

# Getting Started Guide

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to the simplest visual team  
collaboration platform

[www.realtimeboard.com](http://www.realtimeboard.com)

# What is RealtimeBoard?

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RealtimeBoard is the simplest visual collaboration platform for teams of any shape and size. It allows you to create endless online whiteboards and collaborate with your team in real time or asynchronously across distance and time zones, keeping your remote team members engaged.

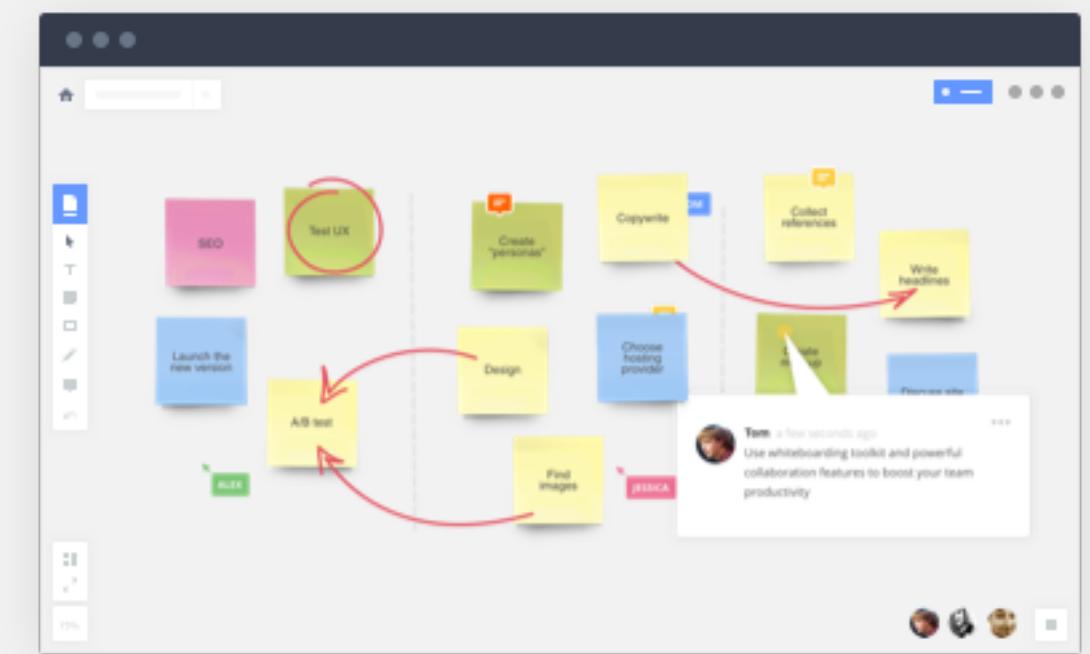
With RealtimeBoard you can have your whiteboard at hand everywhere using your laptop, tablet computer or smartphone and stay involved in the team projects wherever you are.



Common use cases

# What can I use it for?

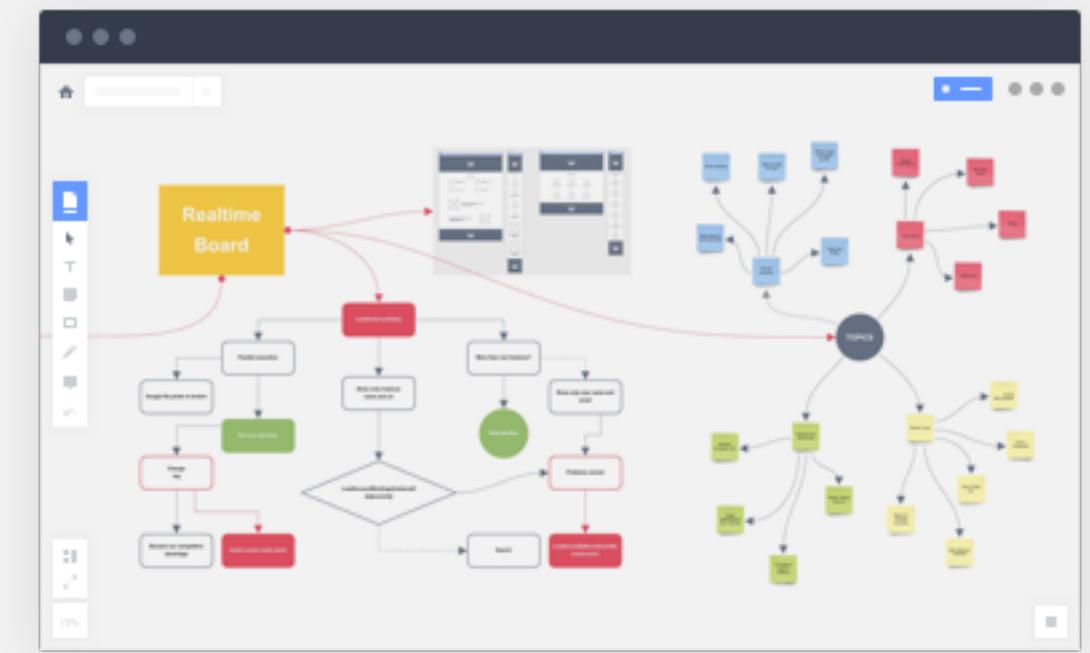
Allow traditional whiteboarding sessions to actively engage remote users continue beyond the conference room and use RealtimeBoard for various team activities.



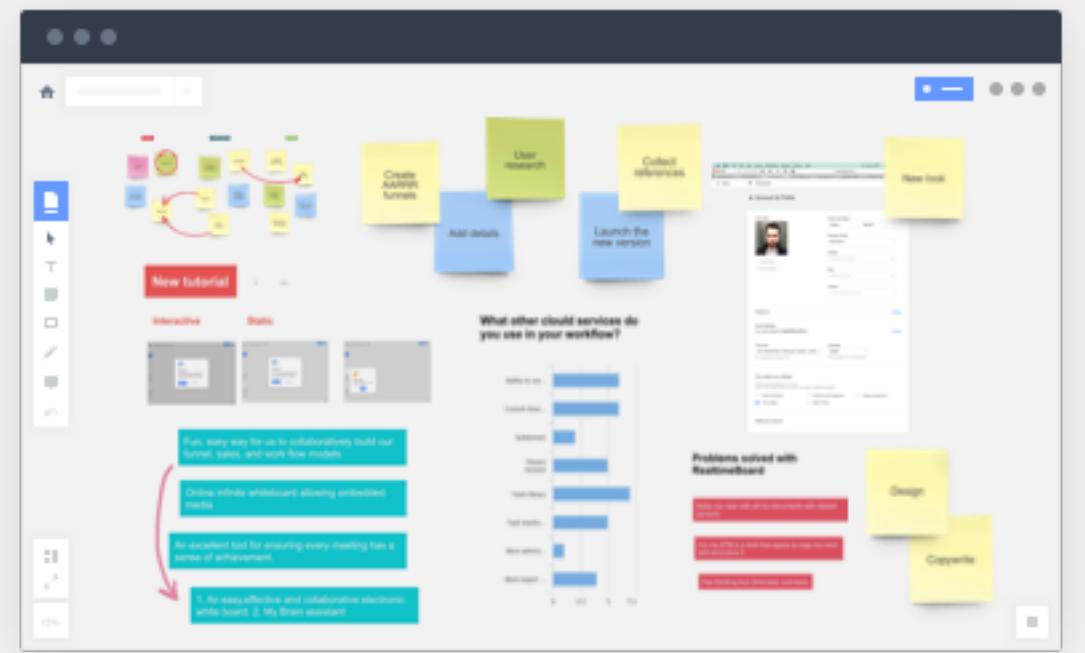
Hold brainstorming sessions



Collaborate on user story maps and retrospectives



Work on UX design, create flowcharts and diagrams



Make plans and see the big picture at all times

# Basics

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Profile and account, interface,  
shortcuts, board navigation

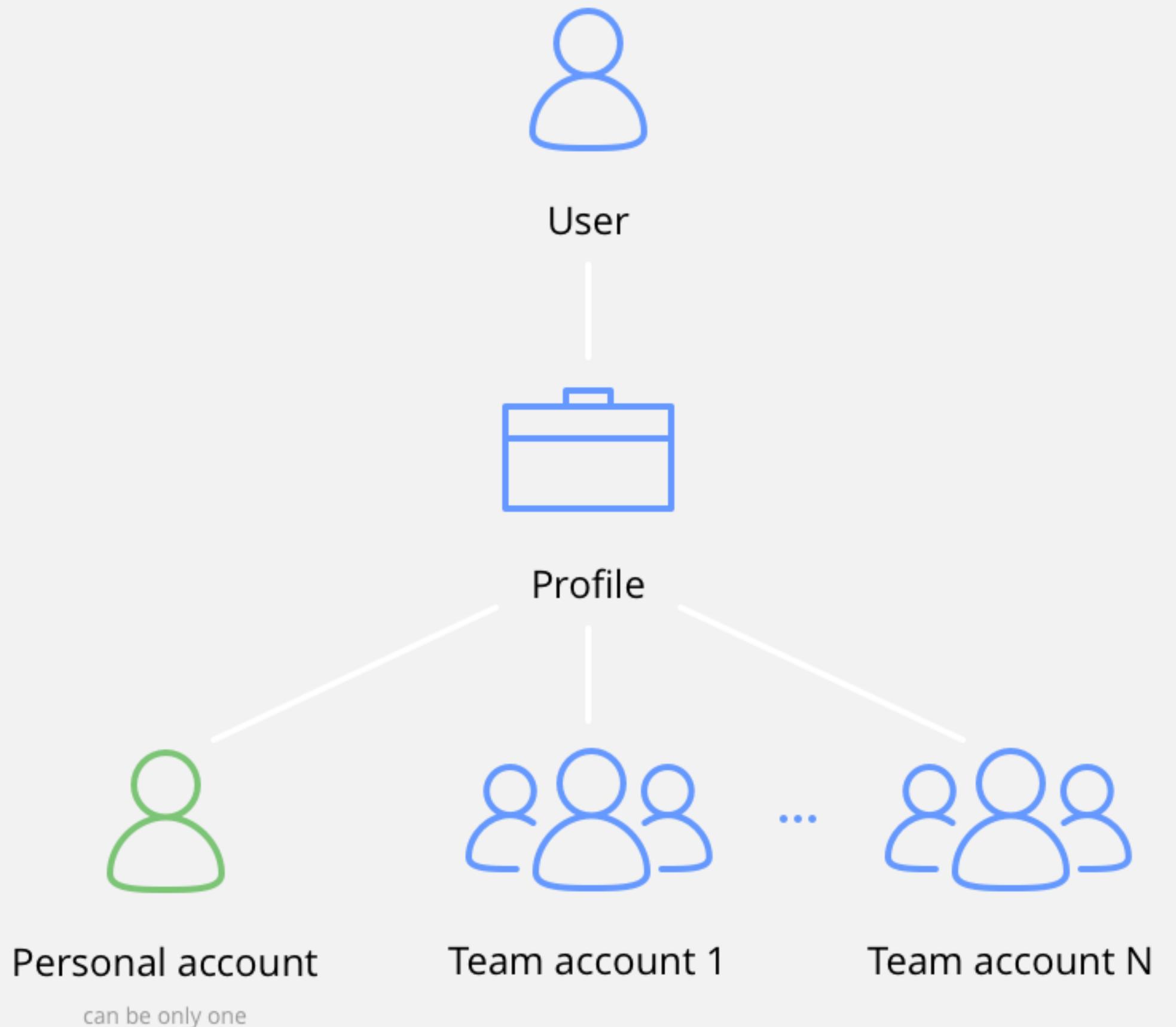
# Your Profile and Account

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Every RealtimeBoard user has a profile. Profiles are tied to individuals.

With a single RealtimeBoard profile, you can create or join multiple Accounts (Free, Team, Edu or Premium) to collaborate with various groups of RealtimeBoard users;

these Accounts are separate entities, each with their own unique set of people and boards. Each account is billed separately.

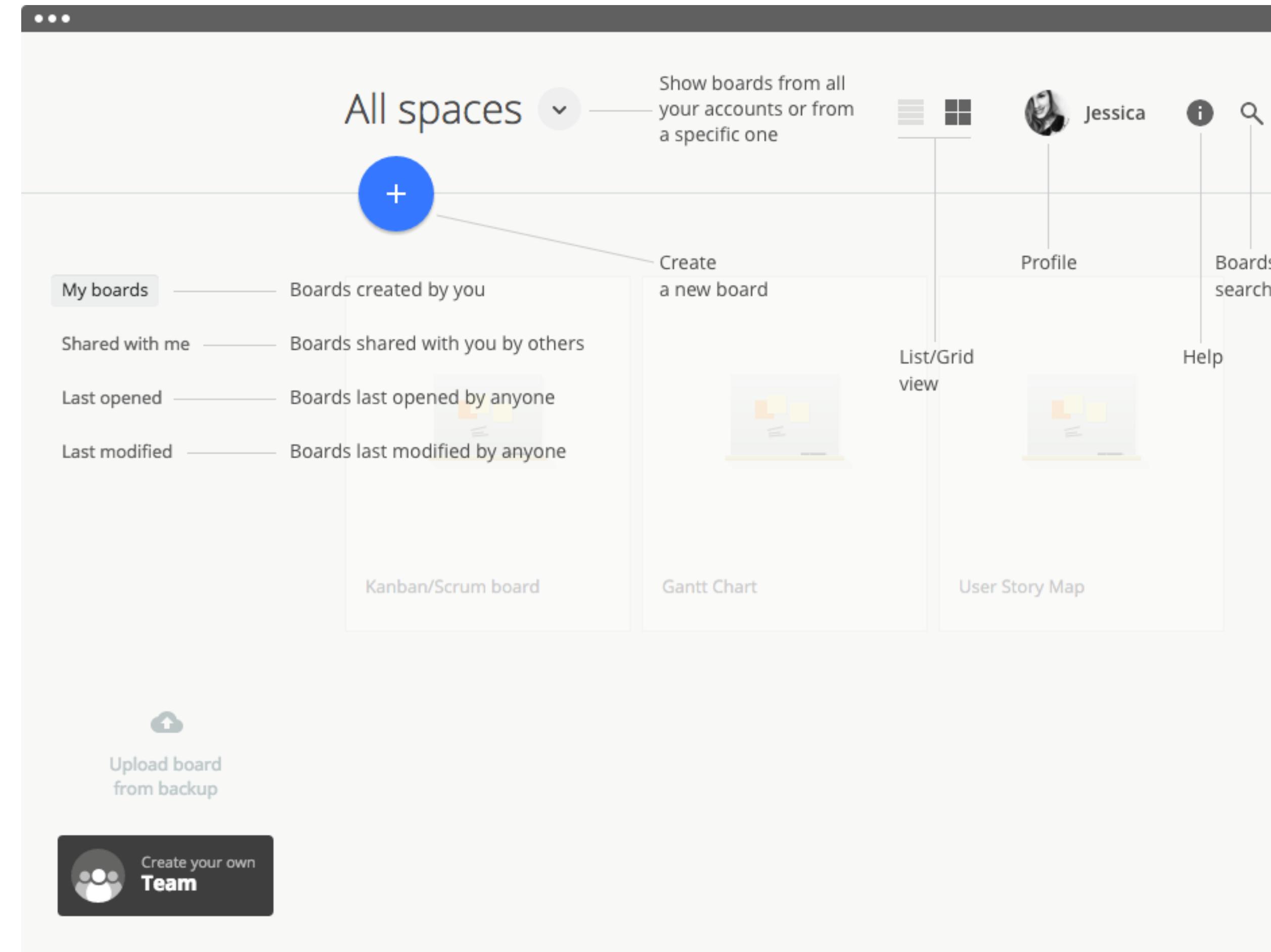


**Note:** your RealtimeBoard profile can be connected to multiple Teams. Premium (personal) account can be only one.

Basics

# Dashboard Interface

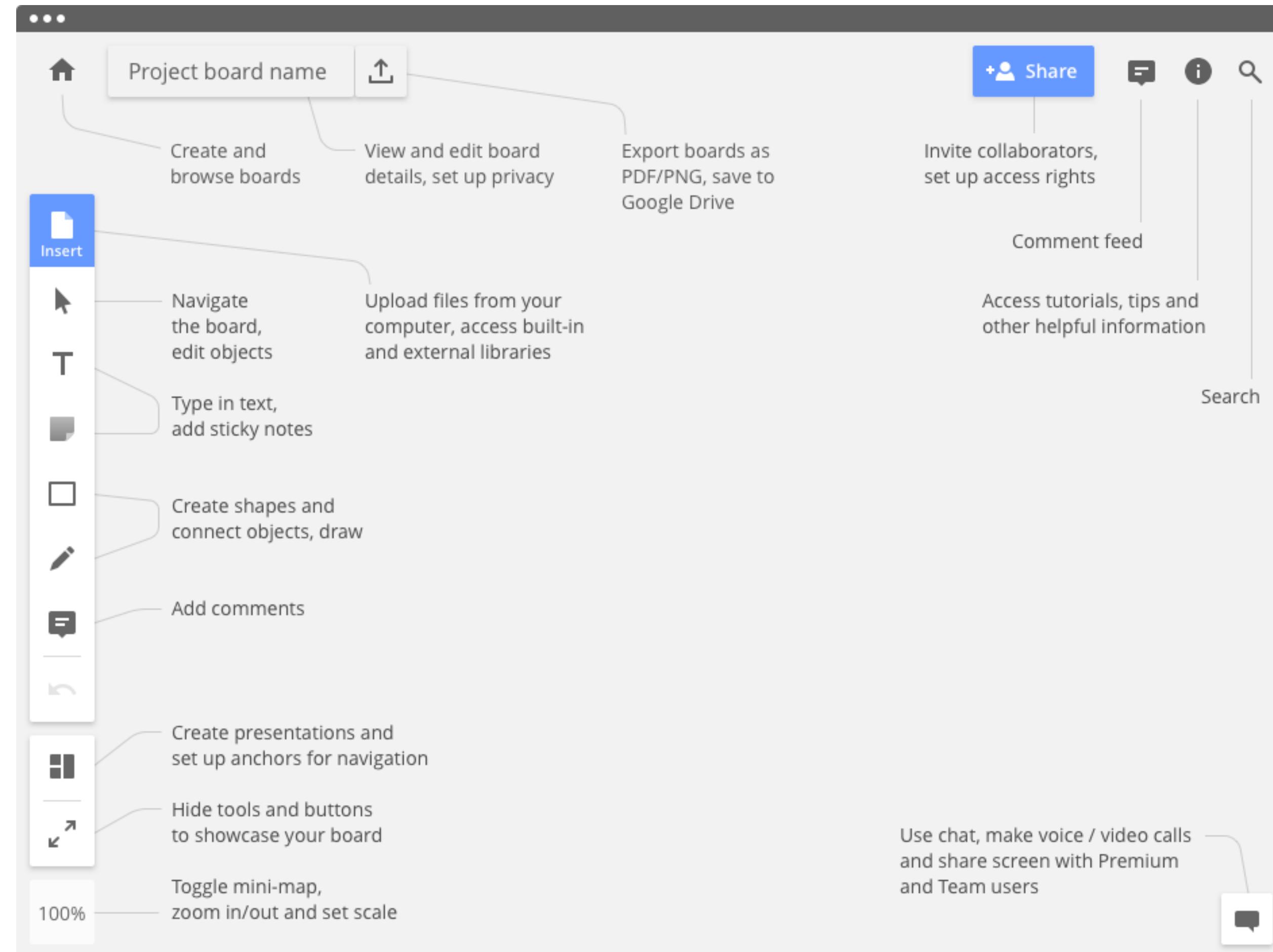
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## Basics

# Board Interface

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# Shortcuts

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RealtimeBoard allows you to use the familiar shortcuts, including:

- Ctrl+C / Ctrl+V to copy and paste objects
- Shift + click and drag the cursor to select multiple objects
- Hold down the spacebar to switch to Hand mode
- Ctrl+F to search for text on boards

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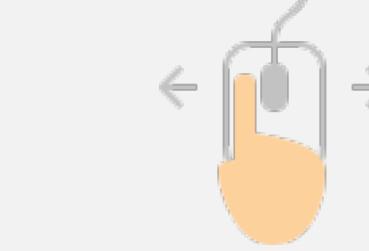
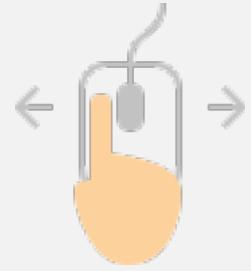
1 , V	→	⌘ F	search
1 , H	✋	← ↓ →	move
2 , T	𝑻	+ , -	zoom
3 , N	█	Z	show minimap
4 , S	□	← →	pan
5 , P	✎	⇧ ← →	multi-select
6 , C	💬	⌥ ← →	duplicate
⌘ Z	↶	esc	deselect
⌘ Y	↷	⌫	delete
F	☰	G	hide grid

You can find the full list of available shortcuts  
and hot keys [here](#)

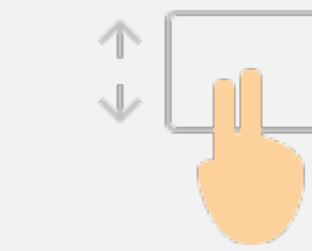
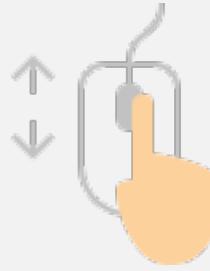
## Basics

# Zooming and panning

There are two ways to navigate around the board — mouse oriented (Default) and trackpad oriented (Alternative).



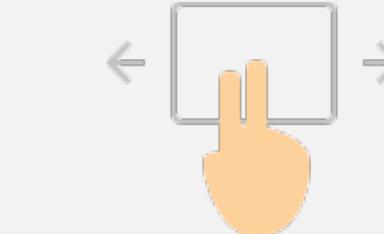
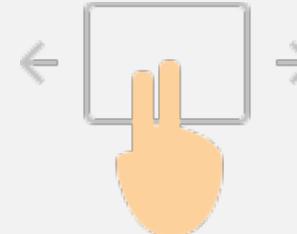
Default



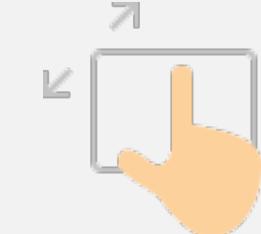
Slide with two fingers  
or pinch to zoom

Zoom by scrolling  
the mouse wheel

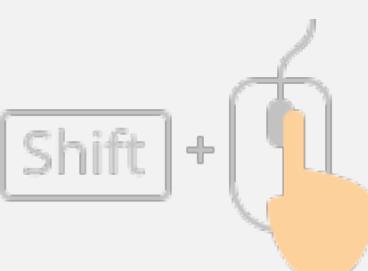
Alternative



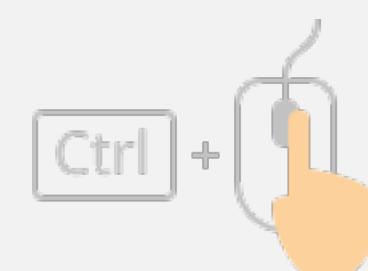
Scroll the board in any direction by  
sliding two fingers on the trackpad



Zoom by pinching  
in and out



Scroll vertically with mouse wheel,  
horizontally with mouse wheel+Shift



Zoom using  
Ctrl/Cmd + mouse wheel

# New board

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Create a board, set up layout,  
add content

New board

# Creating a new board

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To create a new board, click the blue circle with a plus sign. After you have created the board, you can change its title, add a description or set a cover picture in the board settings menu. You can also share, duplicate or delete the board.

New board

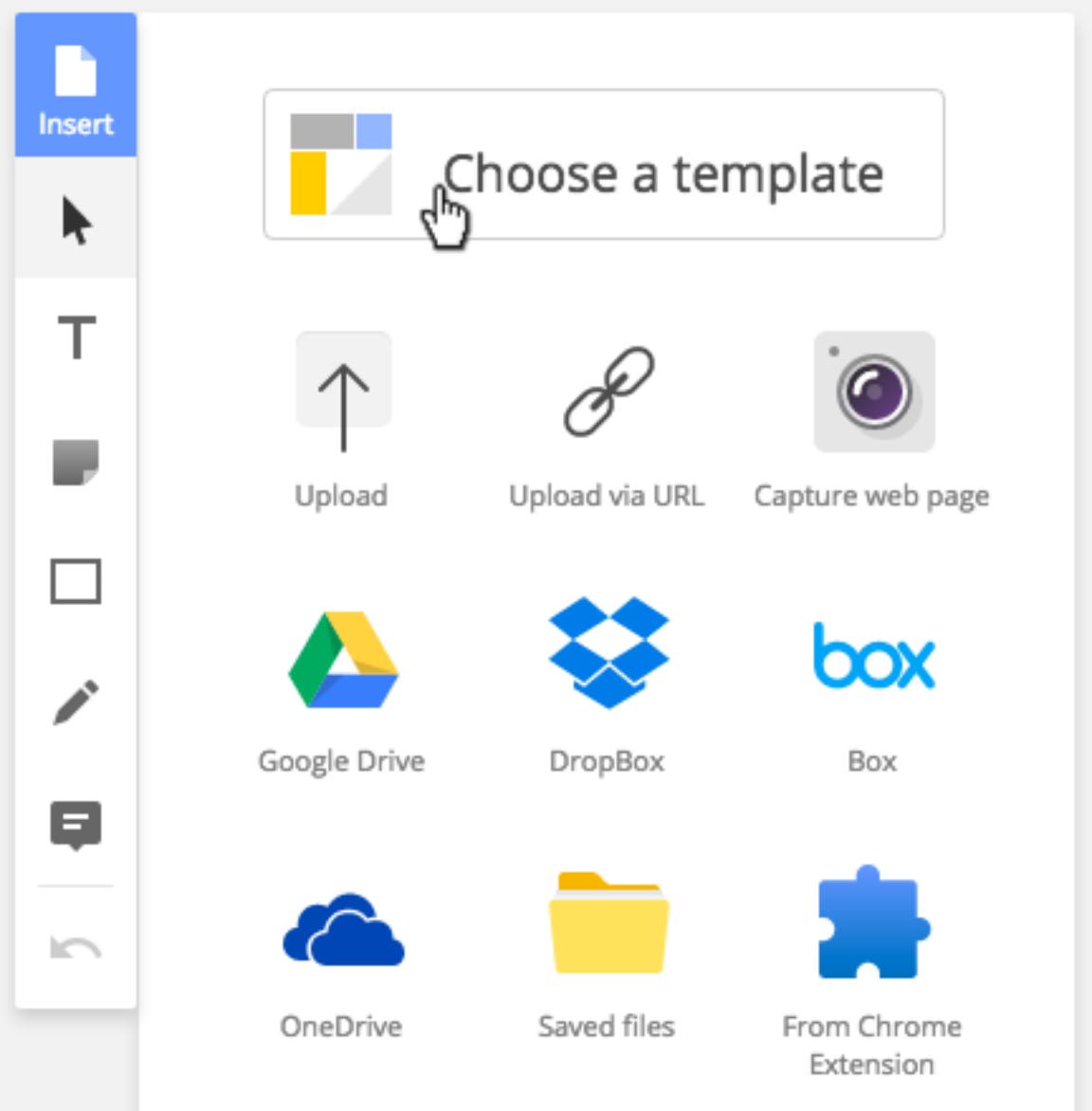
# Set up layout

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If you are doing early stage brainstorming, a blank canvas may be all you need. Other times you'll want to add more structure.

Use our hand-crafted templates to fire up your teamwork and get a head start on any task: brainstorming session, UX design, scrum or kanban board, user story map, retrospective and others. You can easily customize and rearrange the templates to tailor them to your projects.

Templates are available under the blue Insert button at the top of the toolbox.



New board

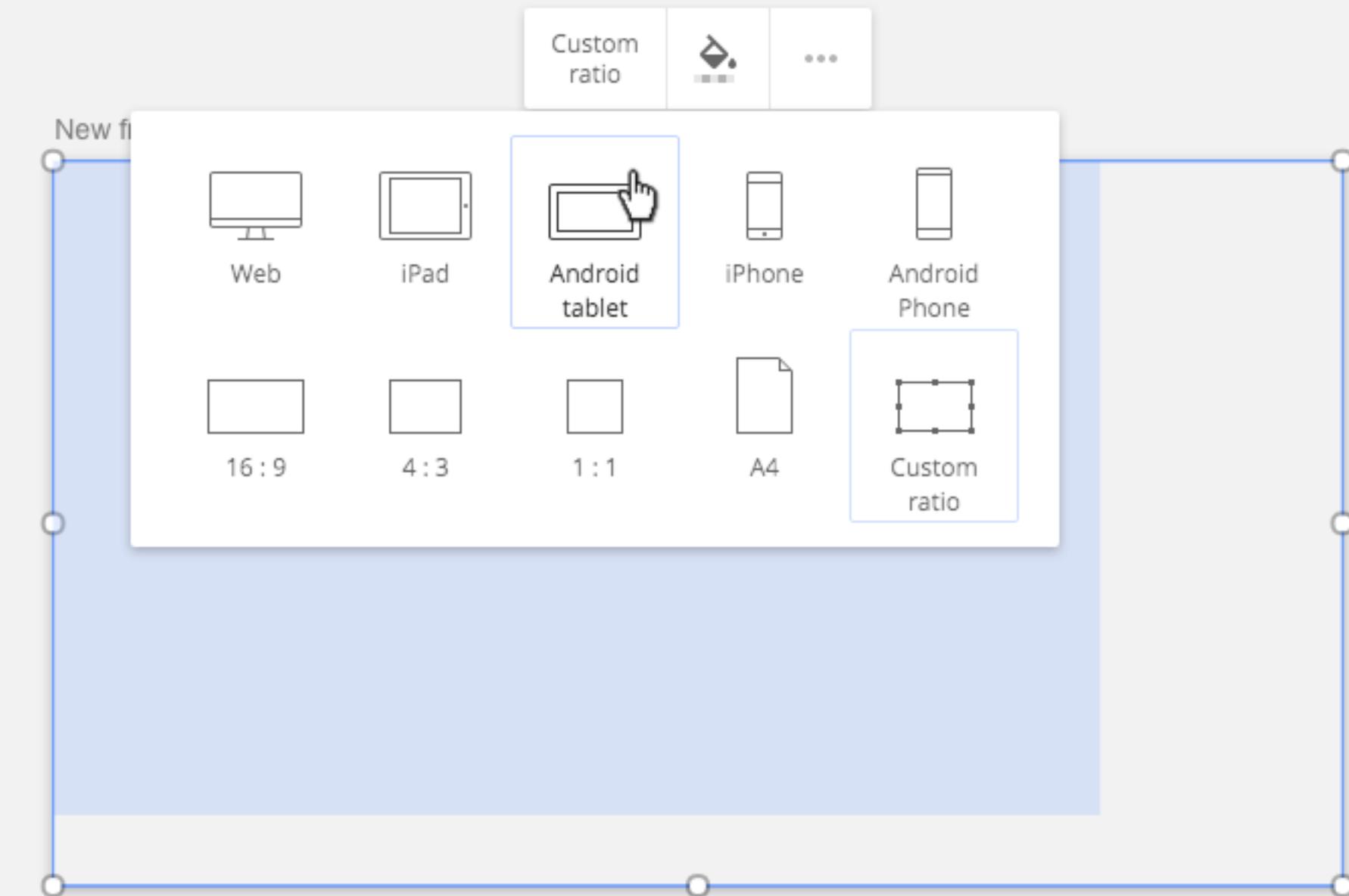
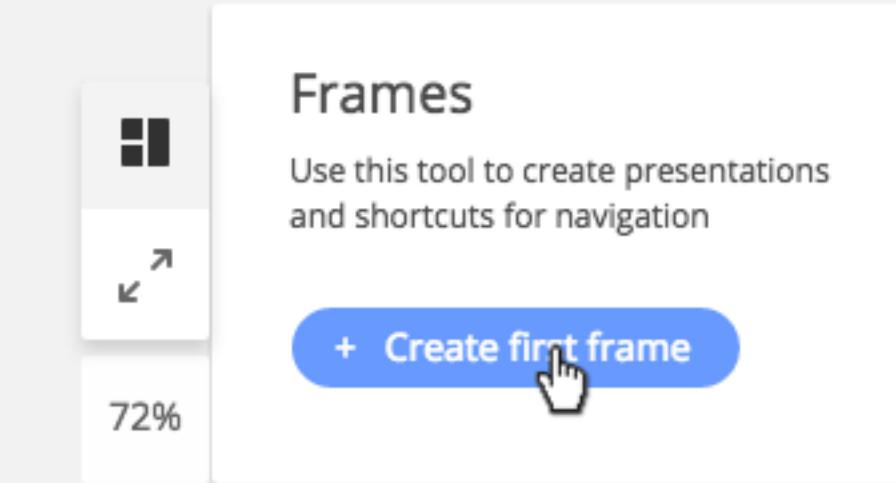
# Set up layout

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RealtimeBoard canvas is endless, so you never run out of space when working on boards. To make navigation on the boards easier, you can separate them into segments using the Frames feature.

To add a Frame, select the Frames tool and click +Create first frame. Choose from a variety of size presets to turn Frames into familiar Wireframe layouts such as iPhone, Android phone, tablet or desktop.

Use the +Add frame button to create more frames.

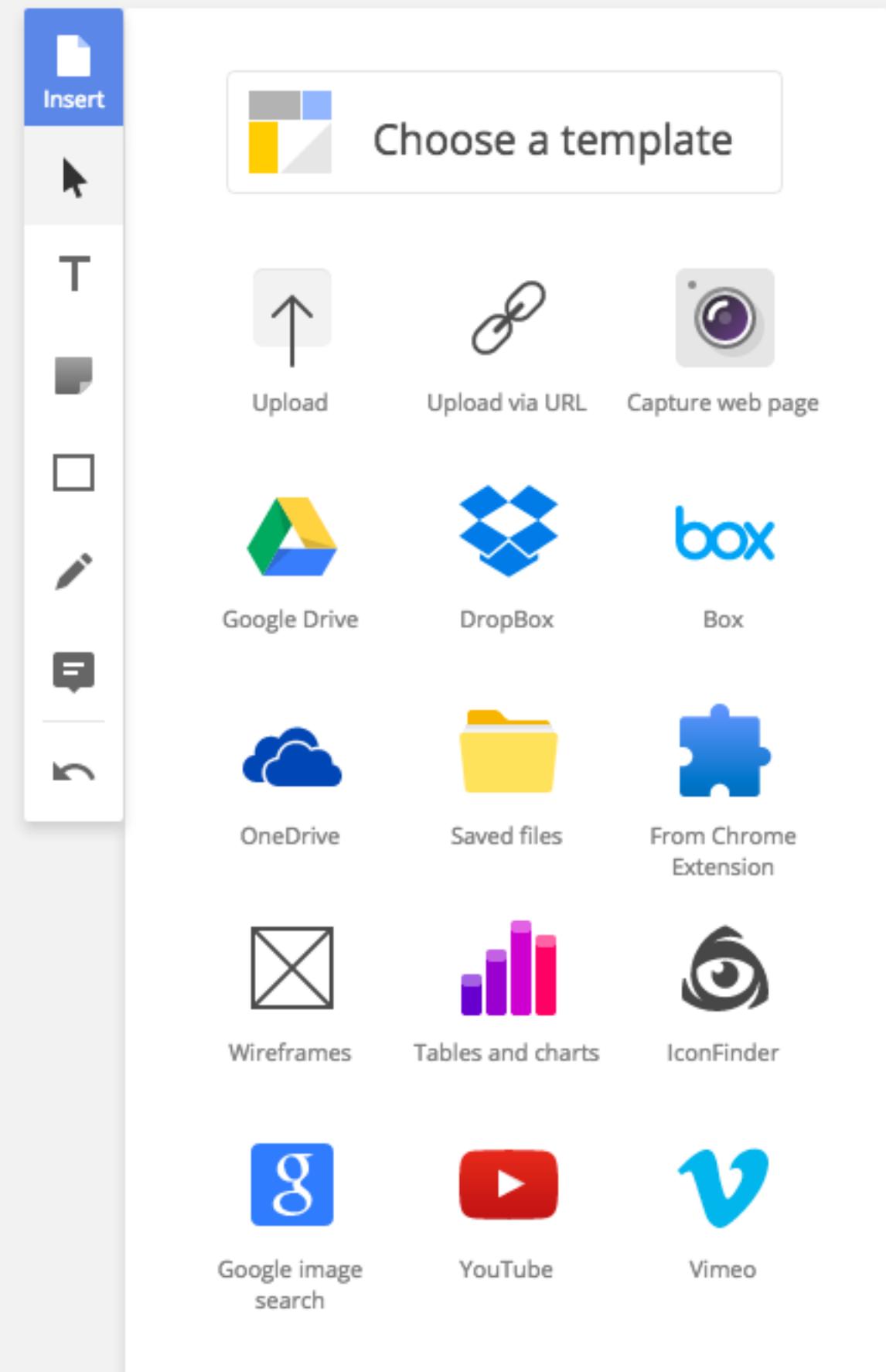


New board

# Add content

There are a number of ways to add content from external sources to your boards. All of them are listed under the Insert button at the top of the toolbox.

You can upload files from desktop, paste from clipboard, add them from URL, cloud storages (Dropbox, Box, Google Drive, One Drive) or use built-in libraries and integrations.



**Note:** Uploaded files should comply with the following formats: jpg, jpeg, gif (static), bmp, png, pdf, csv, doc, docx, xls, xlsx, ppt, pptx, odt, ods, odp and Google Drive documents.

30 MB — maximum file size for locally uploaded files.

50 MB — maximum file size for files uploaded from the web.

New board

# Add content

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The screenshot displays a digital whiteboard interface with the following sections:

- Survey results:** Includes a chart showing team usage of RealtimeBoard for remote work or office colleagues, and a chart showing what other cloud services users have.
- Metrics logic:** A flowchart: Think it → Build it → Ship it → Tweak it.
- Tour page mockup:** Mockups of the RealtimeBoard tour page.
- RealtimeBoard Ecosystem:** A network diagram showing RealtimeBoard integrated with various tools: slack, ASAP, Dropbox, Office 365, JIRA, and ICONFINDER.
- Planned Features:** A grid of sticky notes:
  - Change log
  - URL Sharing
  - This is all real
  - Animated GIFs
  - Revision
  - Version backup
  - Guest access
  - Cat pictures
  - Better stickers
  - Guest edit?
  - Sharing within domain
  - Cat GIFS?
- New tutorial:** Options for Interactive and Static tutorials, each with a preview image.

The bottom left corner shows a sidebar with icons for Insert, Text, Image, and others. The bottom right corner shows a progress bar at 89%.

# Whiteboard toolkit

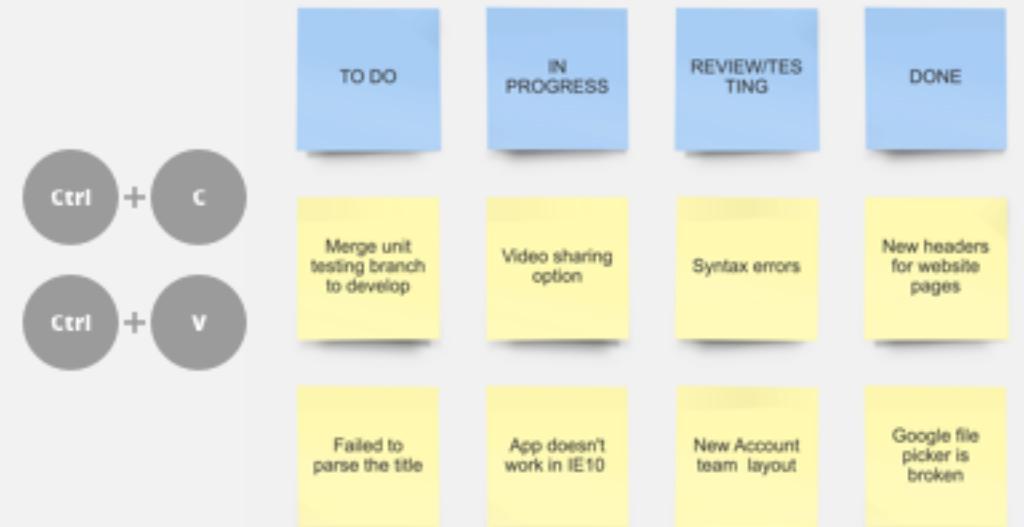
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Sticky notes, shapes, texts,  
annotation tools

# Sticky notes

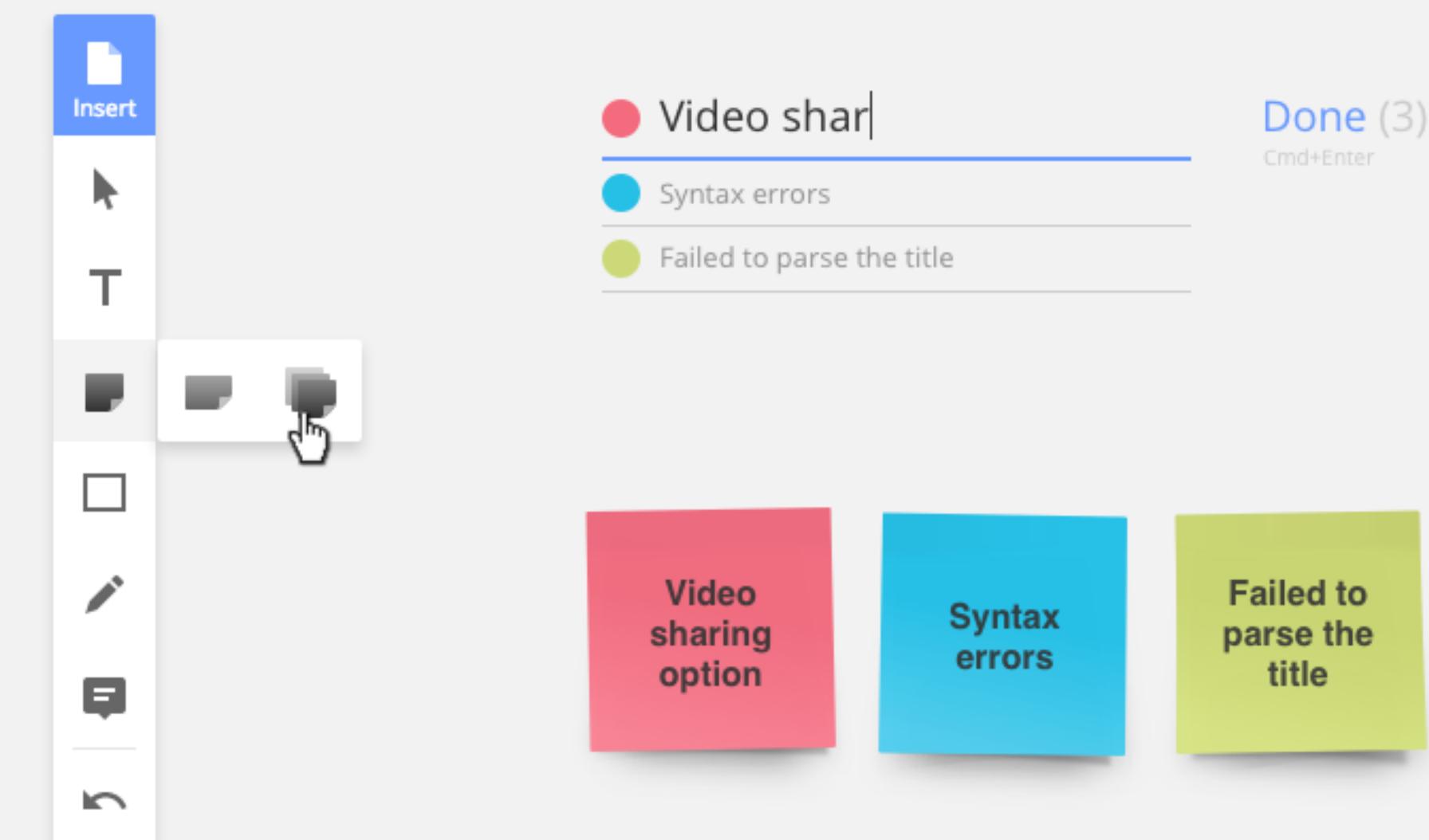
With RealtimeBoard you can create an unlimited number of sticky notes for your brainstorming, design thinking, agile planning and other collaborative activities.

TO DO	IN PROGRESS	REVIEW/ TESTING	DONE
Merge unit testing branch to develop	Video sharing option	Syntax errors	New headers for website pages
Failed to parse the title	App doesn't work in IE10	New Account team layout	Google file picker is broken



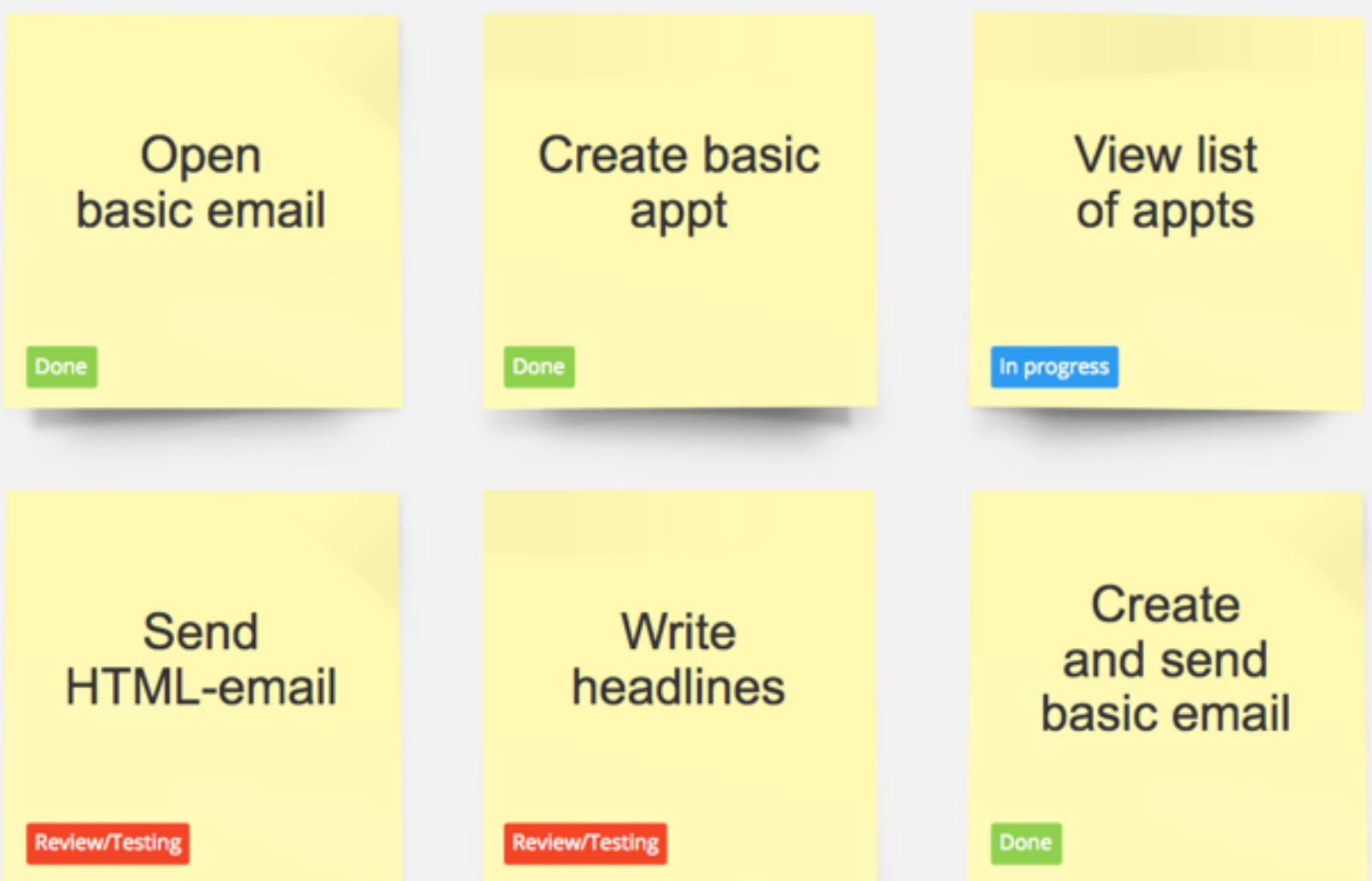
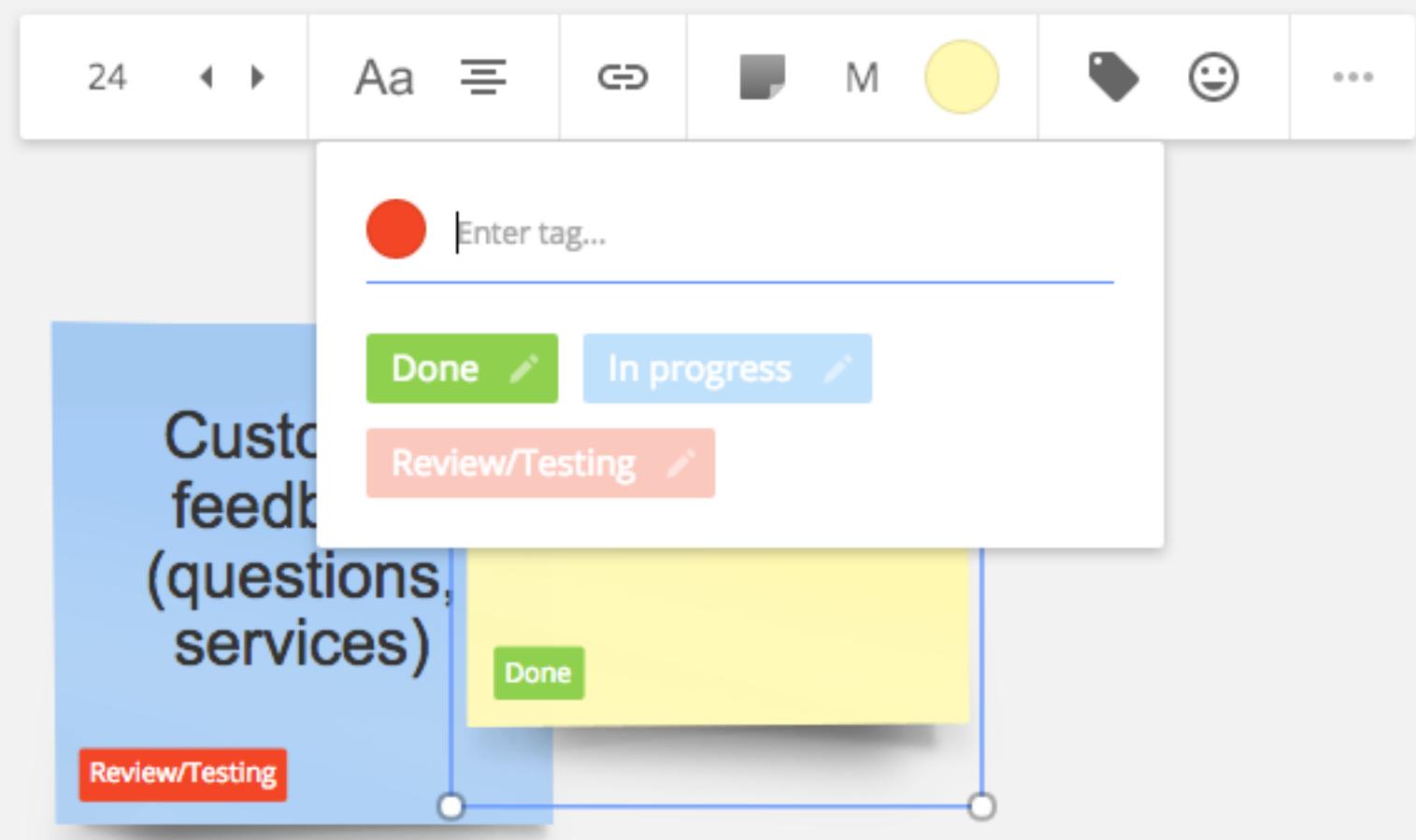
Tips to speed thing up:

- Add stickers from spreadsheets (copy and paste cells using Ctrl+C / Ctrl+V on Windows, or Cmd+C / Cmd+V on a Mac)
- Use the Bulk add mode to add multiple stickers in a row. You can find this mode by clicking on the Sticky note icon in the toolbox.



# Sticky notes — tags

Use tags to structure your ideas and tasks.

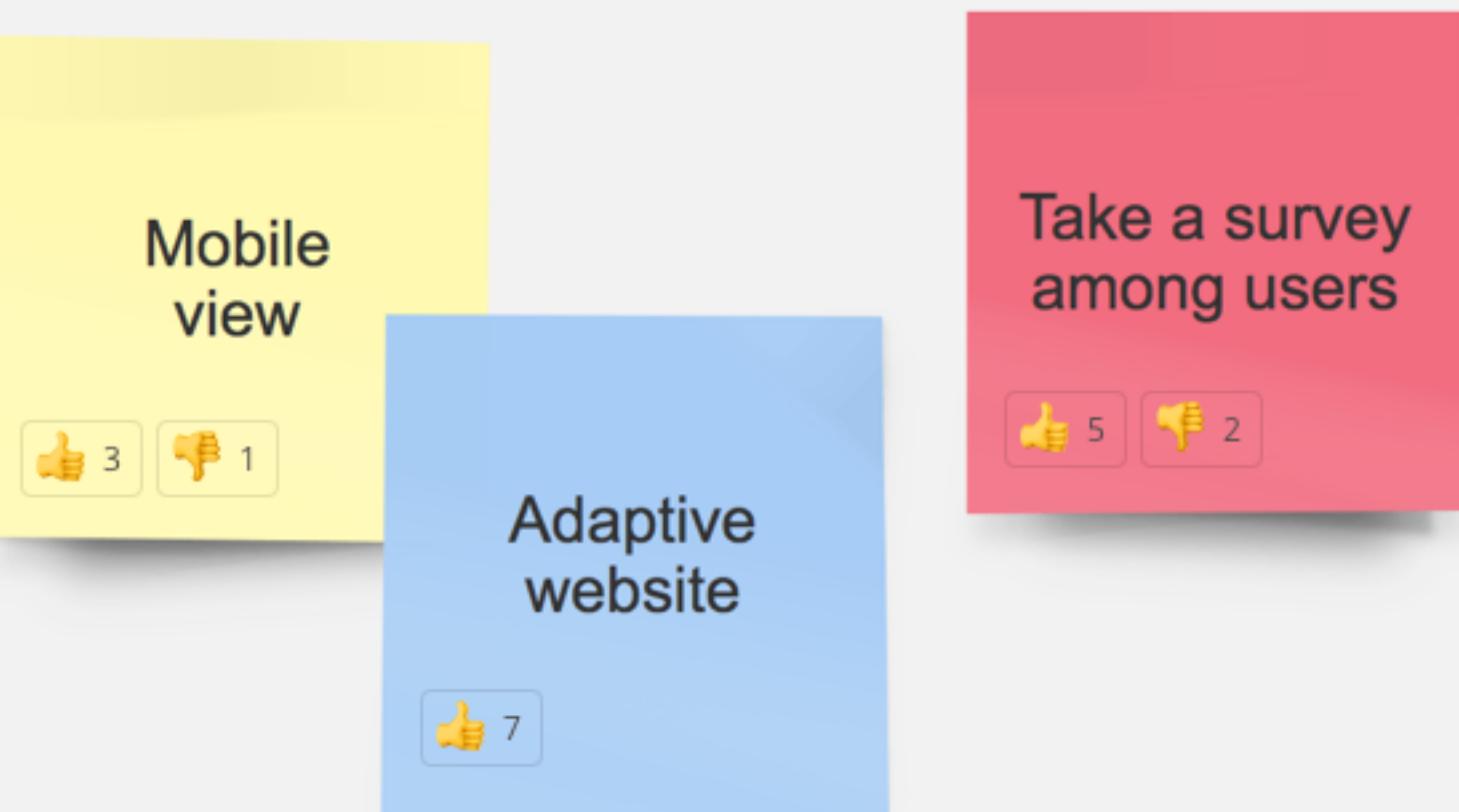
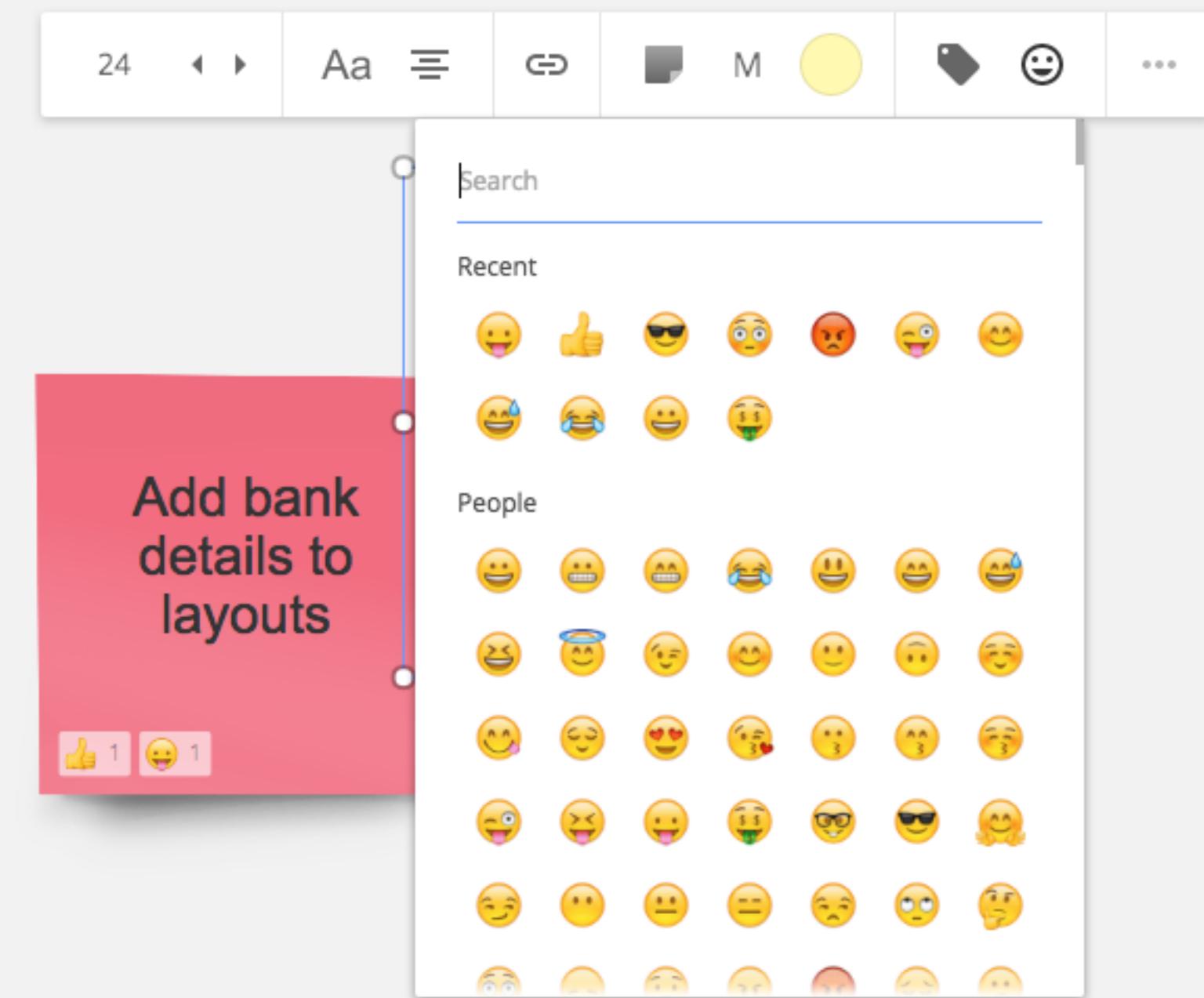


Whiteboard toolkit

# Sticky notes — reactions

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Use emoji reactions to vote



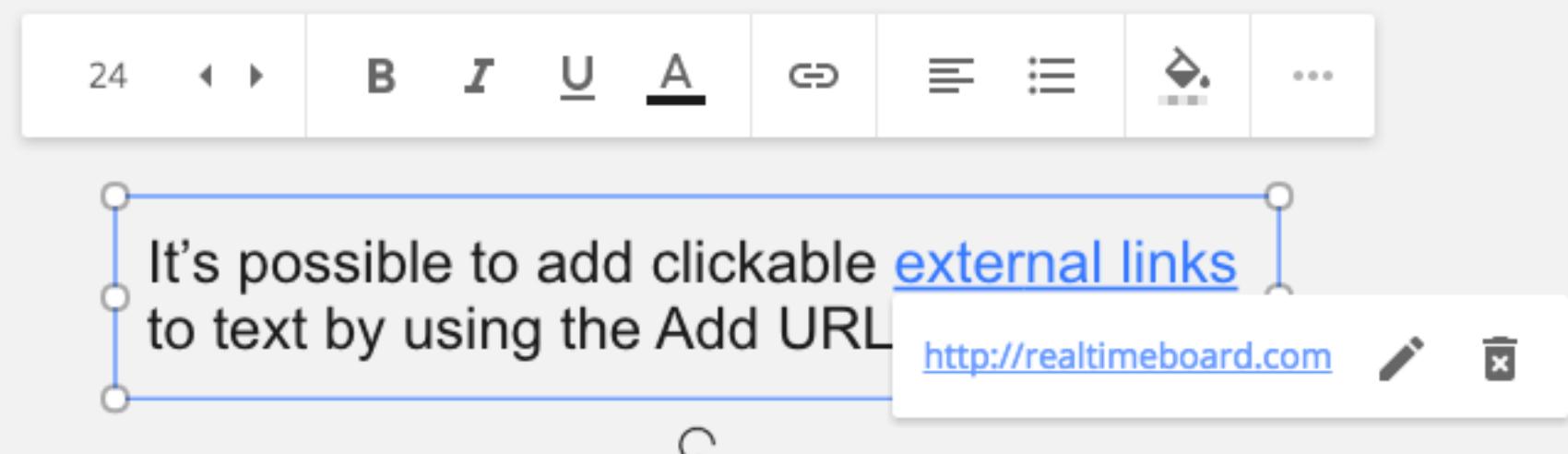
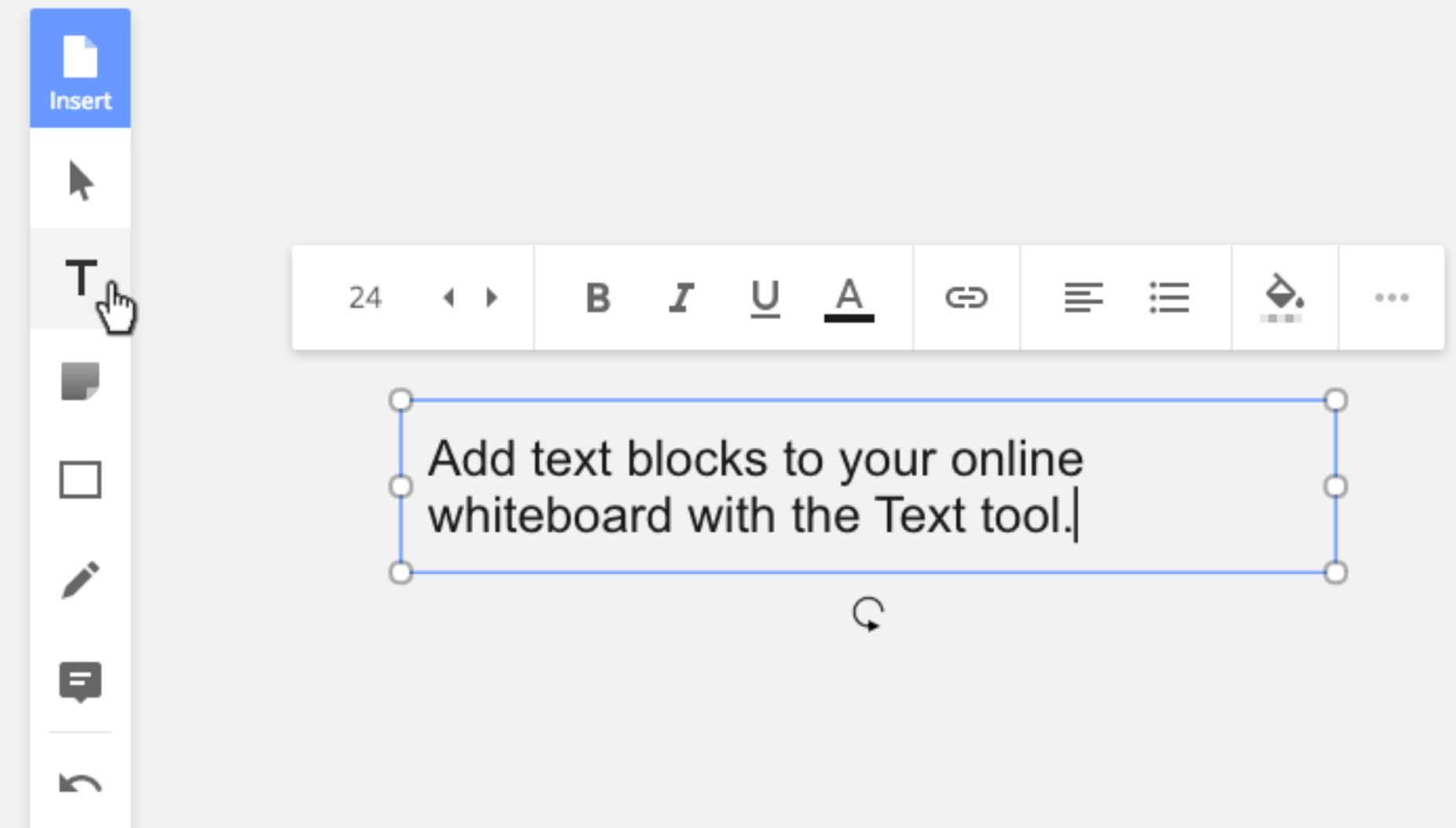
## Whiteboard toolkit

# Text tool

Add text blocks to your online whiteboard with the Text tool.

Change font size, style and formatting to make it more visually appealing.

It's possible to add clickable external links to text by using the Add URL feature.

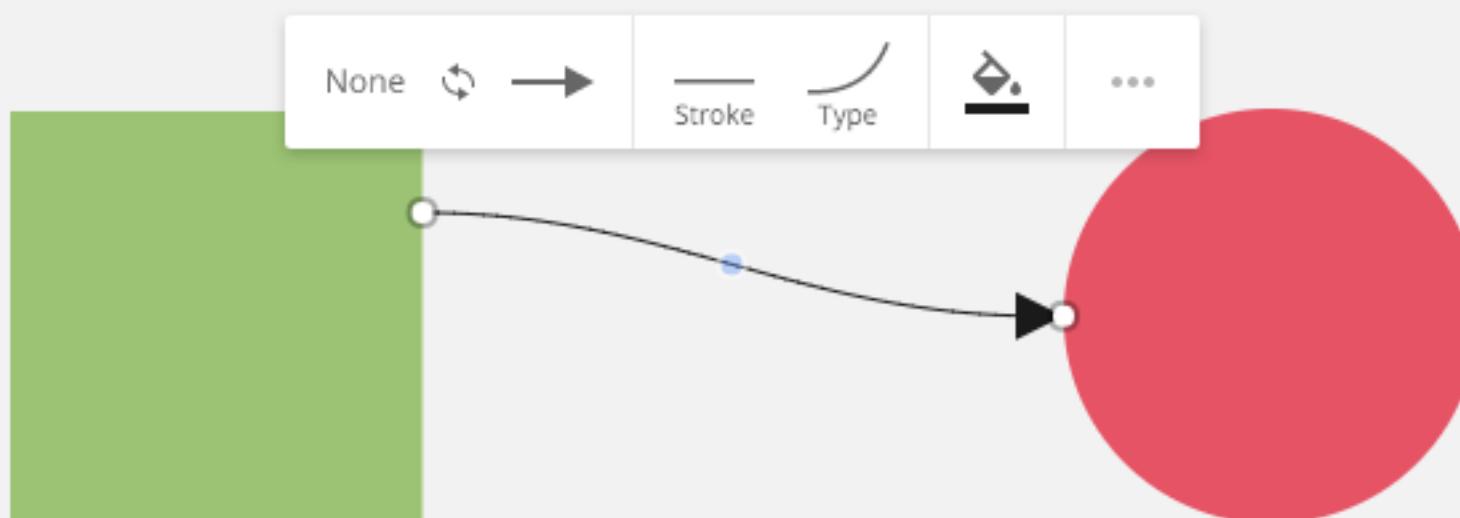
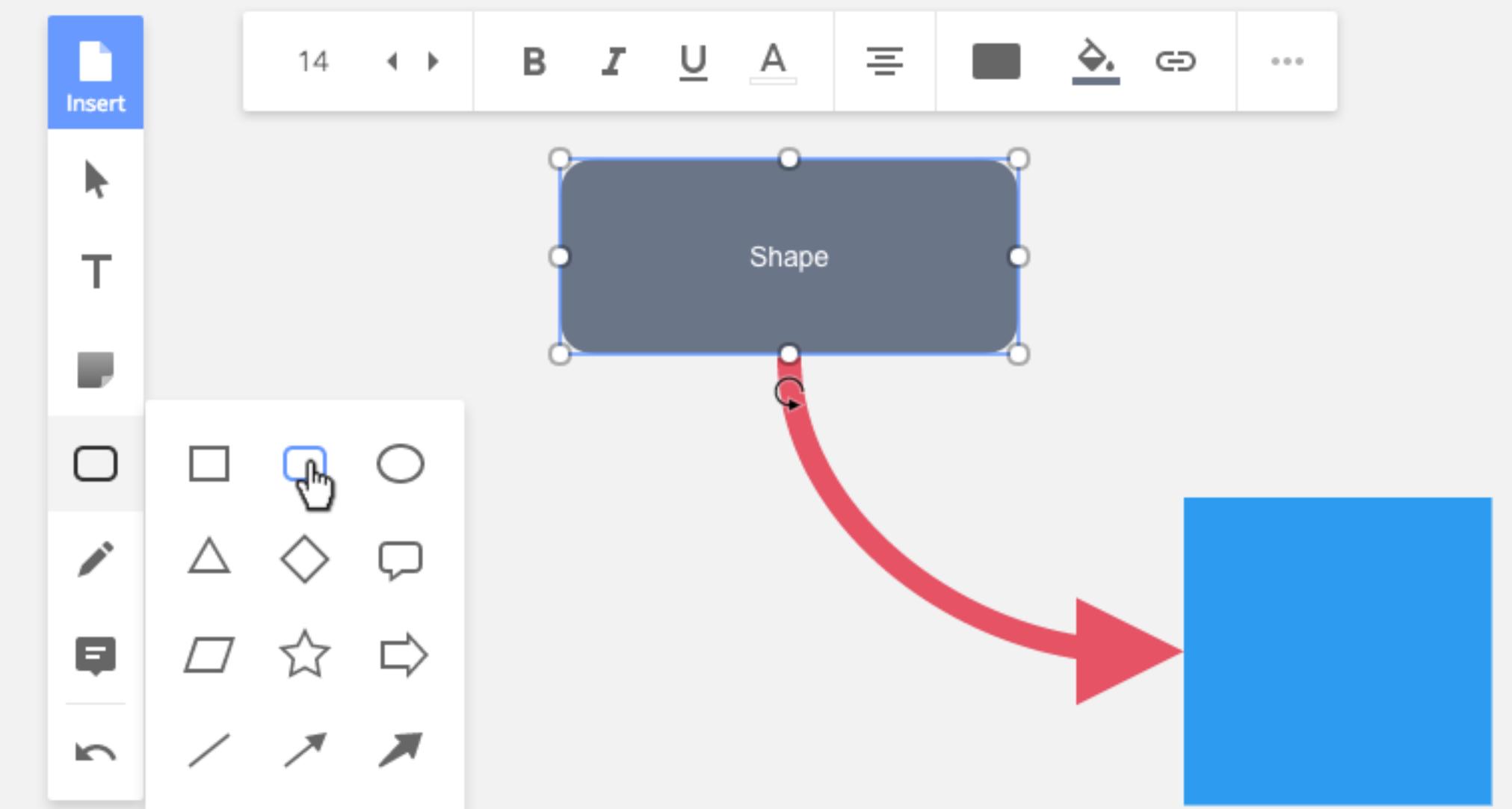


**Note:** Use Search to find any items on the board that contain text: sticky notes, tags, shapes, frames and text boxes.

# Shapes and connectors

To create schemes, diagrams and flowcharts, use the RealtimeBoard Shapes library.

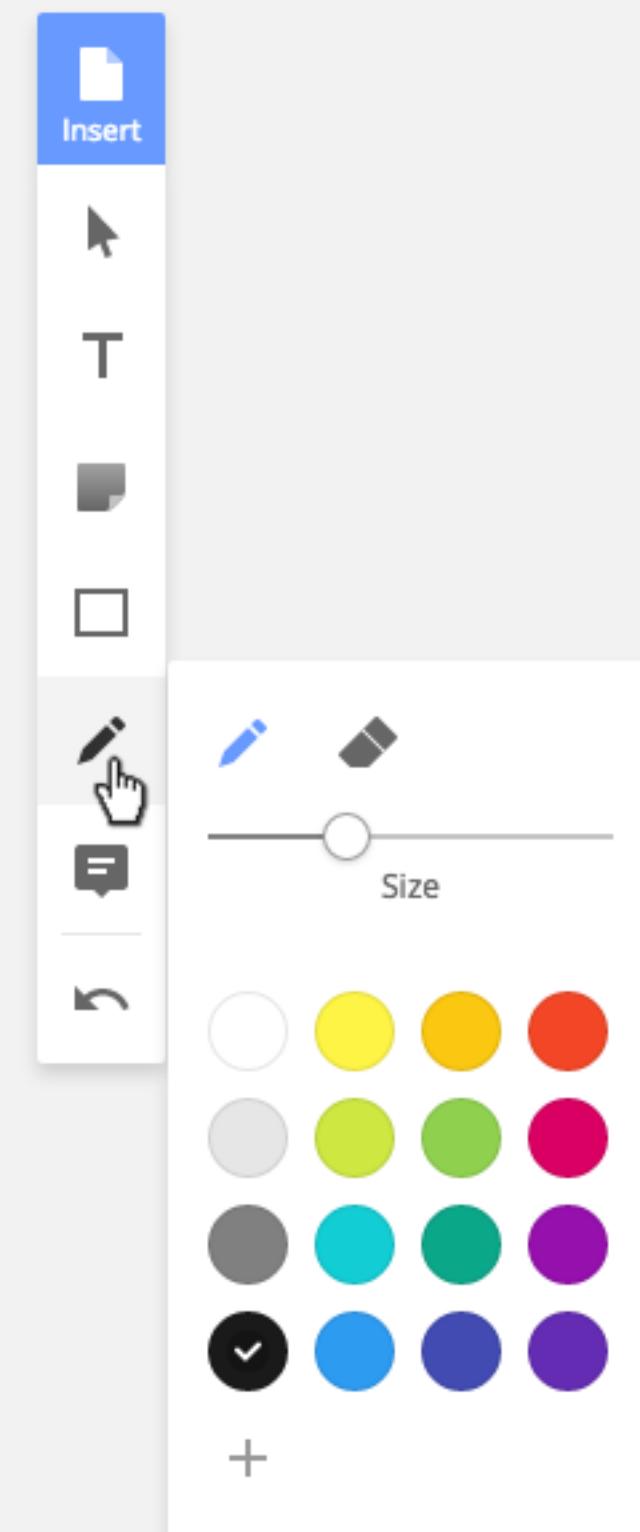
To connect the shapes, use lines and arrows, or simply drag a line from the edge of the shape.



# Annotation tools

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Use the Brush tool to mark up and highlight important items. You can change color, thickness, and also customize your palette to add specific colors.



**Note:** Custom colors can be applied to brush drawings, shapes and text.

# Collaboration

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Sharing, real-time updates, comments and @mentions,  
video chat and export

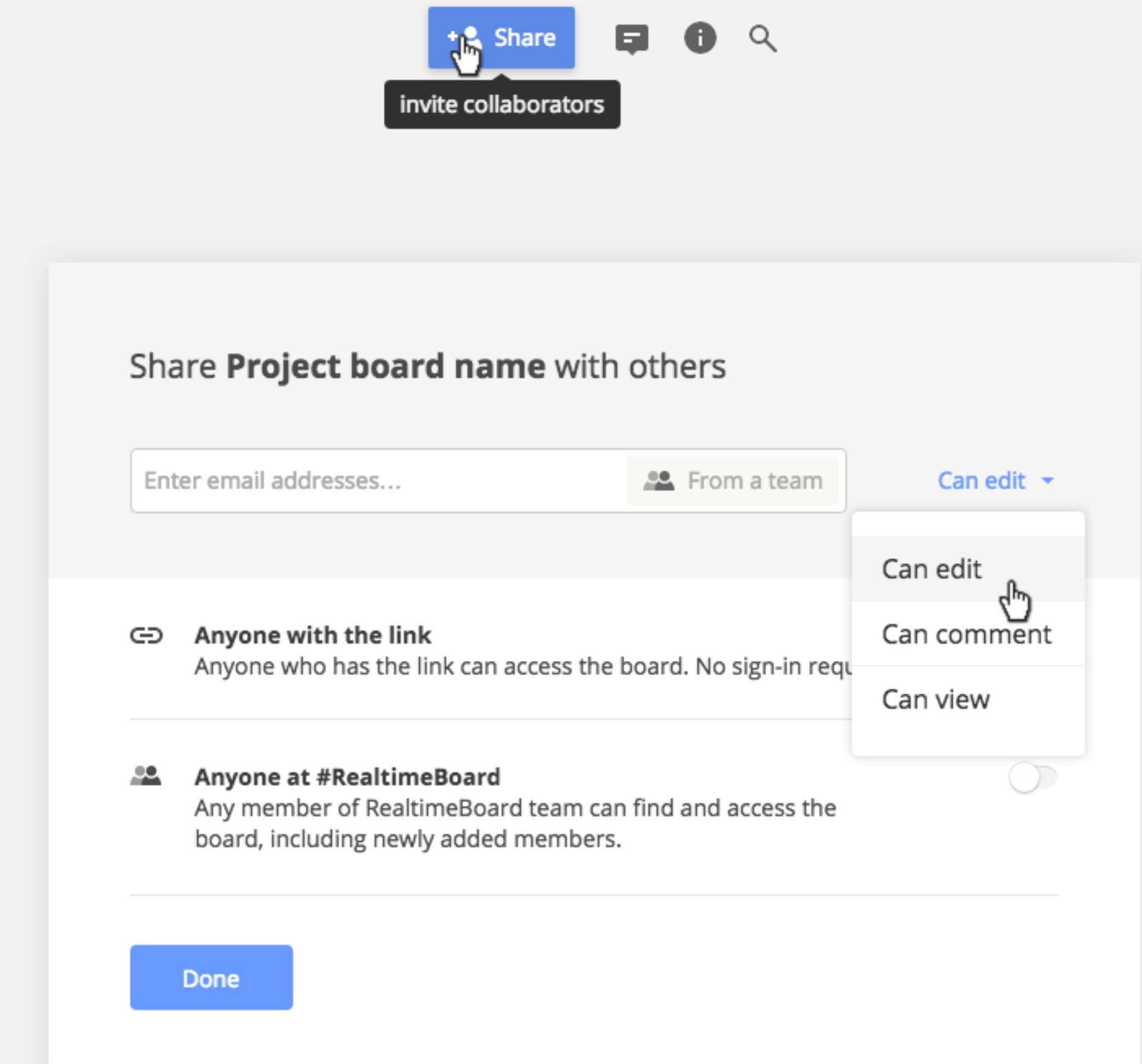
## Collaboration

# Invite your teammates

Take the whiteboarding experience beyond the constraints of the meeting time and conference room! Click the Share button in the top-right corner, enter the email addresses, set the access rights (editor, commenter or viewer) and click Send.

When your colleagues accept the invitation and land on the board, you will see their profile pictures in the bottom right corner.

You can also allow guest access to your board using a shareable link.



**Note:** Free plan allows view-only access for guests. With the Team plan you can also invite guest commenters who don't need to sign up.

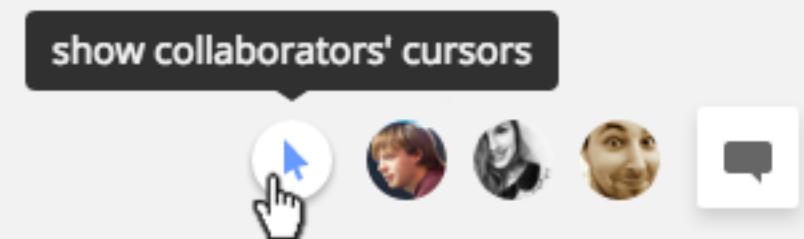
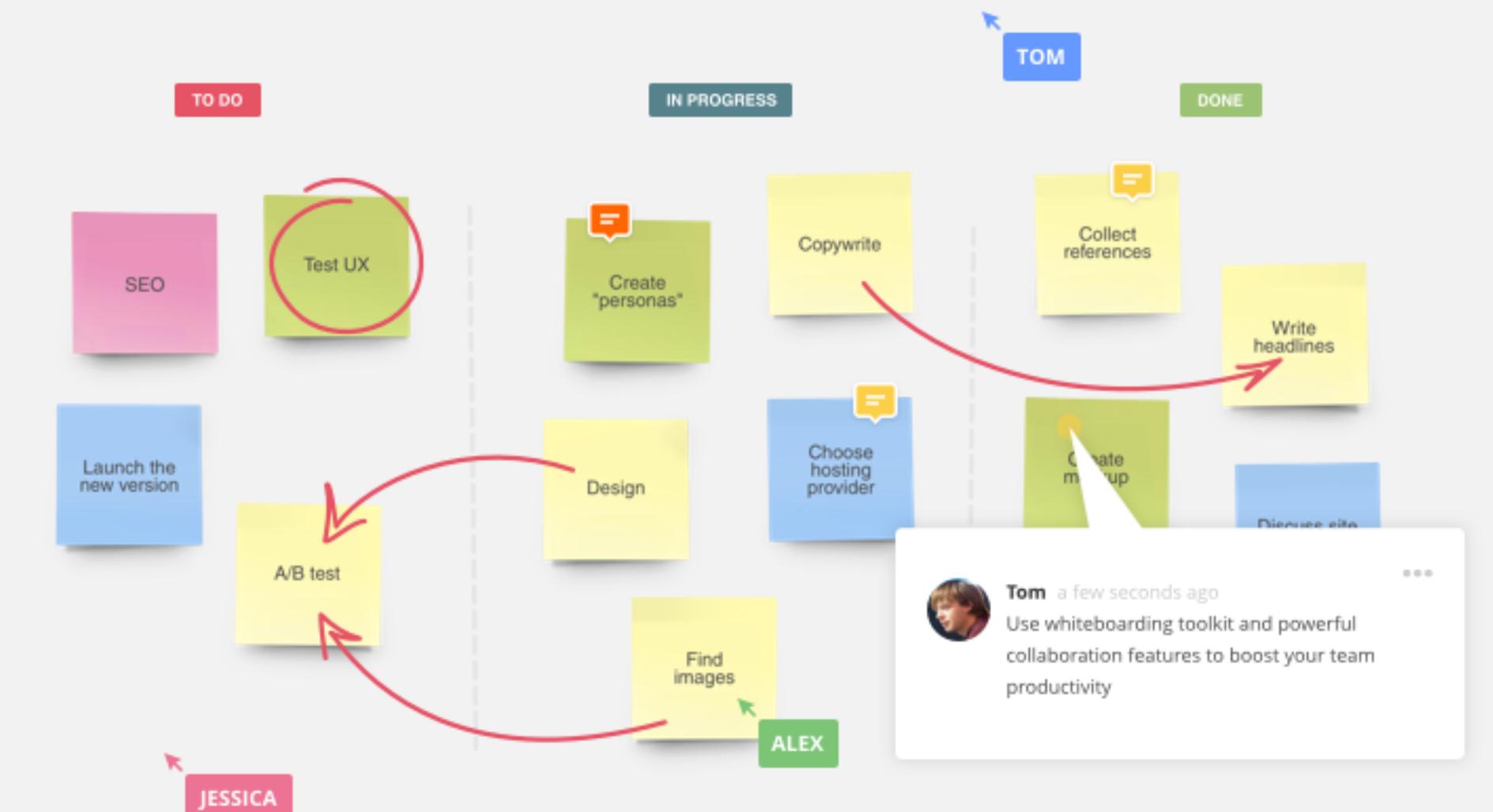
## Collaboration

# Real-time changes

When you and your team are on the board, every participant sees all the changes as they happen in real time. While you may not see people personally, you can still track what everyone is doing by displaying their cursors on the board.

Switch on the option to Show collaborators' cursors, and quickly jump to their point of view to see where they are on the board.

All changes made on the board while you were away are highlighted with pink color.



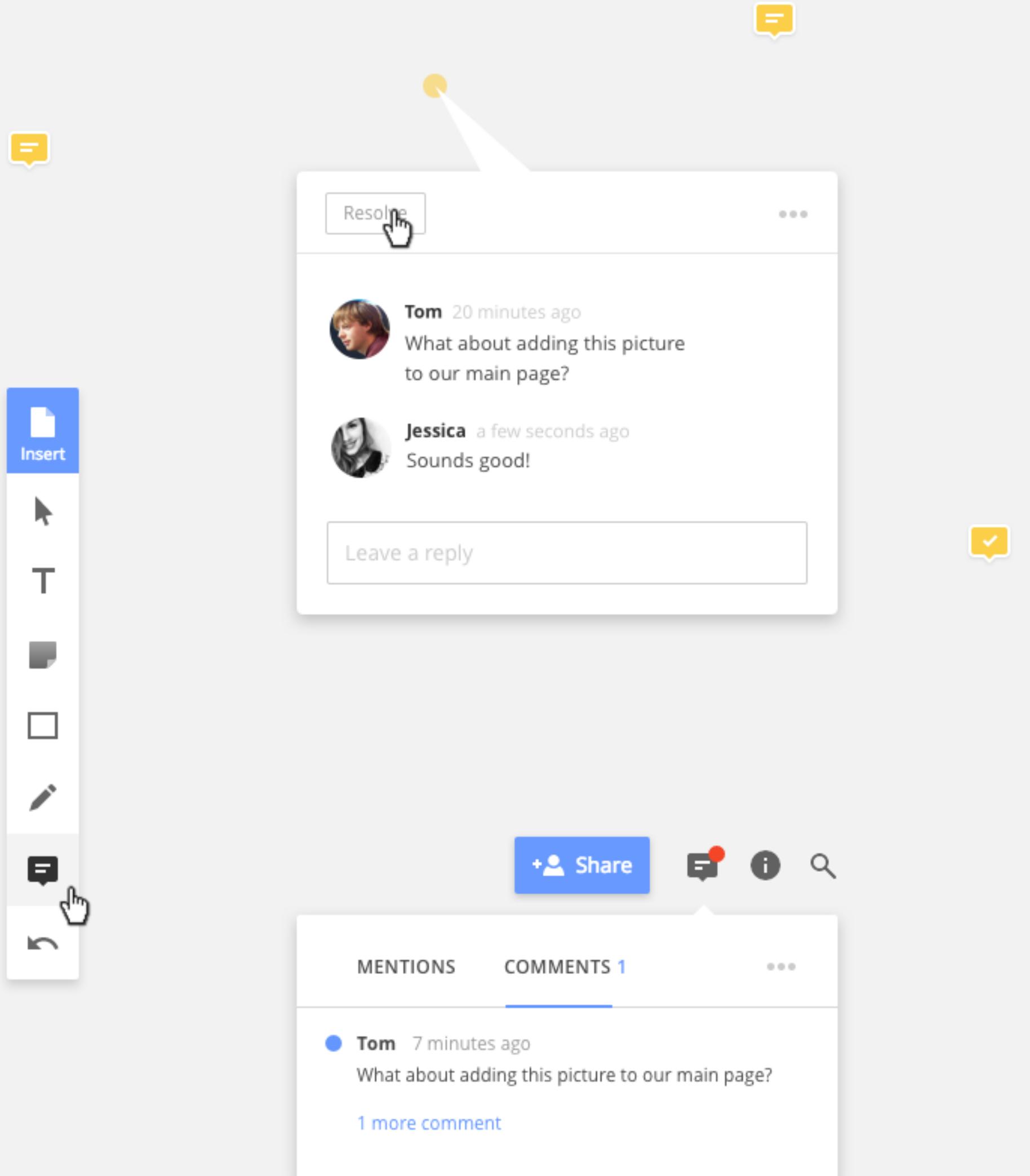
## Collaboration

# Comments

To add a new comment, switch to the Comment tool, click anywhere on the board and type in your message. Your comment will be attached to the object underneath it. You can Pin comments to keep the comment window open, or Resolve to hide the discussions that are no longer relevant.

Keeping track of comments and mentions is easy with the dedicated comment feed.

Just click on the comment icon in the top right corner and you will see all comments in chronological order. Clicking on any comment in the feed takes you to the relevant spot on the board.

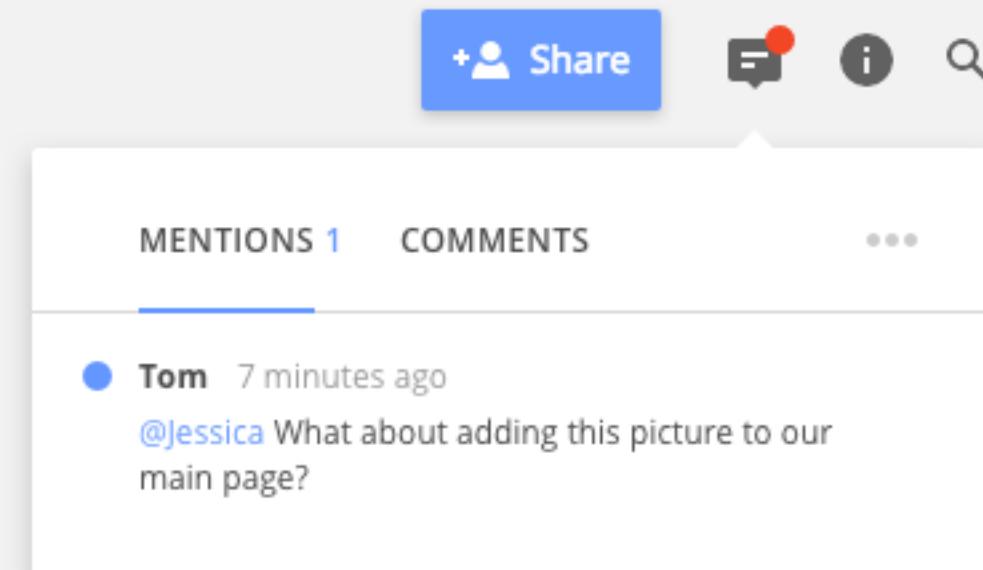
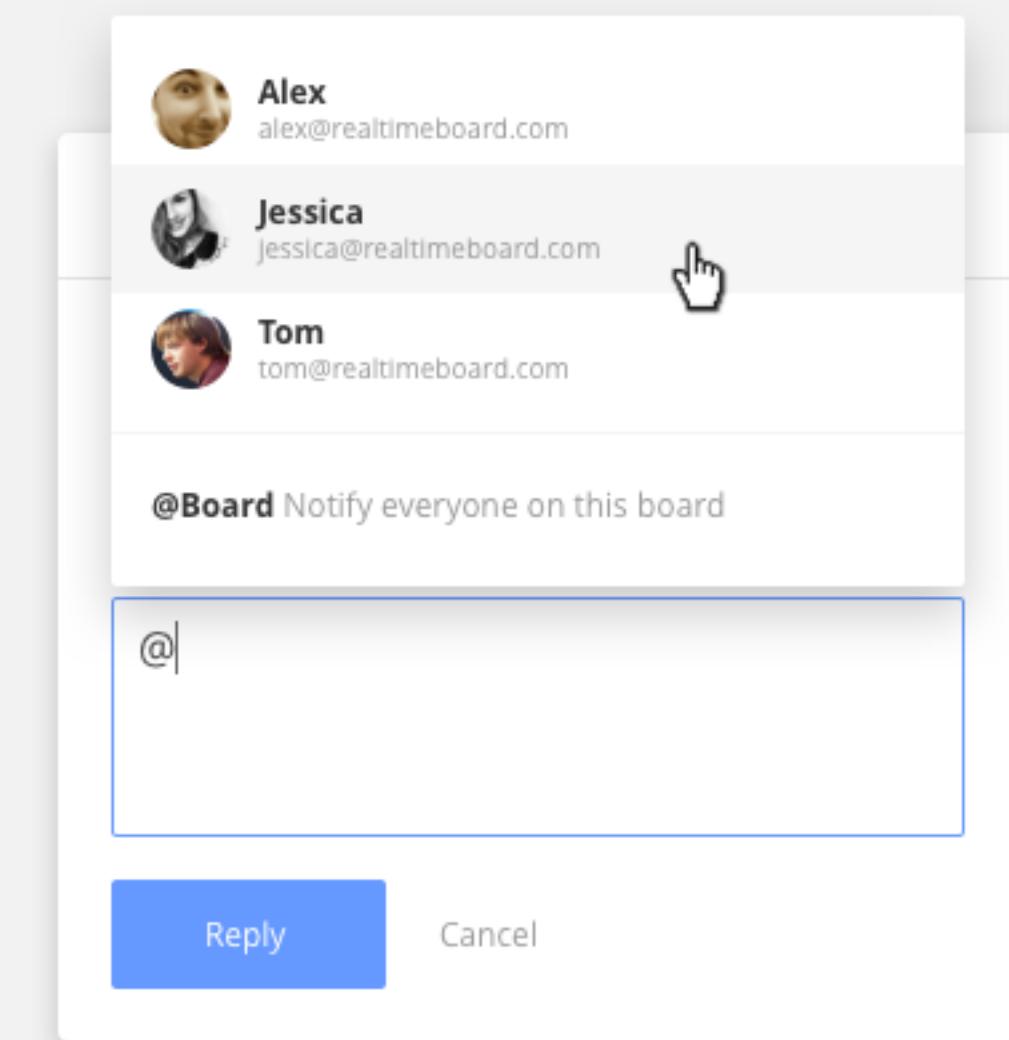


## Collaboration

# @mentions

You can mention any participant of the board while using Comments or Text chat. To do this, just add '@' and type in a few characters from the person's name, then choose the right person from the list. Whenever you mention someone, they get a notification in email and browser.

You can also quickly notify every participant on the board by mentioning @board in your comment or chat message.



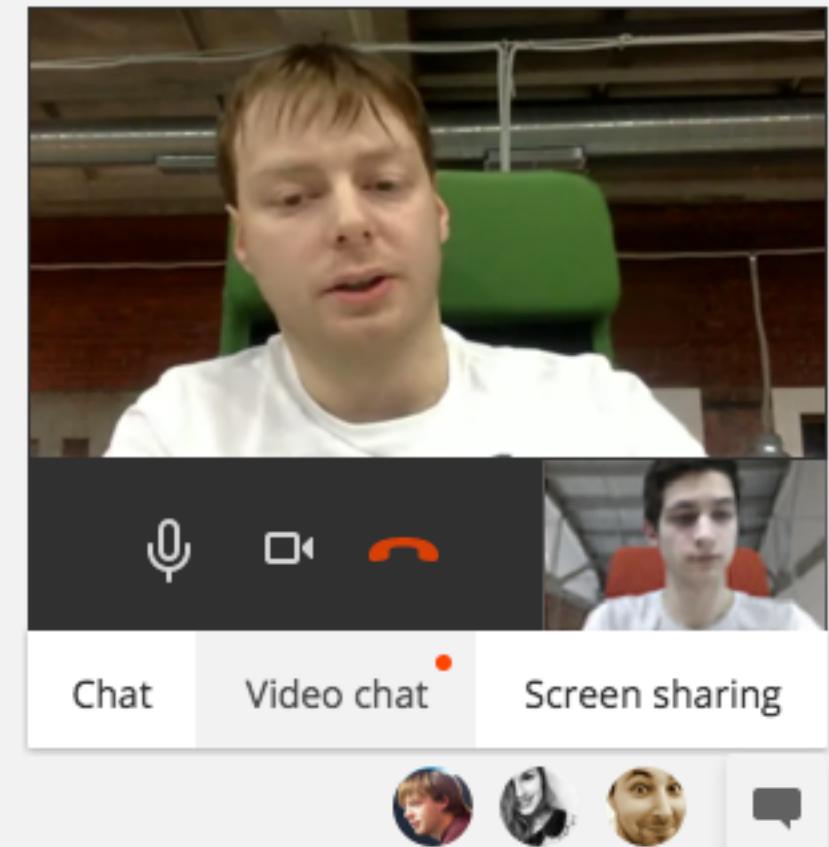
## Collaboration

# Video chat

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If you want to collaborate on a creative project, nothing beats a whiteboarding session. With RealtimeBoard you can host a remote whiteboard meeting, using the built-in voice and video chat.

Start a new call by pressing the Call button, or join an existing session. Your browser might display a pop-up window and request access to your webcam or microphone.



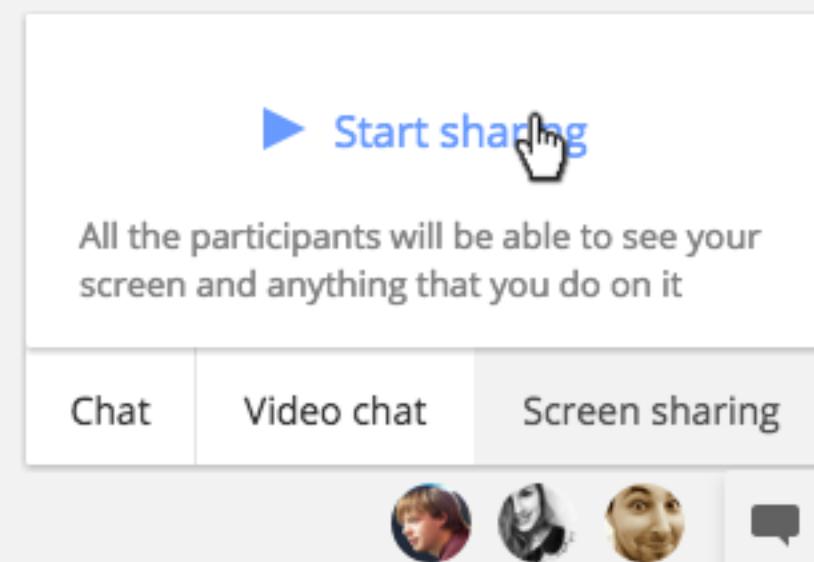
**Note:** You can successfully use RealtimeBoard with your favorite video chat solution — just launch them in separate tabs.

Collaboration

# Screen Sharing

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If you want others to follow your screen on the board, just start a screen sharing session.

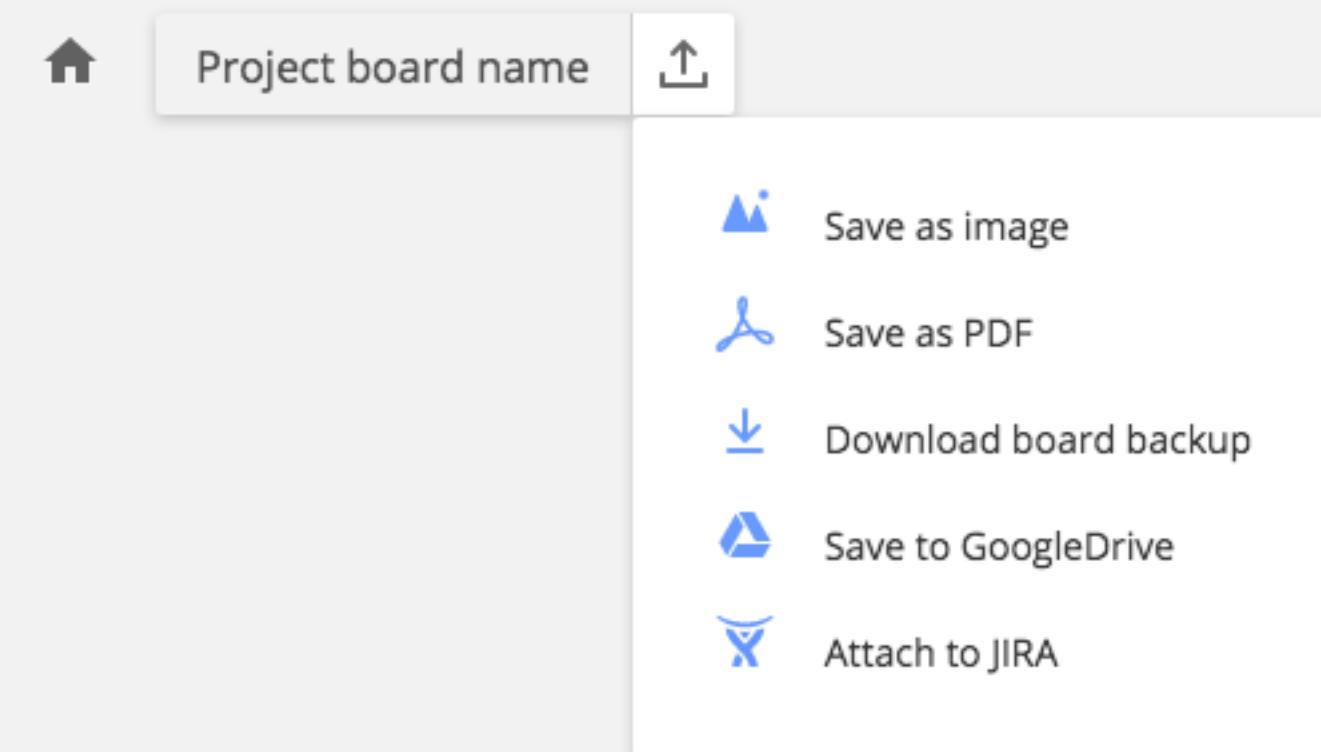


# Export

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There are a few different ways to export your board:

- Save it as an image. Paid plans allow you to save in high resolution
- Save it as PDF. Paid plans allow you to save in high resolution
- Export as CSV (as of now only the content of individual Frames can be exported as a CSV file)
- Save the link to Google Drive
- Download board backup (available in paid plans)



# Integrations

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Google Drive, Dropbox, Box, OneDrive,  
Slack, JIRA

## Integrations

# Google Drive, Box, Dropbox

Integrate RealtimeBoard with cloud storage services  
to upload files from your favorite one right to the board.

You can set up integrations in the account settings,  
or on the board

## → Integrations

Get the most out of RealtimeBoard by connecting it to other tools and services from our growing list of integrations.

 Facebook  
Log in with Facebook

Connect

 Google  
Log in with Google

Connect

 Google Drive  
Work with your Google Documents

Connect

 Google Contacts  
Enables auto-suggest when inviting via email

Connect

 Dropbox  
Use files from Dropbox on boards

Connect

 Box  
Use files from Box on boards

Connect

 OneDrive  
Use files from OneDrive on boards

Connect

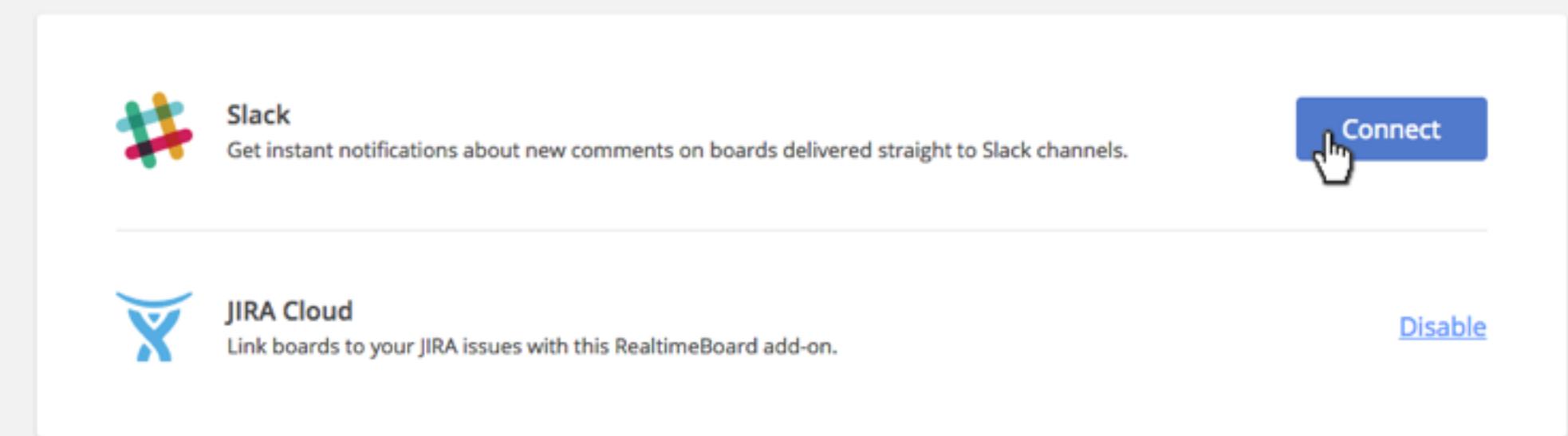
## Integrations

# Slack

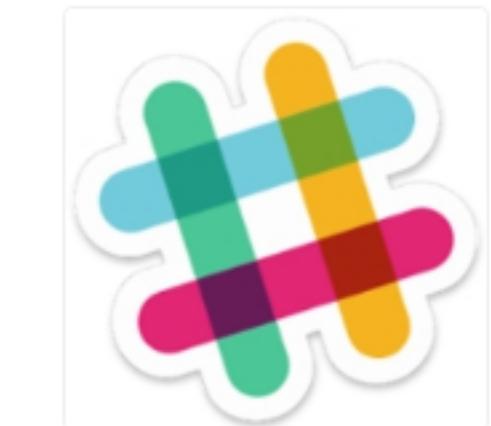
Integrate RealtimeBoard with your workflow tools to collaborate seamlessly.

Add RealtimeBoard to your Slack team, and connect any board to a channel to keep track of comments and mentions. Set up your integration in the Team account settings.

→ RealtimeBoard



Slack Integration



Slack Integration

Owner Yuliya  
Created March, 16  
Last modified October, 05

Leave

Add to Slack

Duplicate

Share

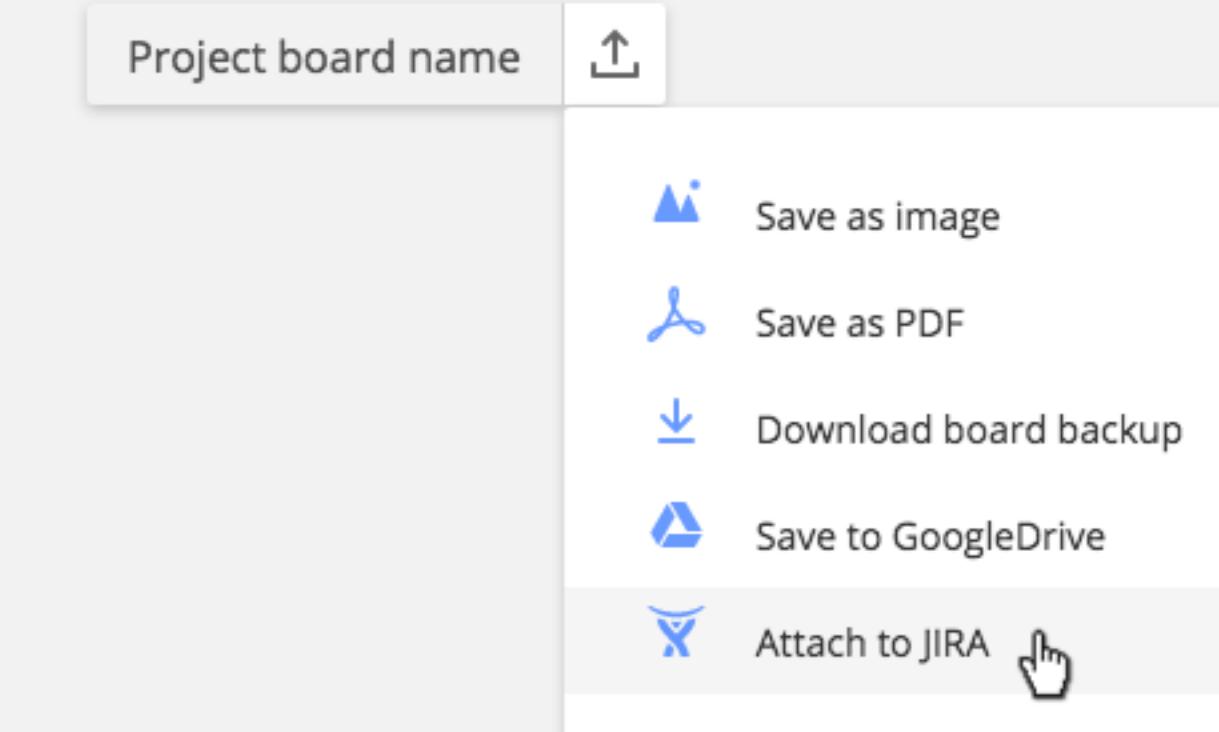
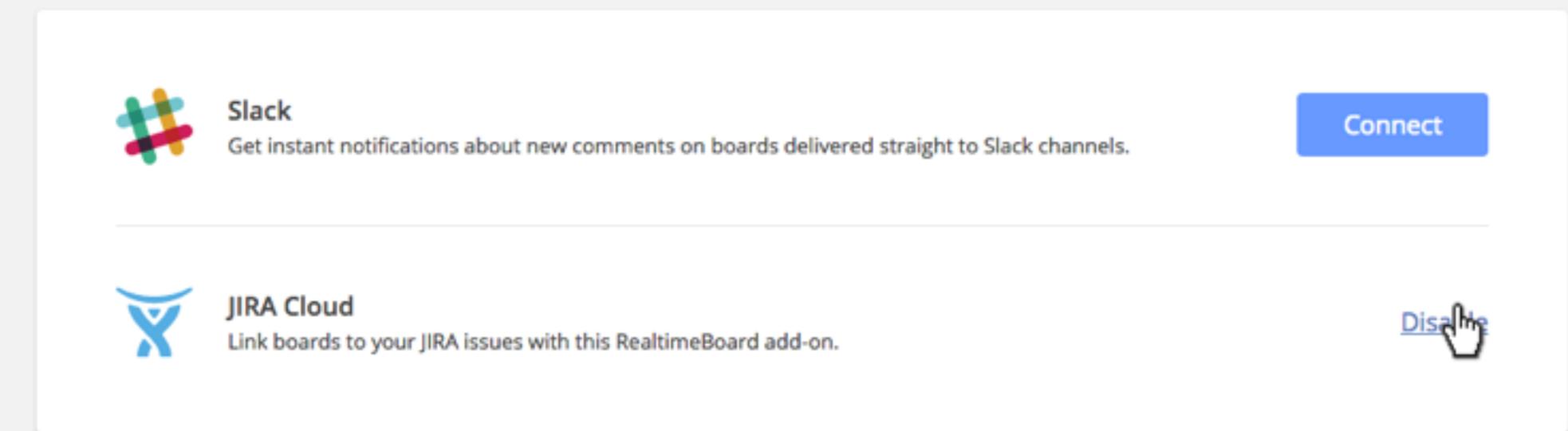
## Integrations

# Jira

Integrate RealtimeBoard with your workflow tools to collaborate seamlessly.

JIRA cloud add-on makes it possible to attach boards to JIRA issues. Now you can view and leave comments on boards directly from JIRA without switching to RealtimeBoard. Set up your integration in the Team account settings.

→ RealtimeBoard



How our users benefit from RealtimeBoard

# Get inspired with the case studies

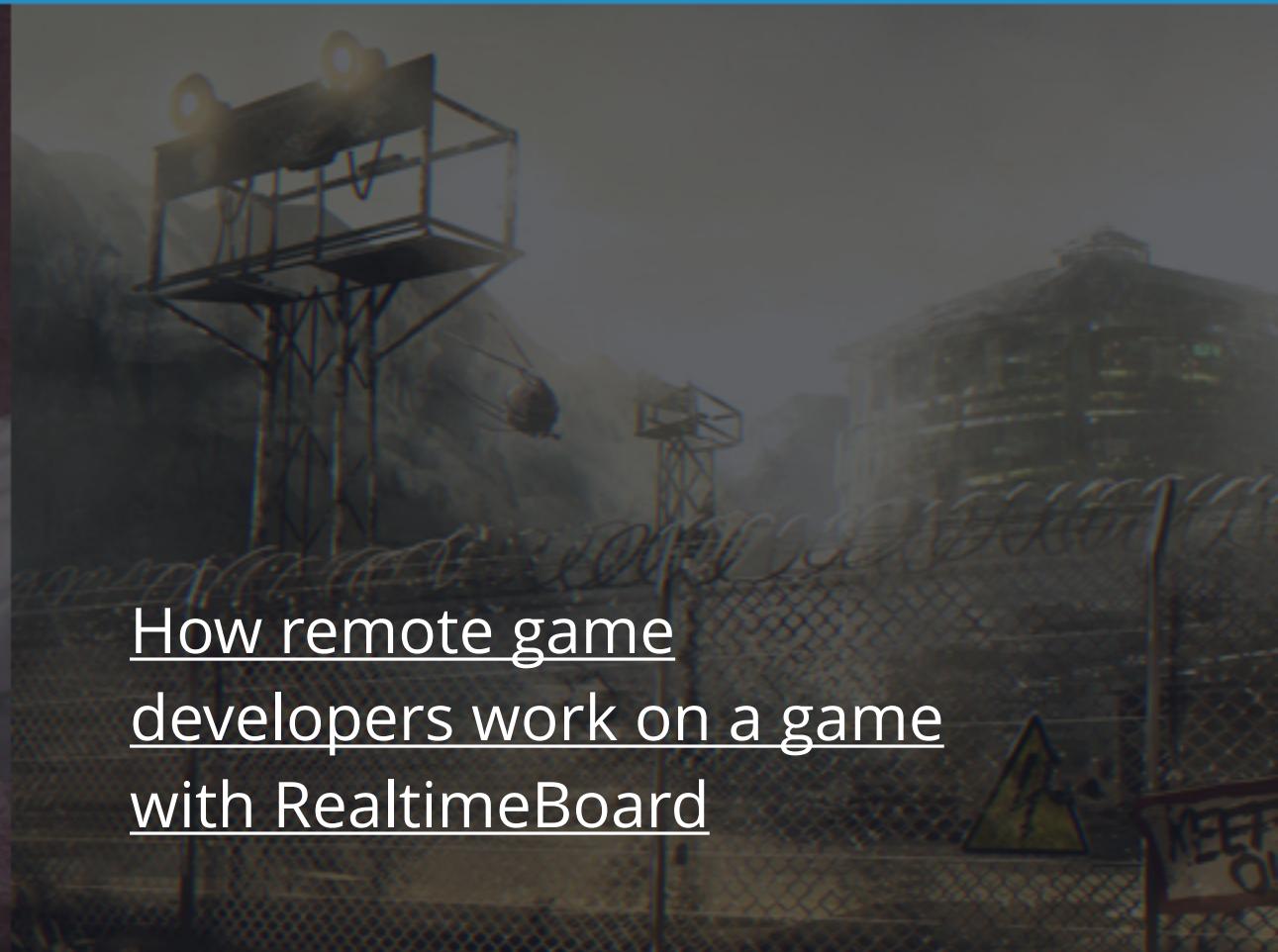
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[How Unbounce applies RealtimeBoard to collaborate on design mockups](#)



[How Scrum Master Applies RealtimeBoard to organise remote story sizing](#)



[How remote game developers work on a game with RealtimeBoard](#)



[How scriptwriters apply RealtimeBoard to make the video outstanding](#)

Learn more about RealtimeBoard and get help

# Resources and contacts

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Visit our [Knowledge base](#) to read useful articles

Discuss ideas and questions in Community Forums

Visit [our blog](#) to learn more about use cases  
and best practices

Join us in Social media



Contacts:

[feedback@realtimeboard.com](mailto:feedback@realtimeboard.com) — your feedback  
and questions are always welcome

[sales@realtimeboard.com](mailto:sales@realtimeboard.com) — feel free to use this  
email for any inquiries about pricing and licensing

