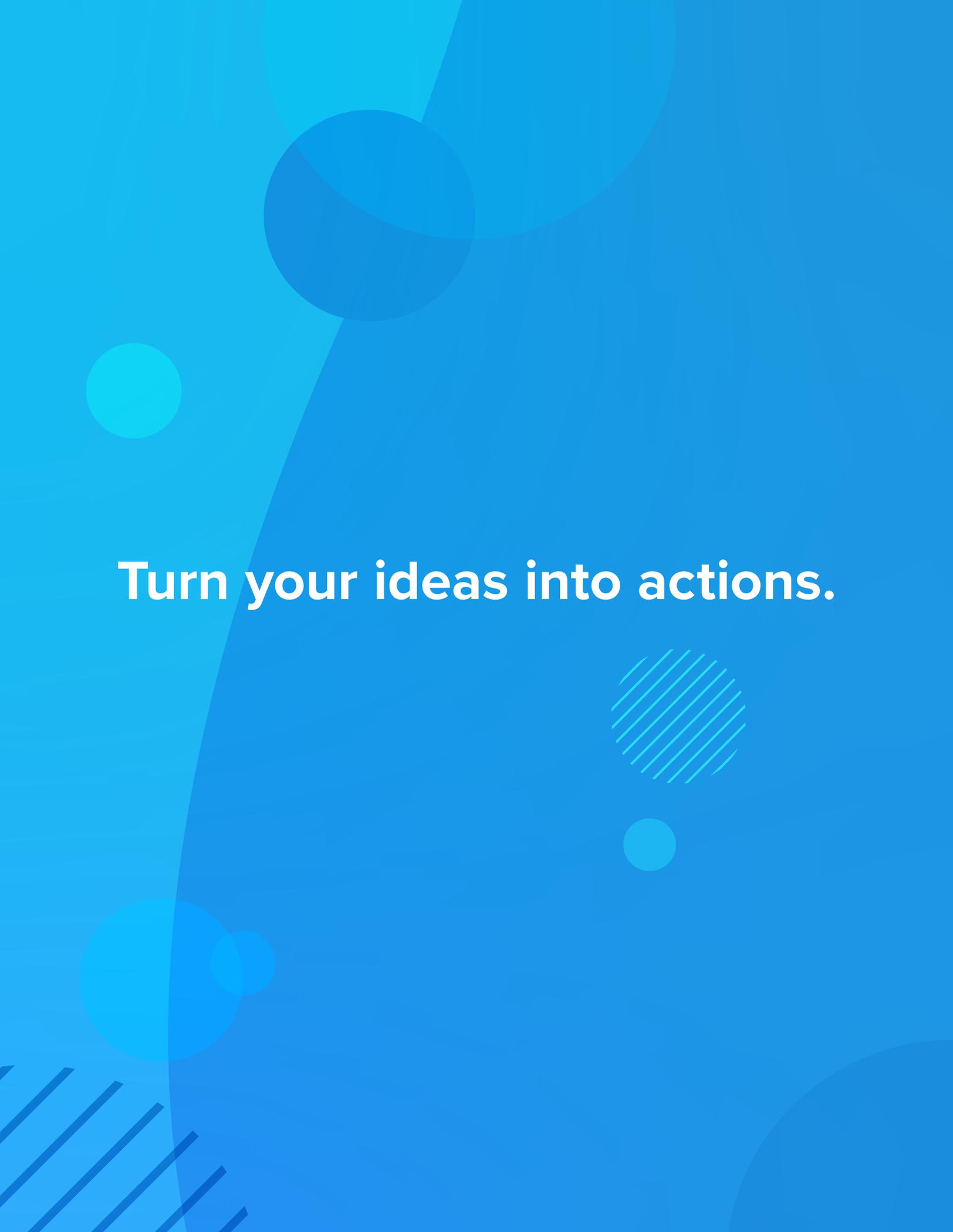


MICROSOFT SURFACE HUB

User Guide

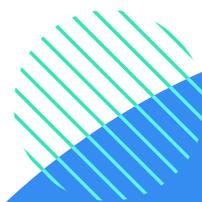
The background is a solid blue color with several abstract geometric shapes. There are several overlapping circles of different shades of blue. A large, dark blue circle is positioned in the upper left quadrant. A smaller, lighter blue circle is to its left. In the lower left, there are two overlapping circles, one larger and one smaller, both in a medium blue shade. In the lower right, there is a small, light blue circle. A circular shape with diagonal white lines is located in the middle right area. In the bottom left corner, there are several parallel diagonal white lines. The text "Turn your ideas into actions." is centered in the middle of the page in a white, bold, sans-serif font.

Turn your ideas into actions.



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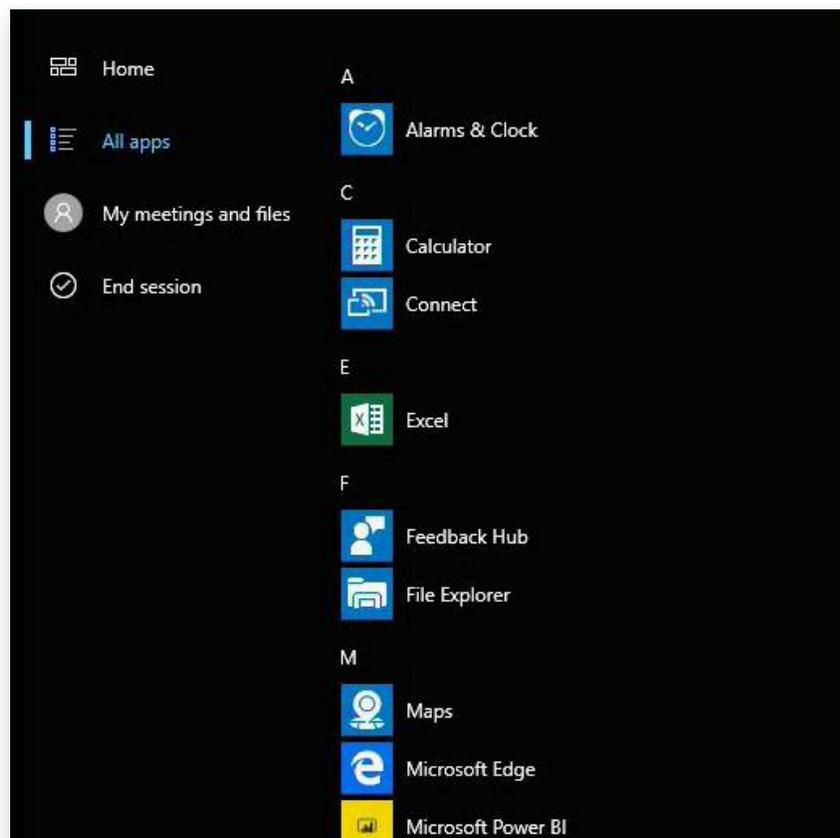
Launching Stormboard

In order to use Stormboard on the Microsoft Surface Hub, you will have to launch the Stormboard app.

1. Press the **Microsoft icon** at the bottom of your screen.
2. Press **“All Apps”** located in the column on the left-hand side of the pop-up window.
3. Scroll down to **“S”** and click on **Stormboard**.

Once you launch the app, you will have a choice to either sign into your account, create a new Storm (what we call your digital whiteboard/meeting space), or join a Storm with a Storm ID and Key (the ID and Key are located at the top of your Storm when you are on the Surface Hub, or can be found by clicking the Share button at the bottom of your Storm).

Note: If you haven't signed up for a Stormboard account yet, or licensed your Hub, you will be walked through the process of creating an account and signing up for a 30-day free trial when you launch the app for the first time.



Signing in

There are three ways that you can start using Stormboard once you have launched the Stormboard app.

Quick Start

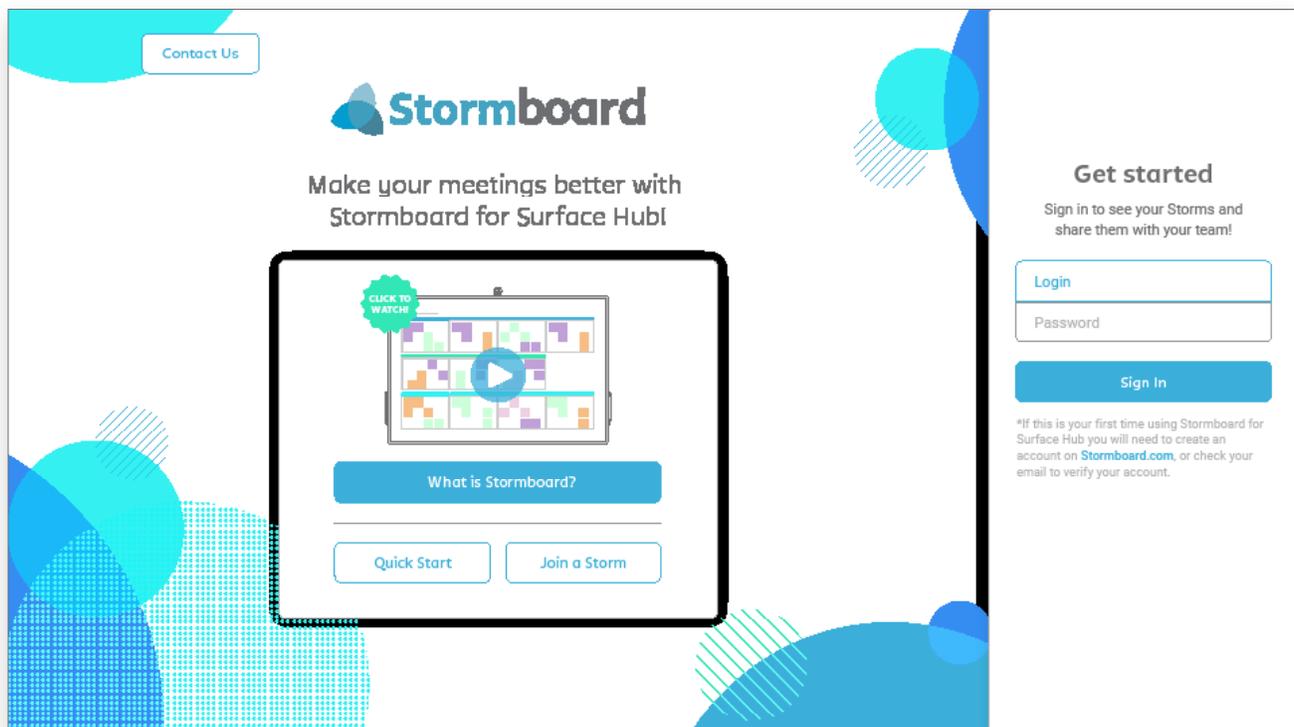
Tap the **“Quick Start”** button to instantly begin your meeting in a new Storm. You will be asked to claim the Storm by logging into your Stormboard account when you exit the Storm. This ensures that all of your ideas are securely saved, and you will be able to access that Storm again on any device.

Join a Storm

Tap the **“Join a Storm”** button to manually enter your **Storm ID** and **Key**. The ID and Key are located at the top of your Storm when you are on the Surface Hub or can be found by clicking the **Share** button at the bottom of your Storm.

Type Your Login and Password

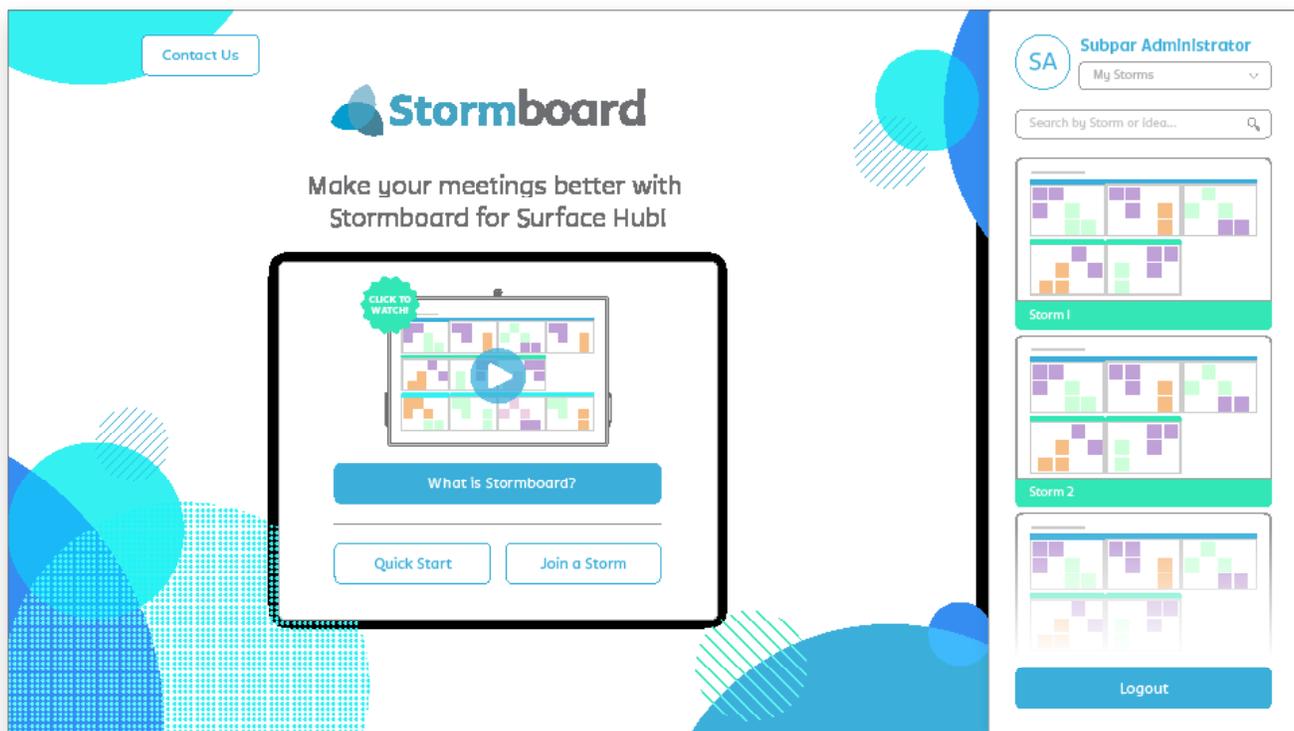
You can type your login name and password, using either the on-screen keypad or a physical keyboard, in the panel on the right.



Navigating your Dashboard

The Dashboard on the Surface Hub is different than what you will see when you login using a desktop or laptop.

When you login, the Storms that you have created, or are a part of, are located in the column on the right-hand side. You can scroll through them and tap on the one you would like to enter.



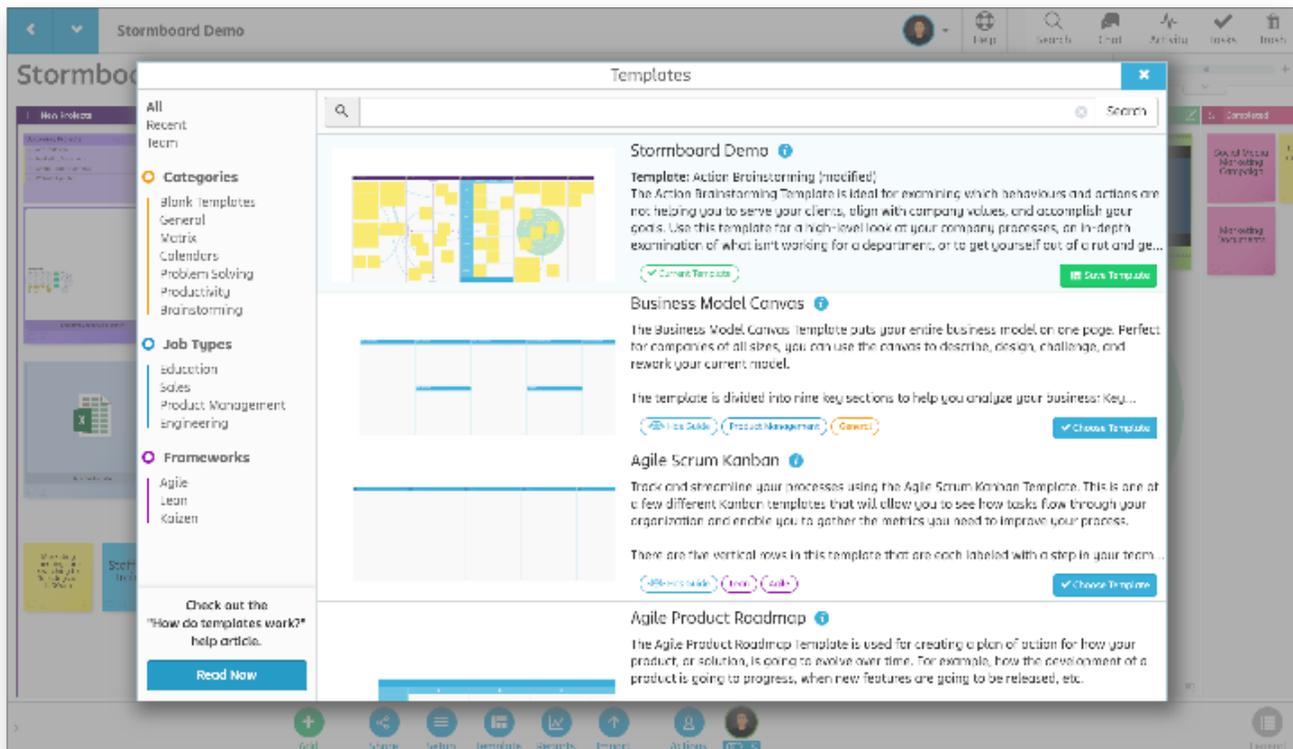
Creating a new Storm

To create a new Storm, tap the **“Quick Start”** button on the left side of your Dashboard. A new Storm will open. The first step will be for you to choose a template.

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

You can change your template at any time.

To change the name of your Storm, tap on the word **“Storm”** at the top of your screen. You can change the name at any time during the life of your Storm.



Setting up and customizing your Storm

To customize your Storm, tap the **“Setup”** 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

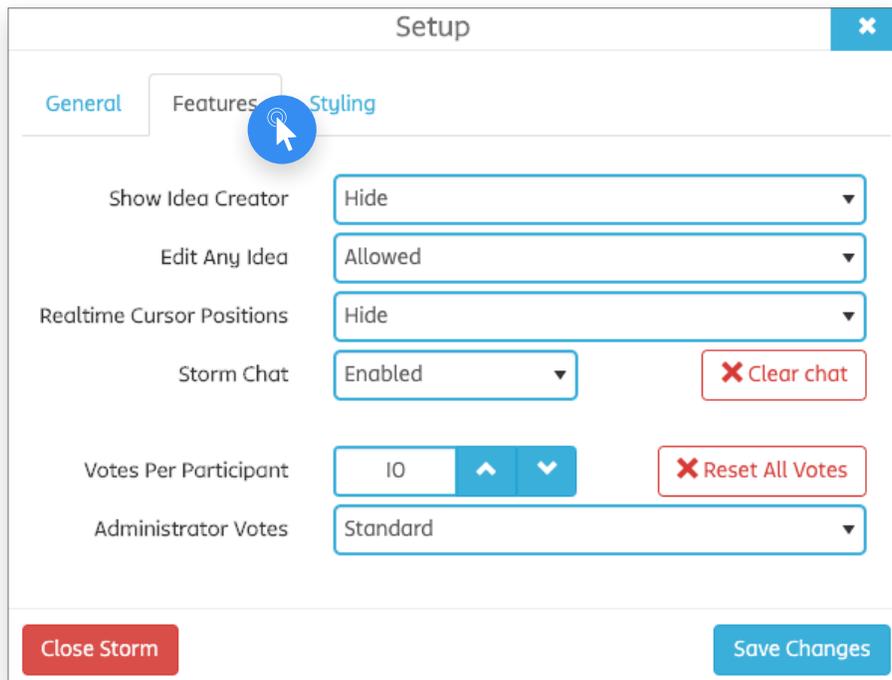
Under the **“General”** tab, you can change the name of your Storm, write a description or set any goals for the Storm, and see who the creator of the Storm is.

A screenshot of a "Setup" dialog box. The dialog has a title bar with "Setup" and a close button (X). Below the title bar are three tabs: "General", "Features", and "Styling". The "General" tab is selected. The form contains three main sections: "Storm Name" with a text input field, "Storm Goals & Description" with a larger text area, and "Created By" with a circular profile picture placeholder. At the bottom of the dialog are two buttons: "Close Storm" (red) and "Save Changes" (blue).

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 'Setup' dialog box with the 'Features' tab selected. The 'Features' tab is highlighted with a blue circle and a mouse cursor. The dialog contains the following settings:

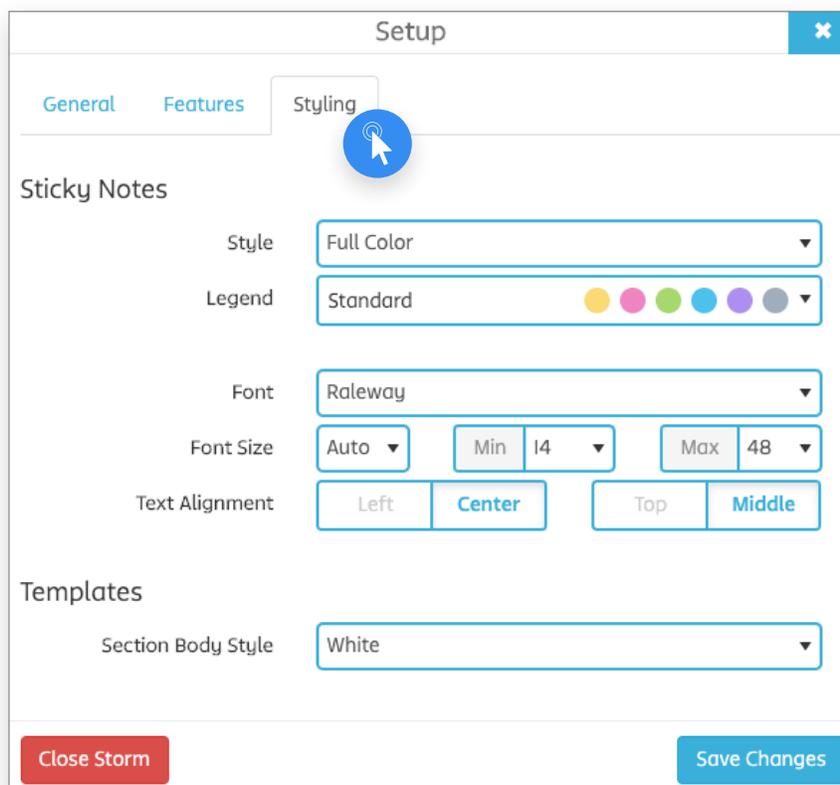
Setting	Value	Action
Show Idea Creator	Hide	
Edit Any Idea	Allowed	
Realtime Cursor Positions	Hide	
Storm Chat	Enabled	✕ Clear chat
Votes Per Participant	10	✕ Reset All Votes
Administrator Votes	Standard	

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

[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.



Inviting people to your meeting or collaboration

To invite people to participate in your Storm, tap the **“Share”** 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.

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.



Share this Storm by link or email ✕

Contributors Viewers Reinvite Users

🔒 Users joining with this ID & Key can fully participate in this Storm and will be added to your team.

1) Invite Contributor via Link

copy 🔄

2) Invite Contributor via Storm ID and Key

ID Key

3) Invite Contributor via Email Address

Inviting: 0 Edit Message (optional)

Send Invitations

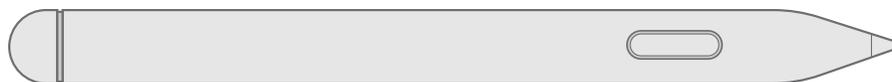
Using the Surface Hub pen vs. touch

Pen for Creation

Grab a pen from the side of the Surface Hub and tap the screen to open a new sticky note. You can add text, draw on a whiteboard, add an image, add a video, create an index card with multiple ideas, or add files (more on that in the following pages). Built-in handwriting recognition allows you to use the pen to write your content in the dialog box, or you can select the keyboard and type your content on the note instead. You can also connect your content together by drawing a line from the center of a note to any other note in your Storm. To make sure your ideas are assigned to you, tap your avatar at the bottom of the screen with your pen before opening a new sticky note.

Touch for Navigation

Use your finger to move your sticky note to a different section of your Storm. You can also fling the notes to the other side of the screen. Pinch the screen to zoom in-and-out and use touch to navigate to different areas of your Storm. All other buttons on the screen, as well as a sticky note's menu, can be opened using both touch and the Surface Hub Pen.



Microsoft Surface Hub 2 Pen



Microsoft Surface Hub Pen (Old)

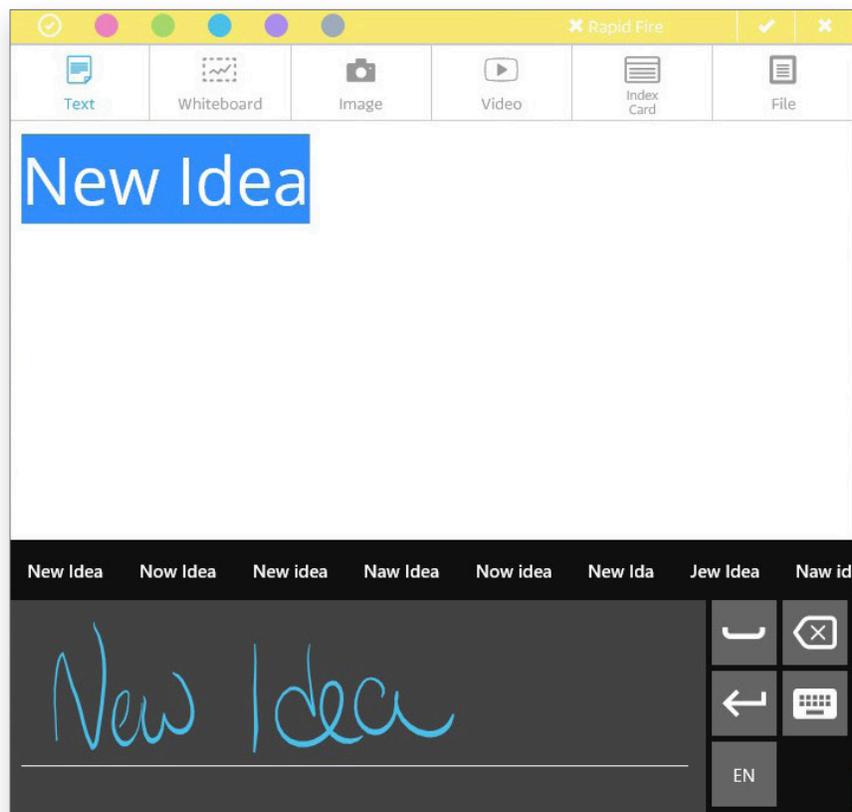
Adding content to your sticky notes

To add content, **tap anywhere** in your Storm with the **Surface Hub Pen** 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 corner touch the note with your finger or the pen.

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.

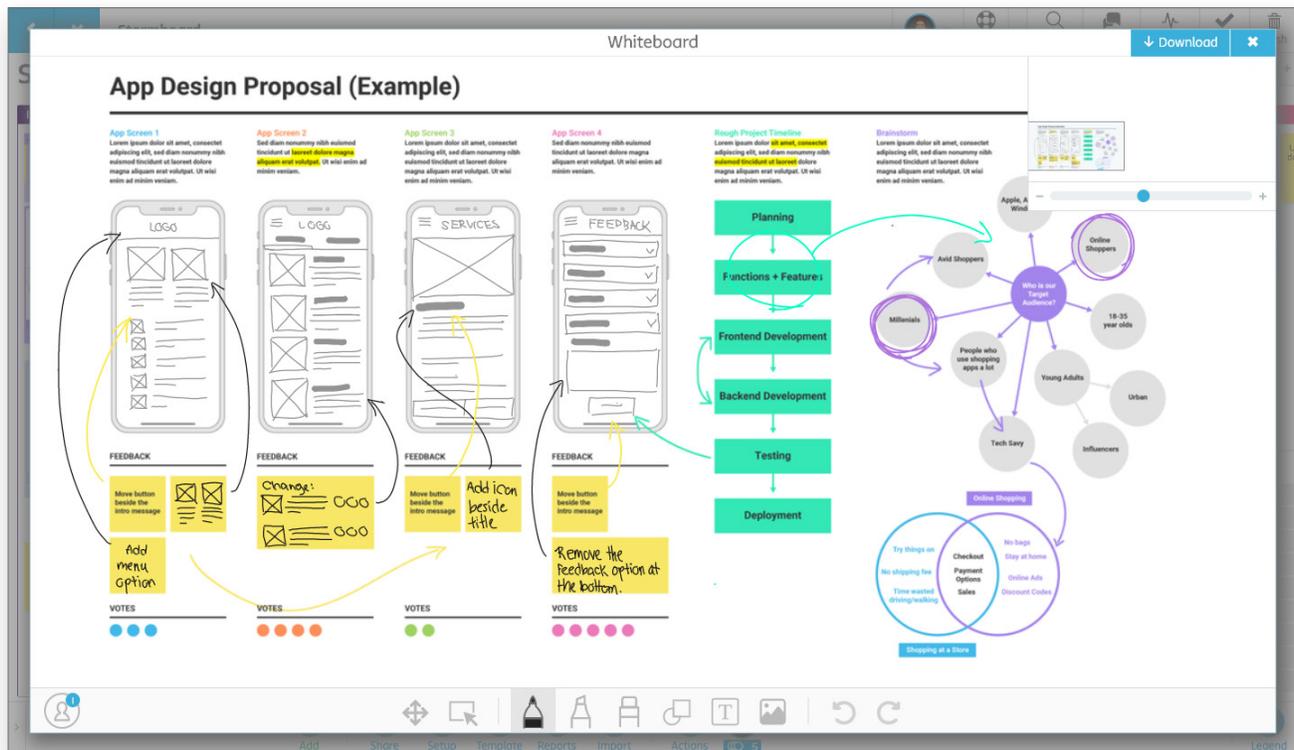
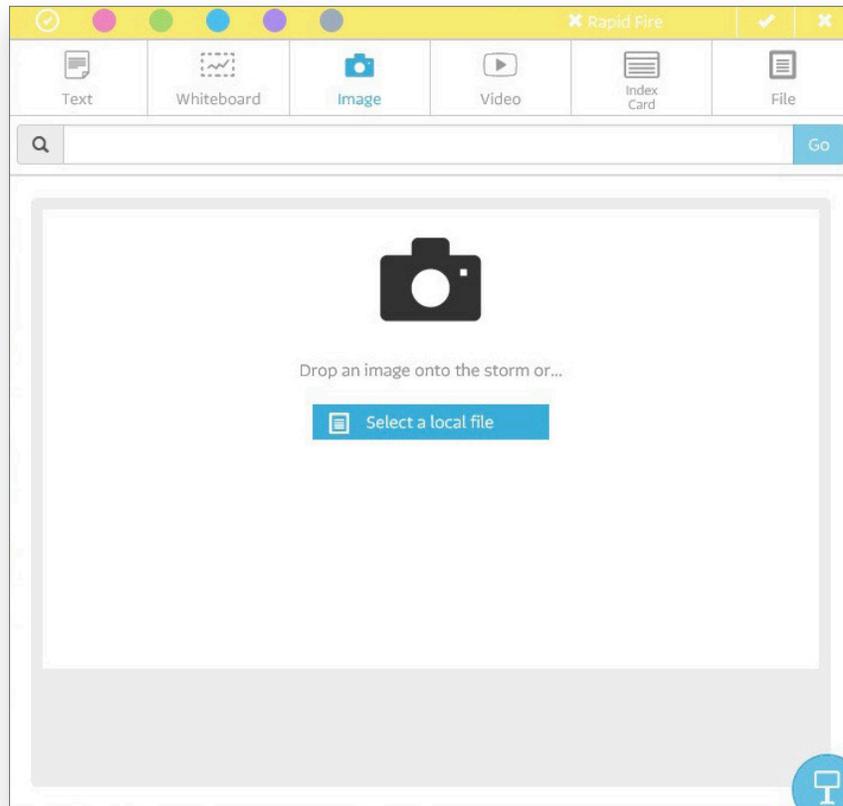


Image sticky notes

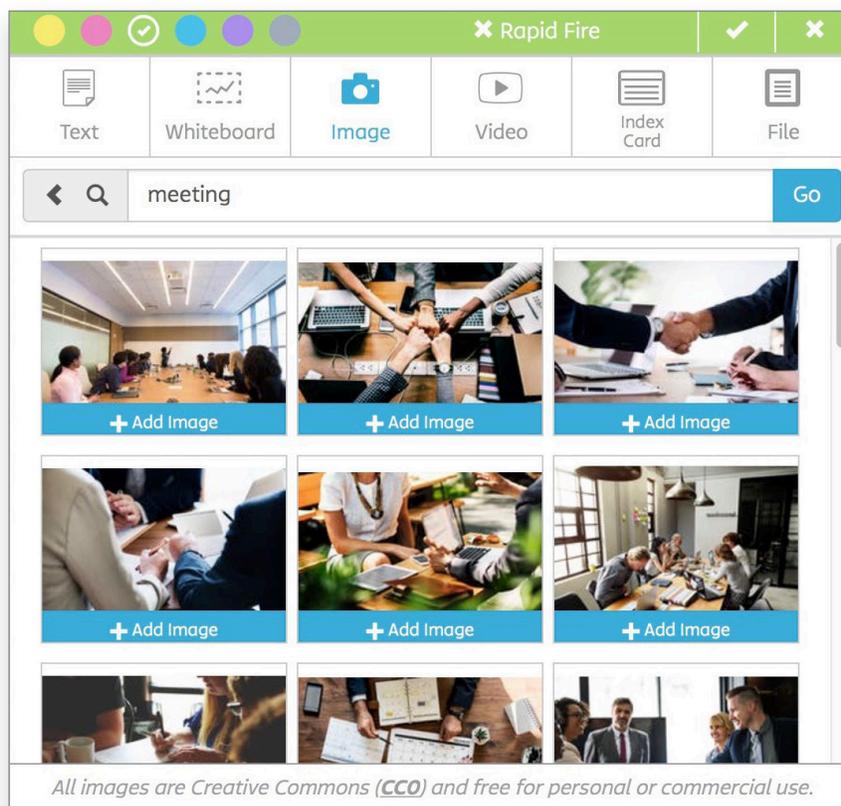
There are a few different ways to add images to your Storm.

You can **drag** an image to your Storm and an image sticky note will automatically be created. Alternatively, **tap** 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 a **local file**.



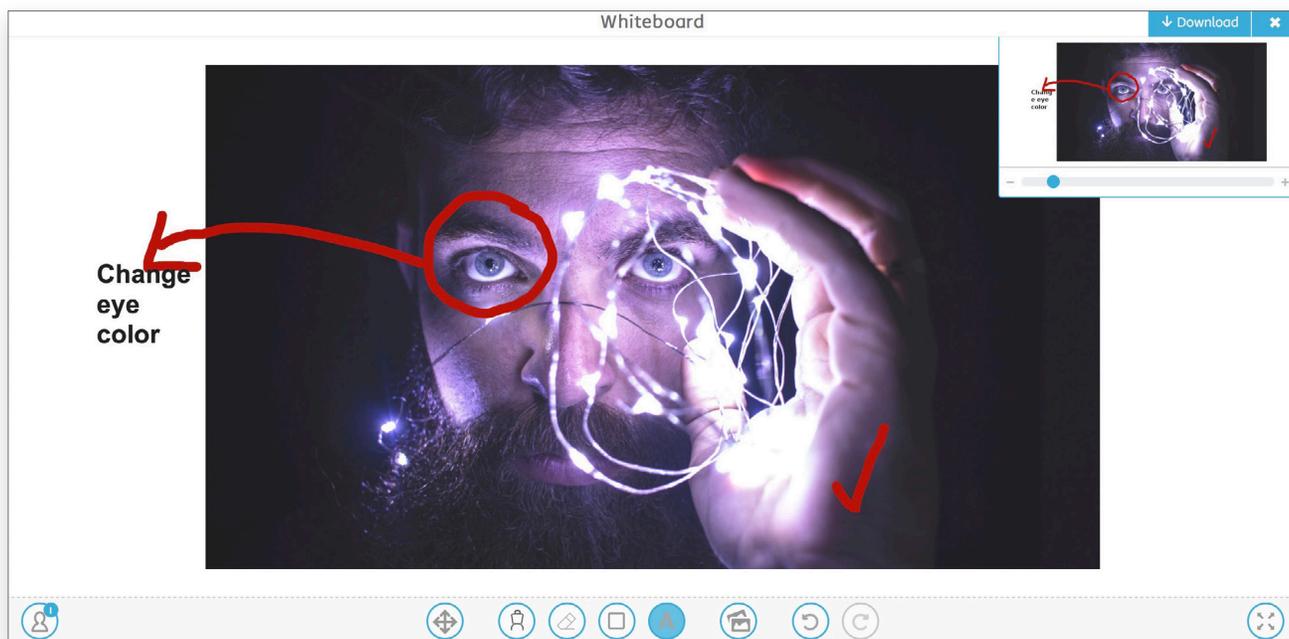
[Instructions continue on the next page](#) →

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!

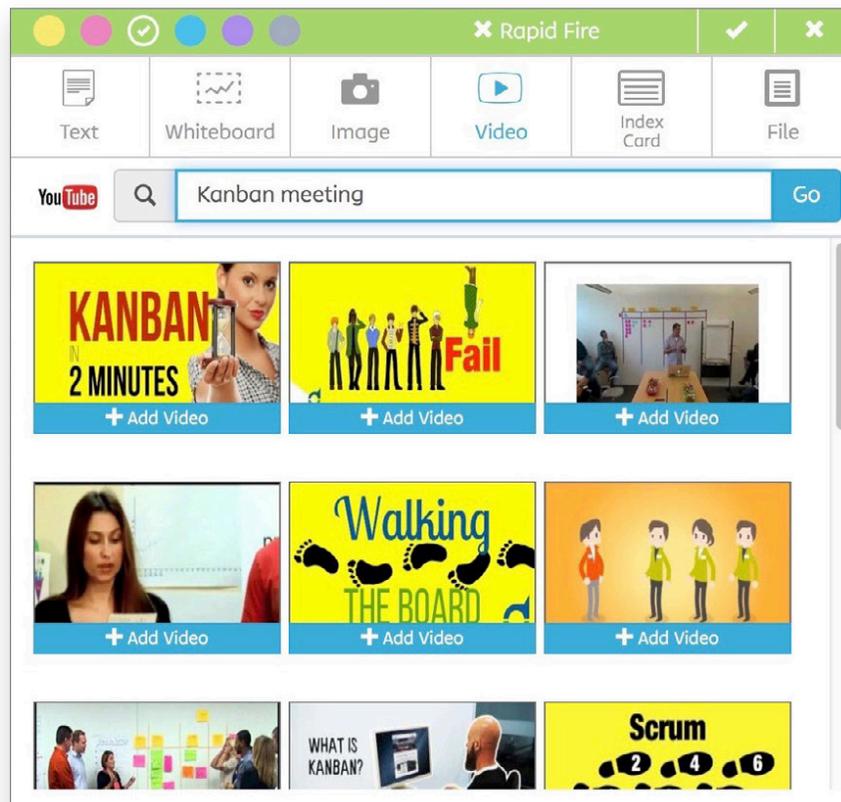


Video sticky notes

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 tapping on it.

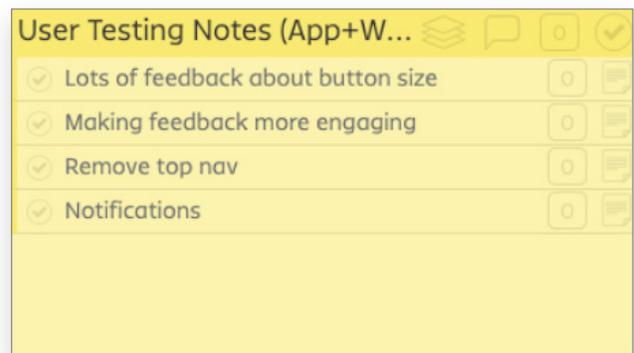
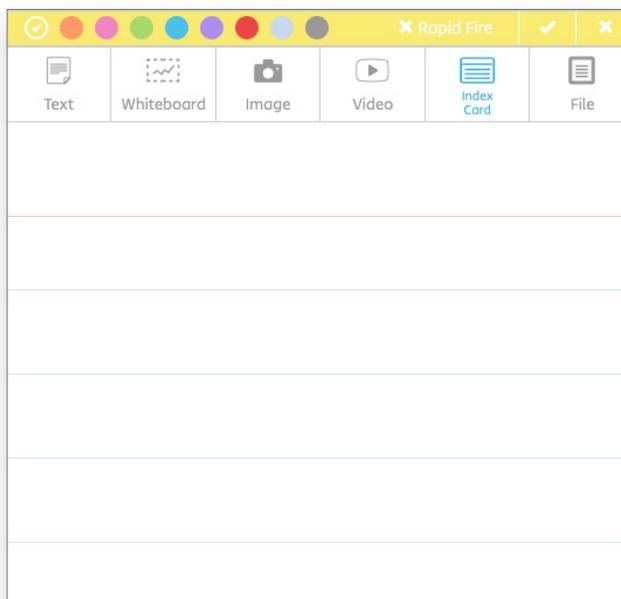


Index cards

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.



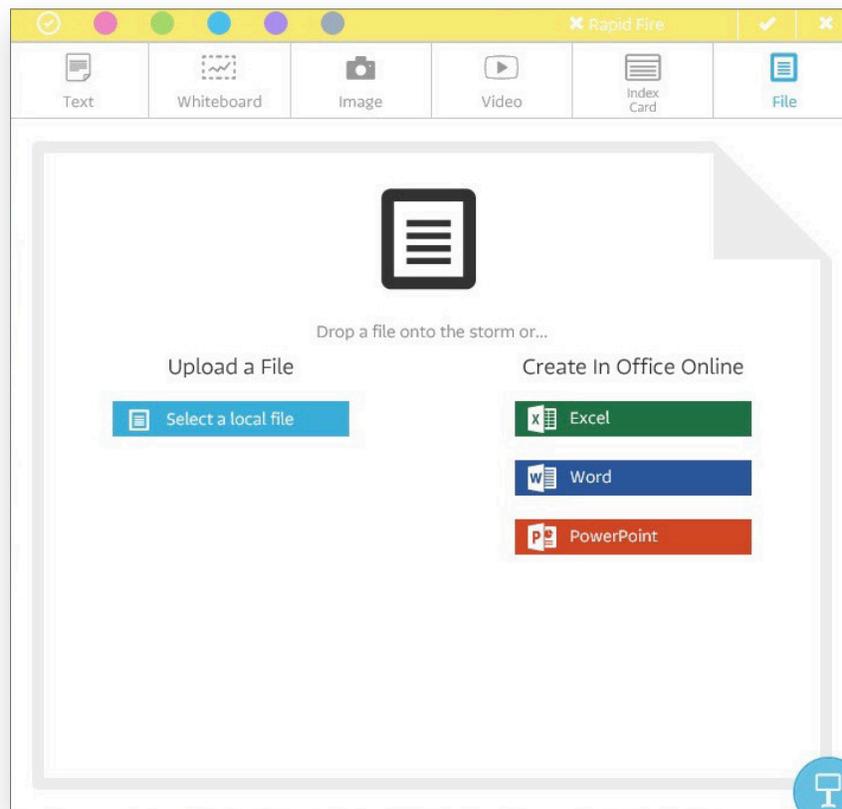
File sticky notes

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 a local file.

You can also create a document in **Excel, Word, or PowerPoint** using Office Online. 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 tapping** on it.

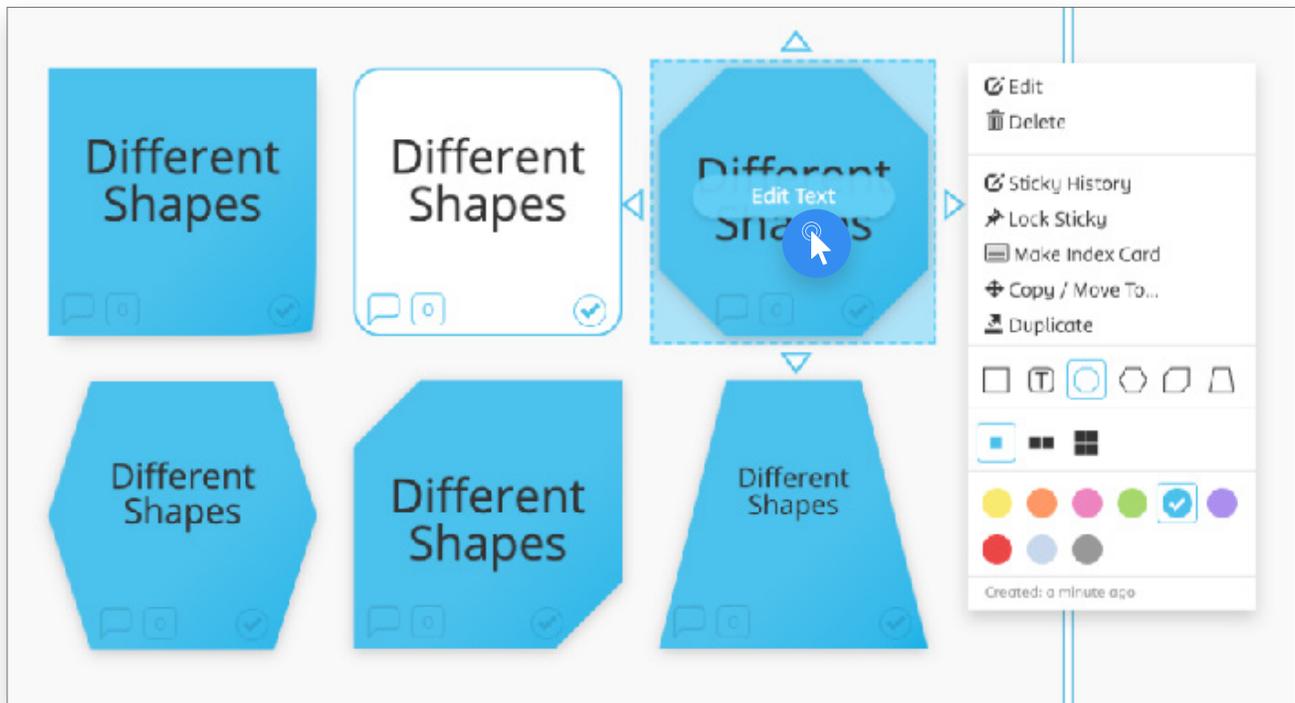


Editing sticky notes

Each sticky note has its own menu that will open when you **tap once** on the note with either your finger or the Surface Hub Pen.

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.

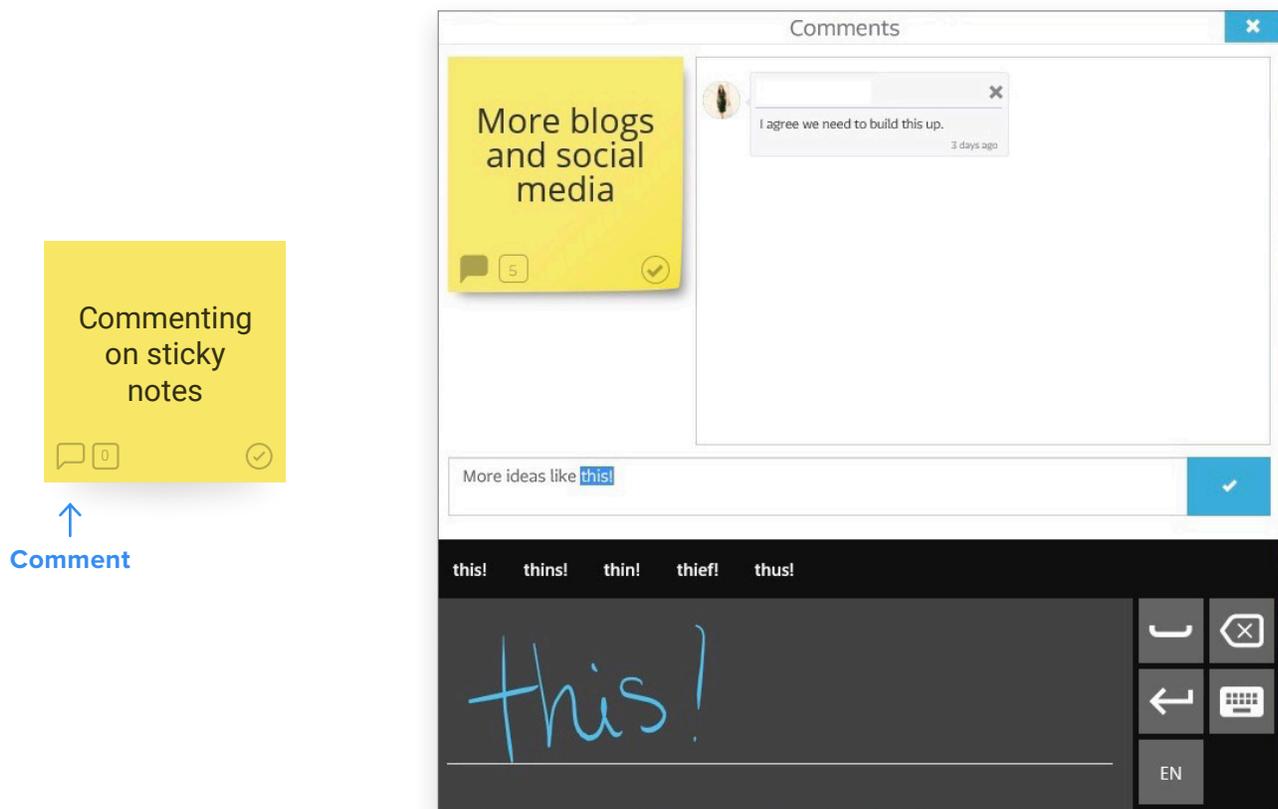


Commenting, voting, and assigning sticky notes

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

Commenting

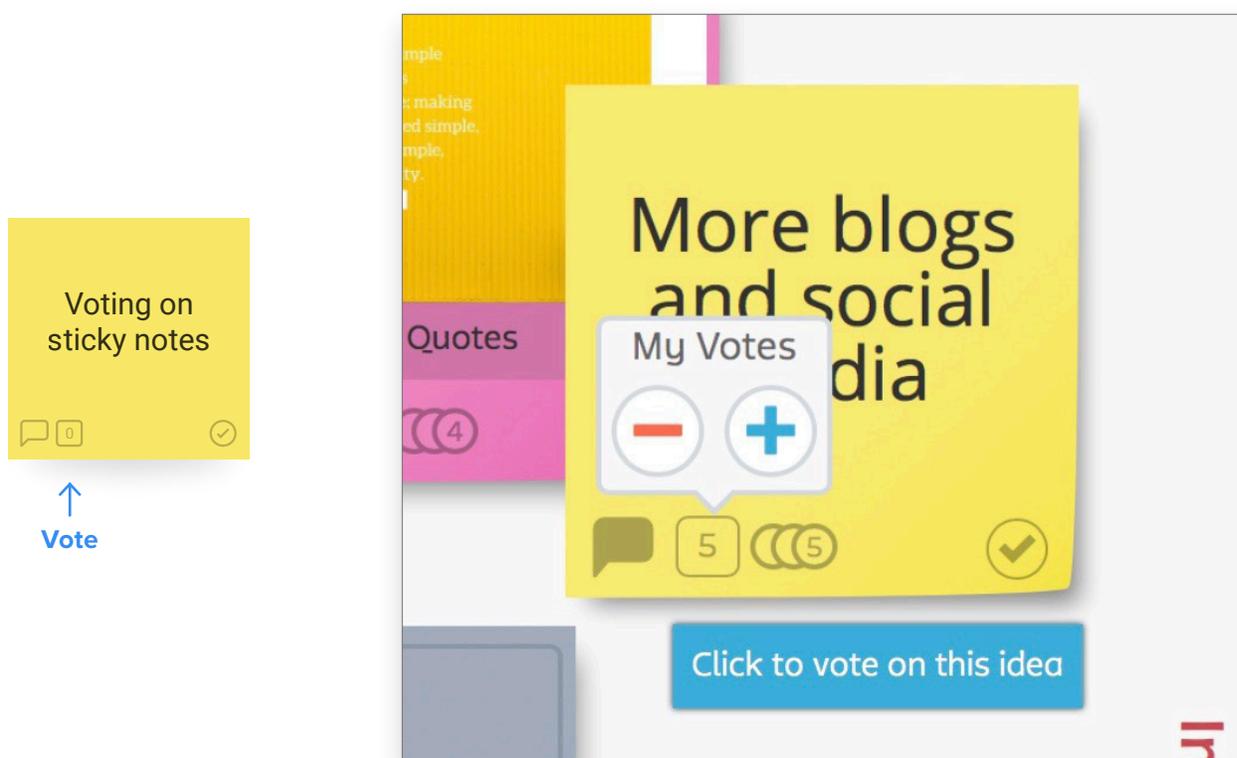
To comment on a sticky note, **tap on the speech bubble** in the lower left-hand corner, write your message, and **press enter** or **tap the check mark**. If someone else comments on a sticky note, a red number will appear on the comment bubble to notify you.



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

Voting

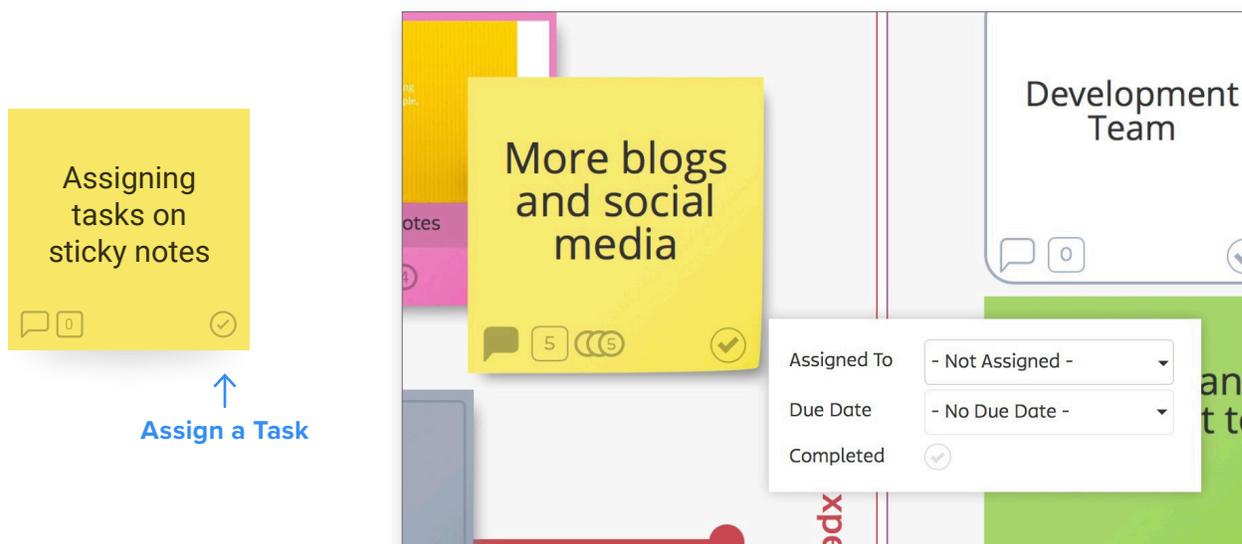
Each participant in your Storm is assigned 10 votes by default. This number can be changed by the Storm Administrator in the Setup Menu. To add your vote to a sticky note **tap on the number** located next to the speech bubble at the bottom of the note. **Tap the plus sign** to add the number of votes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



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

Assigning Tasks

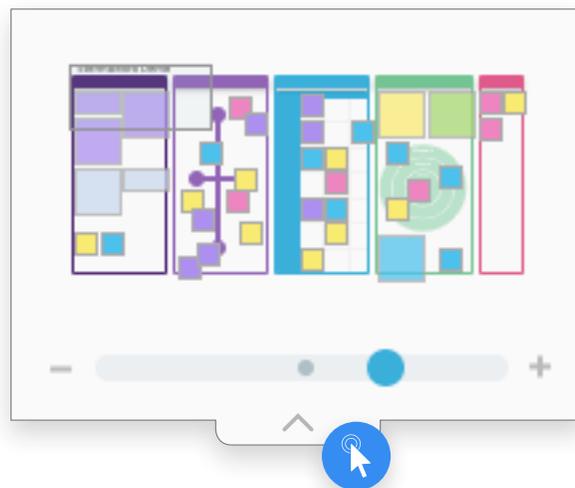
To assign a sticky note, or idea, to a member of your team, **tap the checkmark** on the bottom right-hand corner of your note. You can choose who to assign the note to and the due date. The person that you have assigned the task to will be notified.



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. To collapse or open the viewfinder, **tap on the tab at the bottom**. **Pinch the screen** to zoom in-and-out and use **touch** to navigate to different areas of your Storm.

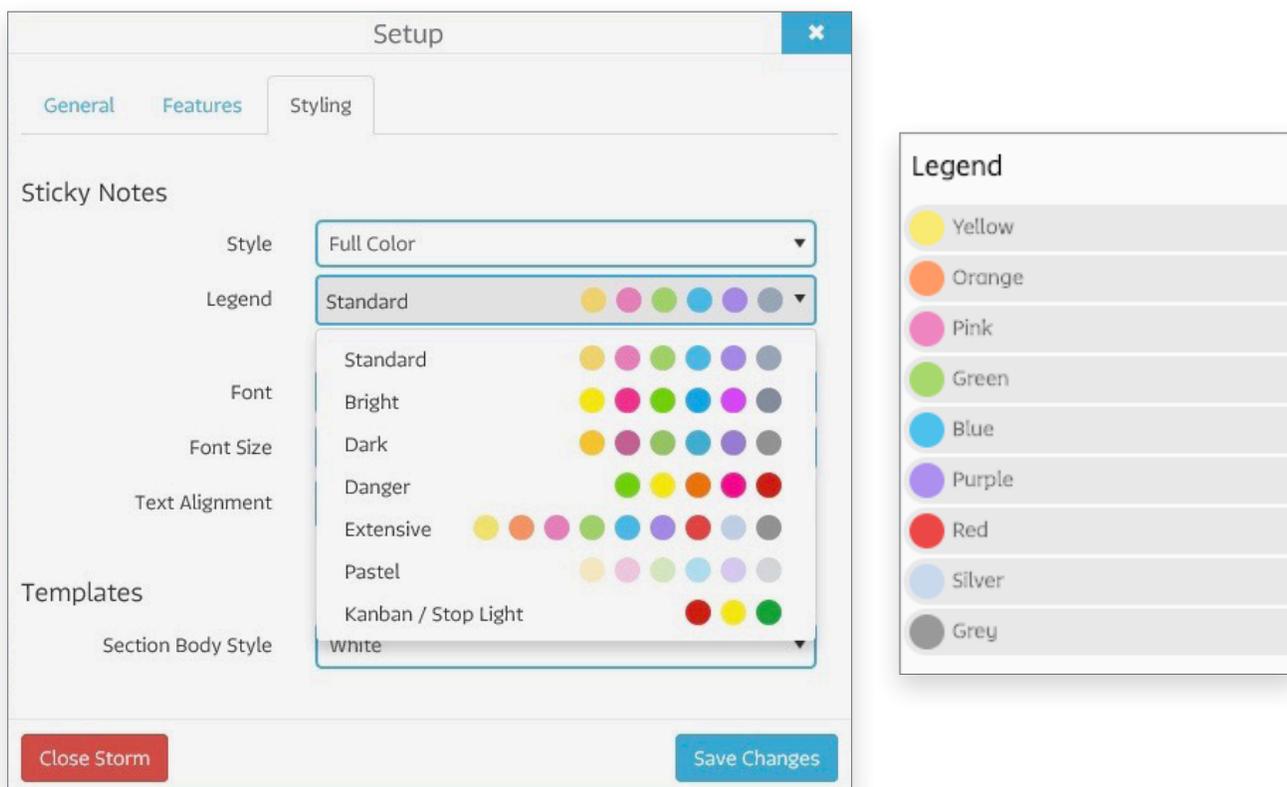


Customizing your color legend

In the bottom right-hand corner of your screen is a menu showing the colors that are available for your 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 **Setup 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: Tap this button to open a new sticky note.

Share: This button takes you to the menu where you can invite people to collaborate with you.

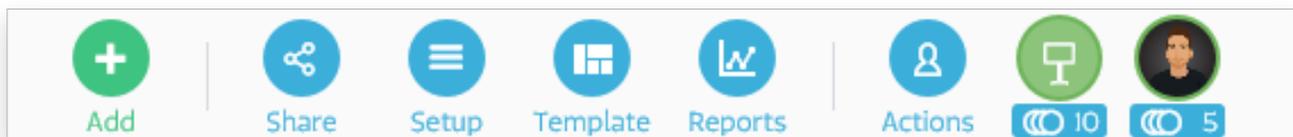
Setup: Opens the menu where you can customize the styles and features of your Storm.

Template: 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!

Participant Area: This area will show the inactive users (in a red circle) and the active users (in a green circle) in your Storm.

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:

Storm ID & Key: You can send the Storm ID and Key to anyone you would like to invite to join your Storm.

Tour: Tap here to take an on-screen tour of your Storm.

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

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.

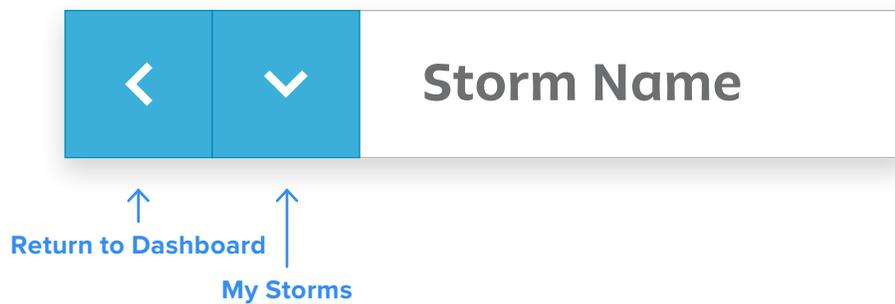


Switching Storms and returning to your Dashboard

The Storm Switcher makes it easy to switch between Storms. To open it, **tap on the down facing arrow** located in the top left corner of your screen (it inverts when the Storm Switcher is open).

The list is automatically sorted with the last active Storm first, so you can easily switch between projects that you are actively working on.

Tap the left-facing arrow to return to your Dashboard.



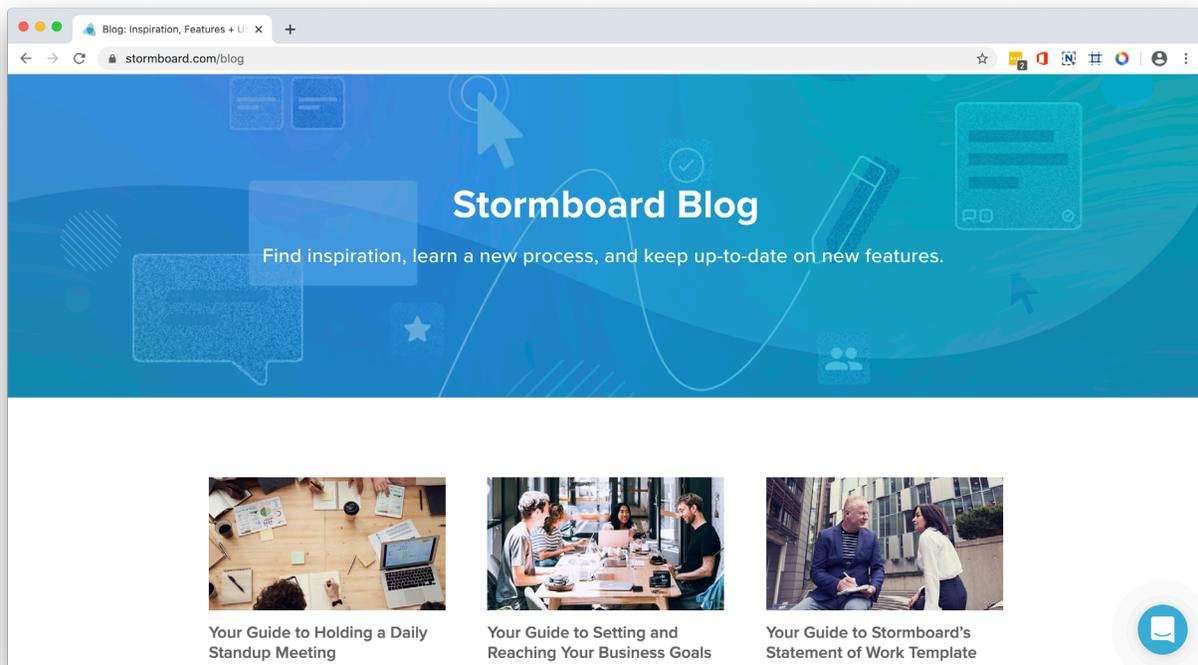
Keep learning

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 for articles on how to use different templates, business processes, and new features.

Happy Storming!



The logo consists of three overlapping circles of different shades of blue, arranged in a triangular pattern.

Stormboard