

A complete guide on:

How to zipBoard

For Admins.

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What is zipBoard?

[zipBoard](#) is a web-based visual annotation, bug tracking, and feedback tool.

What can one do with zipBoard?

zipBoard helps you to:

- Create unlimited projects
- Give visual reviews and feedback
- Assign and manage tasks to your team
- Get feedback and review from stakeholders, clients, and external reviewers
- Track bugs and issues separately
- Put files in a common place for review
- Communicate within the team and also with the stakeholders and clients
- Easily track the progress of the project in Kanban board
- Notify all of your team members about updates instantly
- Add unlimited collaborators, stakeholders, and reviewers

..., all in one place.

Let's get you started in no time.

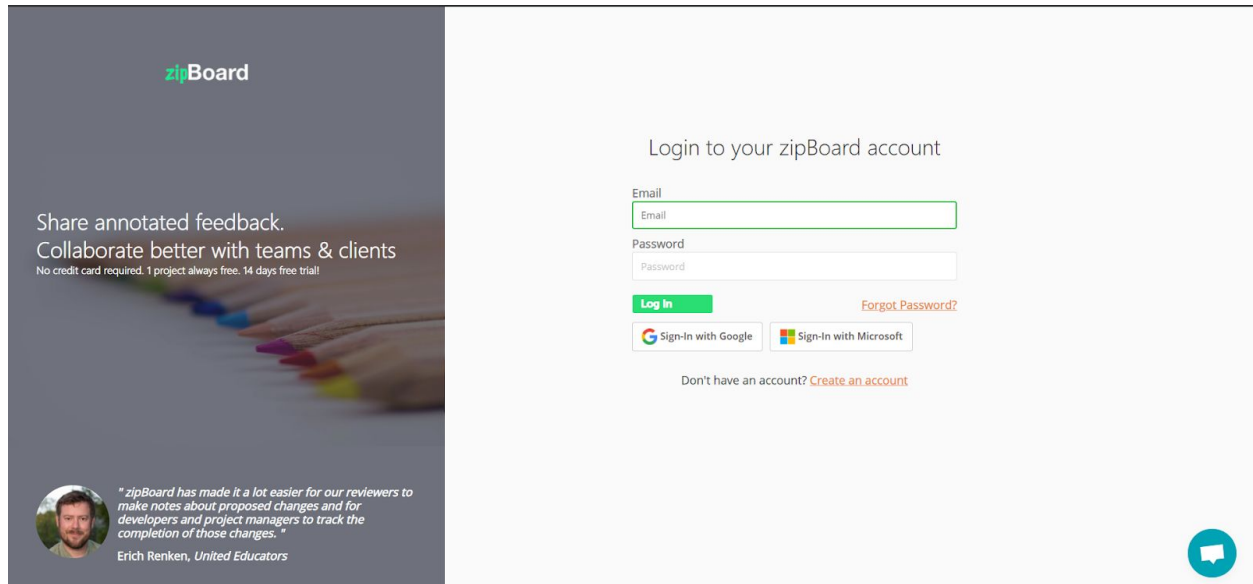
What are the prerequisites to use zipBoard?

Just install our [web extension](#) on your browser and you are done. It's that easy. If you have not installed the extension, you will be prompted to do so once you start using zipBoard.

For the best experience, we recommend [Google Chrome](#).

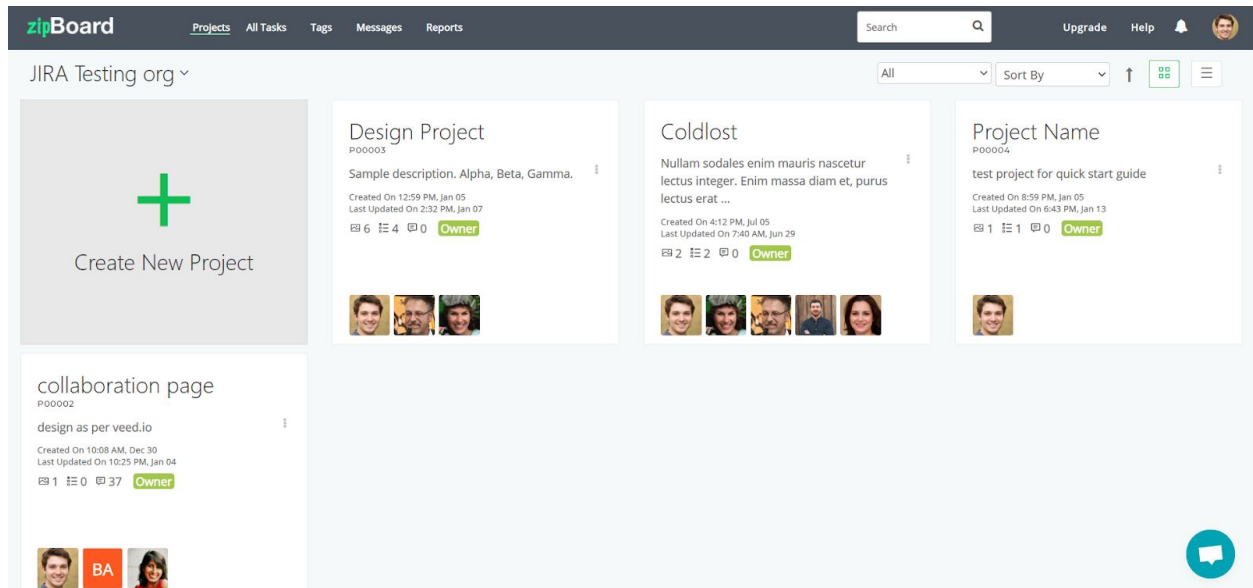
How to log in to zipBoard?

Go to our [Login Page](#) and enter your credentials. You can use your Google account or Microsoft account to log in too. If not, you can always create an account.



How to create a project?

- Once you log into zipBoard's app, you will see a screen like this:



- Click on “[Create New Project](#)” and fill in the relevant details and click “Save”.

New Project ✕

Project Id ^{*}

Title ^{*}

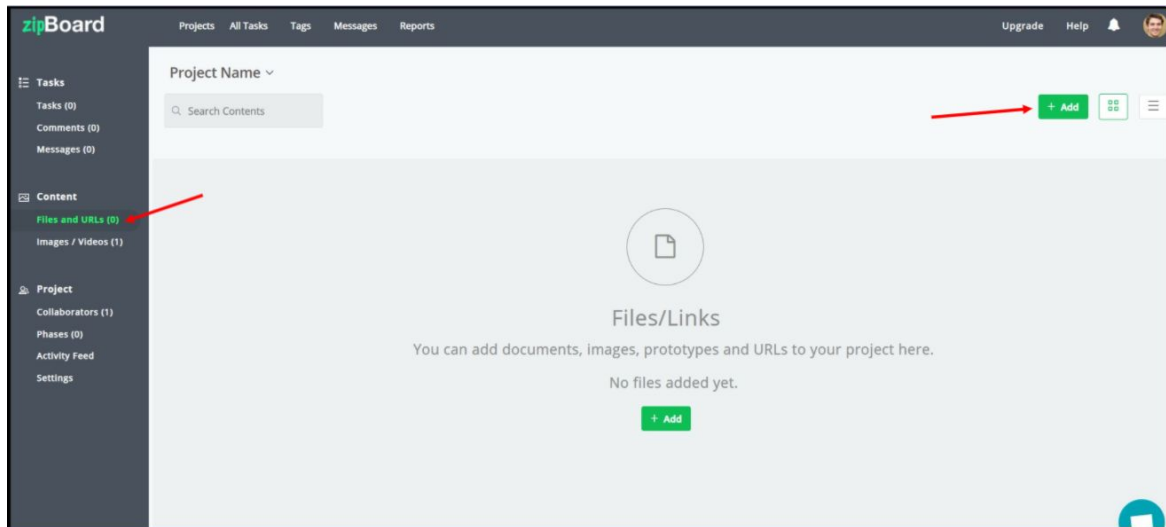
Description

Save Cancel

- Now let us go ahead and add a file.

How to add files/URLs for review?

- Once you are in a project, navigate to “[Files and URLs](#)” under “Content” in the left project menu.



- Then click on “Add” and choose the type of file. Then follow the instructions on your screen.

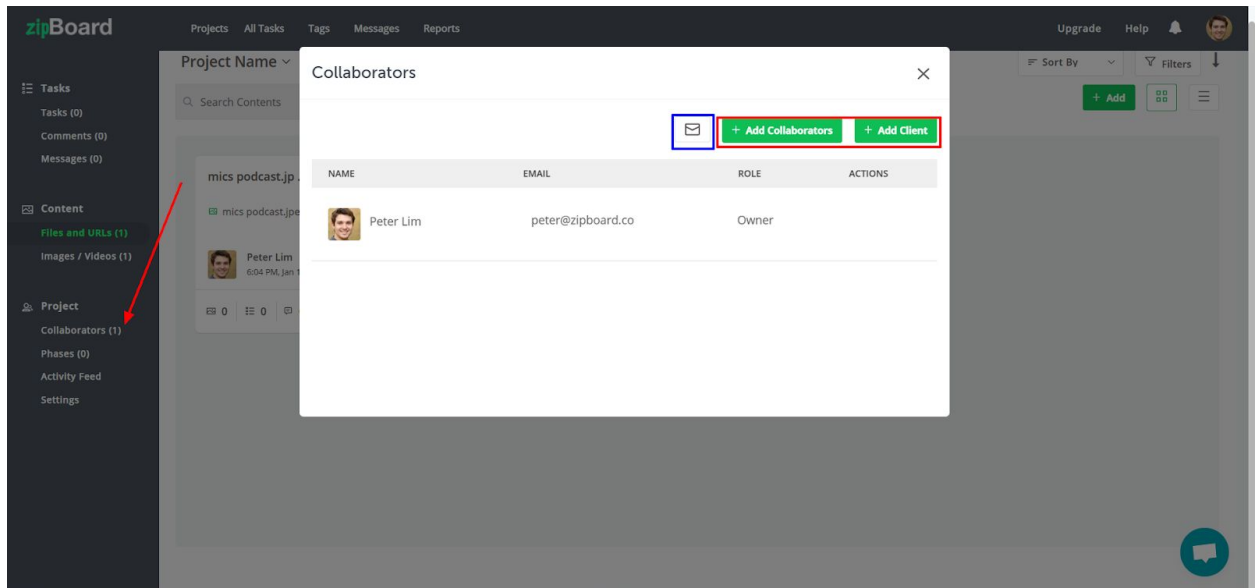
*Add a URL or upload a file
to review in your project.*

- 🔗 URL
- 🖼 Images
- 📺 Video
- 📄 PDF
- 📦 ZIP

Note: In this guide, we have shown you how to review an Image and an URL as examples. Reviewing other types of content/media is similar to it.

How to add collaborators?

- Click on “[Collaborators](#)” under the project in the left project menu. By using the “Message” icon (shown in blue), you can send emails to collaborators and clients directly.




- By clicking on “[Add Collaborators](#)” you can add team members to your project who will have the same reviewing rights as you. The only difference is you will be allowed to manage everyone’s tasks while they can only manage theirs and you will be only allowed to add collaborators and/or clients as you are the “[Owner](#)”. You can also invite collaborators by sending them an [invite link](#).

← Add Collaborators

Fill in the email address of the people you'd like to invite

Email:

 **Katelyn Fifer**

⌵ Add another or add many at once

Message:

[Copy Invite Link](#)
Refresh in 7 days

Invite

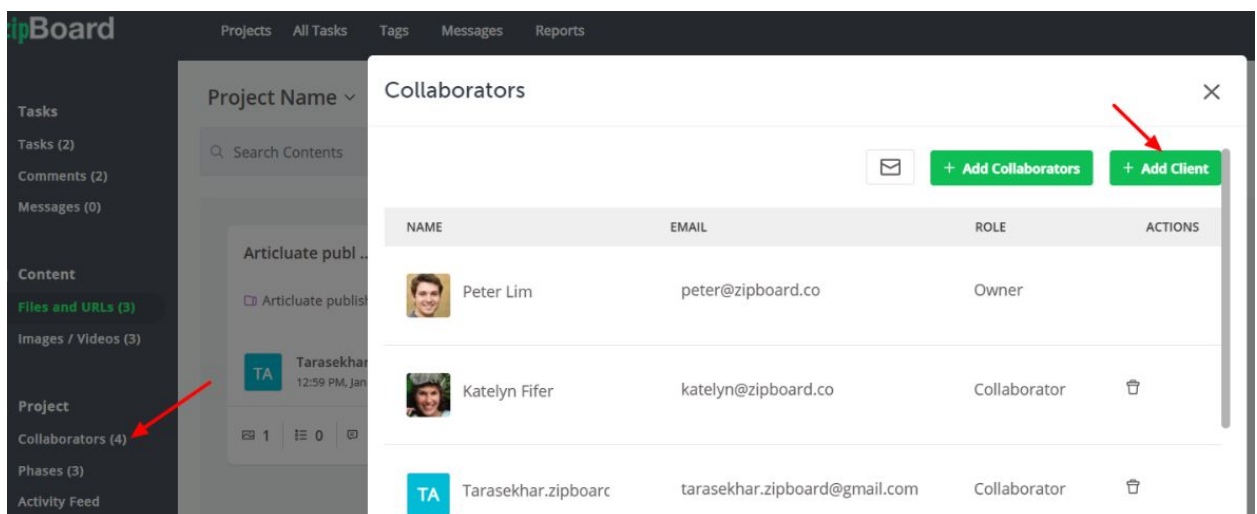
How to invite clients or stakeholders?

zipBoard allows you to get reviews and feedback from all your external clients, reviewers, and stakeholders in one place. You can [invite/add as many clients](#) as you want. There are two ways to do it: you can add a client to an entire project or to specific files or URLs.

Note: Clients/external reviewers won't be able to add content or assign and manage tasks.

From “Collaborators” in Left Menu Bar

- After clicking on “Collaborators” in the left menu bar, you will see a dialog box that will show all of the collaborators and reviewers in that project. Click on “[Add Client](#)”.



- By clicking on “Add Client”, you can invite stakeholders and external reviewers to get their [feedback](#). A “Client” will only be able to give their feedback. You can also invite

clients by sending them the [invite link](#). Click on “Copy Invite Link” and send it across.

← Add Clients

Fill in the email address of the people you'd like to invite

Email:

Tarasekhar.zipboard

+ Add another or add many at once

Message:

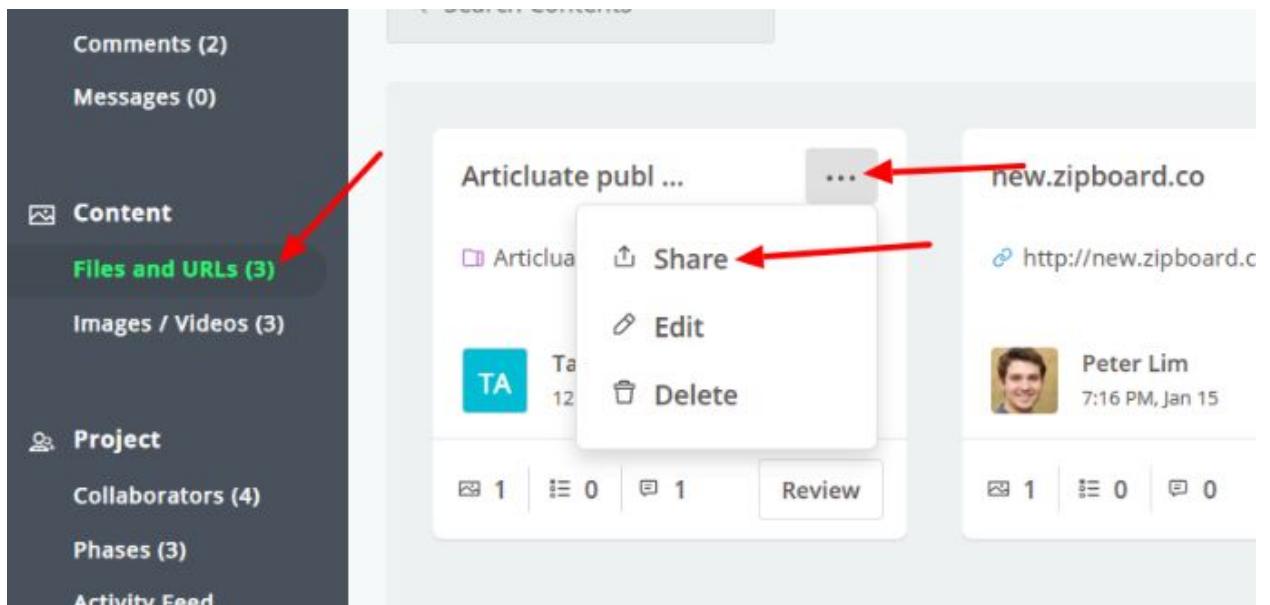
You have been invited to review comments on this project in [zipBoard](#).

[Copy Invite Link](#)
Refresh in 7 days

Invite

Adding them individually to Files and URLs

- You can share each piece of content independently with external reviewers and shareholders by going to “Files and URLs”. Choose the file you wish and click on the three dots above it. Then click on “[Share](#)”.



- After that, you will see a pop-up like the one below. Here, you can set specific rights, decide whether the reviewer needs to log in or not, etc.

X

Share Review

Guest
Collaborators
Shared Links

Require Signup / Login ☐

View All Boards/Reviews ☒

Collaborators can view previous boards and comments.

Add New Boards/Reviews ☐

Collaborators can add new boards and comments.

Copy url to share:

Copy

Email to share:

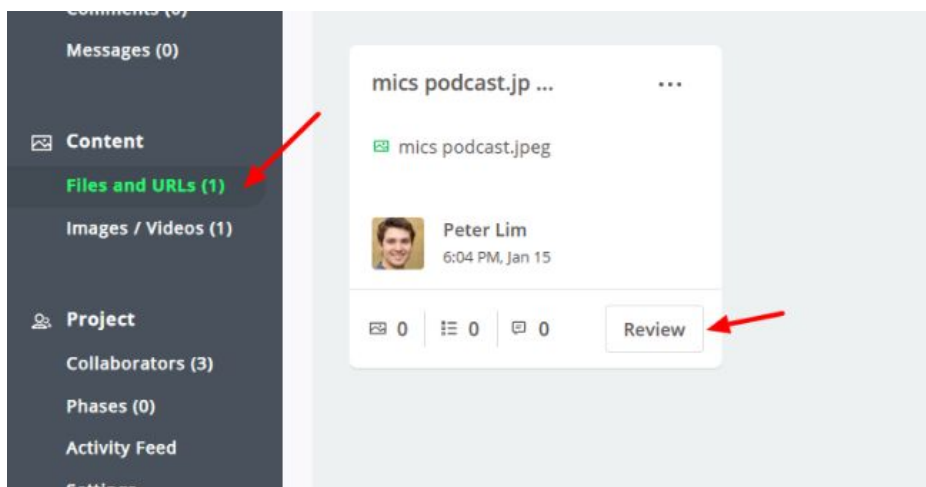
Enter Email to share

Inviting you to share feedback for this project in zipBoard.

Send

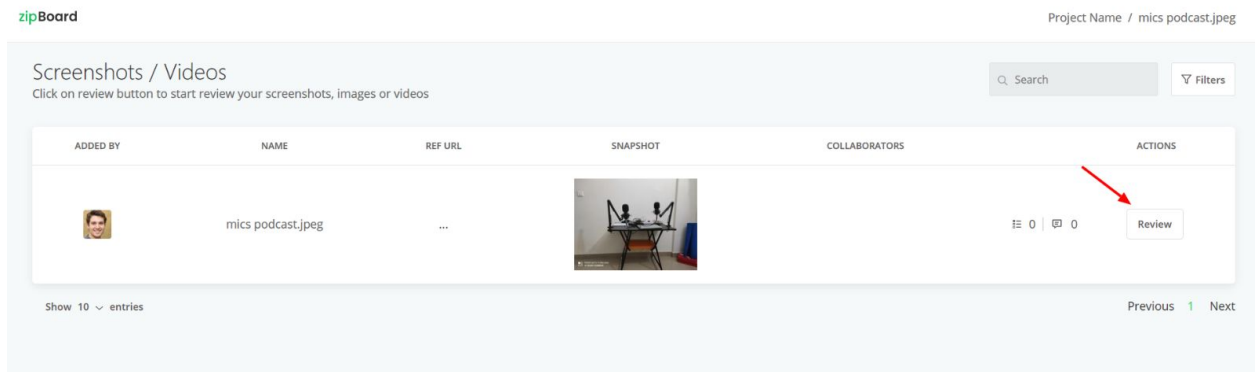
How to review an Image? (example 1)

- Once you are in the “Files/URLs”, click “[Review](#)” under the image(or any type of content).

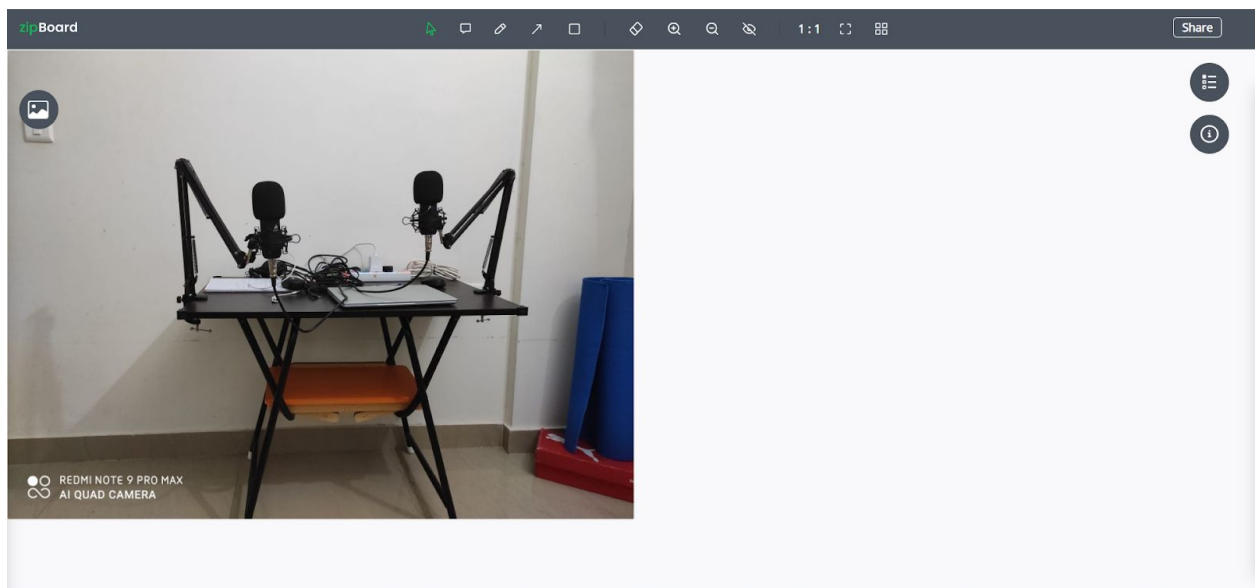


- You will be redirected to the “Review Summary” page. This page will provide you with all the details about all the reviews given to every file in that project including details like,

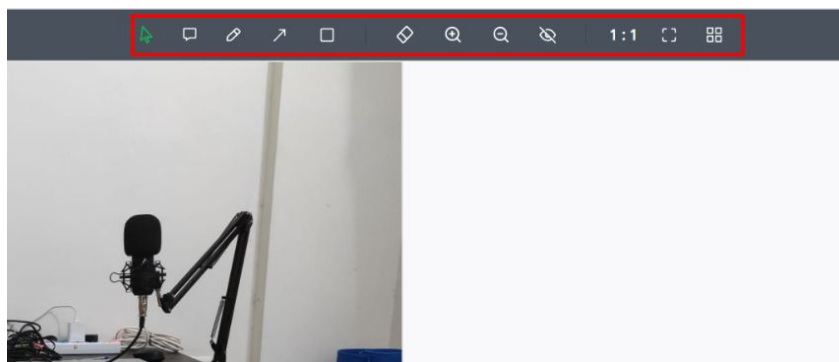
who had given the reviews etc. Click on “Review” to proceed.



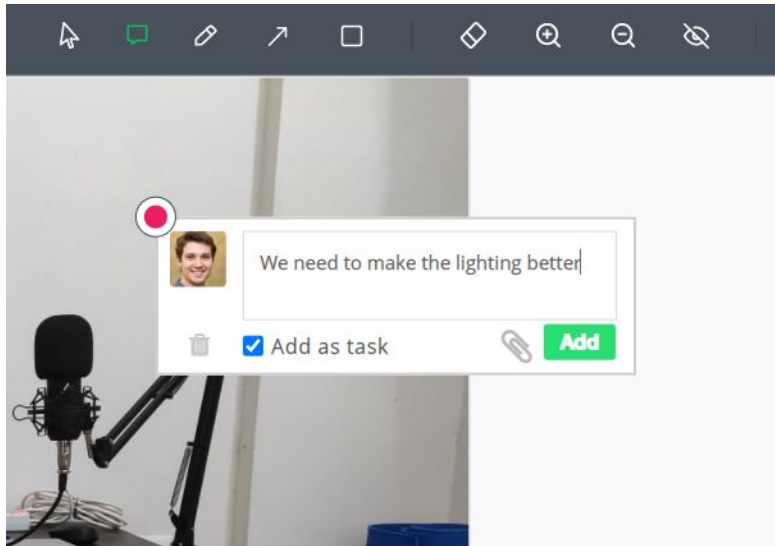
- You will come across a [page like below](#) which has a lot of components. Let us go ahead and see what each of them does.



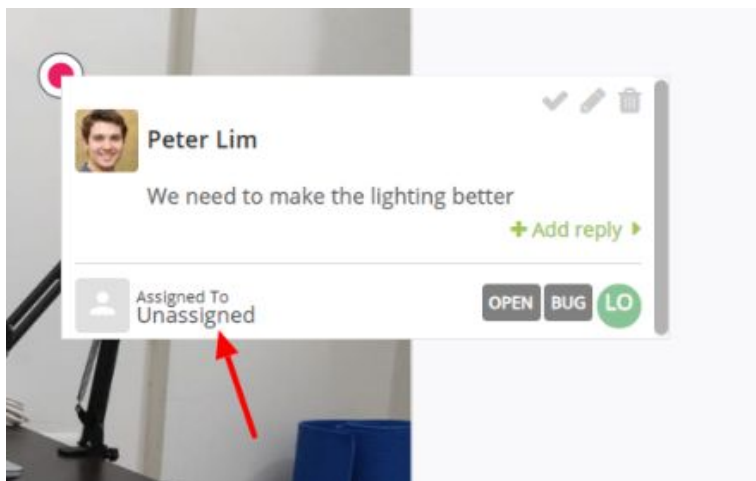
- On the top, you can see all of the [annotation tools](#) which are (from left): Select, Comment, Pencil, Arrow, Rectangle, Eraser, Zoom In, Zoom Out, Hide, 1:1 view, Fullscreen, Review Summary. Go ahead and try each one out to see what each one does.



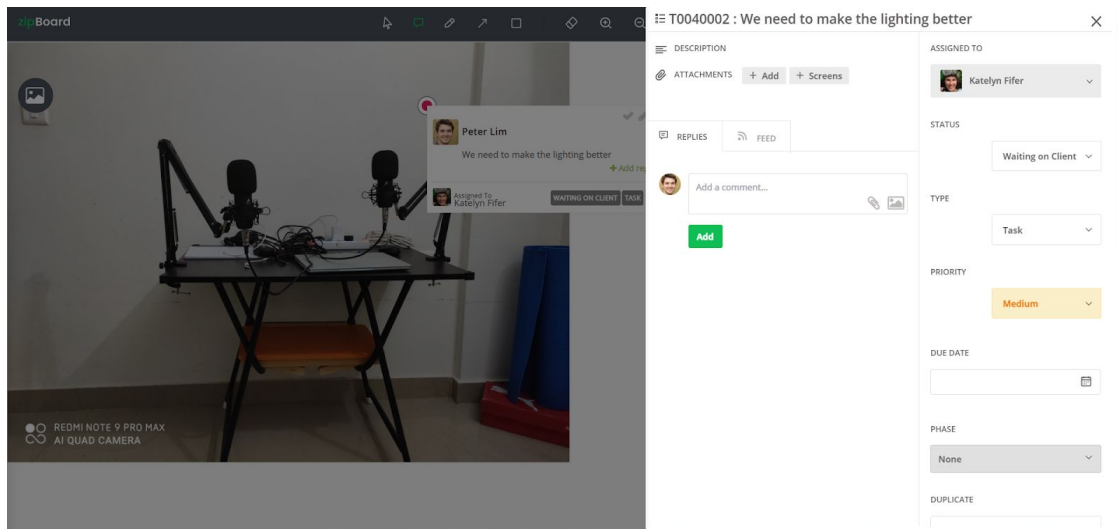
- Let us use the tool “Comment”, to give sample feedback and create a task. We can simply give our feedback here, and/or attach a relevant file, and/or [create a task](#). To create a task, check the box near “Add as task” and then click on “Add”



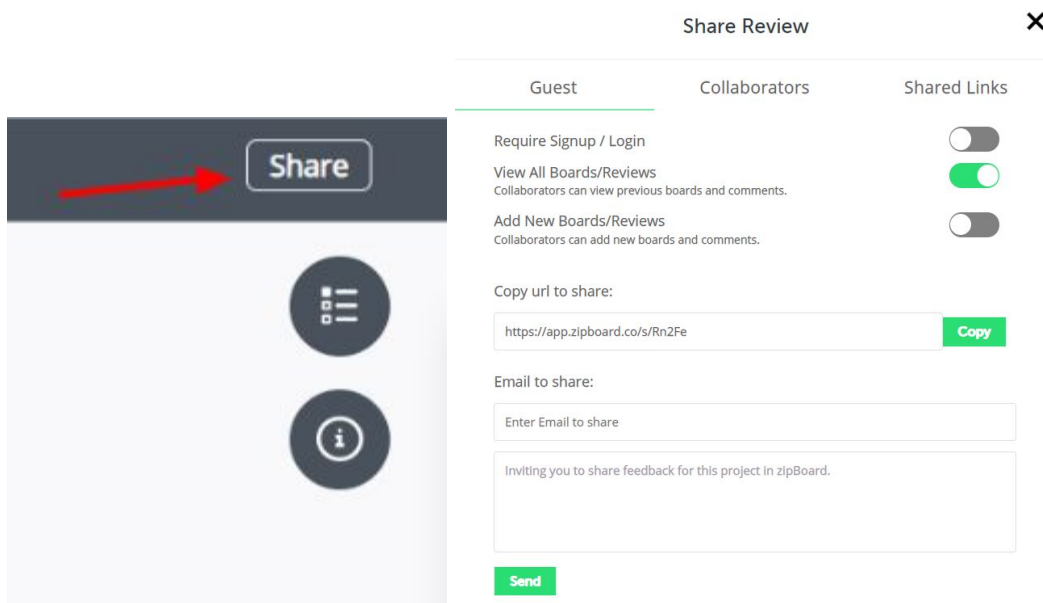
- As soon as you click on “Add” you will see a message like this, where you can assign the task to a particular team member, set priority for it, the type of task and it’s status. To edit the task’s details, click on [“Assigned To”](#).



- A pane will pop in from the right side of the screen, where you can [edit the details](#) of the task. Go ahead and explore it.

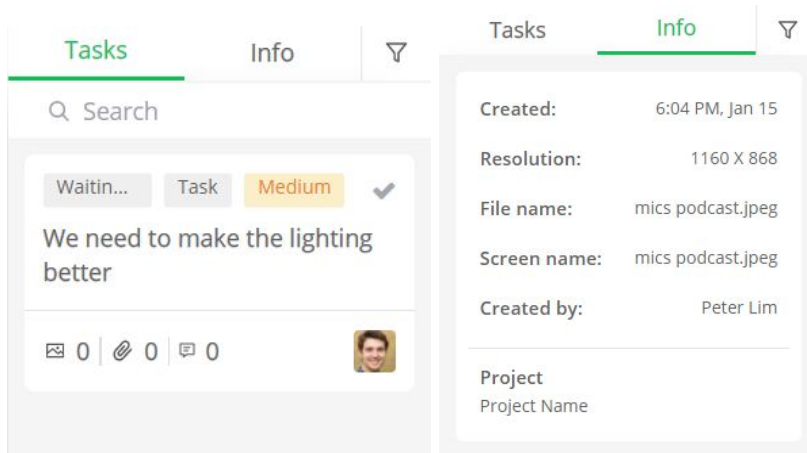


- “Share”, present in the top right corner, lets you share that particular review/screen with clients and/or collaborators.

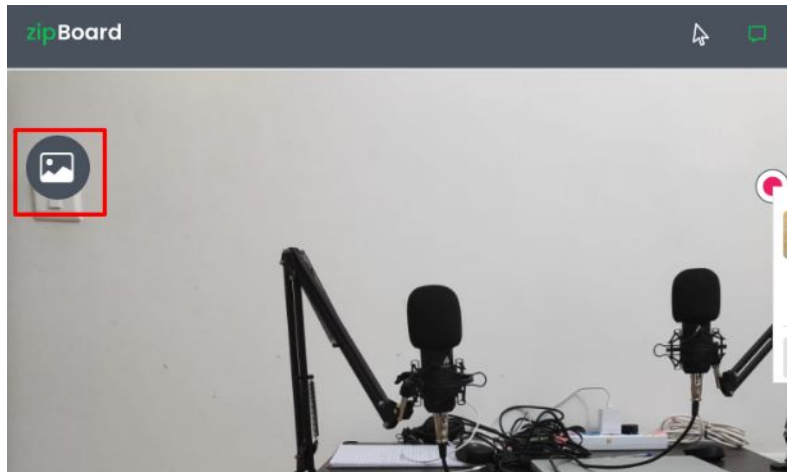


- The two buttons below it are “Tasks” and “Info”. “Tasks” shows all of the tasks created on this file and “Info” provides you with an overall summary. Go ahead and have a look around. You can use the funnel icon on the extreme right to filter through the tasks if you

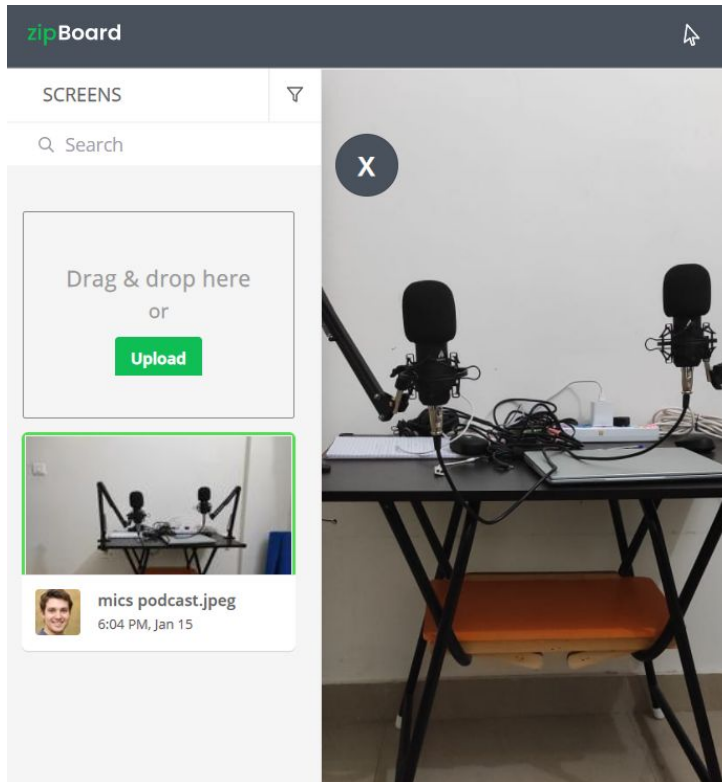
are looking for something particular.



- On the left side, you will find the “[Screens](#)” button. This feature allows you to instantly upload another piece of content and review it immediately.



- You can also filter through the Screens, or search for something specific.

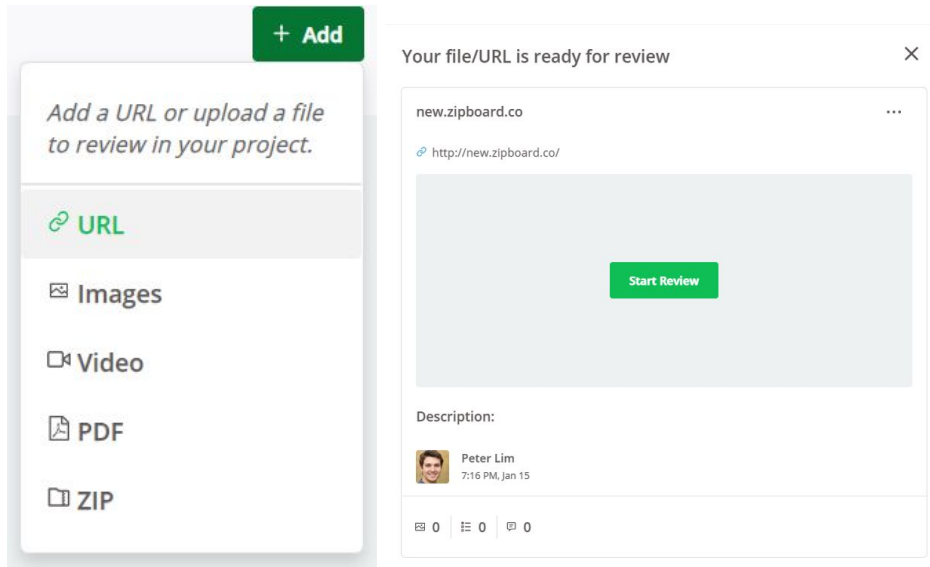


How to review a website? (example 2)

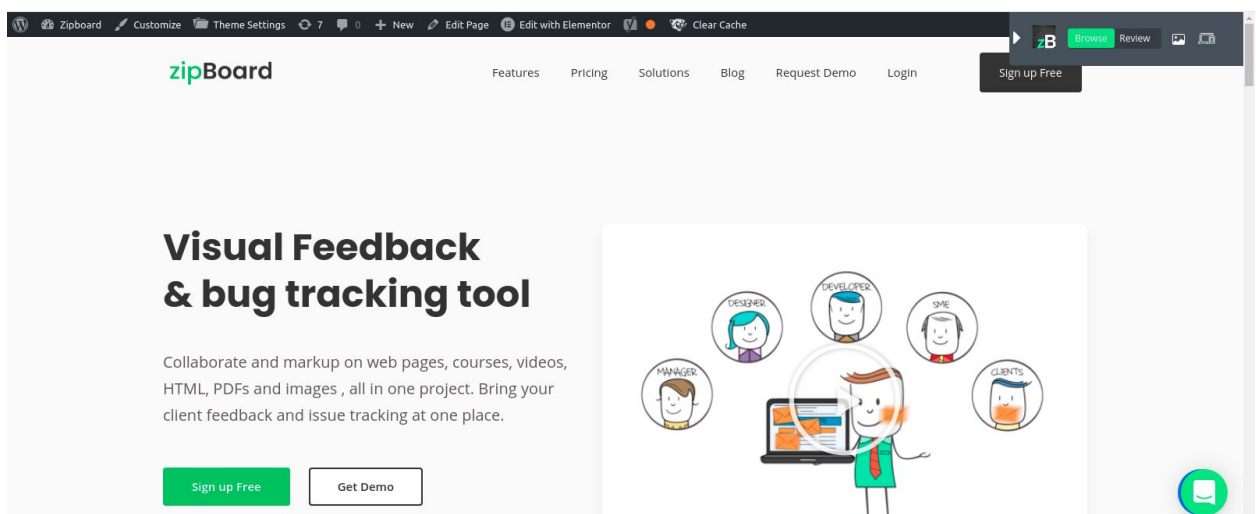
In this example, we will learn how we can [review a product that is hosted on a website](#) from its URL.

- To get started, let us add the URL. For example, we have added zipBoard's homepage. Just type in the address, no need for "HTTP://" stuff, fill in the relevant details, and click on

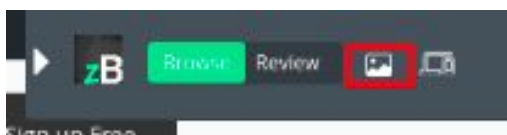
“Add”. Then click on “Start Review”.



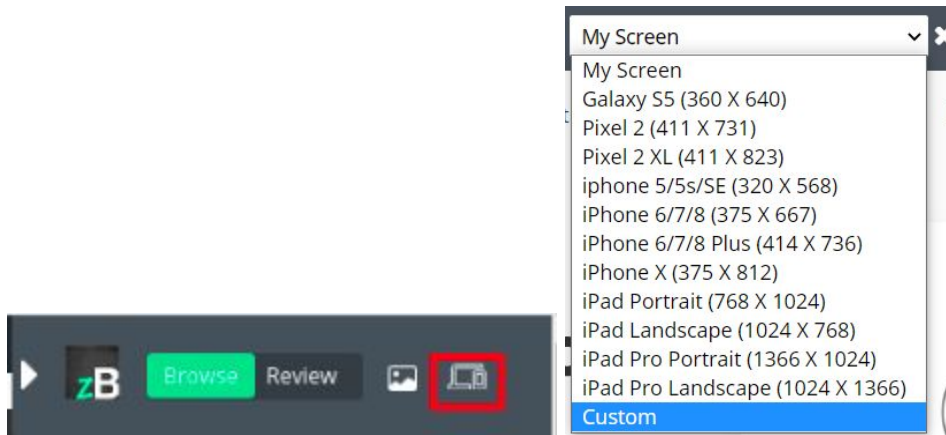
- You will be redirected to a new page where you will view the particular web page in “Browse” mode. This mode allows you to have a look around the page without making any comments or giving any reviews. You can minimize the extension in the top right corner by using the “arrow”. Let us explore the features here.



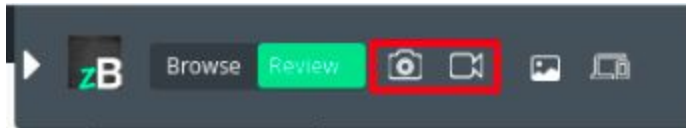
- “Screens” will take you to the review summary page where you will be able to view all the past reviews of that particular file provided by all of the collaborators and external reviewers.



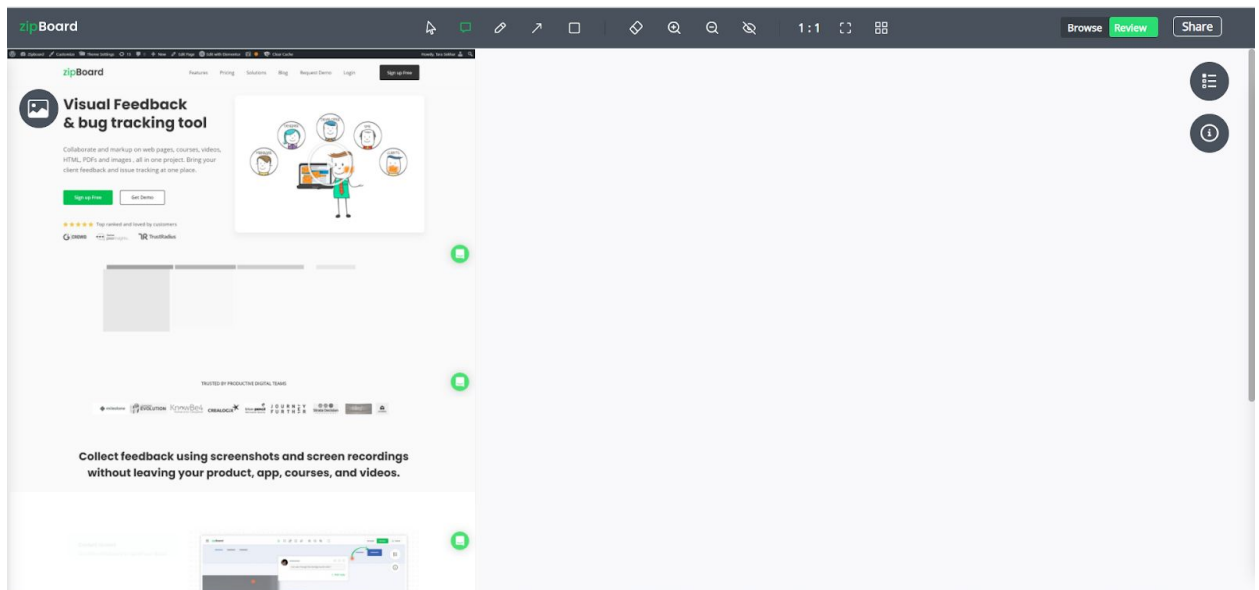
- The last icon, “Device Mode” helps you view the particular page in a specified resolution that is perfect for your project. We have added a few options for you, and you can always create a custom resolution tailored for your project.



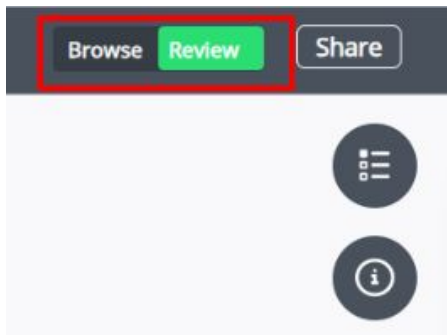
- When you switch to the “Review” mode, you will be able to see two more icons. “Screenshot” and “Video”. By using “Screenshot” you can capture a portion of the web project or the entire page. “Video” lets you record the screen along with your mic and camera while giving detailed review and feedback.



- For the sake of this example, let us go ahead and capture the [full screenshot](#) of the website and review it. You will view a screen similar to the one below. You can give your comments and feedback by using the annotation tools. (See the previous example)

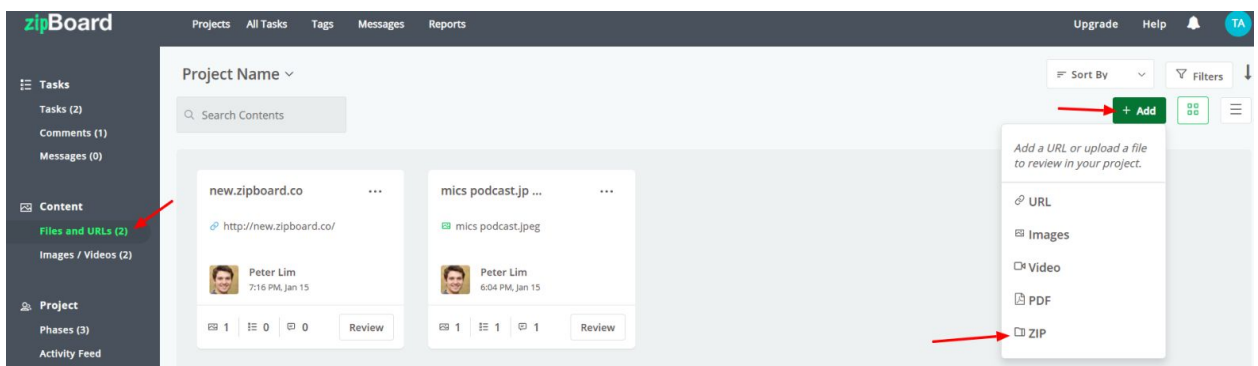


- You again can toggle between “Browse” and “Review” easily by using the options available at the top, if you desire to have a look once again.

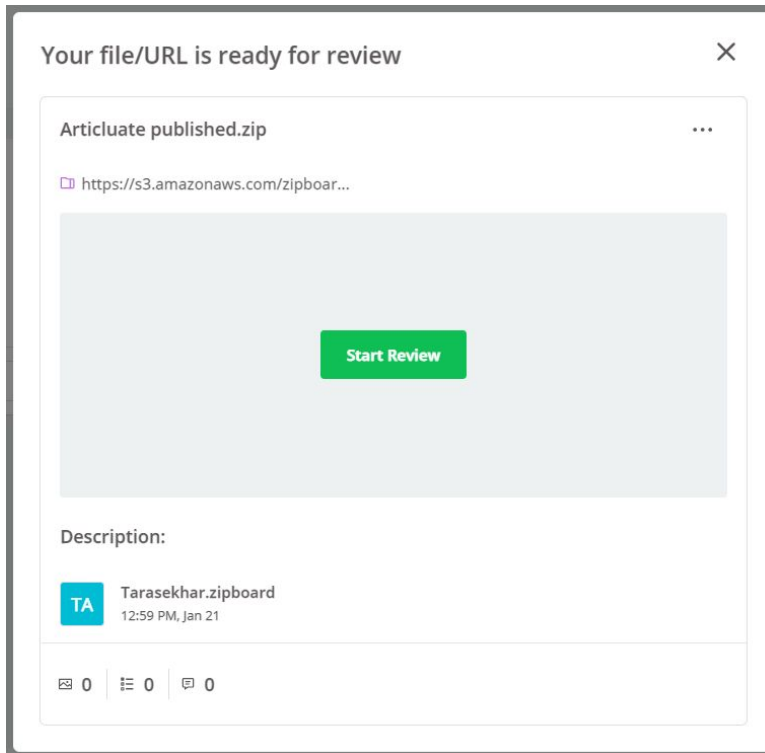


How to review an eLearning document? (example 3)

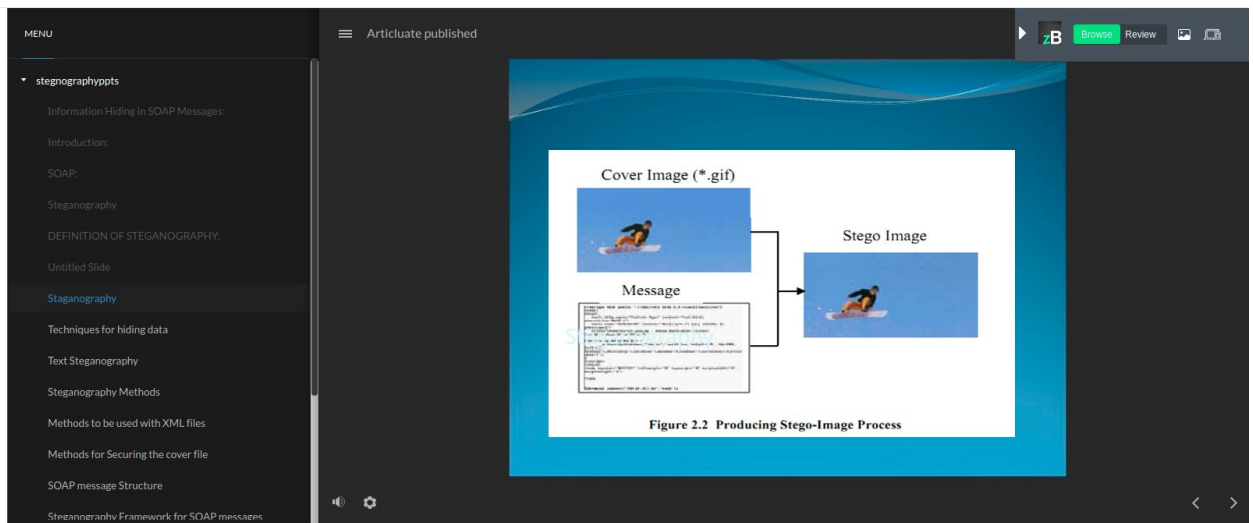
- Go to “Files and URLs” and click on “Add”. Then choose “ZIP” and upload the file you are working on.



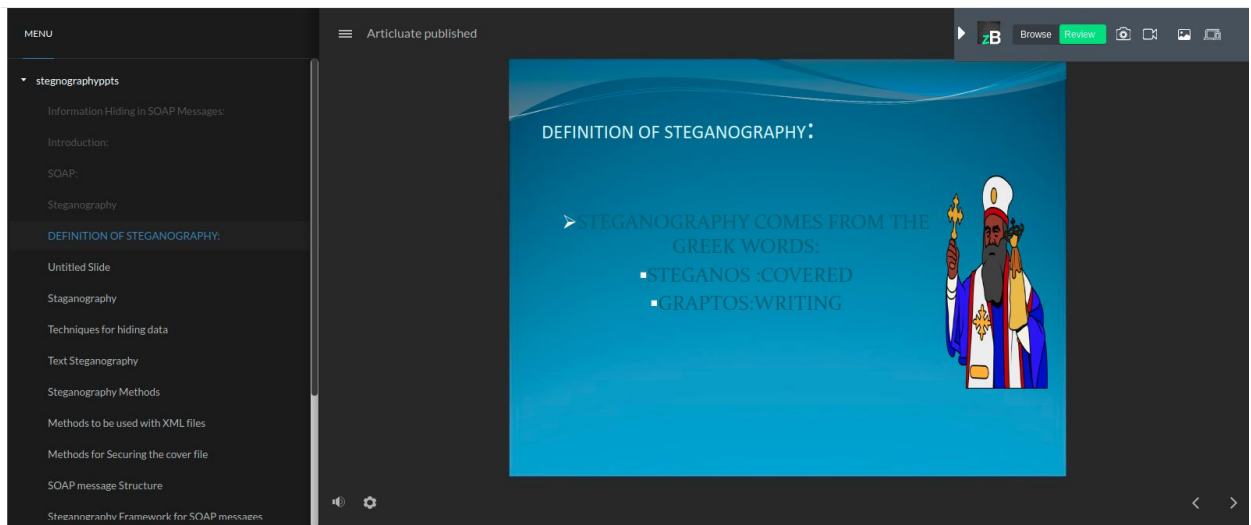
- After your content has been uploaded, click on “Start Review”.



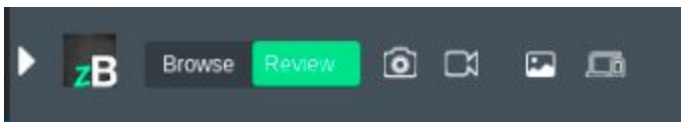
- You will be directed to a new tab where you can view your eLearning course file in “Browse” mode.



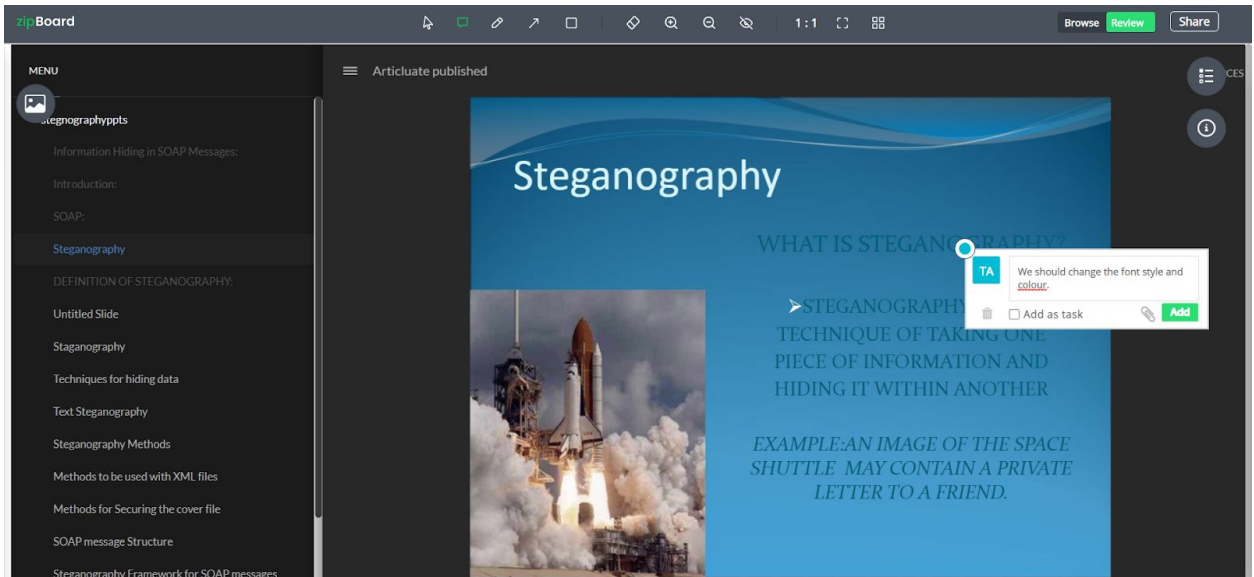
- After navigating to the slide on which you want to give review, you can switch to “Review” mode.



- By using the buttons on the top right corner, you can take screenshots, record your screen along with your mic and camera, view the existing screens for this particular file or view your course in different resolutions. Let us take a screenshot and review a part of our eLearning course.

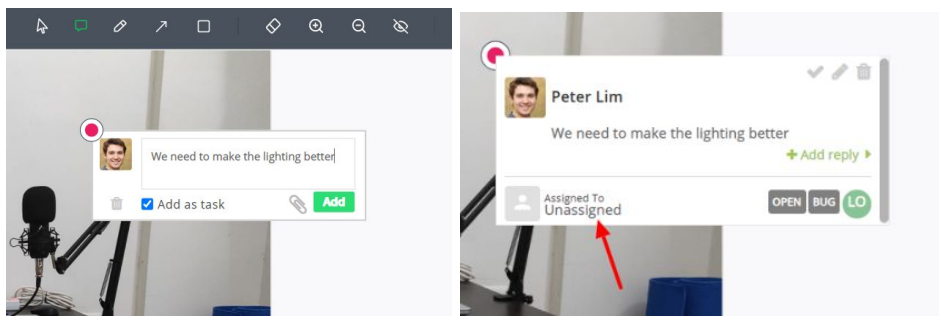


- After you take a screenshot, you will be redirected to a new page in the same tab where you will be able to annotate and give your [feedback](#) and create tasks. (see example 1 and 2)

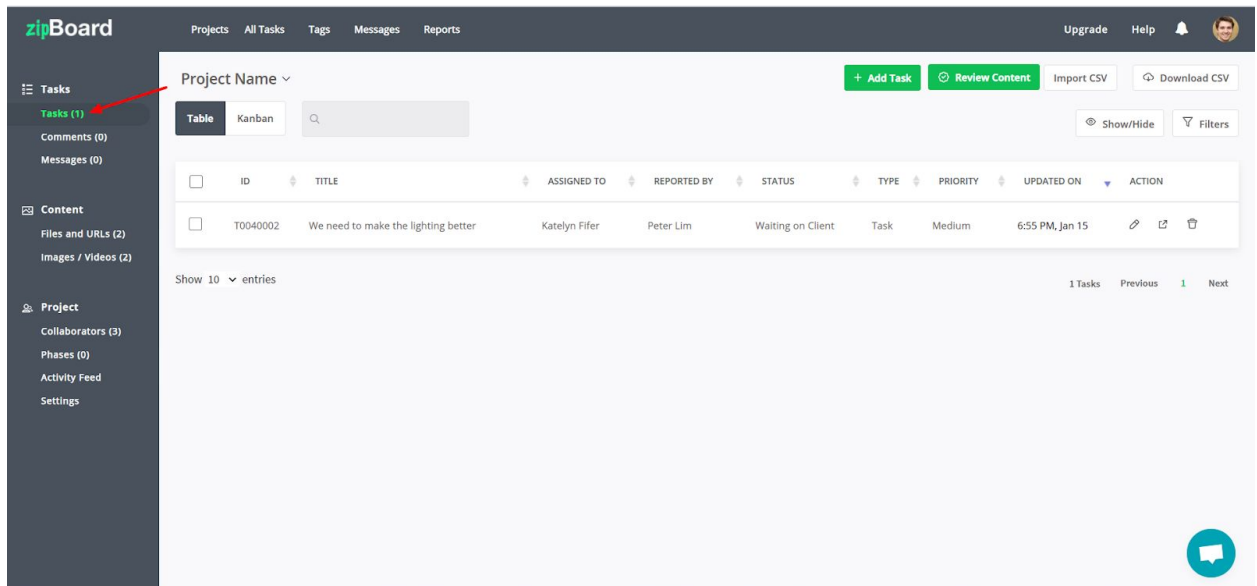


How to create and manage tasks?

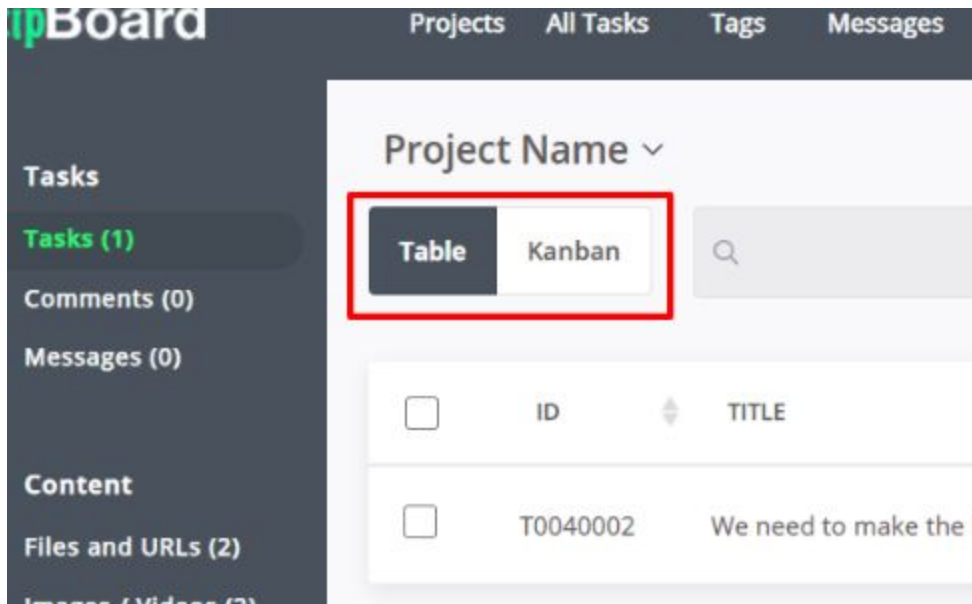
- You can [create and manage tasks](#) while reviewing files/URLs. Preferably, you can give comments here related to the visual content.(view example 1 for more details)



- You can also add and manage tasks from “Tasks” from the left project menu.

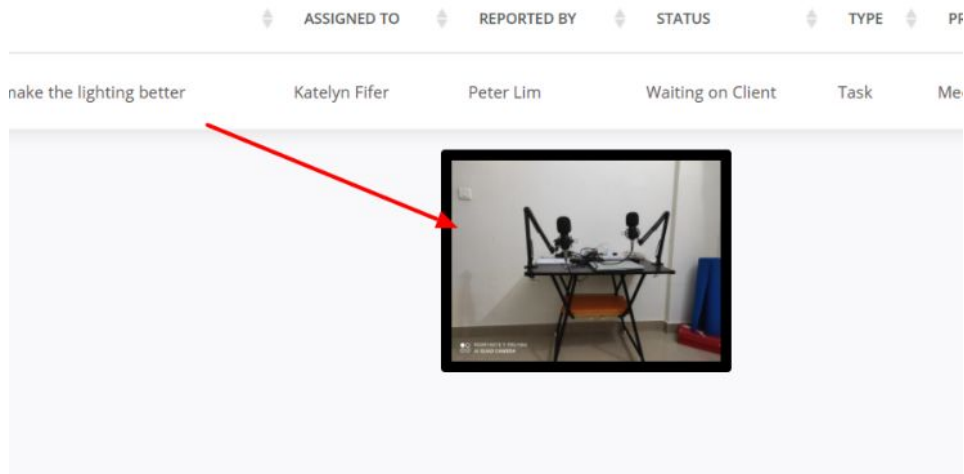


- You can toggle here between “Table” and “[Kanban](#)” view. Let's talk about “Table” first.

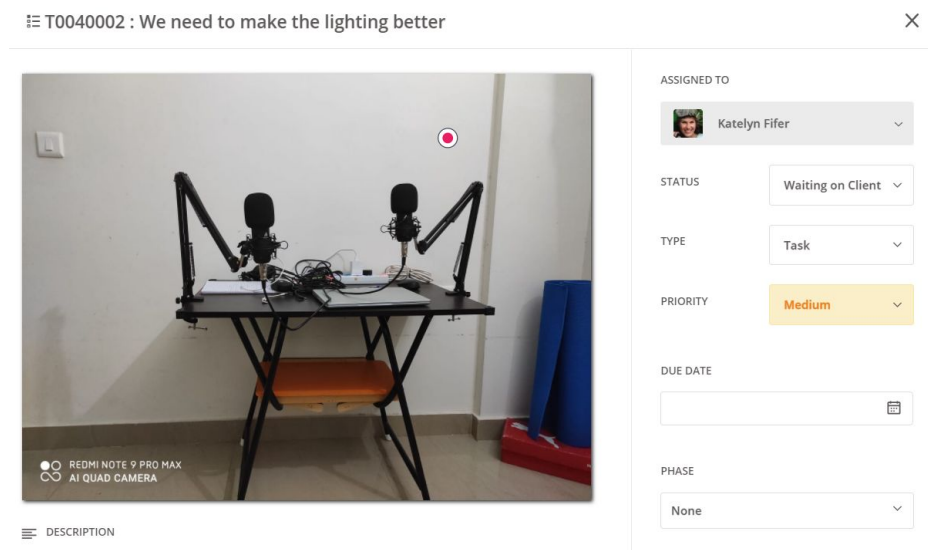


- This mode shows all of the tasks related to a project in a detailed-list view. You can sort your tasks in increasing/decreasing order by any of the parameters provided. By hovering

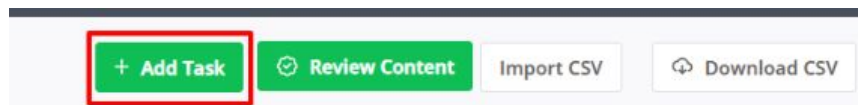
over a particular task, you can see a quick view related to the concerned content.



- Click on a task to edit its components. (Also, see example 1)



- Now, let's focus our attention on the buttons available in the top right corner. “Add Task” lets you create a new task and [edit](#) all details in it. You can tag that task to any of the uploaded content or simply let it be. We have an example below.



- Fill in the task description and click on “Add”.

Task Title

Write a description of the picture in 100 words.

Add

- You can then fill in all the relevant details and can choose whether or not to link the task to a file. If you want to, use the following buttons.

T0040003 : Write a description of the picture in 100 words.

DESCRIPTION

B I U S

Normal

Message body...

ATTACHMENTS

+ Add

+ Screens

ASSIGNED TO

Katelyn Fifer

STATUS

Open

TYPE

Feature

PRIORITY

Low

DUE DATE

- Continuing further, “Review Content” will open a pop-up that shows all the content you have uploaded for that project.

+ Add Task

Review Content

Import CSV

Download CSV

- In that popup, you can [add more content](#), and also toggle between grid view and list view for the content. By clicking on “Review” you will be redirected to a new page where you will be reviewing the content. (see example 1 and 2 to know how to review content)

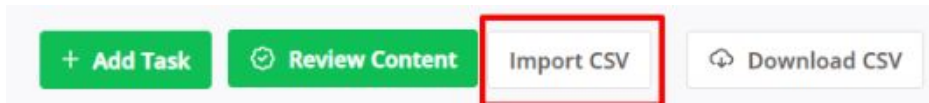
Review Content

Search Contents

+ Add


ADDED BY	URL/FILE NAME	FILE TYPE		ACTIONS
	http://new.zipboard.co/	url	1 0 0	Review
	mics podcast.jpeg	prototypelimages	1 1 0	Review

- “[Import CSV](#)” will let you import a task sheet that has been created earlier.



- To obtain our spreadsheet template, click ok “Import CSV” and follow the link.

Choose your files to import



Drag and drop, or [browse](#) your file

Excel, CSV files are accepted

📘 Need help formatting your file?

Download our [spreadsheet template](#) and follow the formatting for the best result

You can upload any Excel or CSV files with any set of columns as long as it has 1 record per row.

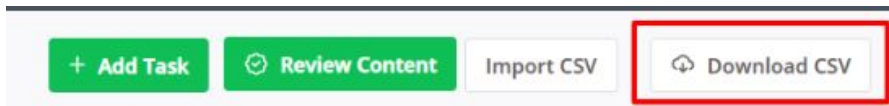
See below an example of some of the columns and their expected input that you can set in your spreadsheet:

Column	Expected input
*Title	alphanumeric, 255-character limit
Description	alphanumeric
Tags	alphanumeric, comma separated
EstimatedTime	hh:mm
LoggedTime	hh:mm

Clear Data

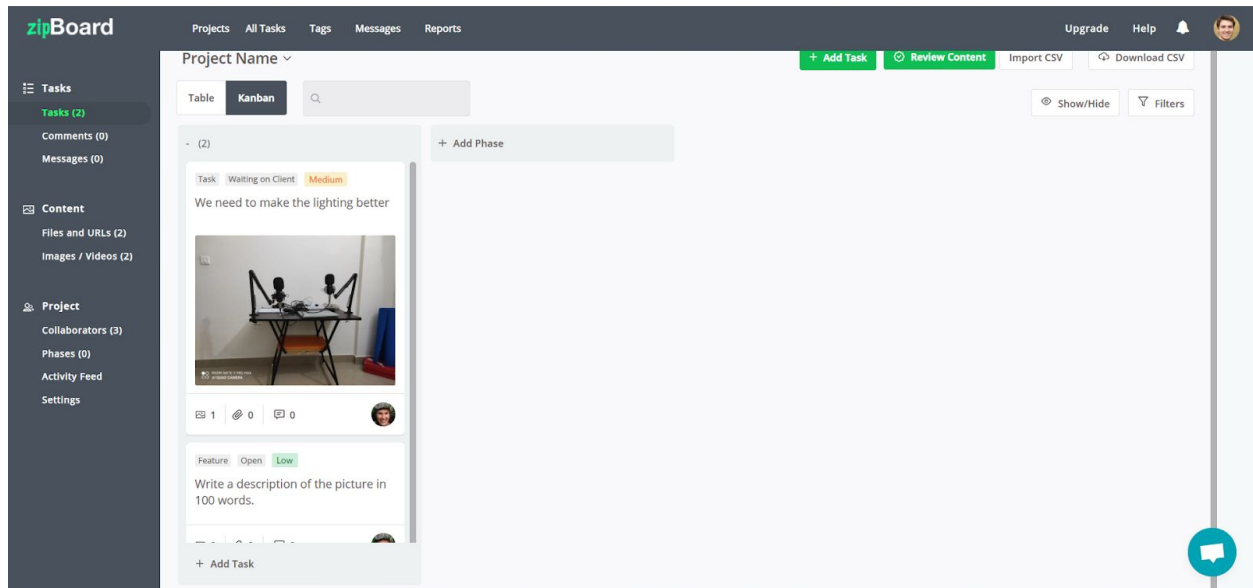
Continue

- “[Download CSV](#)” exports the current task table to your computer. You can always do it for personal referencing, in-depth analysis, or internal records.



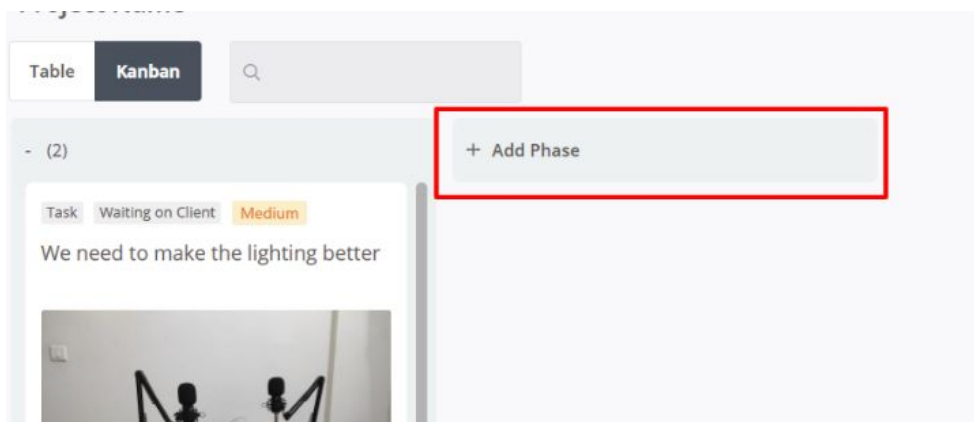
What is Kanban Board?

[Kanban Board](#) is a feature that allows you and your team to manage tasks visually by our virtual notice board view. Let us take a look at how Kanban Board can be best utilized.



How to use the Kanban Board effectively?

- On the top, you can [add phases](#) to the tasks of your project. Which will inform your entire team on what is currently happening in a glimpse. Let us create three phases of action in this project.

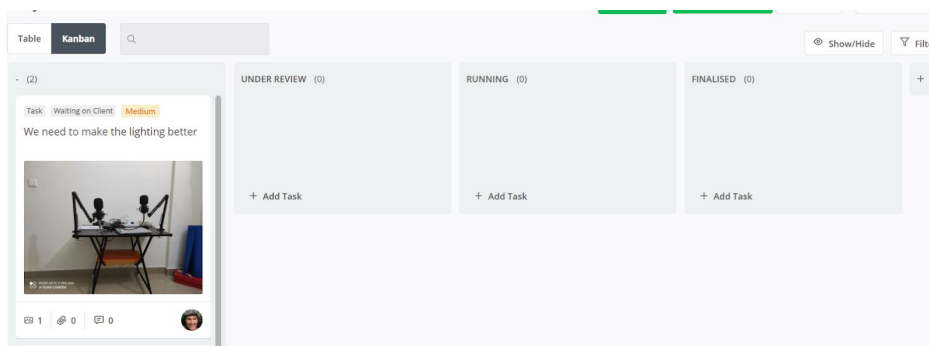


- After clicking on “[Add Phrases](#)” you will view a pop-up, where you can add the details regarding that phase. Click on “Add” to create a phase.

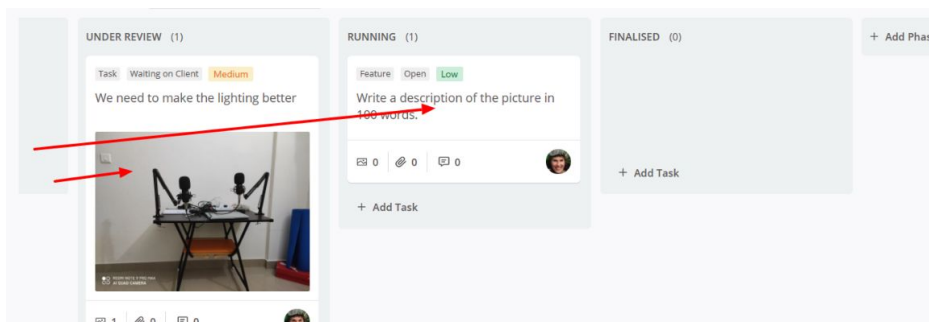
The 'Add Phase' pop-up form contains the following fields and options:

- Name:** A text input field containing 'Under Review'.
- Description:** A text area containing 'tasks which are pending approval from upper management'.
- Status:** A dropdown menu with 'Not Started' selected. The dropdown list shows options: 'Select', 'Active', 'On Hold', 'Completed', and 'Not Started' (highlighted in blue).
- Completion Date:** A date picker field.
- Buttons:** 'Cancel' and 'Add' (green).

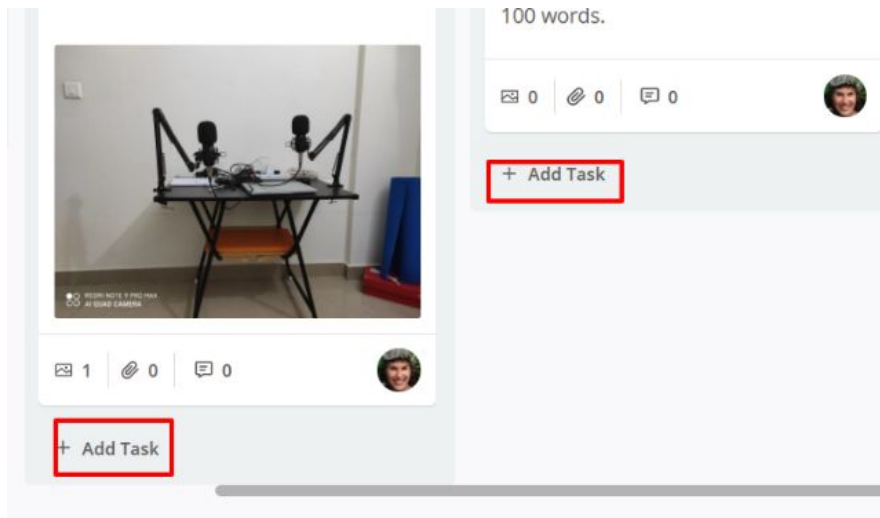
- We have created three phases in this project: Under Review, Running, and Finalised. You can add as [many phrases](#) as you want.



- You can drag and drop tasks from the uncategorized section across to any phase you have created. You can also move tasks like that within the phases.



- Also, in the Kanban Board, you can add new tasks directly in the phases. (also see “How to create and manage tasks?”)



Thank You

Thank you for trusting zipBoard.

We are excited to learn how you plan to use it and help you in any way we can to help you do your best work.

We at zipBoard consistently work to improve our product and your feedback is the first and most important step to it.

Write to us: support@zipboard.co

For any further help on this guide, please check out our online [help documents](#).



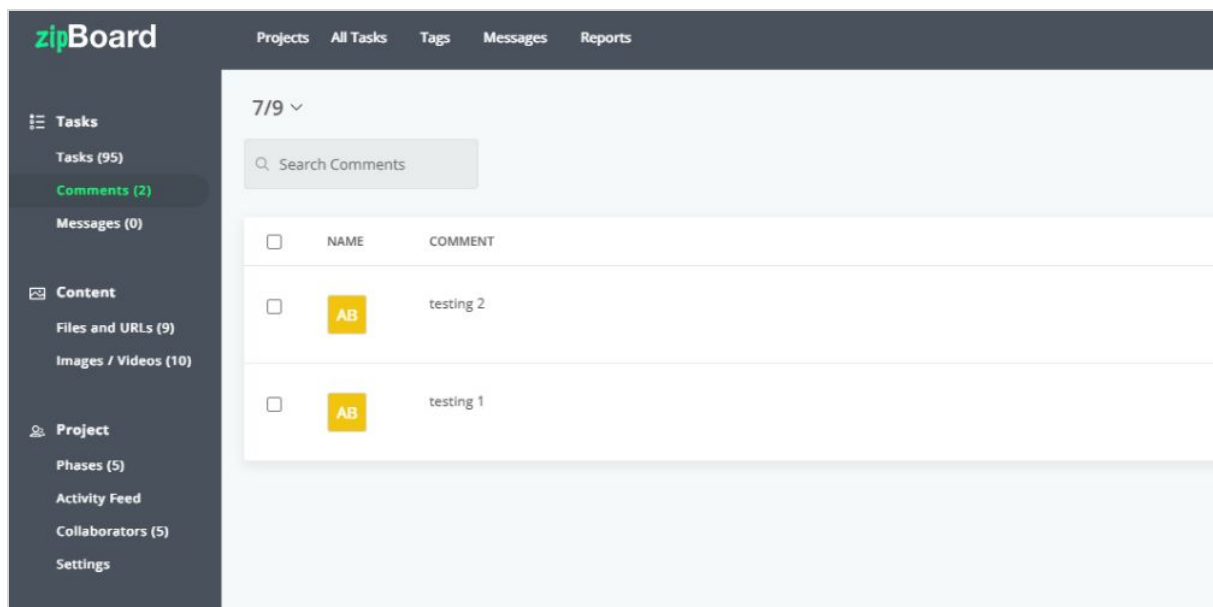
Appendix 1: Components of the Menu Bars

Left Menu Bar

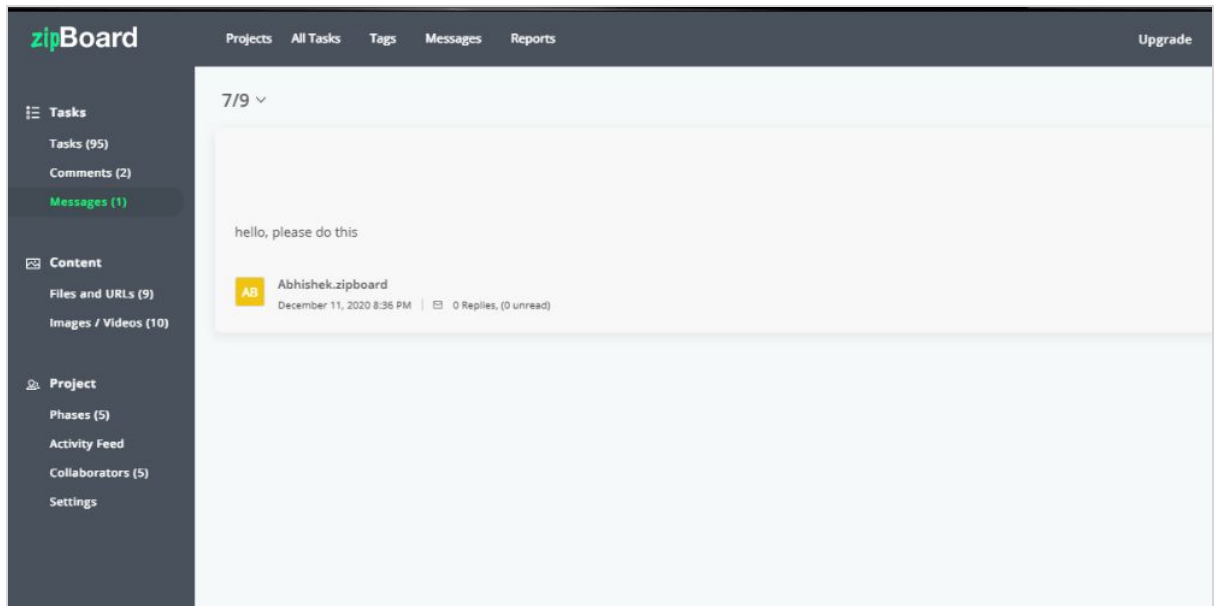
The three sections of the left menu bar will help you to use different features of zipBoard in a particular project.

Tasks

- A. **Tasks:** Click on the tasks subsection to get an overview of all the tasks along with their details within the project in two formats namely table style view(a list of all the tasks) and kanban style view (a list along with the featured image of the task file). Clicking on any task from the list gives you an overview of all the details of the specific task with options to add a description, reply to comments, check the activity feed of the task, and most importantly assign a task to another team member within the project with priority, type, and completion date options with the flexibility to add more watchers if required. You can also add a new task, review existing content files, or add new files, and even import or download CSV into and to your local drive respectively.
- B. **Comments:** Click on the comments subsection to get an overview of all the comments by the team within a specific project with the option of [adding new feedbacks](#).



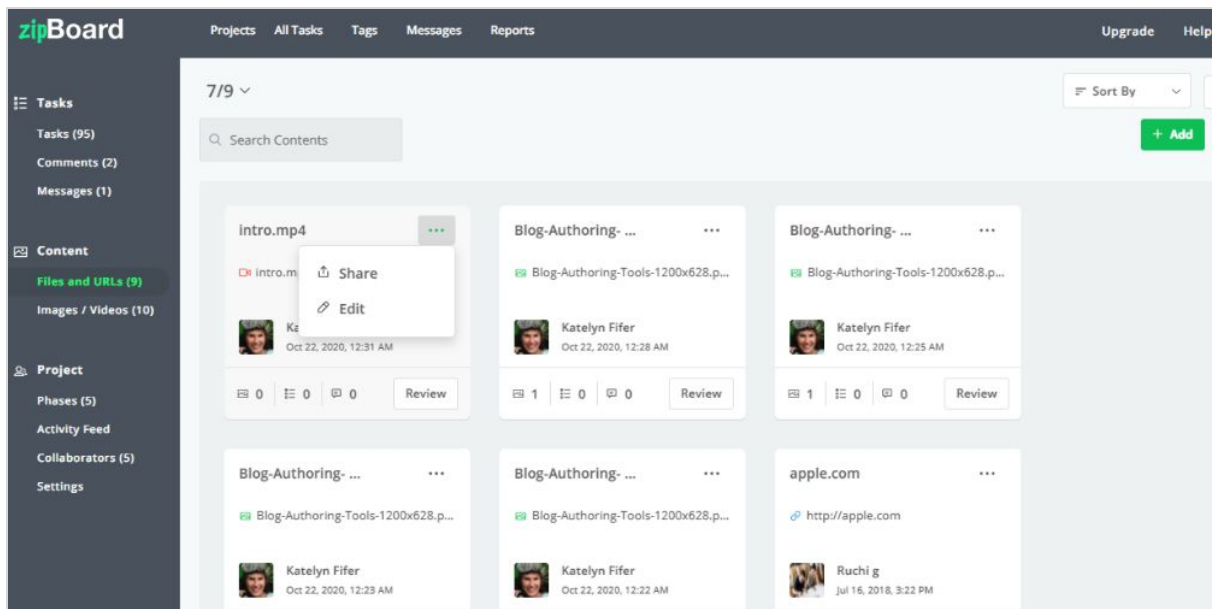
- C. **Messages:** Click on the messages subsection to get an overview of all the [messages](#) by the team for the project you created.



Content

Click on the content section on the left menu bar to get an overview of all the multimedia files within the project and start reviewing all the files separately with options to share links for guest collaboration (without login) or existing members for collaboration.

You can also [add new multimedia](#) files if needed.

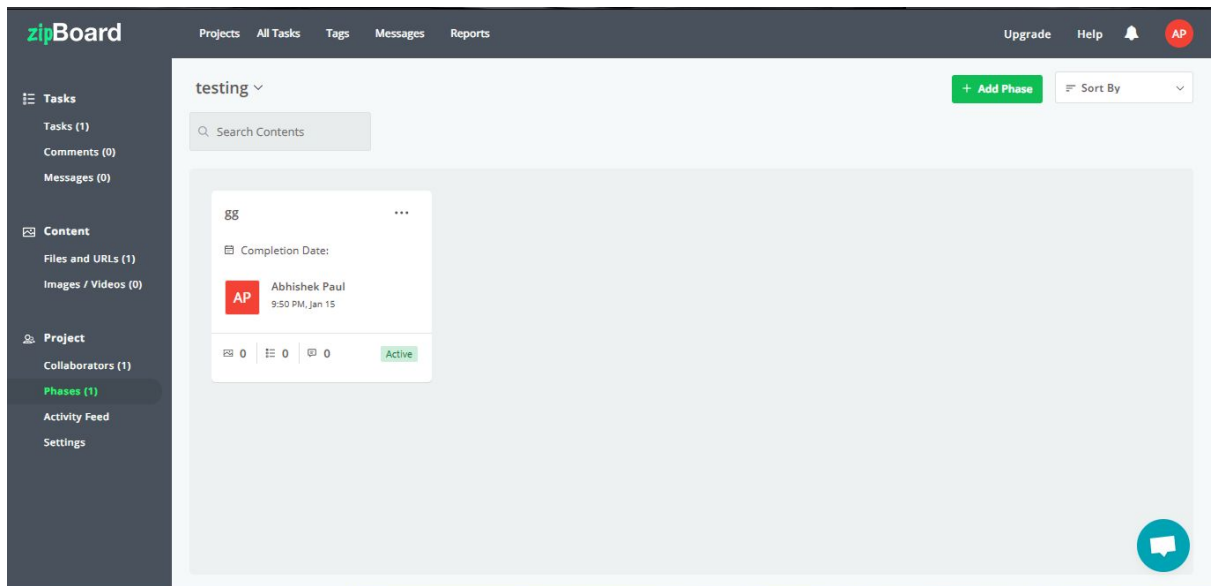


Clicking the share button also gives an overview of all the file shares with additional details such as permissions assigned and actions are taken on the shared file.

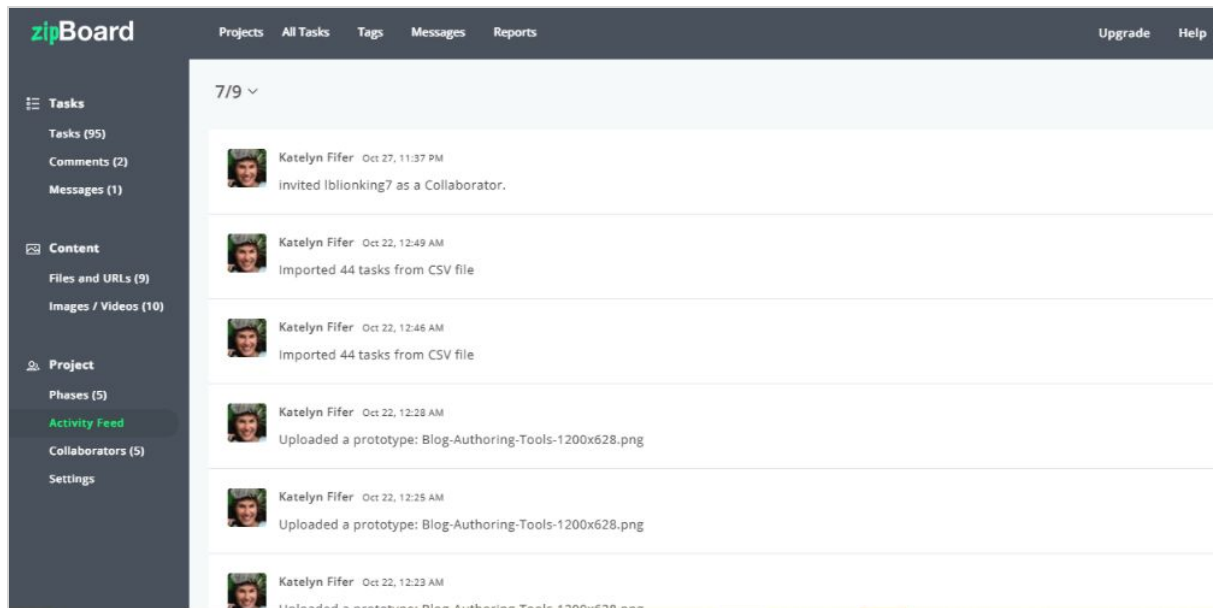
Project

- A. **Phases-** Click on the phases' subsection to get a list of all the [phases](#) for the project. Clicking on any phase will give a detailed view of the completion date and [current status](#) of the project phase and a few other options like the files/links view button, add more tasks and comments for the specific phase of the project. As an admin, you can also list a

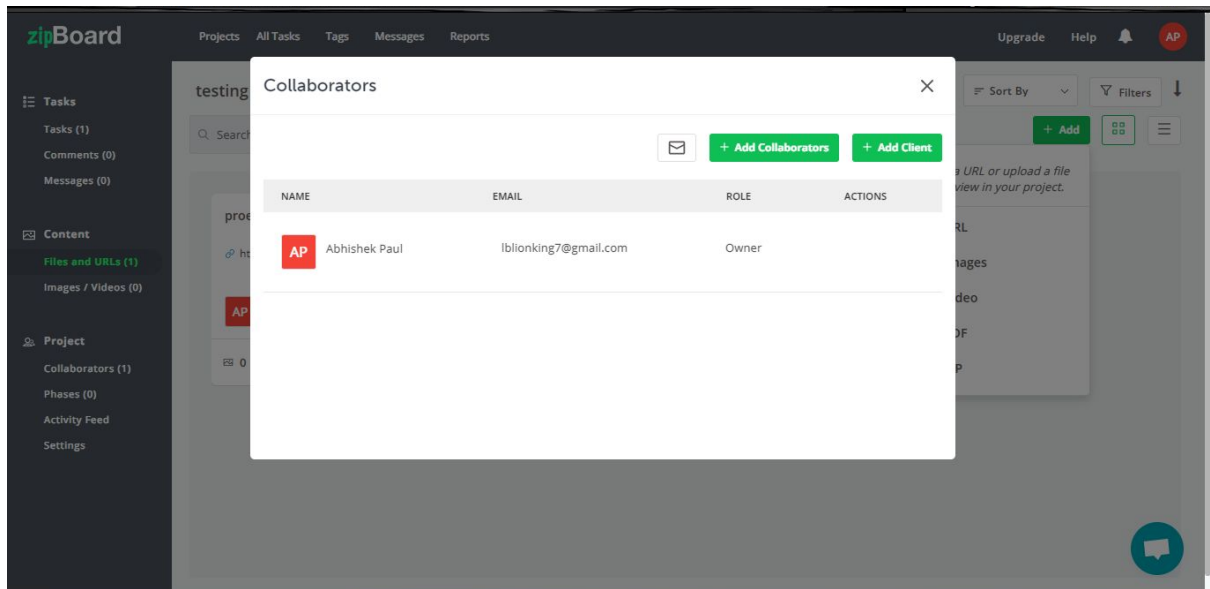
[new phase.](#)



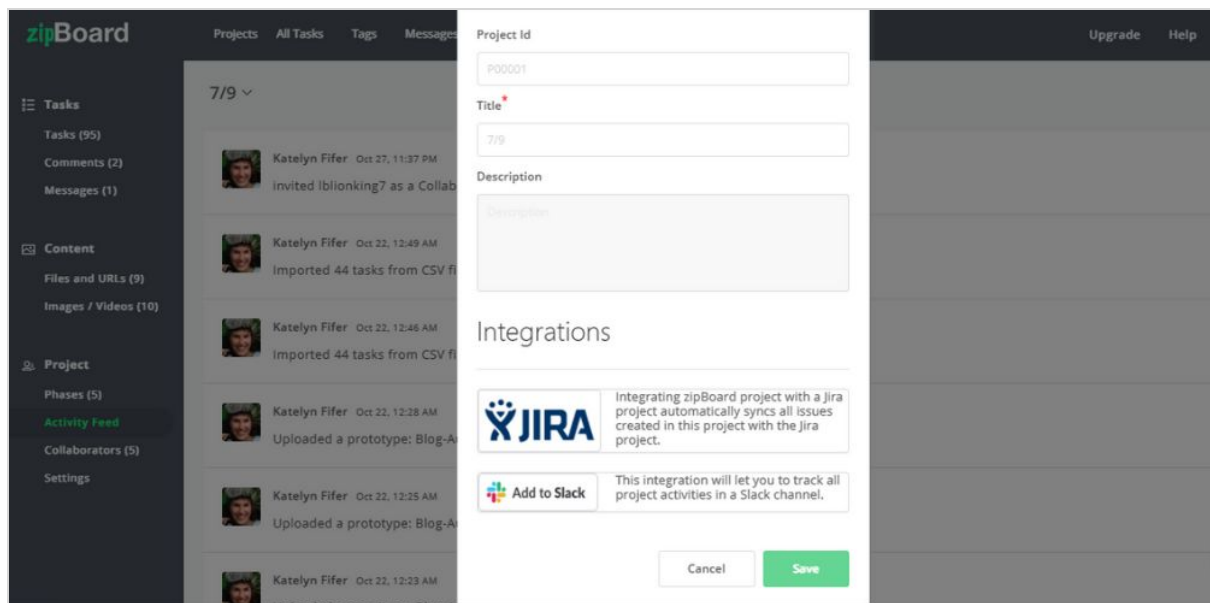
- B. **Activity feed**- Clicking on the activity feed subsection on the left menu bar gives a detailed list of all the activities undertaken within the project.



- C. **Collaborators**- Clicking on the collaborator's subsection gives a glimpse of all the collaborators within the project with options to [add new collaborators and clients](#).



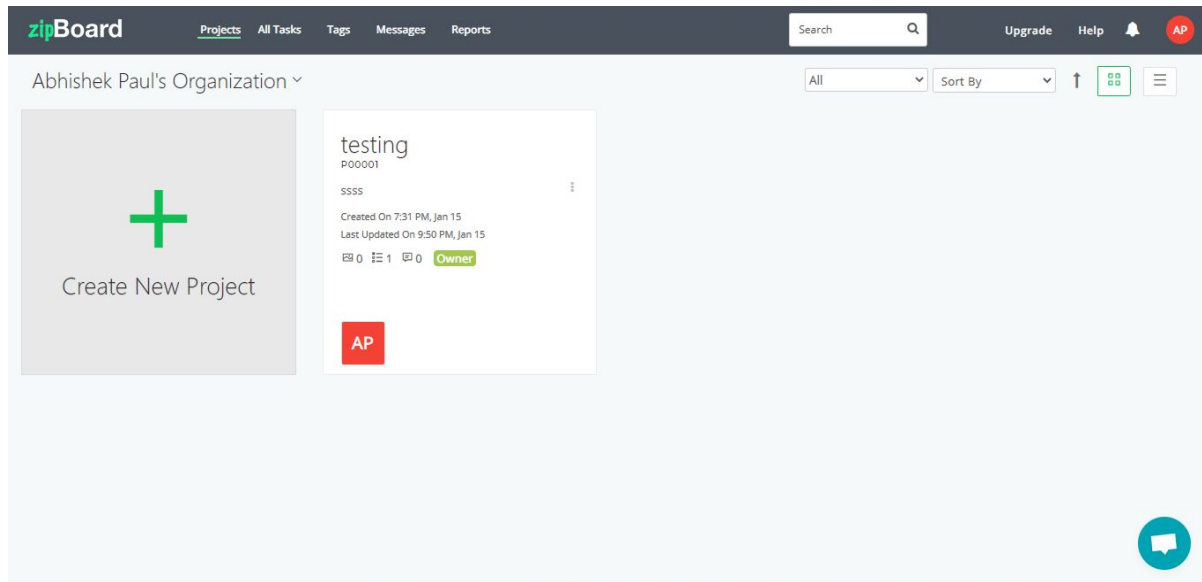
- D. **Settings**- Clicking on the settings subsection gives a detailed overview of the project that includes project id, title, description, and integrations set up by the owner of the project with the flexibility to add additional integrations like [JIRA](#) and [Slack](#).



Top Menu Bar

Projects

Clicking on the projects section on the top menu bar gives an overview of all your existing projects(if any) and the “[Create New Project](#)” widget option.



All Tasks

Clicking on the [all tasks](#) section gives a detailed list of all the tasks within the project with the option to filter the list according to the organization, project, assignment to collaborators, reporter, status, priority, and type, and an additional button of reset for convenience which are [downloadable](#). Clicking on a specific task within a project gives details of the task such as topic, description, attachments, and replies within the task and also additional options such as add more files or screenshots for the task, comment to the replies with texts, and multimedia attachments and also view the activity feed of the task.

Apart from this, the collaborator also gets a detailed list of the collaborator/s for the task with their type, status, priority, due date, phase, tags, watchers, reporter, and reporting information.

The all tasks section also has a sub-section called feedback which when clicked gives a detailed

list of all the feedback for tasks within the project.

zipBoard

Projects

All Tasks

Tags

Messages

Reports

Upgrade

Help

Tasks

Feedback

Download

Search

Organization

Project

Assigned To (1)

Reported By

Status

Priority

Type

Reset

Hide/Show Columns

<input type="checkbox"/>	ID	TITLE	PROJECT NAME	ASSIGNED TO	REPORTED BY	STATUS	TYPE	PRIORITY	UPDATED ON	ACTION
<input type="checkbox"/>	T0280051	zipBoard : security whitepaper	zipBoard Marketing	Abhishek.zipboard	Bhavya Aggarwal	Open	Task	High	Dec 08, 2020	edit
<input type="checkbox"/>	T0280046	Create zipBoard security page, and also a help question for security	zipBoard Marketing	Abhishek.zipboard	Bhavya Aggarwal	Open	Bug	High	Dec 08, 2020	edit
<input type="checkbox"/>	T0280049	Create an intro video for zipBoard. Look at the video here: https://www.youtube.com/watch?v=E28b9bFJSJw . For script, see description and for audio use googles text to speech	zipBoard Marketing	Abhishek.zipboard	Bhavya Aggarwal	Open	Bug	Low	Nov 18, 2020	edit

Show 50 entries

Previous

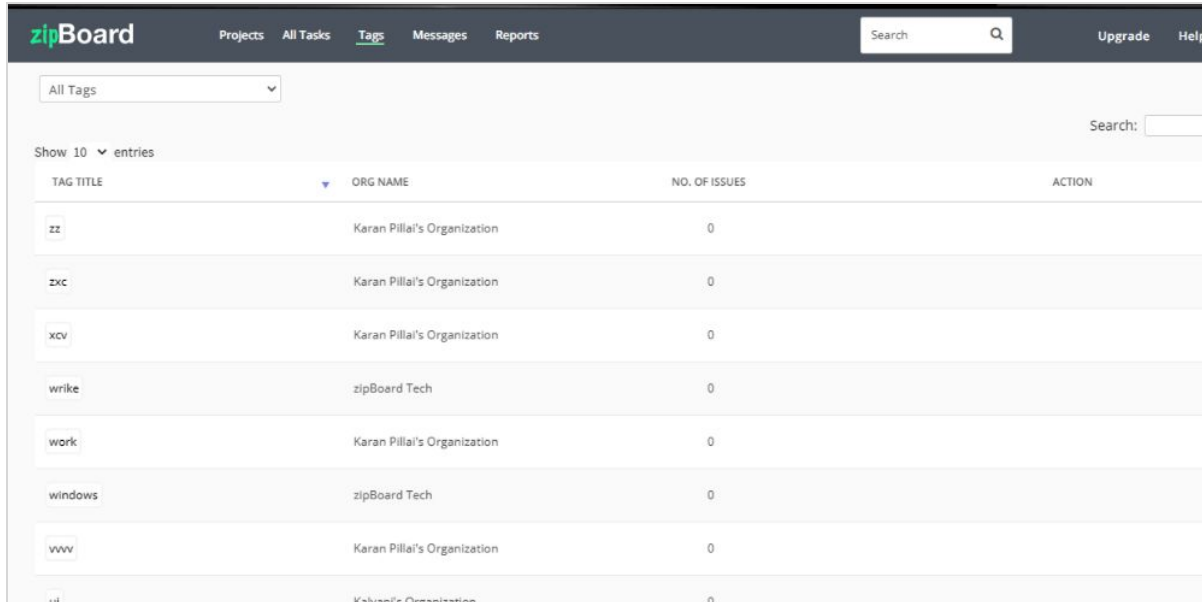
1

Next

Tags

Clicking the tags section on the top menu bar gives a list of all the tags with their respective organization name, number of issues, and action taken for the tags with an additional option to search as per relevance. Clicking on the [add tag](#) button on the top right corner of the tags section

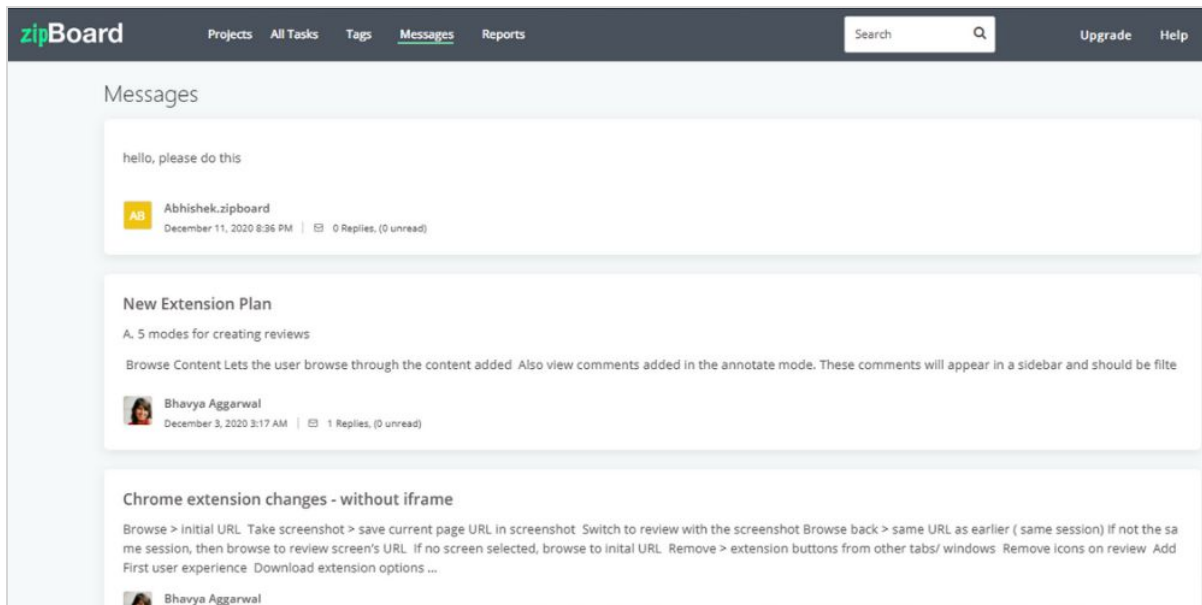
gives the option to add more tags for specific organizations if any.



TAG TITLE	ORG NAME	NO. OF ISSUES	ACTION
zz	Karan Pillai's Organization	0	
zxc	Karan Pillai's Organization	0	
xcv	Karan Pillai's Organization	0	
write	zipBoard Tech	0	
work	Karan Pillai's Organization	0	
windows	zipBoard Tech	0	
www	Karan Pillai's Organization	0	
ui	Kalvani's Organization	0	


Message

Clicking on the message section redirects to all [messages](#) page within the project and also additional features like replying to the messages with texts and multimedia files and composing new messages if any.



Messages


hello, please do this

 Abhishek.zipboard
December 11, 2020 8:36 PM | 0 Replies, (0 unread)

New Extension Plan


A. 5 modes for creating reviews

Browse Content Lets the user browse through the content added. Also view comments added in the annotate mode. These comments will appear in a sidebar and should be file

 Bhavya Aggarwal
December 3, 2020 3:17 AM | 1 Replies, (0 unread)

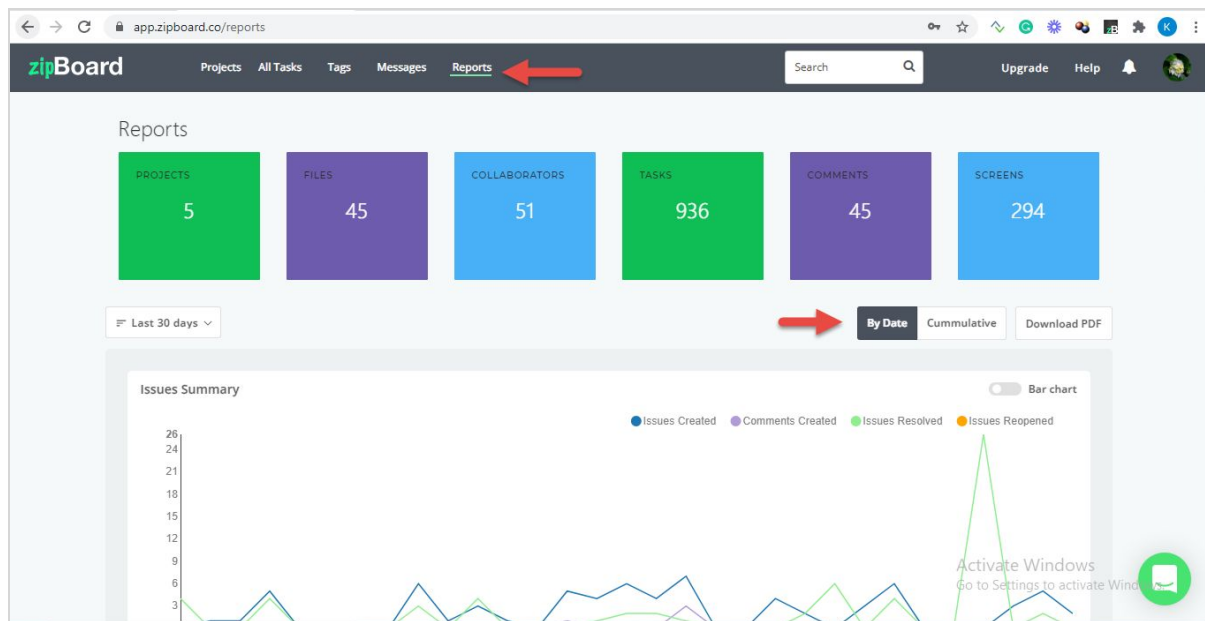
Chrome extension changes - without iframe

Browse > Initial URL. Take screenshot > save current page URL in screenshot. Switch to review with the screenshot. Browse back > same URL as earlier (same session) If not the same session, then browse to review screen's URL. If no screen selected, browse to initial URL. Remove > extension buttons from other tabs/ windows. Remove icons on review. Add First user experience. Download extension options ...

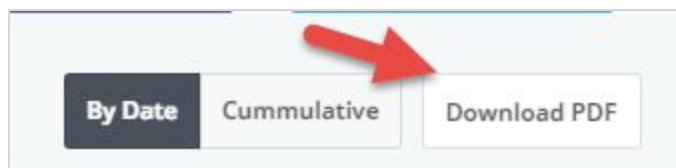
 Bhavya Aggarwal

Reports

Clicking the [reports](#) section(available for enterprise plan only) gives you access to information about Projects, Files, Tasks, Collaborators, comments, and screens and also can Issue summary by date and also cumulative.



You can also download reports in pdf format by clicking on "[Download PDF](#)"



There is also a **search bar**, **profile icon**, and **notification icon** on the top corner of the menu bar that prompts new notifications for the projects such as the assignment of tasks, mentions, and much more helping you stay updated on all the activities within the project/projects.

Appendix 2: Roles in zipBoard

We request you to go through the common terminologies and the context in which they were used.

- A. Owner/Admin:** Someone who owns an enterprise account and can add managers to an organization. If you are someone who has delivery responsibility for your organization and will be responsible for the upkeep of the organization account, then you are the owner.
- B. Manager:** Usually a project manager in an organization. The manager has permission to add, delete, and edit projects. The manager can also add more reviewers to existing projects.
- C. Collaborator:** Someone who collaborates with other team members on a project. Collaborator has the permission to add new files for reviewing to an existing project.
- D. Client:** Someone who has access to all the external feedback for a project. Clients can approve the feedback comments and convert them into trackable tasks.
- E. Guest Collaborator:** Anyone who collaborates on your zipBoard project using the login required share link is referred to as a guest collaborator. Guest collaborators when invited to collaborate, need to sign up and then they can review the file they are invited to collaborate on.
- F. Guest Reviewer:** Anyone who reviews your zipBoard project using the no login required share link is referred to as a guest reviewer. Guest reviewers when invited to review, need not sign up to zipBoard. They can directly review the files they are invited to review.