


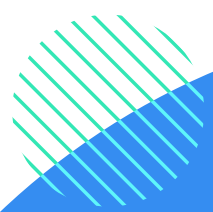


STORMBOARD

# User Guide



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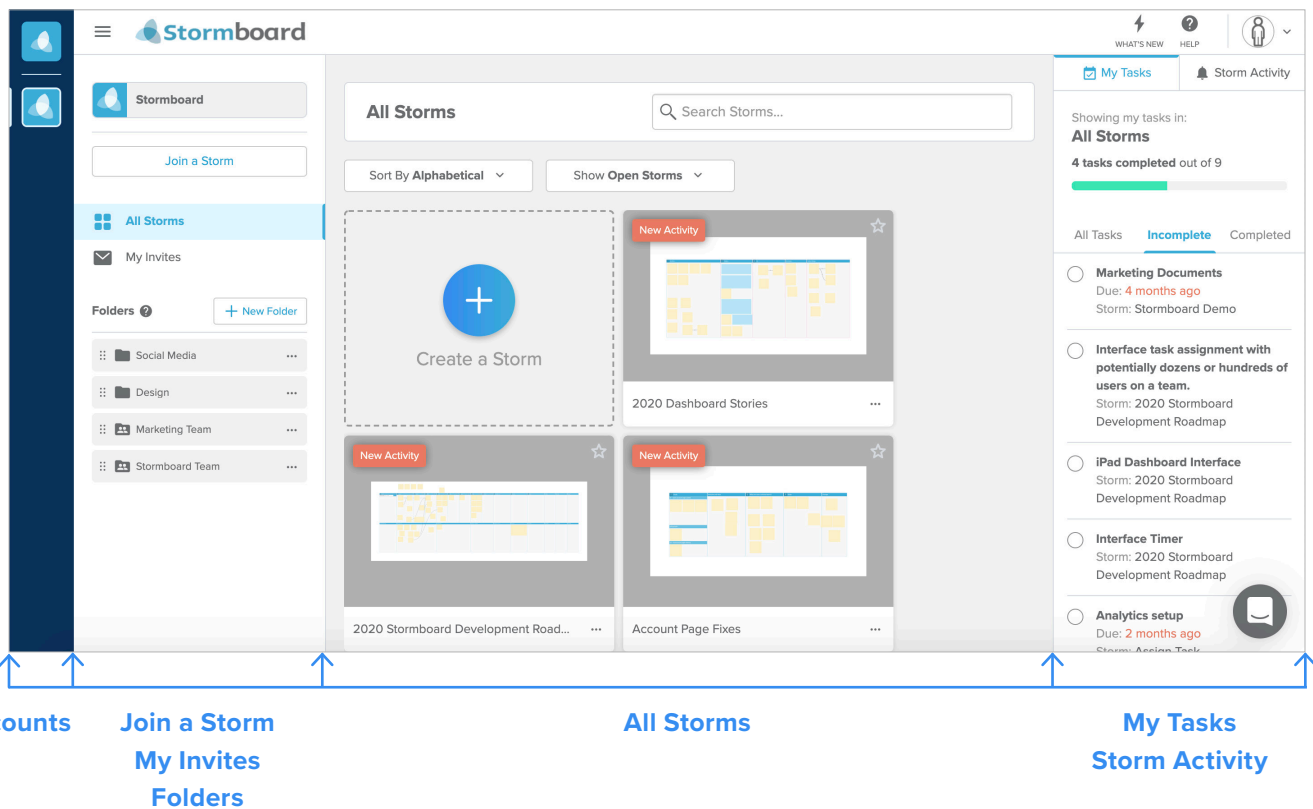
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# Navigating your Dashboard

The Dashboard is the first screen that you will encounter when you sign into your Stormboard account.

It gives you access to all of your **Storms**, your different **team accounts**, your **account** and **profile settings**, Storms that you have been **invited to**, the new **Folders** feature (for Business and Enterprise users only), your **tasks**, and the **activity** in your various Storms.

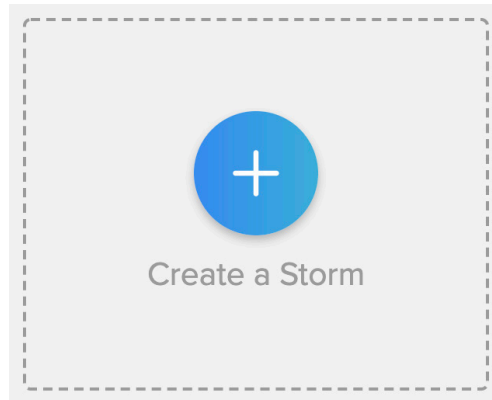
If you **click on your avatar** in the top right corner of the page you will be able to customize your profile picture, view your account information, log out, and more!



# Creating a new Storm

To create a new Storm, click the **“Create a Storm”** button in the *All Storms* section of your Dashboard.

You will be asked to name your Storm and choose if you want to select a template or create a basic Storm. Note that you can change the name of your Storm, the type of template you’re using, and invite others to collaborate with you at any time.



### New Storm

**1. Name Your Storm**

Make it awesome, fun, and informative

**2. Choose a Storm Type**

☐ Personal Storm (up to 5 users) 0 of 5 personal Storms used

☒ Team Storm

Enterprise

**3. Templates**

Choose a template now or get started with a basic Storm. You can change the template any time by clicking the templates button once you're in your Storm. We have templates available for all types of business processes — Kanban, Agile, Design Thinking, and more!

Create a Basic Storm

Choose a Template

Cancel

# Choosing a template

Stormboard has hundreds of templates to choose from!

Scroll through the template picker, use the search bar at the top, or narrow your search by category, use case, team, or framework to find the perfect template for your business process, meeting, brainstorm, or collaboration.

### Templates

Search...

All Templates  
Recent  
Team  
Guided Templates  
Super Admin

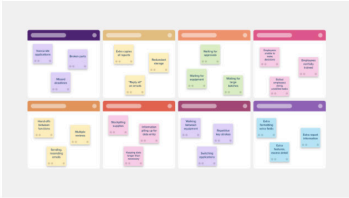
Categories

Blank Templates  
General  
Matrix  
Calendars  
Shape

Use Cases

Problem Solving  
Productivity  
Brainstorming and Ideation  
PI Planning  
Agile Product Management  
Design Thinking  
Sales Management  
Strategic Planning  
Process Mapping/Improvement

How do templates work?




#### 8 Wastes Checklist

The 8 Wastes Checklist Template is set up to help you determine which steps or actions in your process are non-value adding. The 8 Wastes of Lean are Defects, Overproduction, Waiting, Non-Utilized Talent, Transportation, Inventory, Motion, and Extra-Processing....

Has Guide

Choose Template



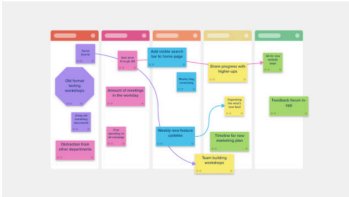
#### 5 Paragraph Essay Outline

The 5 Paragraph Essay Outline is a template helps you teach your students how to create a layout for their project or paper.

The template is pre-set up with five sections — Introduction, Thesis, Body Paragraph 1, Body Paragraph 2, Body Paragraph ...

Has Guide

Choose Template



#### Action Brainstorming

The Action Brainstorming Template is ideal for examining which behaviours and actions are not helping you to serve your clients, align with company values, and accomplish your goals. Use this template for a high-level look at your company processes, an in-depth examination of what isn't working for a department, or to...

Has Guide

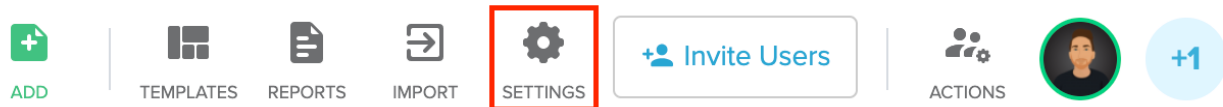
Choose Template

# Setting up and customizing your Storm

To customize your Storm, click the **“Settings”** button at the bottom of your screen. This will open a menu with three tabs. Note that only the *Storm Creator* or *Storm Administrators* can customize Storms.

## General

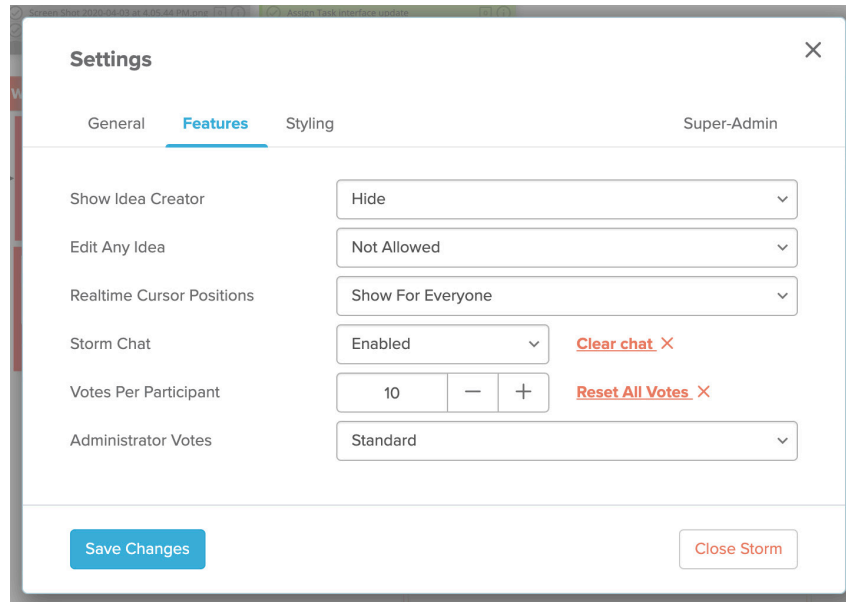
Under the **“General”** tab, you can change the name of your Storm, write a description or set any goals for the Storm, and see who the creator of the Storm is.

A modal dialog box titled 'Settings' with a close button (X) in the top right corner. It has three tabs: 'General' (selected), 'Features', and 'Styling'. In the top right corner of the dialog, it says 'Super-Admin'. The 'General' tab contains three sections: 'Storm Name' with a text input field containing 'Product Design'; 'Storm Goals + Description' with a large text area containing '(Optional)'; and 'Storm Creator' which shows a profile picture and the name 'Matthew B'. At the bottom of the dialog are two buttons: 'Save Changes' and 'Close Storm'.

Instructions continue on the next page →

## Features

The “**Features**” tab is where you can set if you want the sticky notes to show the person who created them or not, set editing permissions, turn on real time cursor positions, enable or disable the chat function, and set or reset the number of votes that each participant will have.



The screenshot shows the 'Settings' dialog box with the 'Features' tab selected. The dialog has a title bar with a close button (X) and four tabs: 'General', 'Features' (active), 'Styling', and 'Super-Admin'. The 'Features' tab contains the following settings:

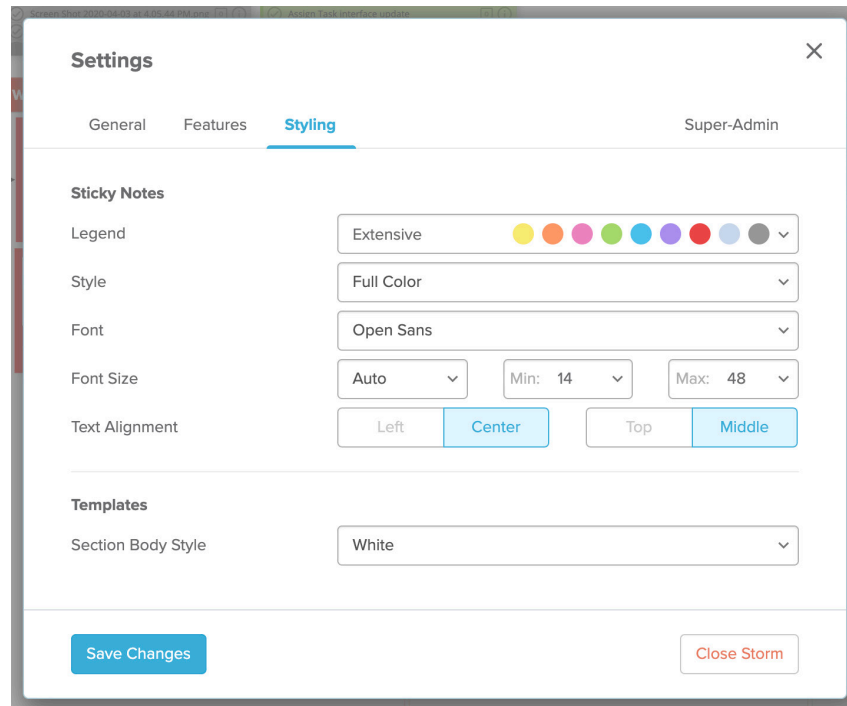
Setting	Value	Actions
Show Idea Creator	Hide	
Edit Any Idea	Not Allowed	
Realtime Cursor Positions	Show For Everyone	
Storm Chat	Enabled	<a href="#">Clear chat</a> X
Votes Per Participant	10	<a href="#">Reset All Votes</a> X
Administrator Votes	Standard	

At the bottom of the dialog, there are two buttons: 'Save Changes' and 'Close Storm'.

Instructions continue on the next page →

## Styling

Under the “**Styling**” tab you can set your sticky notes to full color or classic-style (white), set your color palette, font type, text alignment, minimum font size, and whether you want the sections of your template to be white or full-color.



The image shows a screenshot of the Stormboard Settings interface, specifically the 'Styling' tab. The window has a title bar 'Settings' with a close button 'X' in the top right corner. Below the title bar are four tabs: 'General', 'Features', 'Styling' (which is selected and highlighted with a blue underline), and 'Super-Admin'. The 'Styling' section is divided into two main categories: 'Sticky Notes' and 'Templates'. Under 'Sticky Notes', there are five settings: 'Legend' with a dropdown menu showing 'Extensive' and a color palette of 10 colored circles; 'Style' with a dropdown menu showing 'Full Color'; 'Font' with a dropdown menu showing 'Open Sans'; 'Font Size' with three dropdown menus: 'Auto', 'Min: 14', and 'Max: 48'; and 'Text Alignment' with four buttons: 'Left', 'Center' (which is highlighted in blue), 'Top', and 'Middle'. Under 'Templates', there is one setting: 'Section Body Style' with a dropdown menu showing 'White'. At the bottom of the settings window, there are two buttons: 'Save Changes' (in blue) and 'Close Storm' (in red).

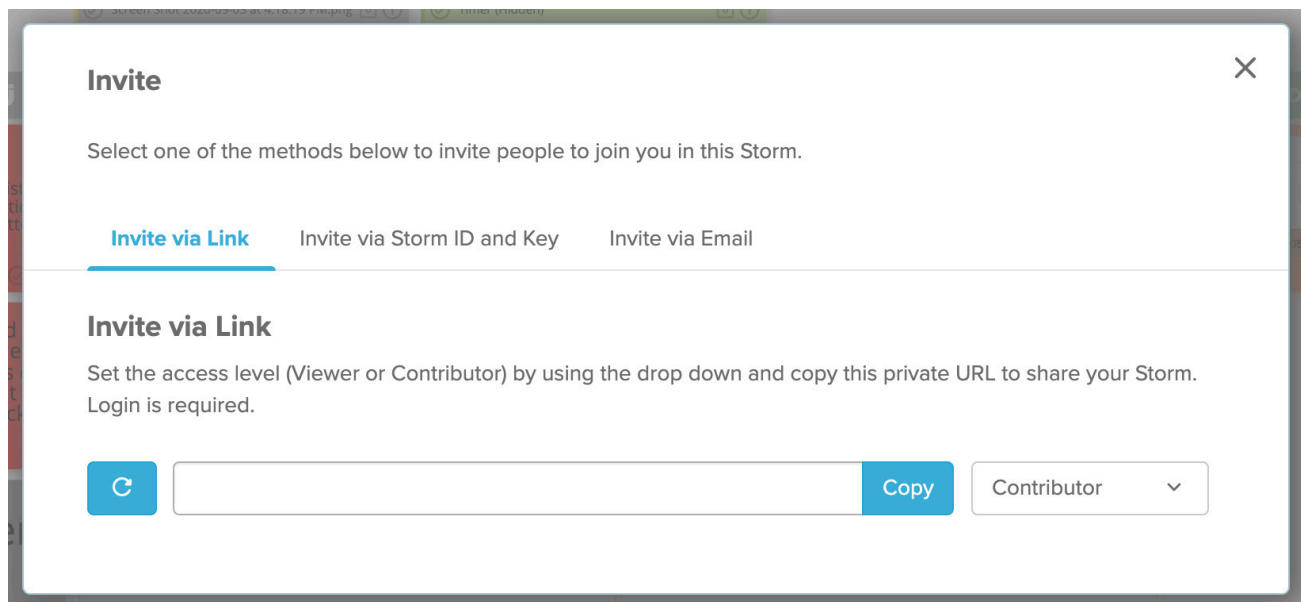


# Inviting people to your meeting or collaboration

To invite people to participate in your Storm, click the “**Invite Users**” button in the menu at the bottom of your screen. This will open a window that will give you three different ways to share your Storm. Each method will let you invite users as **Contributors** or **Viewers**.

1. Copy the **URL** to paste in an email, a message, chat, etc. When your team member clicks on the link (on a Surface Hub, desktop, laptop, tablet or other device) they will be taken directly to your Storm.
2. Copy the **Storm ID** and **Key** to paste in an email, a message, chat, etc. Your team members can enter these on the login screen on the Surface Hub or from their dashboard on other devices.
3. Enter the **email(s)** of the person(s) you would like to share your Storm with and click send. They will receive an email with a link they can click to access the Storm.

**Note:** All Storms are private and available only to participants that have been specifically invited to them. Everyone who joins a Storm must have or create a Stormboard Account.



## 1. Invite via Link

Instructions continue on the next page →

Invite

×

Select one of the methods below to invite people to join you in this Storm.

Invite via Link

Invite via Storm ID and Key

Invite via Email

Invite via Storm ID and Key

Set the access level (Viewer or Contributor) by using the drop down and copy both the Storm ID and Key that new people will use to join your Storm. Login is required.

⌂

Copy

Copy

Contributor

▼

## 2. Invite via Storm ID and Key

Invite

×

Select one of the methods below to invite people to join you in this Storm.

Invite via Link

Invite via Storm ID and Key

Invite via Email

Invite via Email

Enter the email addresses of the people you want to add to this Storm and set their access level (Viewer or Contributor) by using the drop down. Paste a list of email addresses to invite up to **20** people at once.

Enter an email address...

Contributor

▼


Add a message (optional)...

Send

## 3. Invite via Email

10

Visit [stormboard.com](https://stormboard.com) to start your FREE trial.

 Stormboard

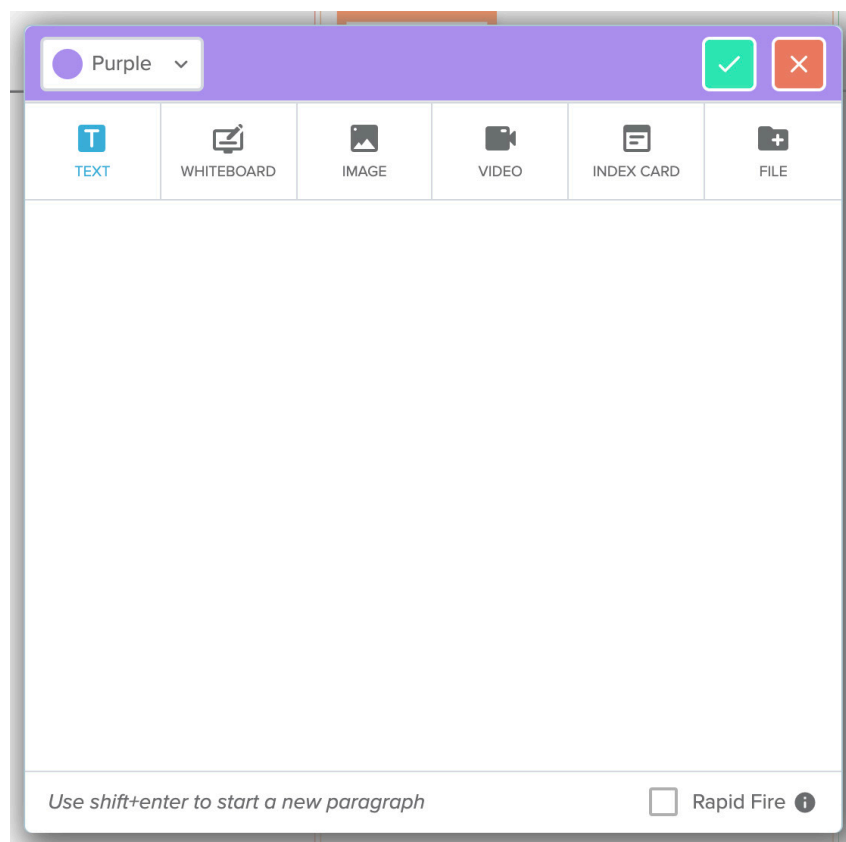
# Adding content to your sticky notes

To add content, **click anywhere** in your Storm and a new sticky note will open.

There are **six types** of sticky notes that you can use: **Text**, **Whiteboard**, **Image**, **Video**, **Index Card**, or **File**. The default is a text sticky note.

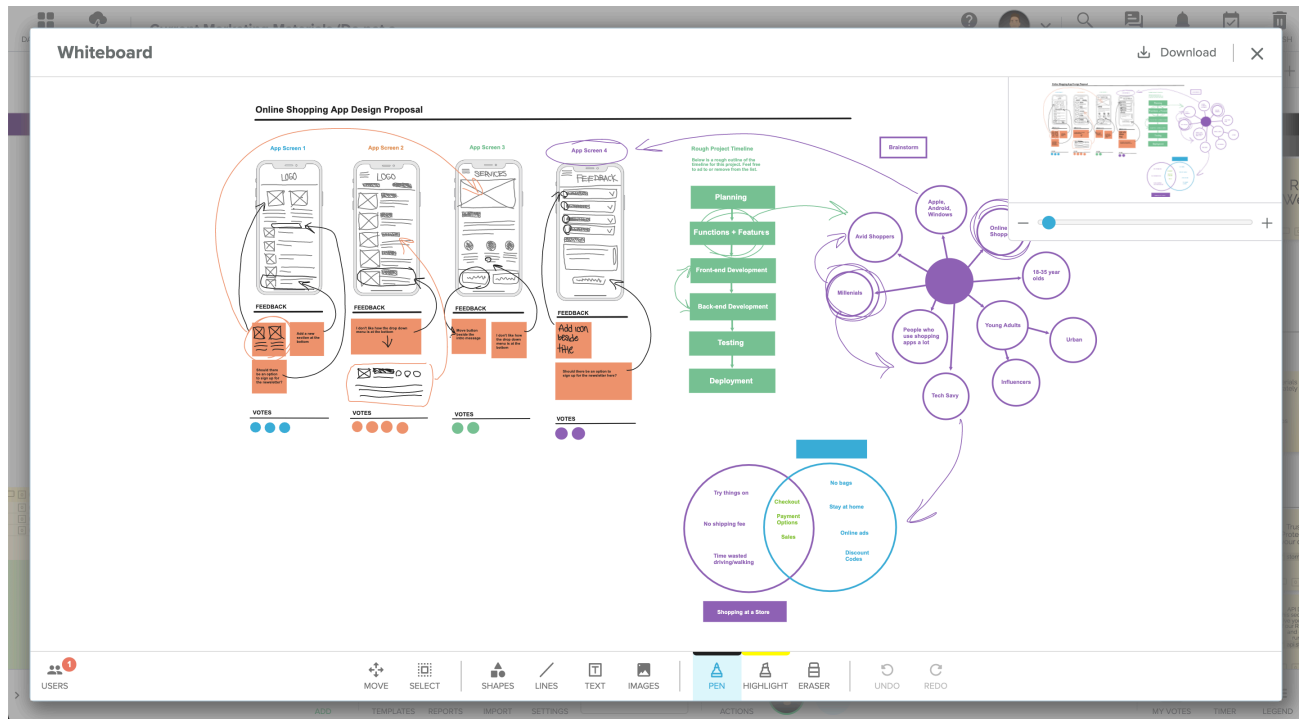
When you enter a Storm, if there is new content that you haven't seen yet, the top right corner of the note will be flagged red and say **"New"**. To remove this red flag, move your cursor over the note.

The next few pages take a deeper dive into each type of sticky note.



# Whiteboard sticky notes

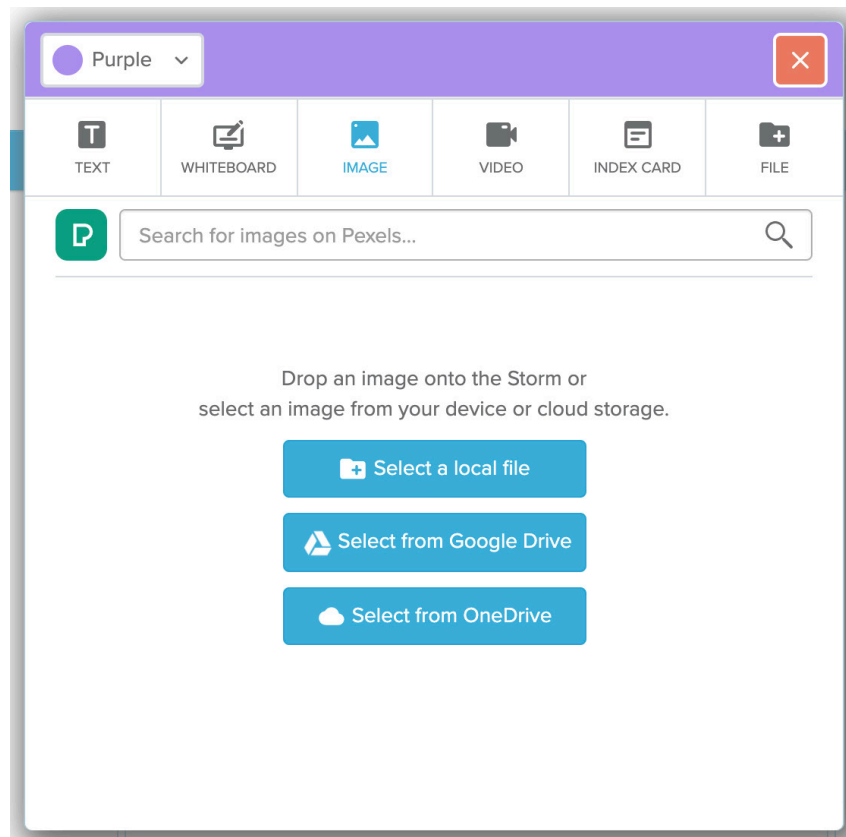
Selecting the “**Whiteboard**” sticky note opens a digital whiteboard that you can sketch on with multiple pen sizes and colors. You can also add text, shapes, and images to the board. Closing the board saves your sticky note to your Storm.



# Image sticky notes

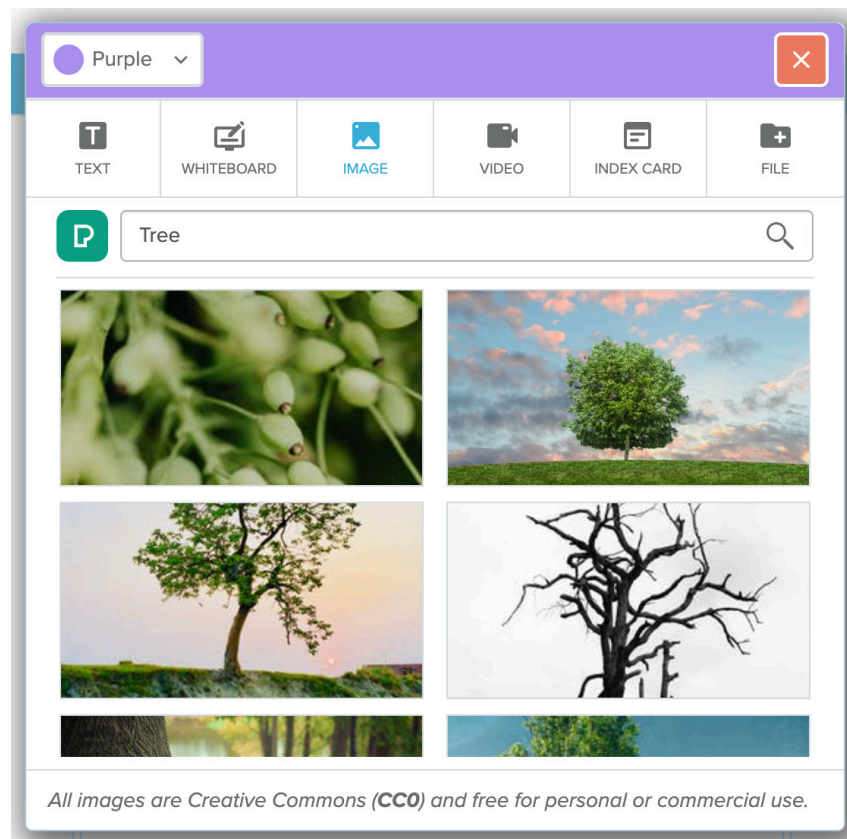
There are a few different ways to add images.

You can **drag** an image to your Storm and an image sticky note will automatically be created. Alternatively, **click** on the image tab when you open a new sticky note and either drop an image onto the note itself, or **upload** an image from your **computer, Box, Google Drive, Dropbox** or **OneDrive**.



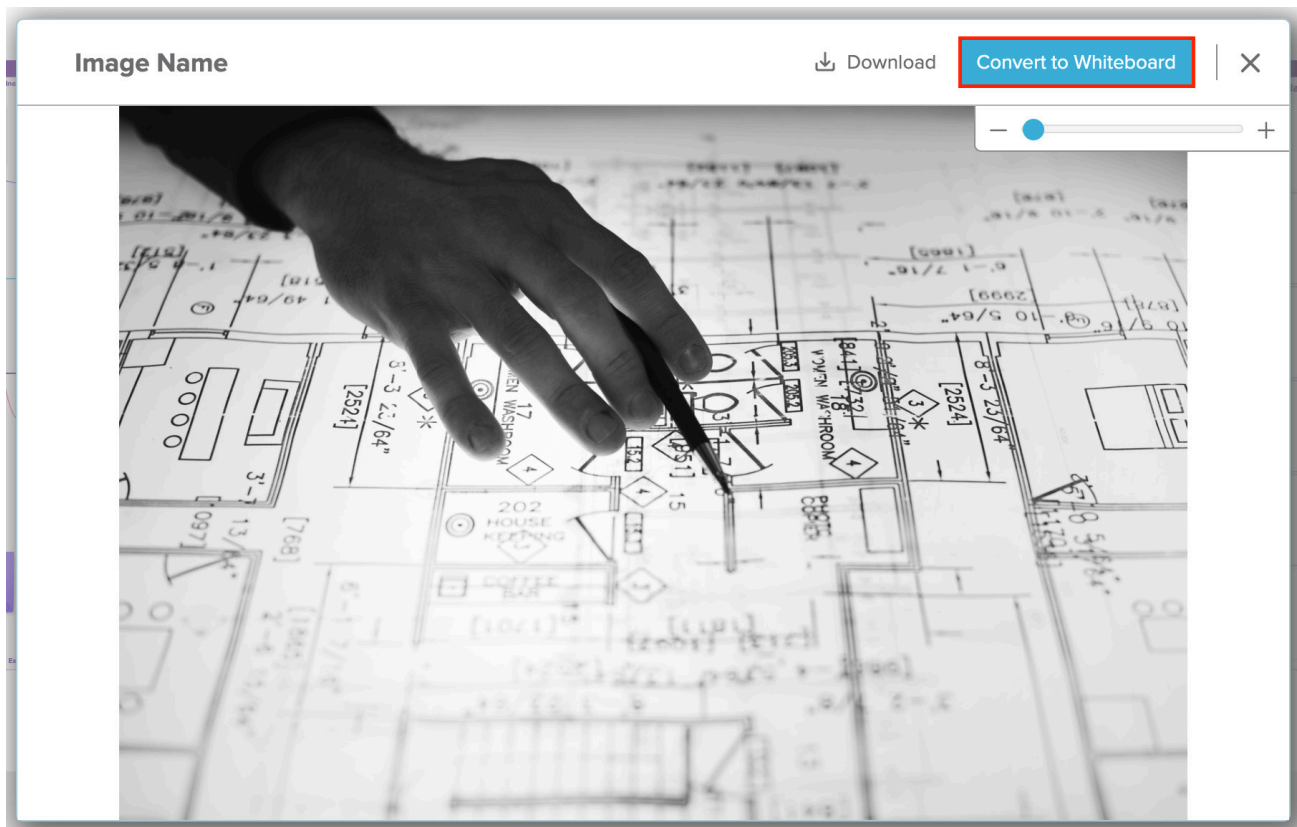
Instructions continue on the next page →

You can also use the **search bar** at the top of the sticky note to search the Pexels database. These stock images are all Creative Commons (CC0) and free for personal or commercial use.



Instructions continue on the next page →

Once you have created your image sticky note, you can convert it to a whiteboard (the option to do this is on the **top right-hand corner** of your screen when you reopen the note) and sketch directly on top of the image. This is great for working on screen mock-ups, photo edits, logo designs, and more!

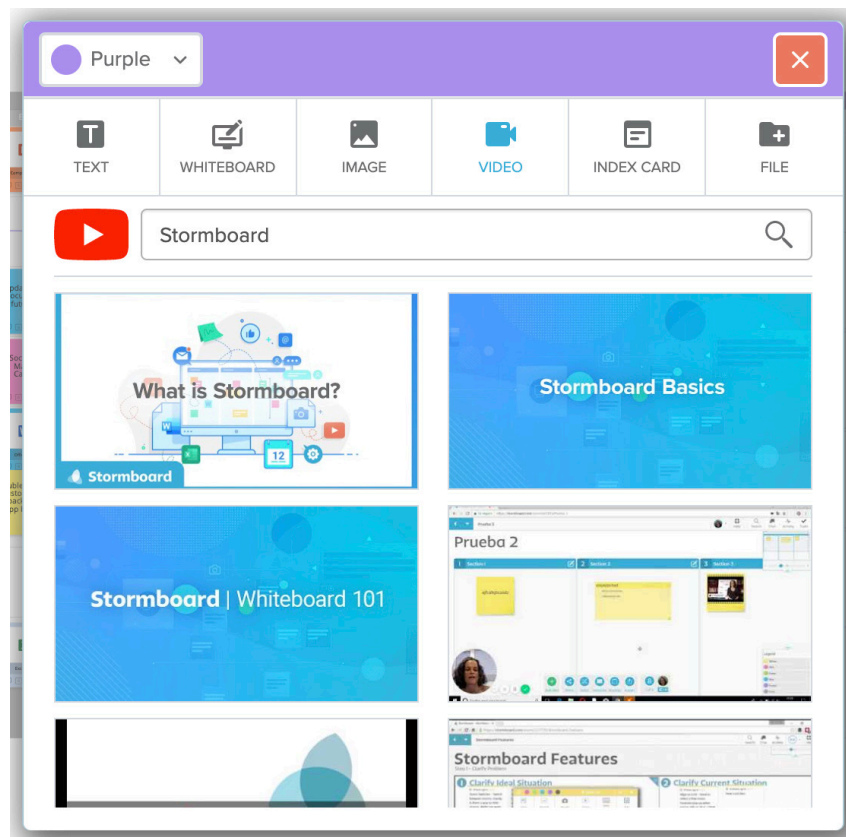


# Video sticky notes

Upload a video by pasting a **link** from **YouTube** into the video sticky note search bar.

You can also search for a video using keywords or phrases and then select the video that you would like to add.

A preview image of the video will be displayed when you save your sticky note by tapping the **“Add Video”** button, and anyone will be able to play the video by double clicking on it.



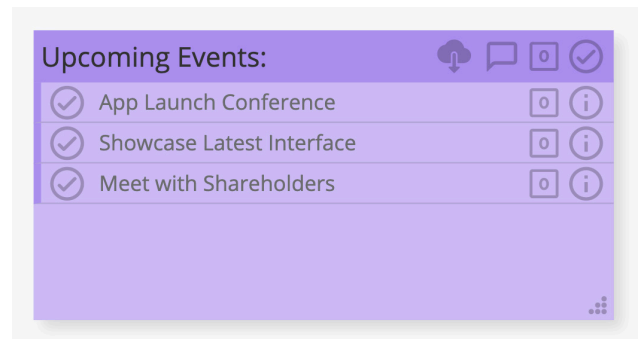
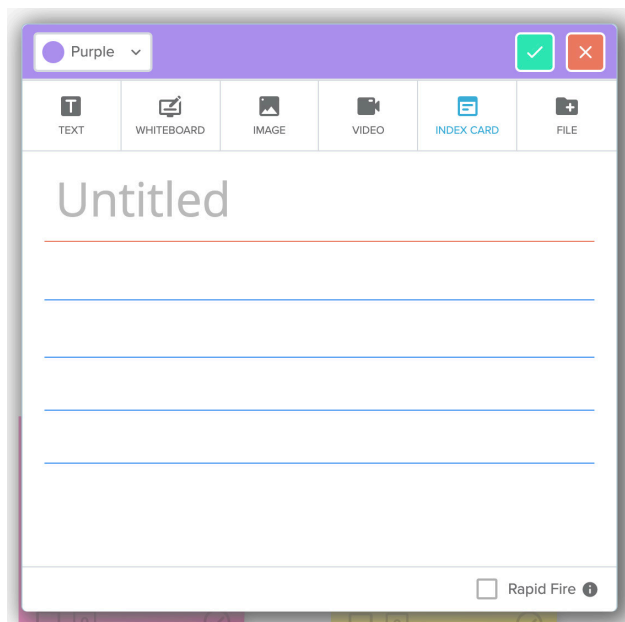


# Index cards

Index cards can be used to categorize, organize, or prioritize your ideas.

When creating a new index card sticky note, the text that you add on the first line of the index card will show up as the title of your card. Once it is created you can either drag and drop other sticky notes in your Storm on top of your card to store them all together, or tap on a line to write text directly on the card.

Any of the lines of an index card can be dragged off to create independent sticky notes.



# File sticky notes

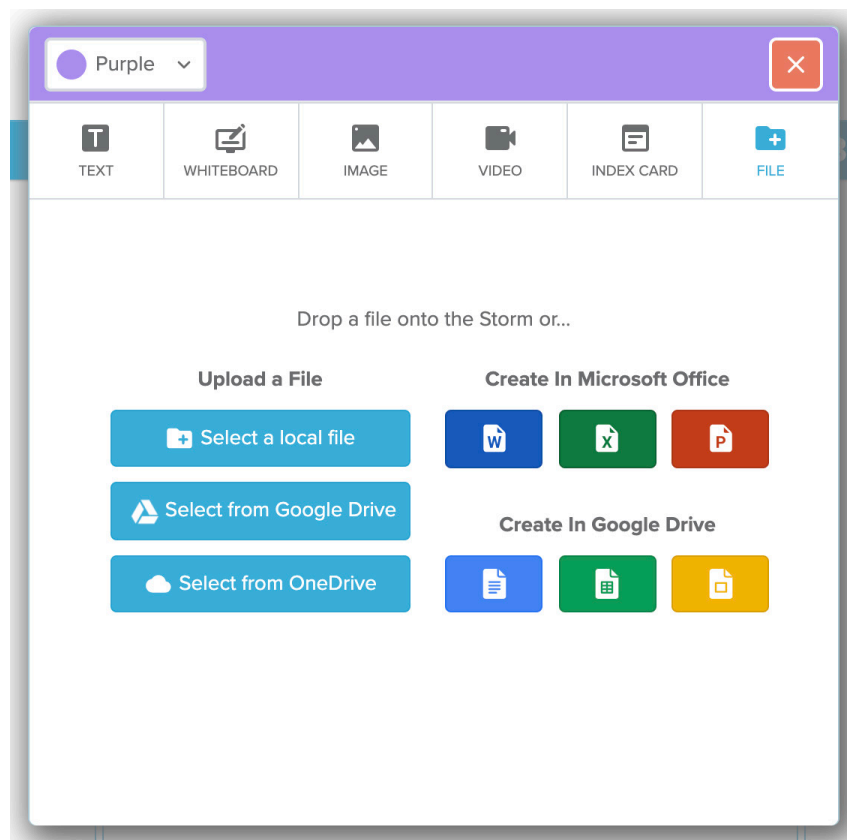
There are a few different ways to add files to your Storm.

You can **drag a file** to your Storm and a file sticky note will automatically be created.

Alternatively, tap on the **“File”** tab when you open a new sticky note and either drop a file onto the note itself, or upload an image from your **computer, Box, Google Drive, Dropbox** or **OneDrive**.

You can also create a document in **Excel, Word, or PowerPoint** using **Office Online** or **Docs, Sheets, or Slides** using **Google Drive**. The document you create will be automatically saved in your Storm, and can be live co-edited with members of your team at any time.

You can open the file in your Storm by **double clicking** on it.

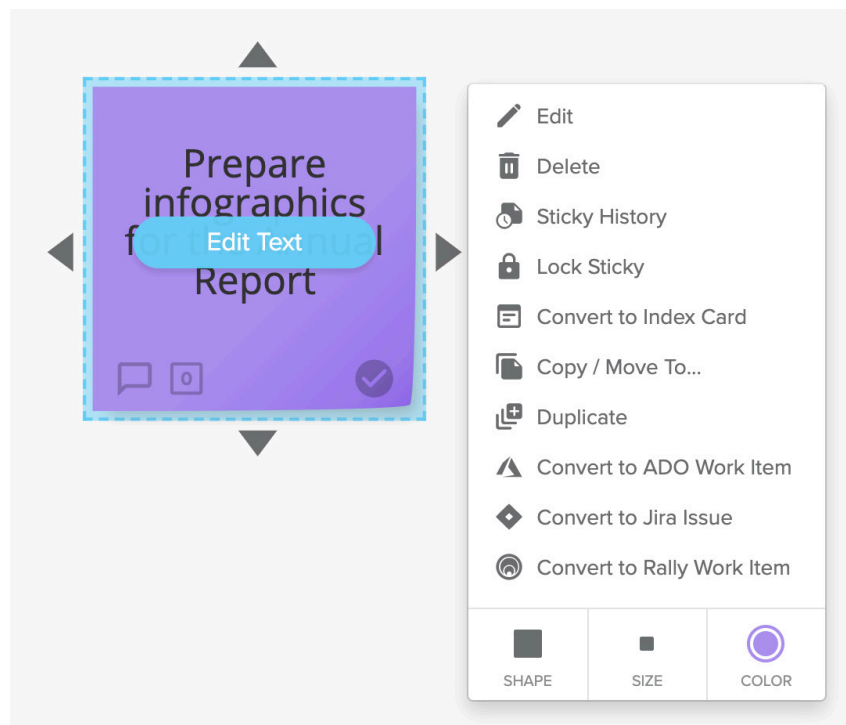


# Editing sticky notes

Each sticky note has its own menu that will open when you **click once** on the note.

The menu allows you to **edit** or **delete** the sticky note, see the **history** of the note, **lock** it so no one else can move or edit it, turn it into an **index card**, **copy** or **move** the note to another Storm, **duplicate** the note, change the **shape** of the note, make it a **title sticky** (the square with a “T” in it), change the **size** of the note, or change the **color** of the note.

You can also see when the note was created at the bottom of the menu.

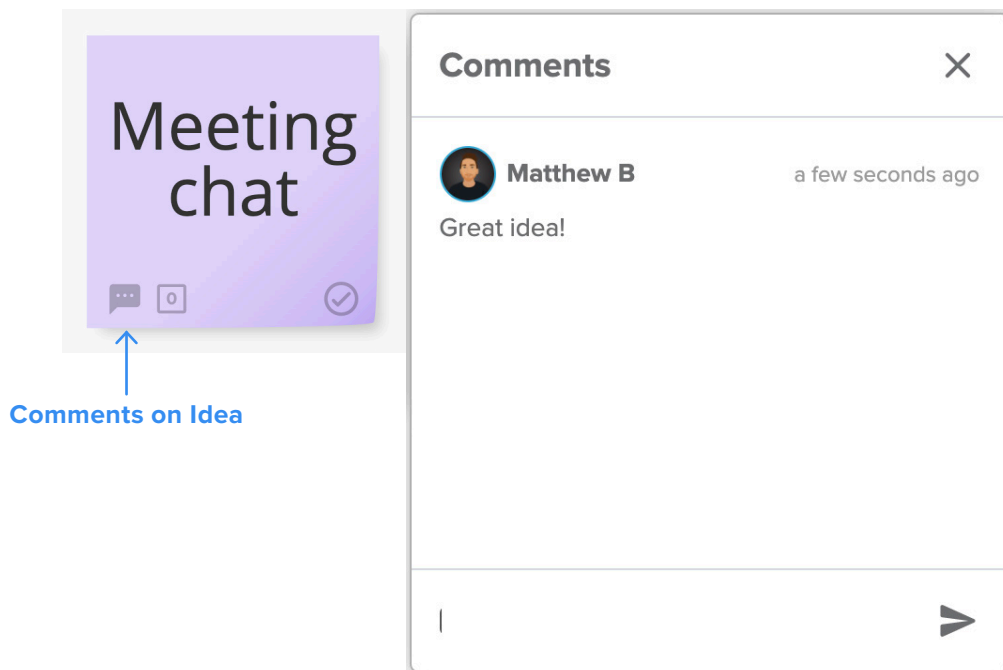


# Commenting, voting, and assigning sticky notes

On the bottom of each sticky note are three icons that allow you to **comment**, **vote**, and **assign** the note.

## Commenting

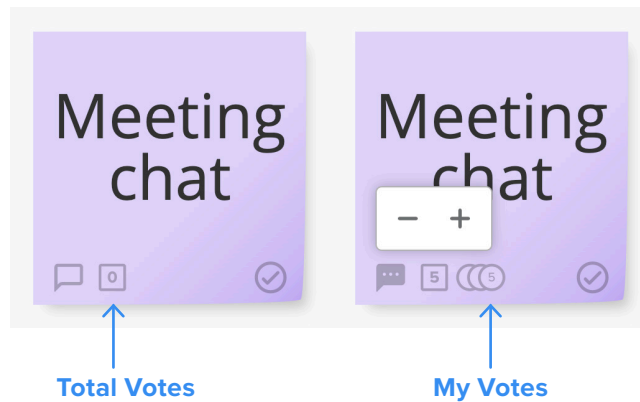
To comment on a sticky note, **click on the speech bubble** in the lower left-hand corner, write your message, and **press enter** or **click the check mark**. If someone else comments on a sticky note, a red number will appear on the comment bubble to notify you.



[Instructions continue on the next page](#) →

## Voting

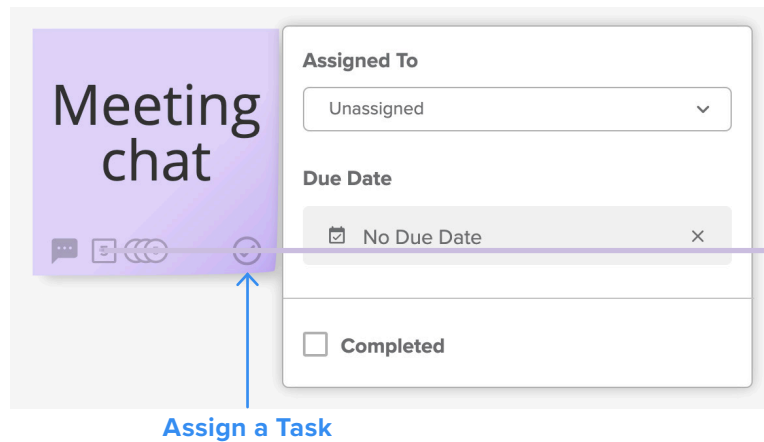
Each participant in your Storm is assigned **10 votes** by default. This number can be changed by the Storm Administrator in the Setup Menu. To add your vote to a sticky note **click on the number** located next to the speech bubble at the bottom of the note. **Click the plus sign** to add the number of votes you would like to give the idea.



Instructions continue on the next page →

## Assigning Tasks

To assign a sticky note, or idea, to a member of your team, **click the checkmark** on the bottom right-hand corner of your note. You can choose who to assign the note to and the due date. The person that you have assigned the task to will be notified.

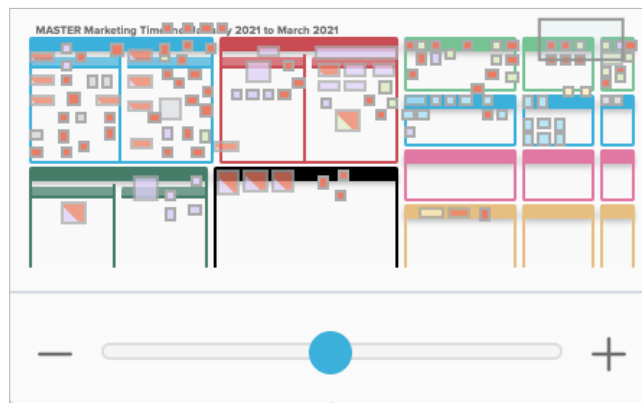


# Navigating your Storm

Located in the **upper right-hand corner** of your Storm, the **viewfinder** is where you can get a quick overview of the entire Storm.

A blue square or rectangle shows the view that is currently on your screen and you can use the slide at the bottom to zoom in-and-out. To collapse or open the viewfinder, **click on the tab at the bottom.**

Note that you can also move to different areas of your Storm by clicking the screen and dragging.

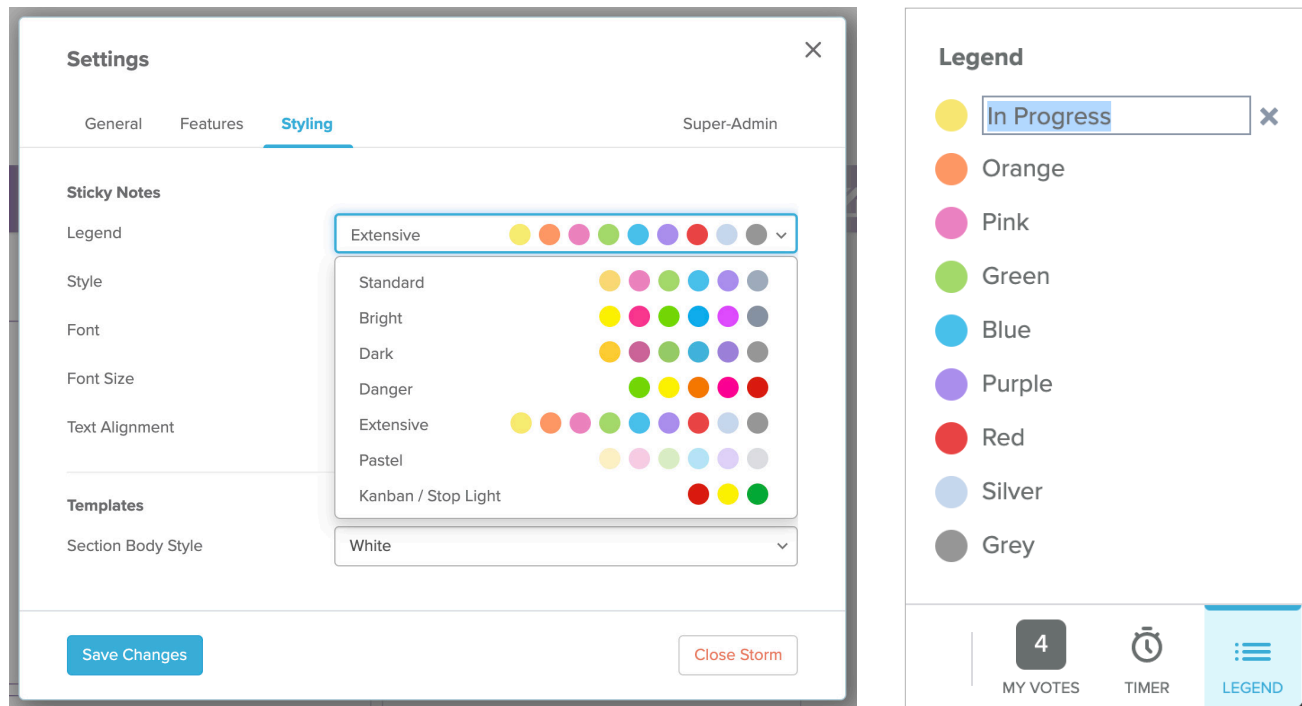


# Customizing your color legend

In the bottom right-hand corner of your screen is a menu showing the colors that are available for the sticky notes in your Storm. When you **tap on a color** in the Legend, you will be able to change the current color names to whatever label you wish.

Colors can be assigned to specific people on your team, topics that are being discussed, stages of your process, and more!

If you would like to change your sticky note color scheme, click on the **“Styling”** tab in the **Settings Menu**. Under **“Legend”** you will be able to select the color combination you prefer. The new colors you choose will appear in the Legend.





# Navigating the lower menu

The menu located at the bottom of your Storm offers you the following options:

**Add:** Click this button to add a new sticky note.

**Templates:** Allows you to explore the other templates available and change the current one.

**Reports:** Reports can be created to be used as meeting minutes, presentations, and more!

**Import:** Import data into your Storm using xlsx, cvs, ods formats.

**Settings:** Opens the menu where you can customize the styles and features of your Storm.

**Invite Users:** This button takes you to the menu where you can invite people to collaborate with you.

**Actions:** Manage users in your Storm, reinvite users or email all of the participants in the Storm, focus everyone on your position, disable Storm tooltips, and disable activity notifications.

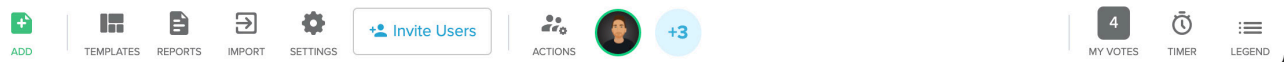
**Participant Area:** This area will show the active users (in a green circle) in your Storm. All Storm users will be displayed as a '+\_' number at the end. Clicking this will open the 'Manage Storm Users' dialog.

**My Votes:** Here you can see how many votes you have remaining. Clicking this button will show all the ideas you have voted on.

**Timer:** Run a timer to keep track of brainstorming sessions or meetings. Set a custom time and enter an optional label for the timer.

**Legend:** When you tap on a color in the legend, you will be able to change the current color names to whatever label you wish.

You can collapse the lower menu by tapping on the arrow on the bottom left-hand side. Tap the arrow again to reopen the menu.



# Navigating the overview menu

Located in the top right-hand corner of your Storm, this menu offers the following options:

**Help:** The Help tab is where you can contact us or access our help documents.

**Guide:** Template Guides are a feature that gives you step-by-step instructions on how to use your templates, and inspiration to help make your meetings and collaborations more engaging and efficient.

**Account Access:** Click on your avatar to access your account settings.

**Search:** Search for an idea, person, assignment, comment, and more within your Storm.

**Chat:** Chat with members of your Team during your meeting or about your project.

**Activity:** View a chronological list of all of the things that have occurred in your Storm, clicking on an item will take you directly to that sticky note in the Storm.

**Tasks:** This panel shows all of the complete and incomplete tasks and who they have been assigned to. You can generate a Tasks Report by clicking on the download button in the top right-hand corner of the panel when it is open.

**Trash:** This is where you will find all of the sticky notes that you have deleted from your Storm. You can choose to restore them or permanently delete them from this tab.

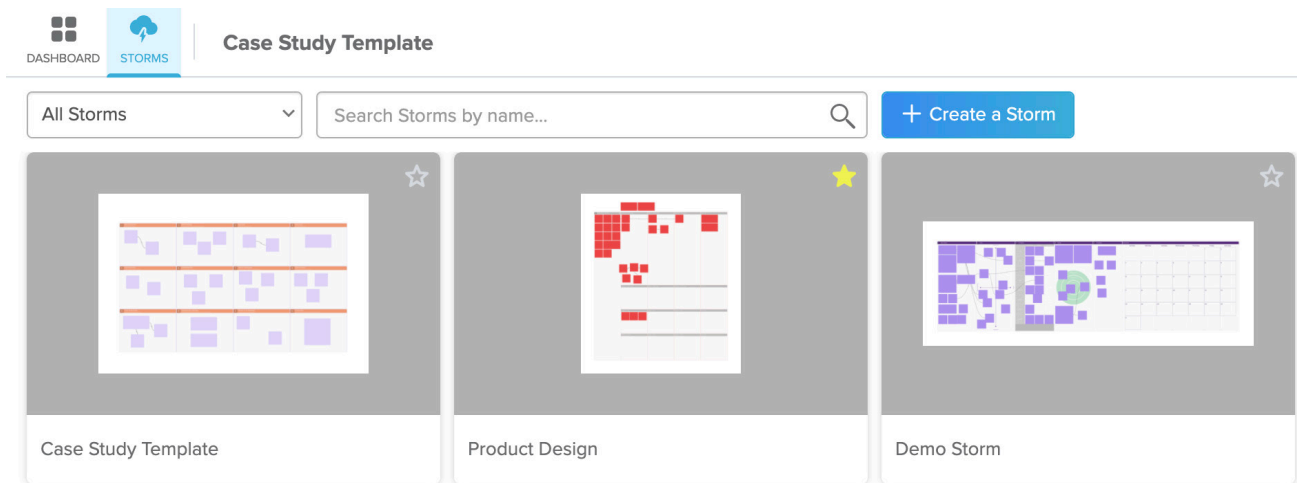


# Switching Storms and returning to your Dashboard

The **‘Storms’ button** makes it easy to switch between Storms.

The list is automatically sorted with the last active Storm first, so you can easily switch between projects that you are actively working on. You also have the option to create a new Storm from this drop-down.

Click the **‘Dashboard’ button** to return to your Dashboard.



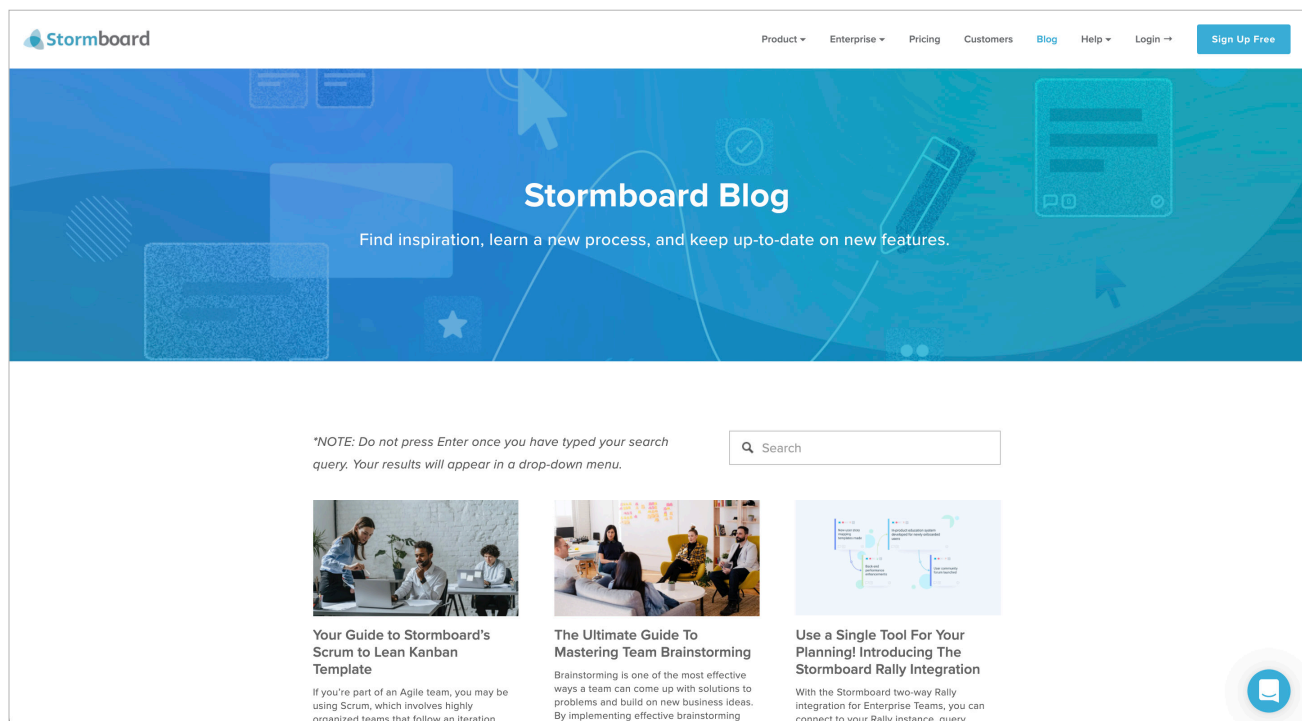
# Keep learning

Do you have a question? Looking for more information on Stormboard features?

You can access the Stormboard help documents through the Help button, or through the link at the footer of the [website](#).

Visit our Blog [stormboard.com/blog](https://stormboard.com/blog) for articles on how to use different templates, business processes, and new features.

Happy Storming!



The screenshot shows the Stormboard Blog homepage. At the top, there's a navigation bar with links for Product, Enterprise, Pricing, Customers, Blog, Help, Login, and a Sign Up Free button. The main header features the Stormboard logo and a large blue banner with the text "Stormboard Blog" and "Find inspiration, learn a new process, and keep up-to-date on new features." Below the banner is a search bar with a note: "\*NOTE: Do not press Enter once you have typed your search query. Your results will appear in a drop-down menu." The content area displays three featured articles: "Your Guide to Stormboard's Scrum to Lean Kanban Template", "The Ultimate Guide To Mastering Team Brainstorming", and "Use a Single Tool For Your Planning! Introducing The Stormboard Rally Integration". Each article has a thumbnail image and a brief description. A chat icon is visible in the bottom right corner.

Stormboard


Product Enterprise Pricing Customers Blog Help Login Sign Up Free

## Stormboard Blog

Find inspiration, learn a new process, and keep up-to-date on new features.


\*NOTE: Do not press Enter once you have typed your search query. Your results will appear in a drop-down menu.

Search




### Your Guide to Stormboard's Scrum to Lean Kanban Template

If you're part of an Agile team, you may be using Scrum, which involves highly organized teams that follow an iteration



### The Ultimate Guide To Mastering Team Brainstorming

Brainstorming is one of the most effective ways a team can come up with solutions to problems and build on new business ideas. By implementing effective brainstorming



### Use a Single Tool For Your Planning! Introducing The Stormboard Rally Integration

With the Stormboard two-way Rally integration for Enterprise Teams, you can connect to your Rally instance, query

Chat icon

