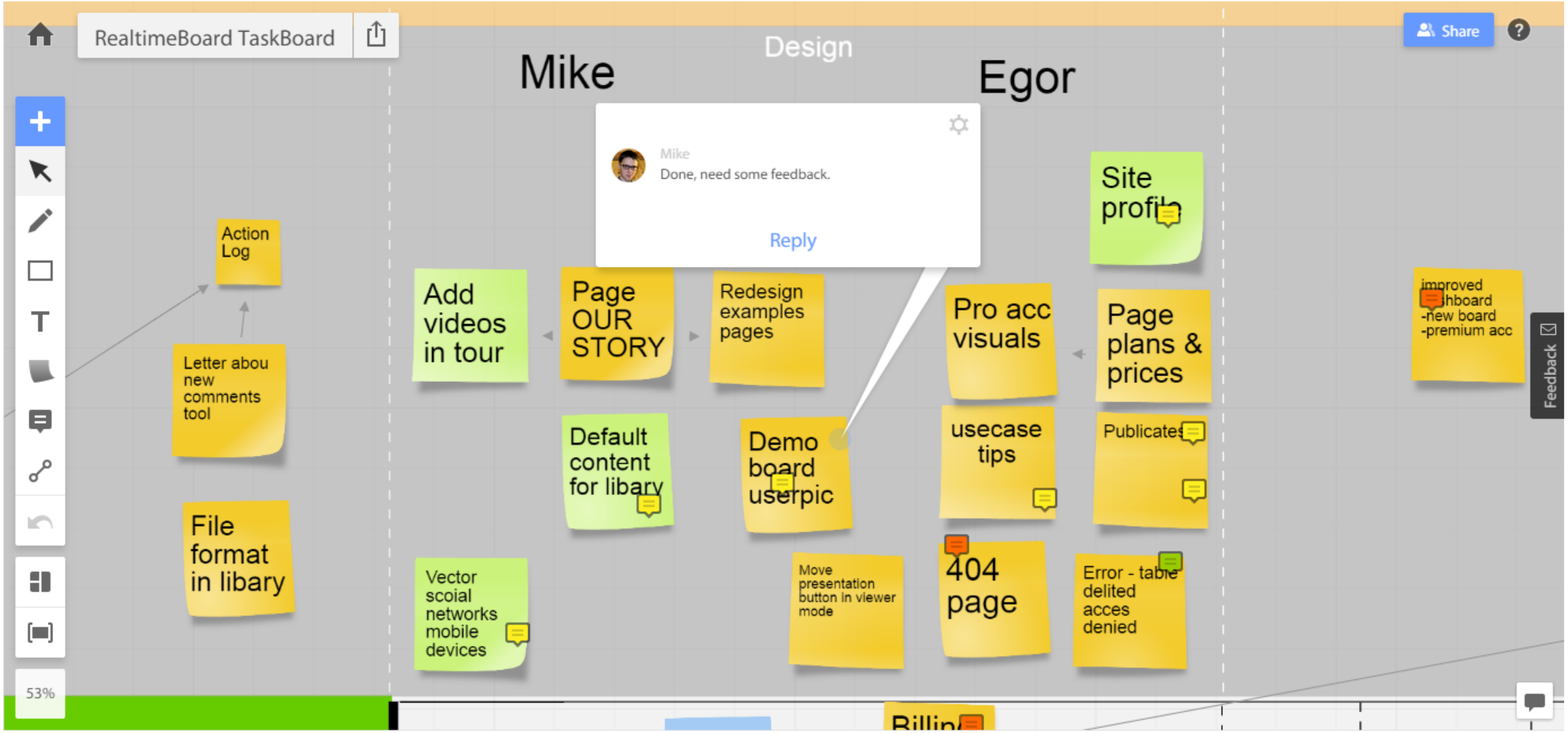
Use post-it notes to represent tasks. Change post-it size to indicate the size of the task. Assign different colors of post-its for specific people / departments.



4.1 Task tracking and color coding

Insights and best practices

Use the color indicator of the comments to mark them as urgent (red), neutral (yellow) or resolved (green).

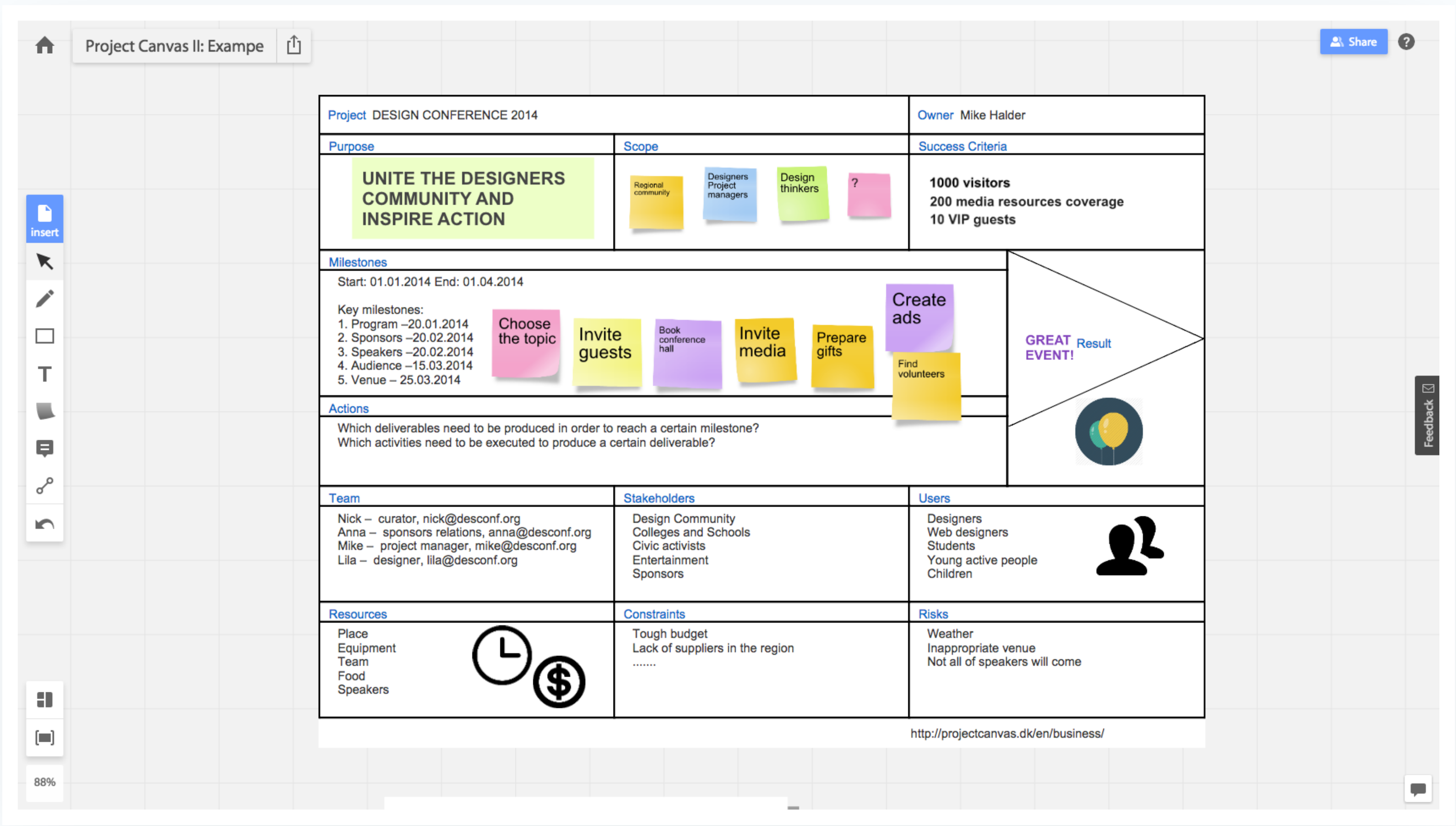


4.2

Business canvases

Insights and best practices

Business canvases provide a great platform for developing your projects and business models. Read more about them in the examples section of our website.

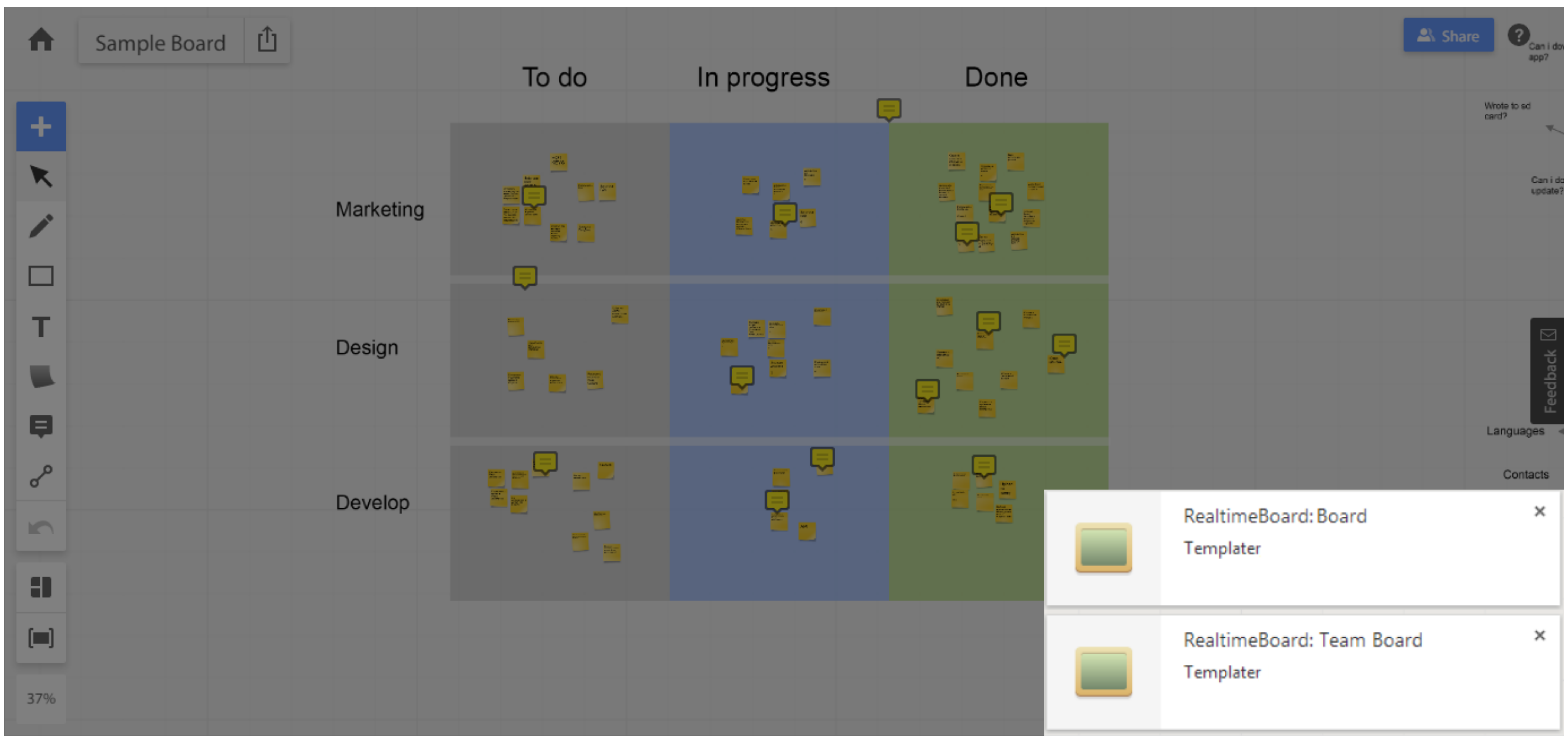


4.3

Real time notifications

Insights and best practices

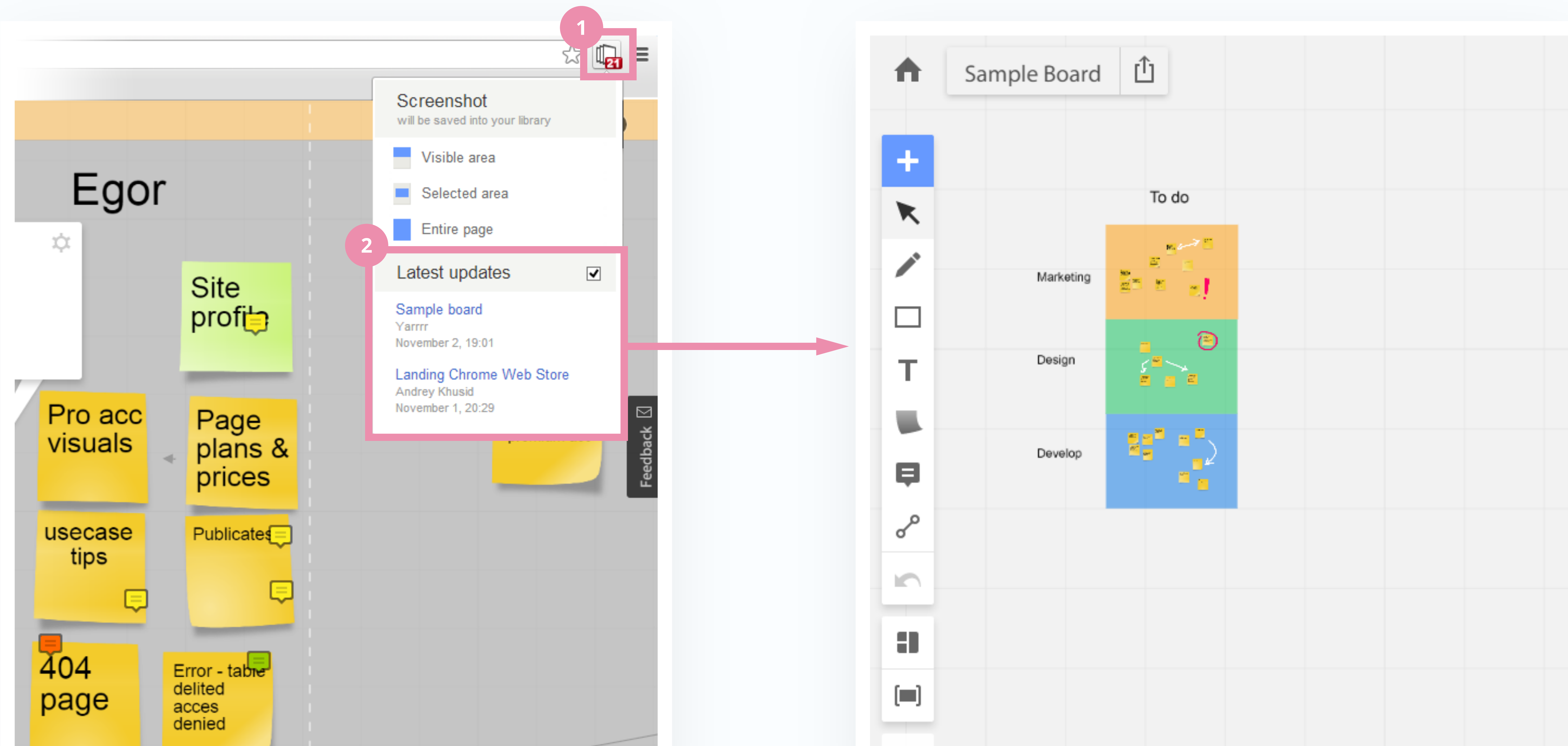
If you're on Google Chrome, install the [RealtimeBoard extension] for your browser. When someone starts working on a board that you have access to, you will get a notification.



4.3 Real time notifications

Insights and best practices

1. Click on the extension icon to access the latest updates sorted by time and date;
2. Clicking on one of the list items will take you to the board, and all the changes will be highlighted in pink.



Tip: *You can run Chrome in the background, so that it displays notifications, while you're working in another browser.*

Enjoy your RealtimeBoard
Team account