

# 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

1.2 Adding team members

1.3 Managing billing settings

## 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.

Boards

Maks

maks@realtimeboard.com

Account & Profile

Notifications

Integrations

TEAM

Marketing

Team settings

Members

Billing information

TEAM

RealtimeBoard

Team settings

Members

Billing information

+ New team

Marketing

Team settings

Team name

Marketing

Team size

5 members

0 remaining

Plan details

Payment period

Monthly

Expiration date

Aug 21, 2016

Storage space

1 GB of 20 GB used

Team members

5

[Cancel subscription](#)

Team logo

Upload

## 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.

### Marketing Team settings

1

Team name

Marketing

2

Team size

5 members



0 remaining

3

Plan details

Payment period Monthly

Expiration date Aug 21, 2016

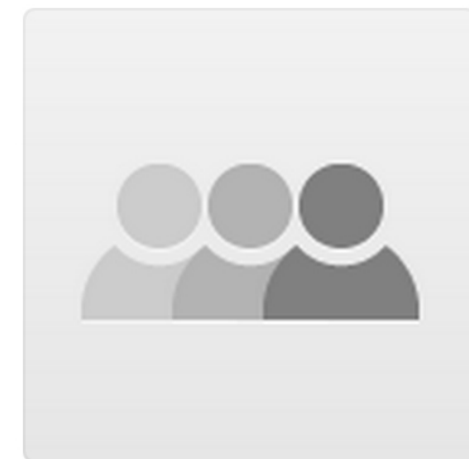
Storage space 1 GB of 20 GB used

Team members 5

[Cancel subscription](#)

1

Team logo



Upload

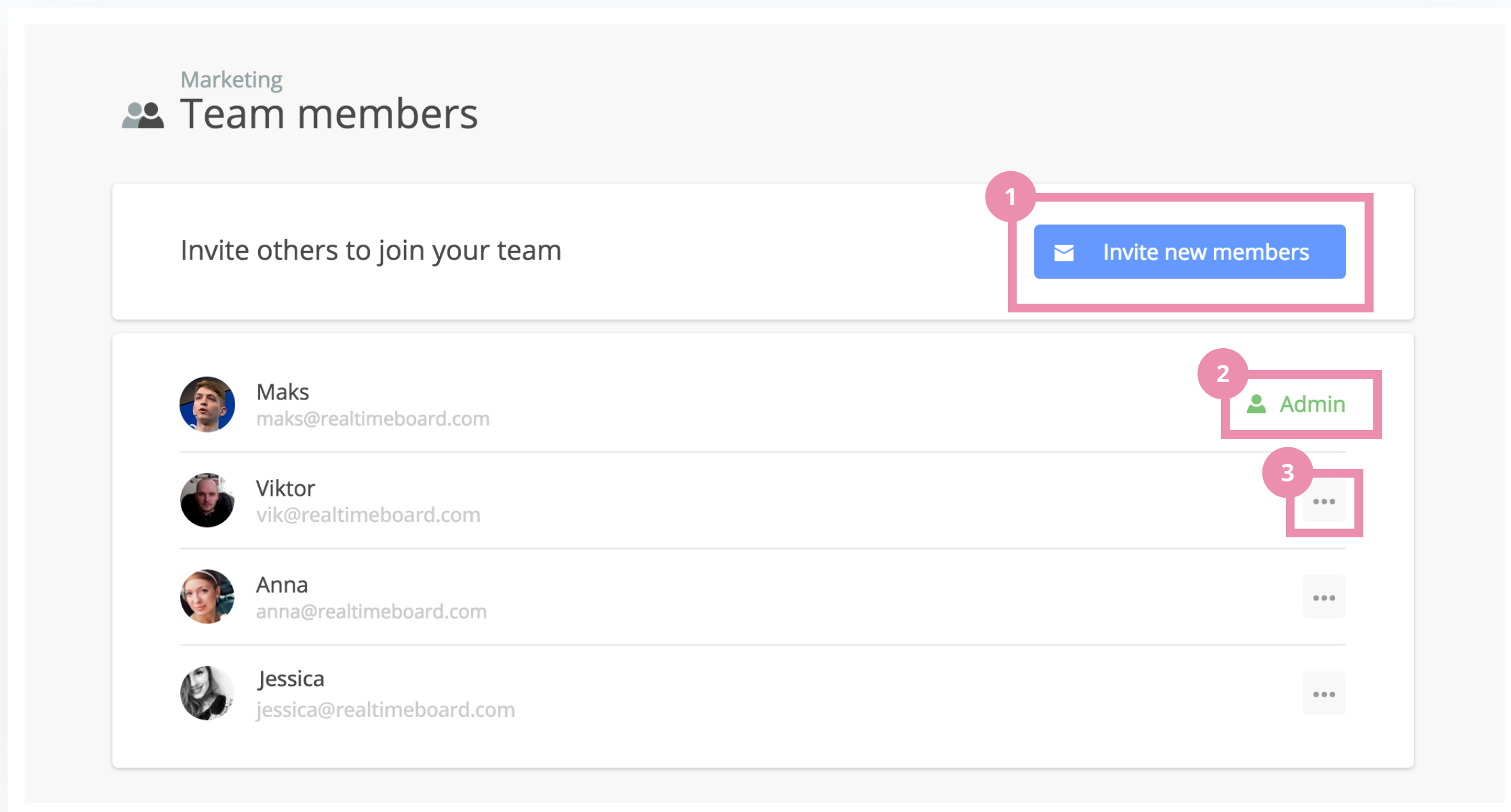
## 1.2

# 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.

The screenshot shows the 'Marketing Billing information' page. At the top left is a credit card icon and the text 'Marketing Billing information'. At the top right is a 'Powered by stripe' badge. The main content area has three sections: 'Credit card' with a masked number '\*\*\*\* 3044', 'Billing information', and 'Receipts and invoices'. Each section has a 'Change' link. Three numbered callouts (1, 2, 3) in pink circles point to these links. Callout 1 points to the 'Change' link for the credit card. Callout 2 points to the 'Change' link for the billing information. Callout 3 points to the 'Receipts and invoices' section, which contains a table with columns: Date, Card number, Amount, Status, and Invoice.

Marketing **Billing information** Powered by stripe

**1** [Change](#)

**2** [Change](#)

**3** [Receipts and invoices](#)

Date	Card number	Amount	Status	Invoice
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## 2 Structuring content

2.1 By kind / type / time

2.2 By tasks / roles

2.3 By projects

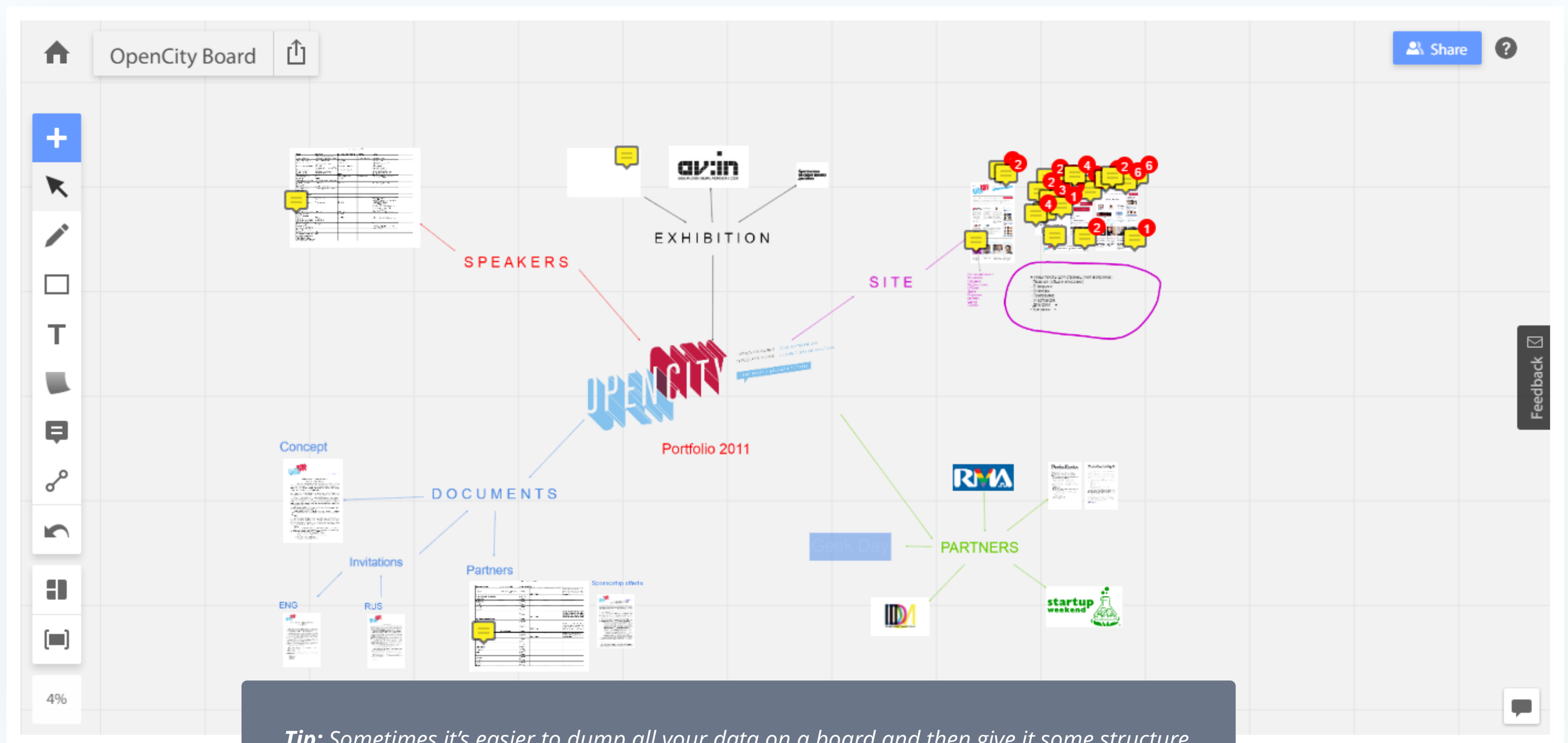
## 2.1

# 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)



## 2.1

# Structuring content by type

Structuring content

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

The image displays a digital workspace interface titled "Look, Mock, Analyze: Example". The workspace is divided into three main sections, each with a title, an icon, and a collection of content:

- Look** (lightbulb icon): This section contains various screenshots of data visualizations, including bar charts, line graphs, and pie charts. Below the content, it says: "Look for inspirations. Paste screenshots. Your competitors and friends are a great source."
- Mock** (pencil icon): This section features a flow diagram showing three mobile phone screens connected by arrows, with a tablet screen below them. Below the content, it says: "Mock successful designs. Use prototyping library. Copy smartly. Use your imagination."
- Analyze** (speech bubble icon): This section displays several screenshots of complex data dashboards and reports. Below the content, it says: "Analyze your own design. Use comments and stickers. Let your colleagues share their opinion."

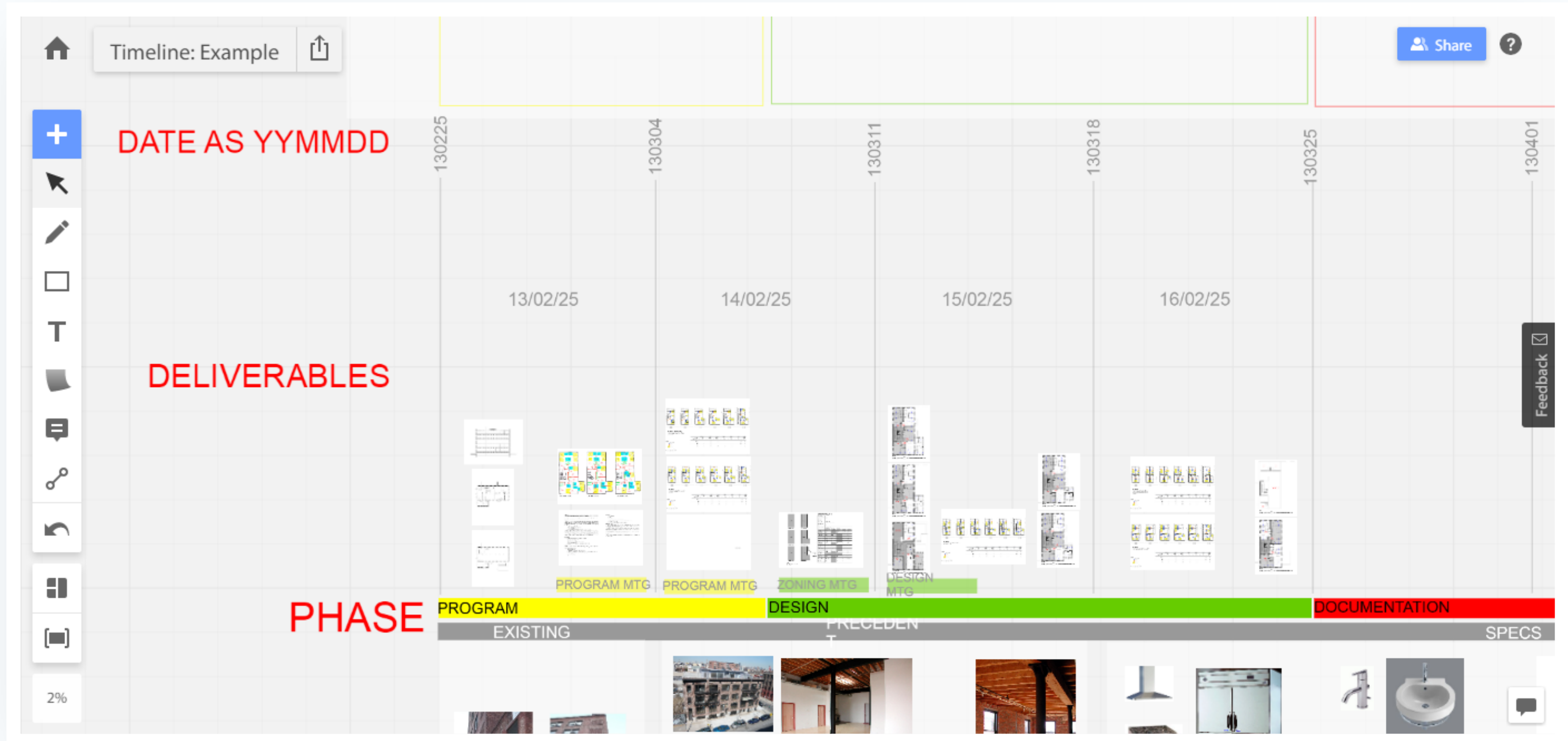
The interface includes a top navigation bar with a home icon, a title bar, a share button, and a help icon. A left sidebar contains various tool icons (plus, arrow, pencil, eraser, text, speech bubble, link, undo, redo, window, and chat). A right sidebar has a feedback button. A bottom status bar shows a 12% progress indicator.

## 2.1

# Structuring content by date

Structuring content

Structure by time and date

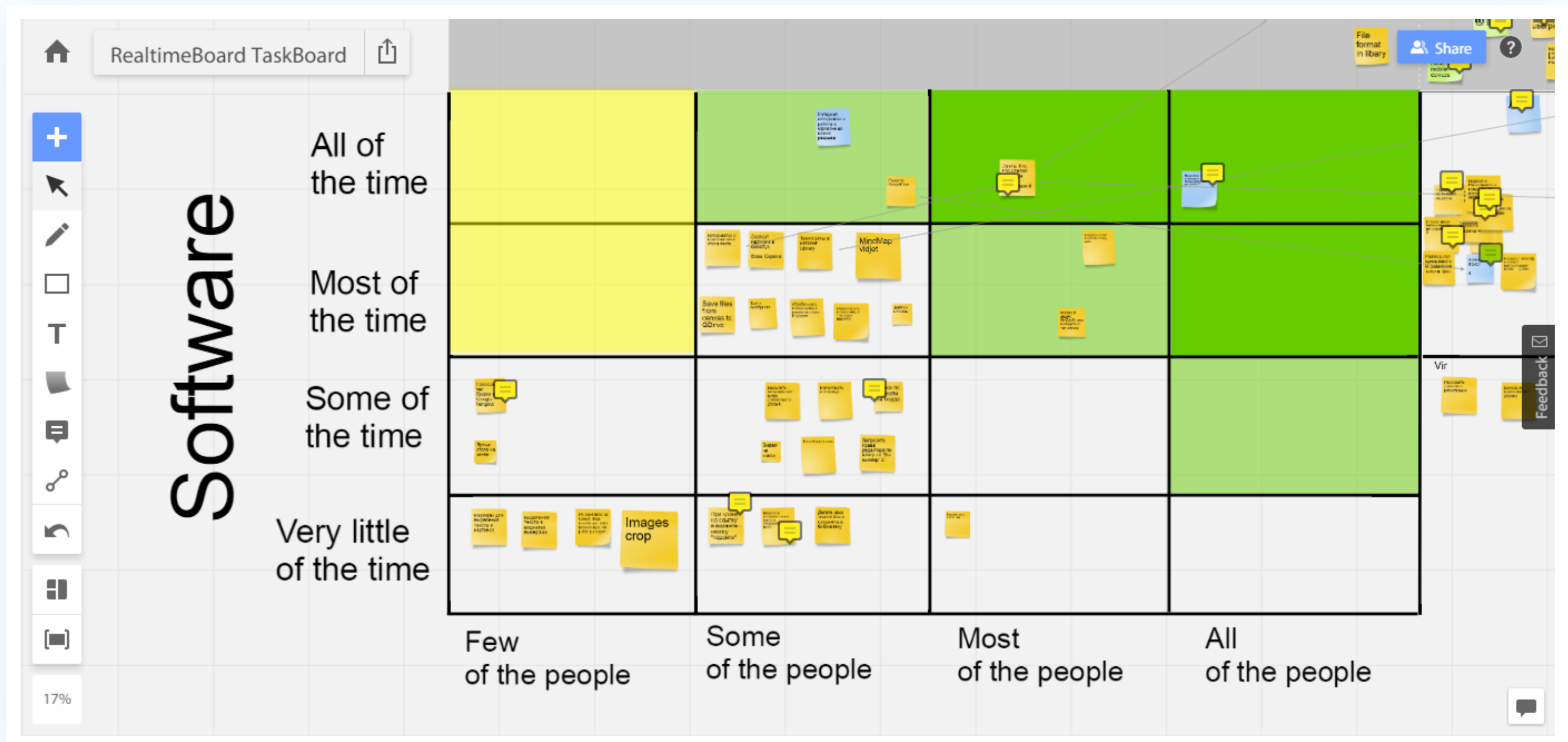


## 2.2

# 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.

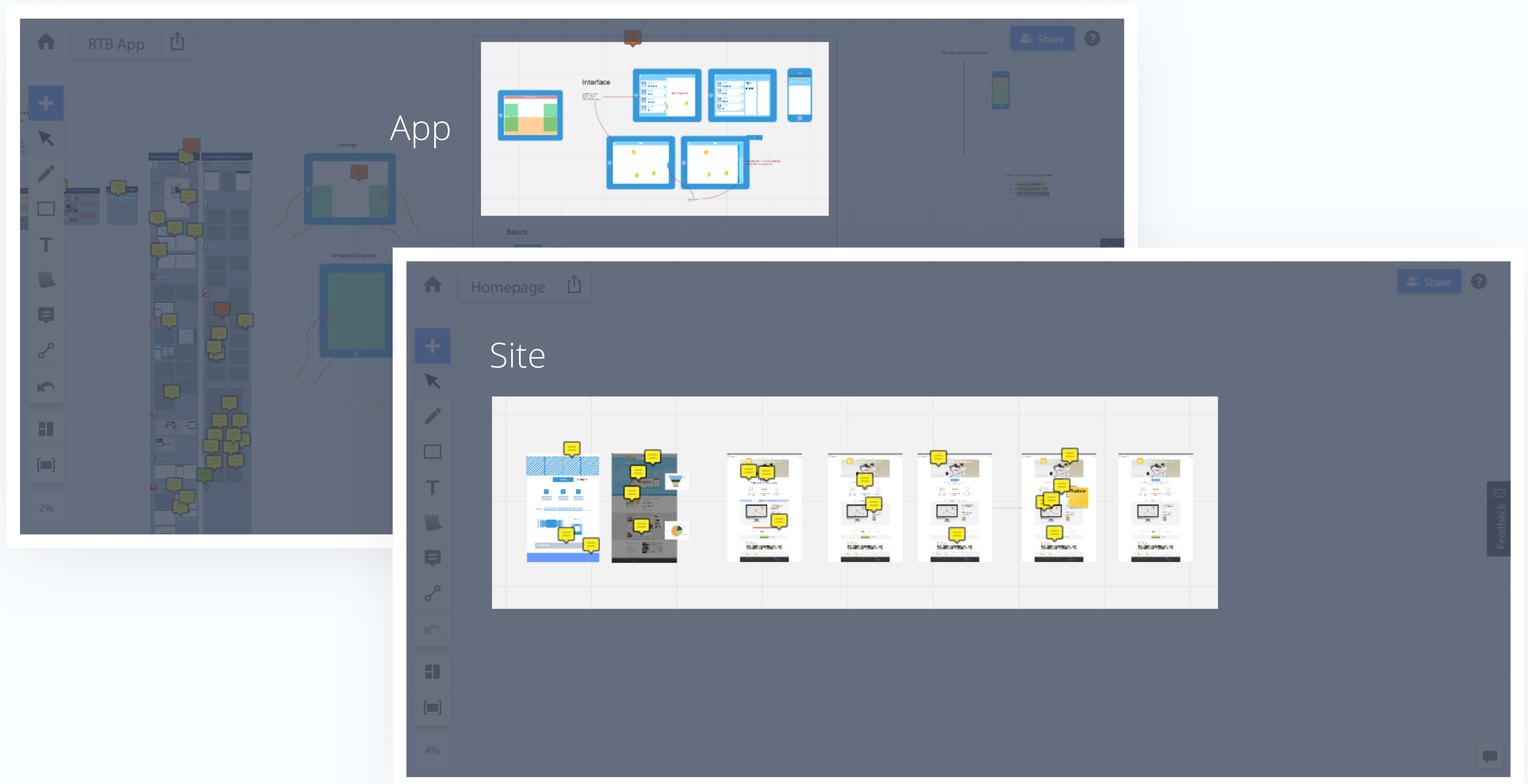


## 2.3

# 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

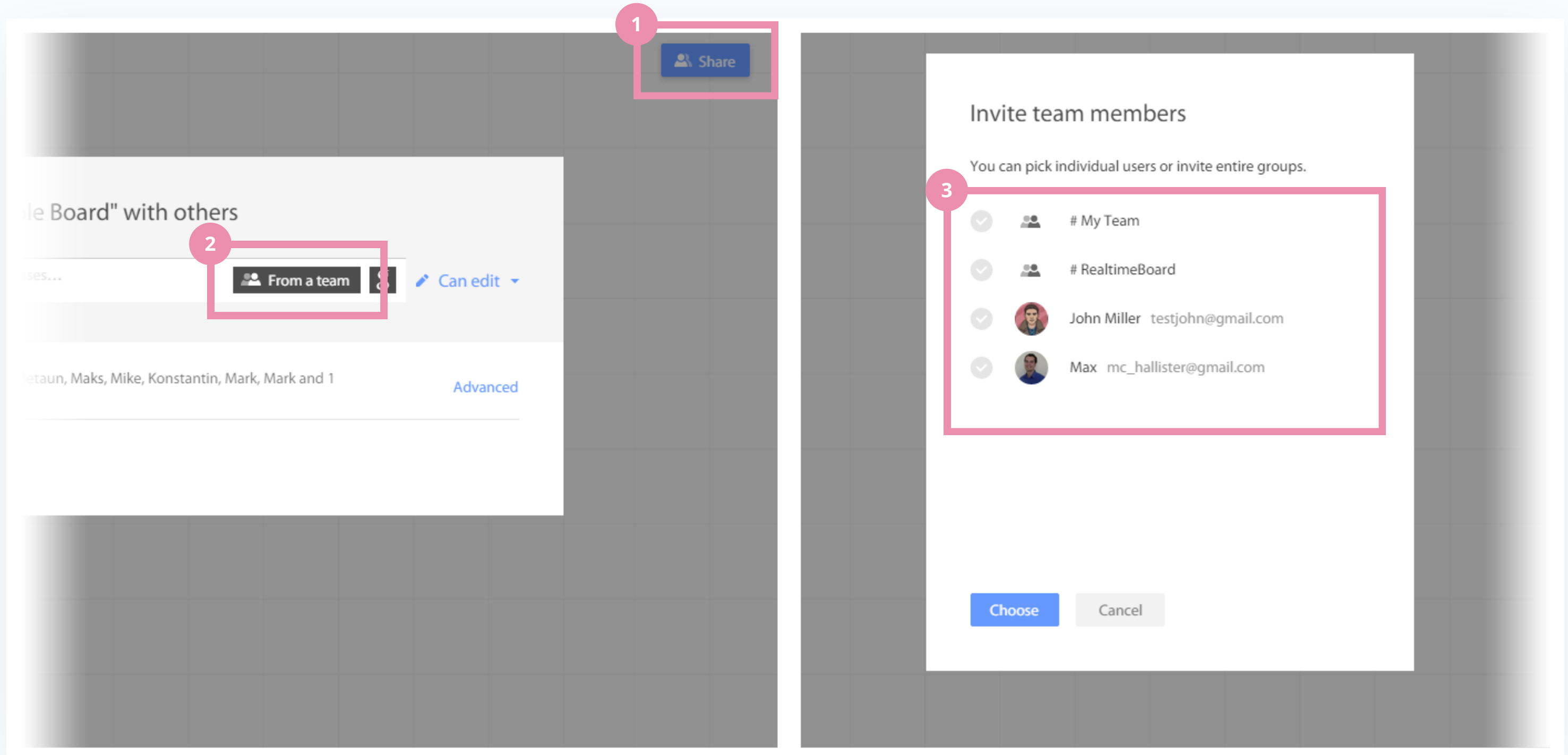
**Tip:** Changes on the boards are displayed in real time for all the participants.

## 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.

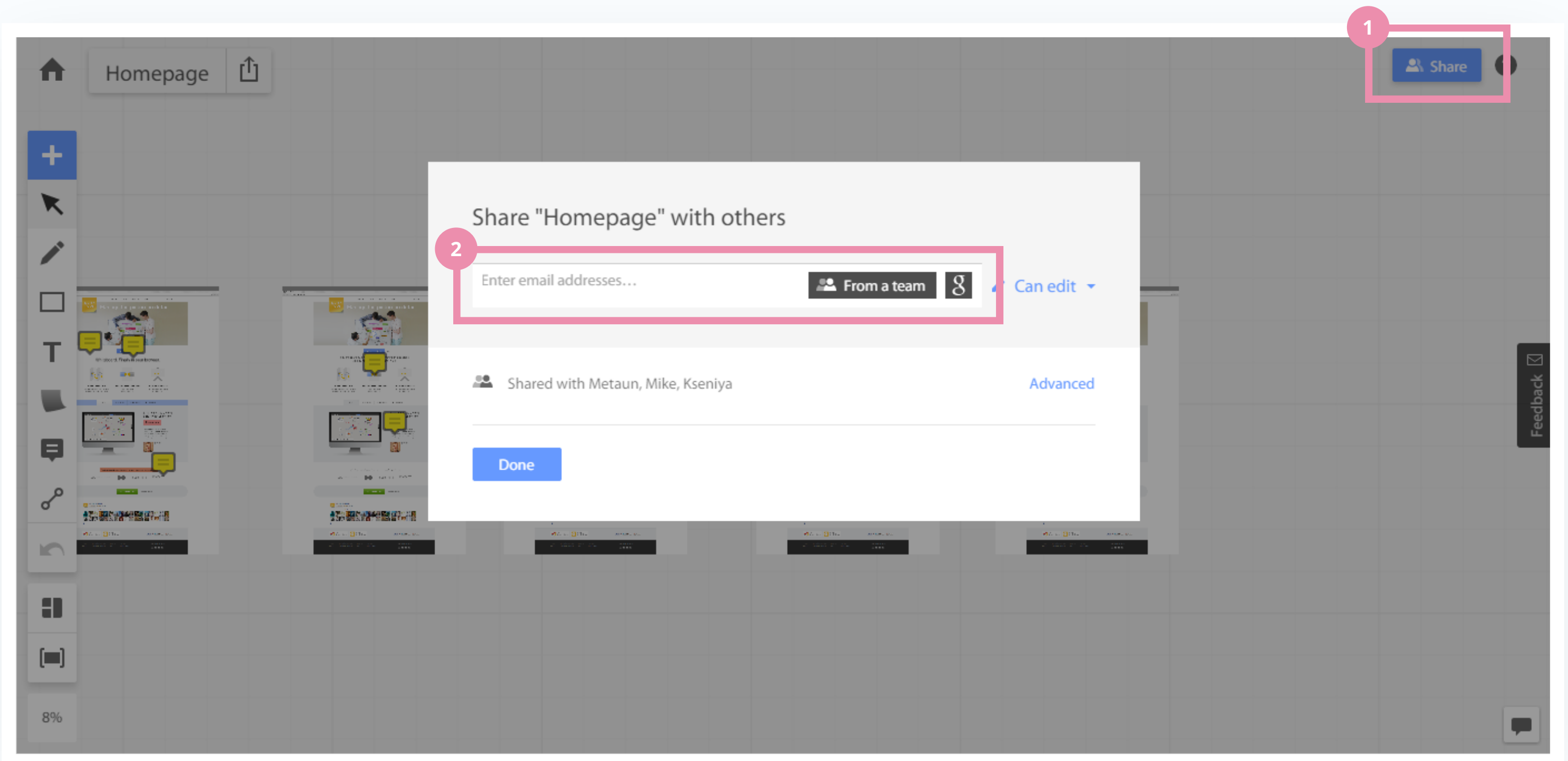


## 3.1 Inviting participants

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.

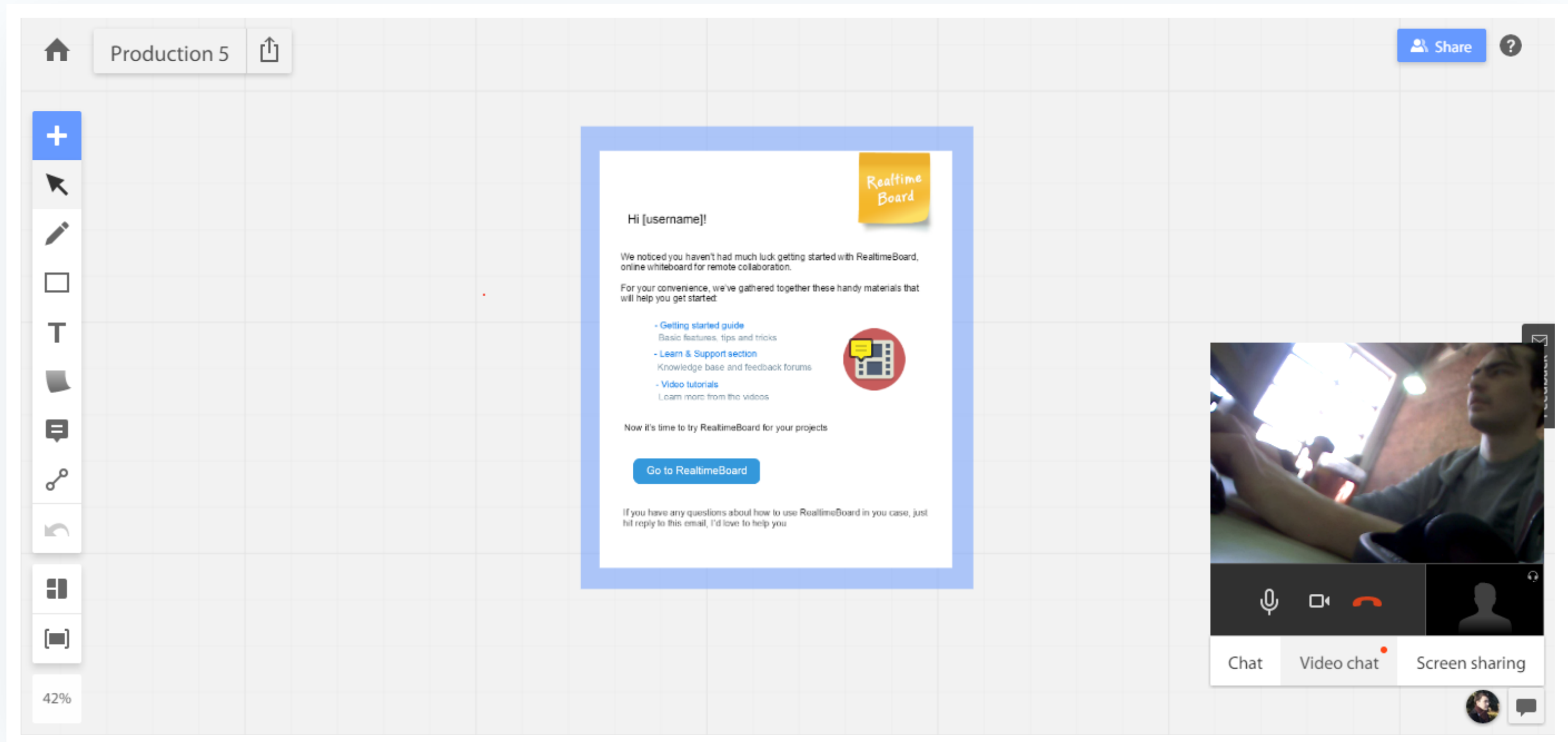


## 3.2

# Video & chat

Basics of real time collaboration

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



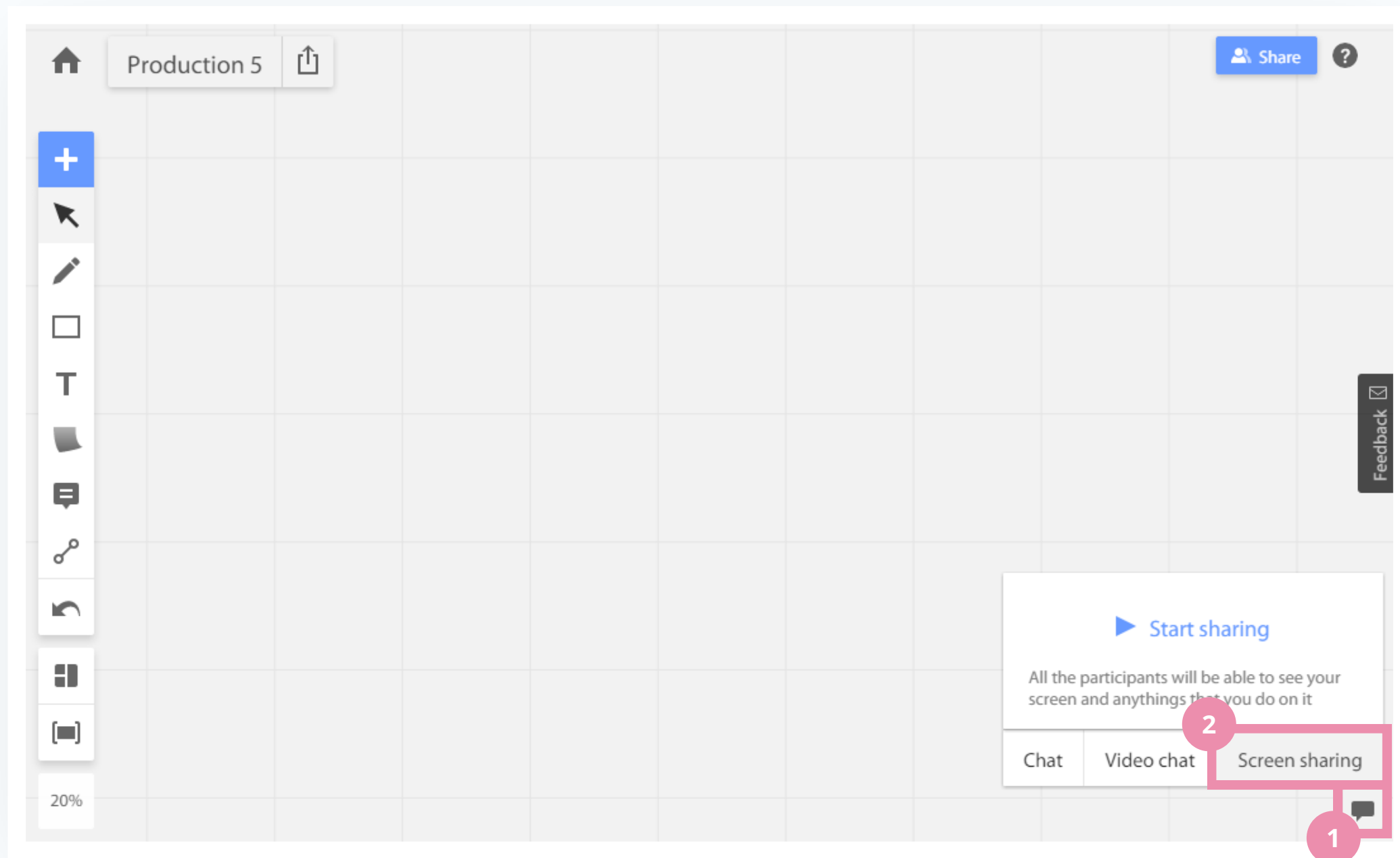
## 3.3

# 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

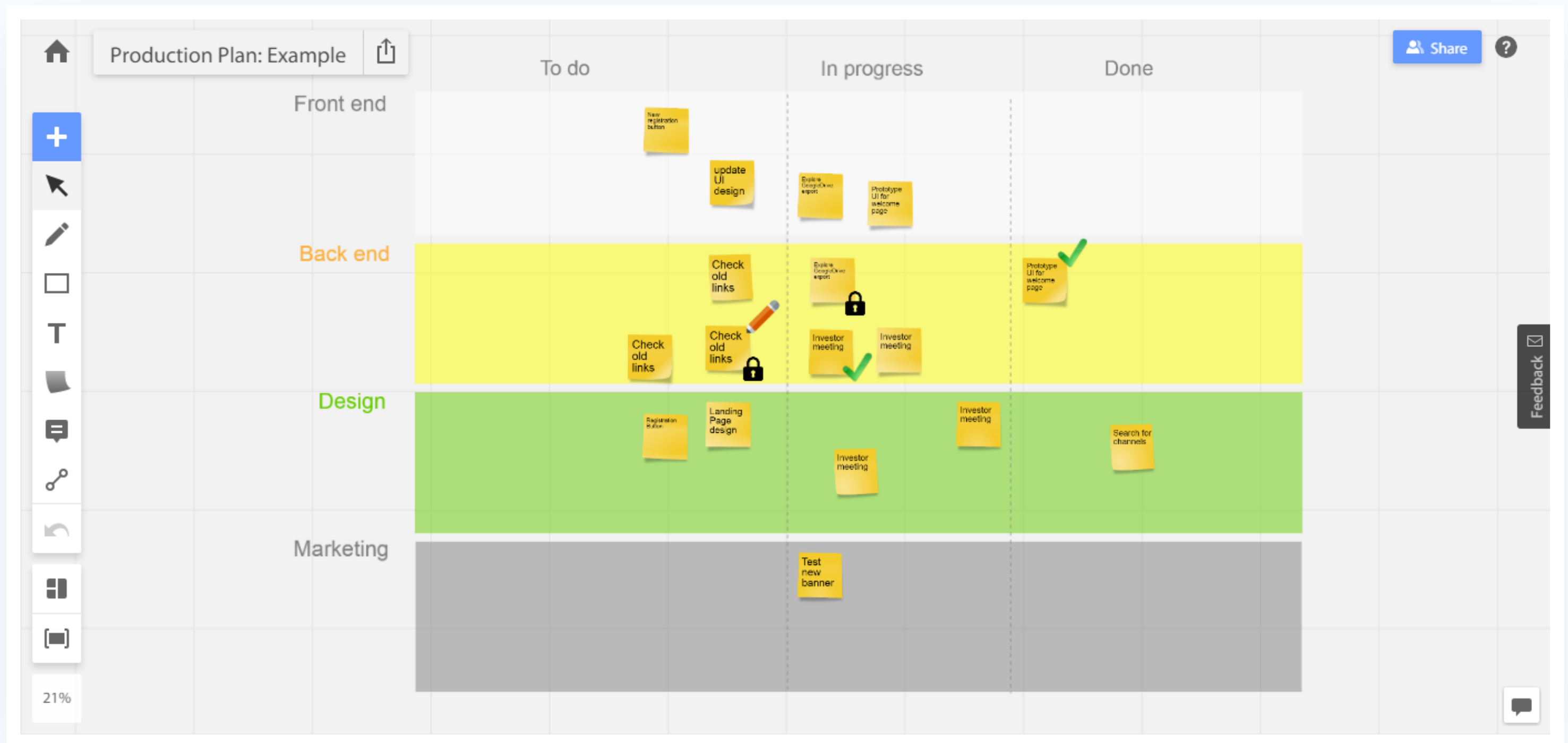
4.3 Instant notifications

## 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.

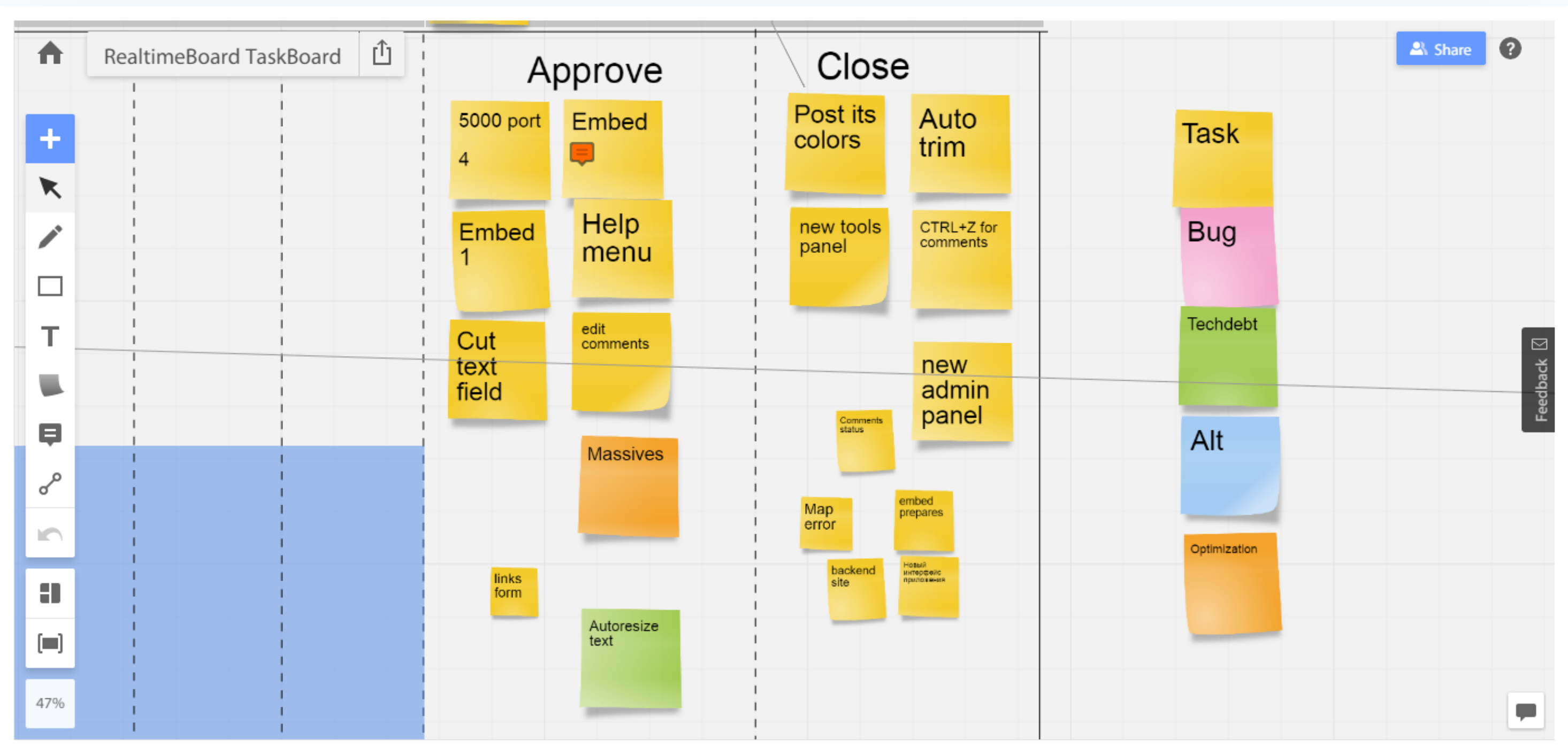


## 4.1

# 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).

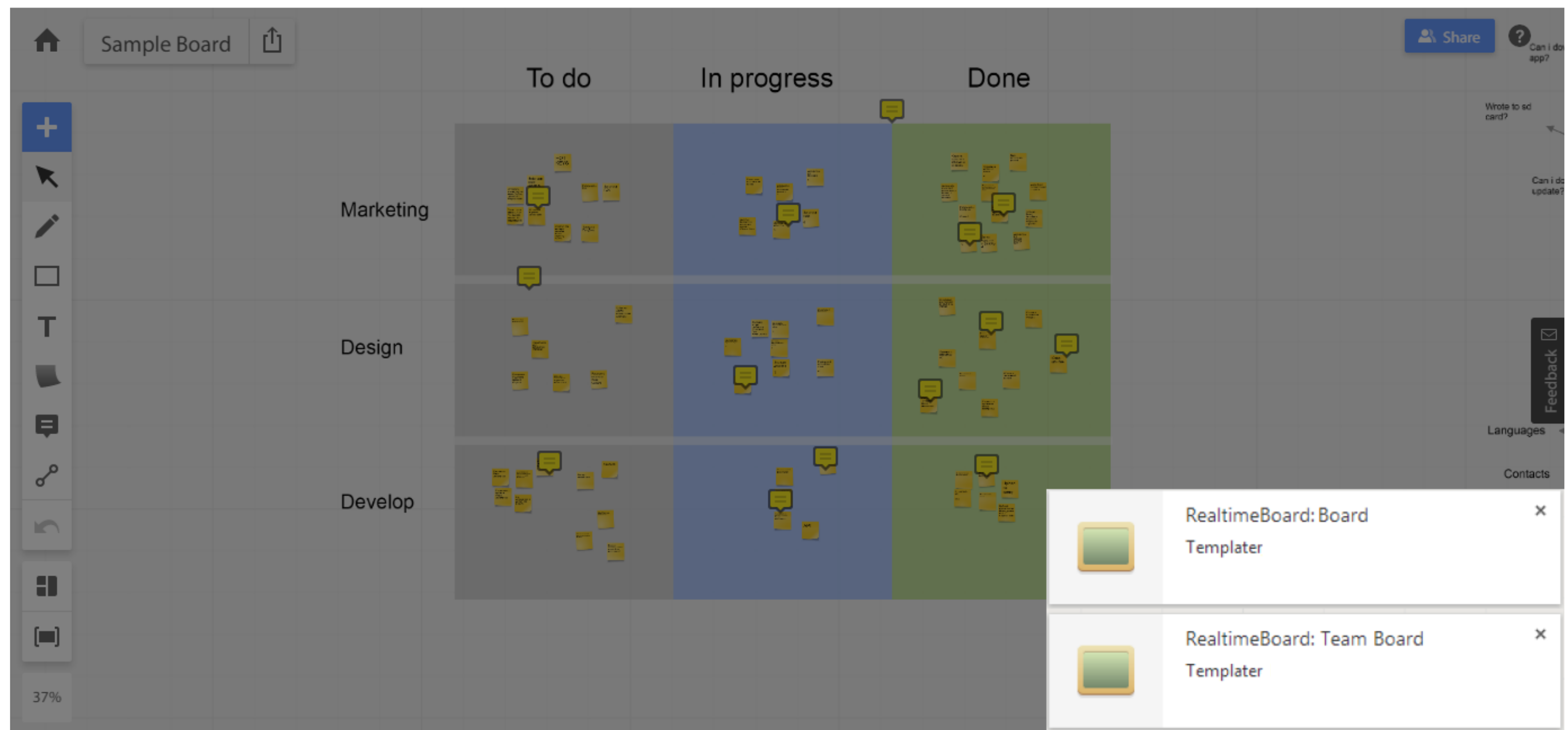
The screenshot displays the RealtimeBoard TaskBoard interface. The board is organized into columns for 'Mike' and 'Egor' under the 'Design' section. Sticky notes are color-coded: green for resolved tasks (e.g., 'Add videos in tour', 'Site profile', 'Default content for library', 'Vector social networks mobile devices', 'Error - table deleted access denied') and yellow for urgent tasks (e.g., 'Action Log', 'Letter about new comments tool', 'File format in library', 'Page OUR STORY', 'Redesign examples pages', 'Pro acc visuals', 'Page plans & prices', 'Improved hboard - new board - premium acc', 'Publicates', '404 page', 'Move presentation button in viewer mode', 'Demo board userpic', 'usecase tips', 'Improved hboard - new board - premium acc'). A comment overlay from Mike says 'Done, need some feedback.' with a 'Reply' button. The interface includes a sidebar with various tools (home, add, select, draw, text, eraser, link, undo, redo, zoom, share) and a bottom status bar showing '53%' and 'Billing'.



## 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.

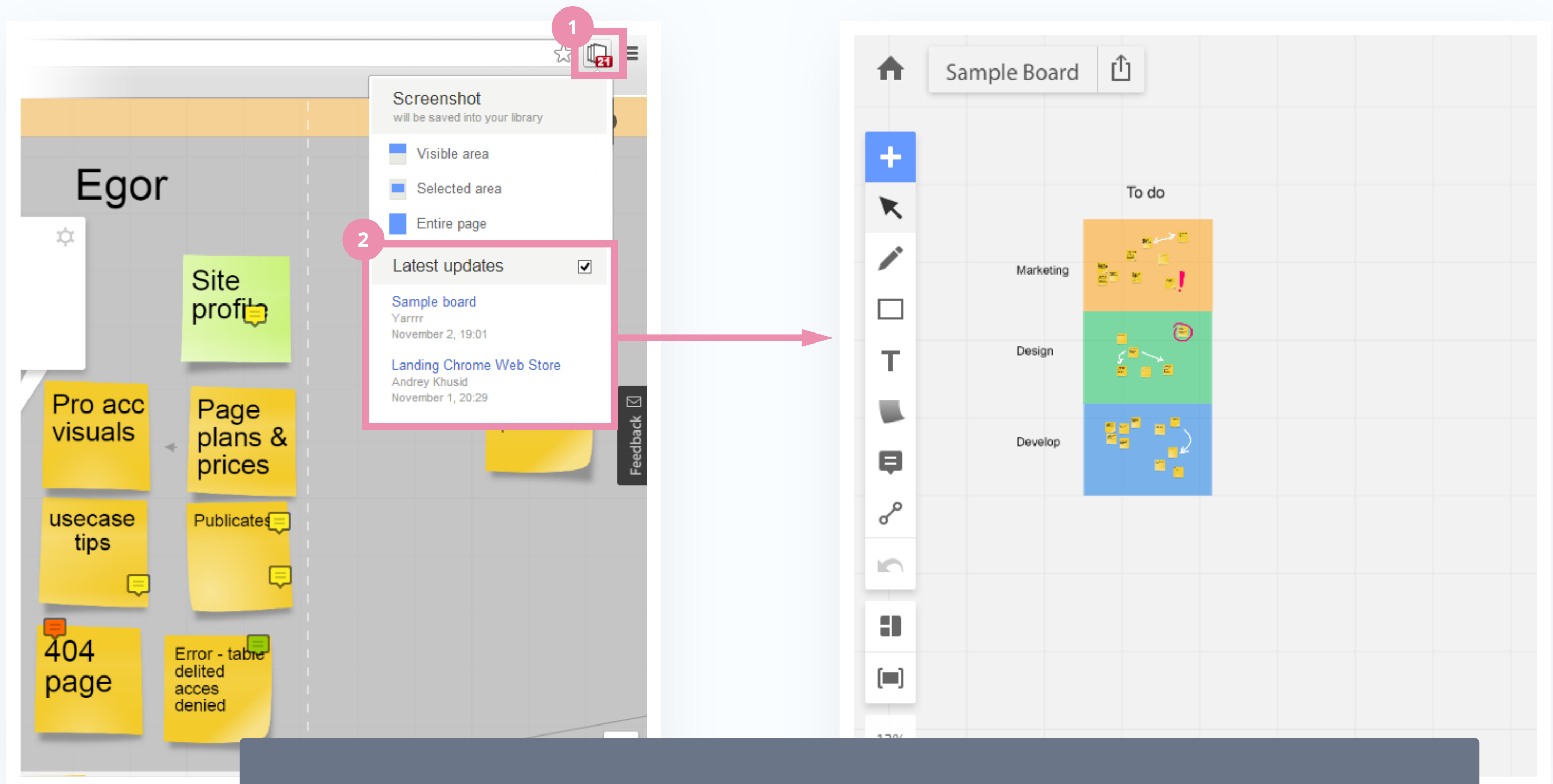


## 4.3

# 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