

Training Guide

Microsoft Whiteboard



To book training or to speak to a trainer, please get in touch via.

e training@imerseyside.nhs.uk

Disclaimer

Periodically changes to business processes or updates to systems or applications result in the update of training guides and materials. It is the responsibility of the delegate to check that they have the most up-to-date guides. All guides contain a Change Control table at the front which will detail when the document was updated. If you want to check if you have the correct version please email training@imerseyside.nhs.uk





Change Control

Document Type		Document Title		
Training Guide		Microsoft Whiteboard		
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Document Approval

Version	Date	Approver Name	Approver Job Title
V1.0	03 December 2020	Claire McGrady	IT Training Manager

Hints and Tips

	This symbol suggests a tip or a good method of working for speed and efficiency
	This symbol suggests a caution or an action to be aware of
	This symbol indicates an Information Governance warning
	This symbol indicates hints and tips that support digital optimisation

Contents

Open and Share Whiteboard	4
Use Whiteboard in Teams	4
Export and Save the Canvas.....	5
Download and Install the Windows App.....	6
Download from the Microsoft Store.....	6
Download the App from within a Meeting.....	7
Working on the Whiteboard	7
Drawing (Inking).....	7
Add an Image.....	8
Add a Note	9
Add additional items	9
Format Canvas Background.....	10
Ink to Shape	11
Ink to Table	12
Clear the Canvas	13
Share the Canvas	13
Export.....	13
Post to Teams	14
Send email summary.....	15
Contact Details	16

Microsoft Whiteboard

Microsoft Whiteboard is a digital canvas where ideas and content come together and can be shared. It allows collaboration between people, especially within meetings, in real-time no matter where the user is working from. Users of Whiteboard can see who is adding content to the canvas instantly. The canvas can then be saved and/or shared accordingly.

Open and Share Whiteboard

Use Whiteboard in Teams

[Whiteboard](#) can be used integrated within [Teams](#) without the need to download and install anything. This also supports access to [Whiteboard](#) for attendees who have joined the meeting outside of [Teams](#), e.g. through their Internet browser.

From the [Meeting Screen](#).

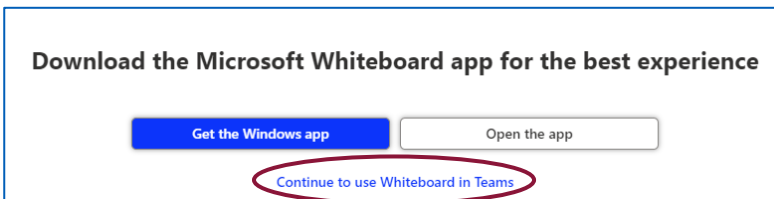
- Select [Show Sharing Options](#).



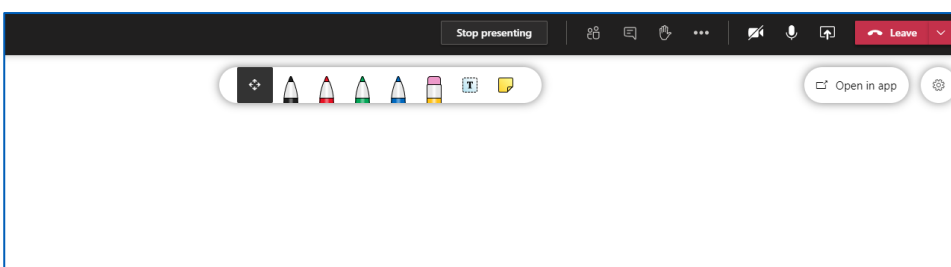
- Select [Microsoft Whiteboard](#).



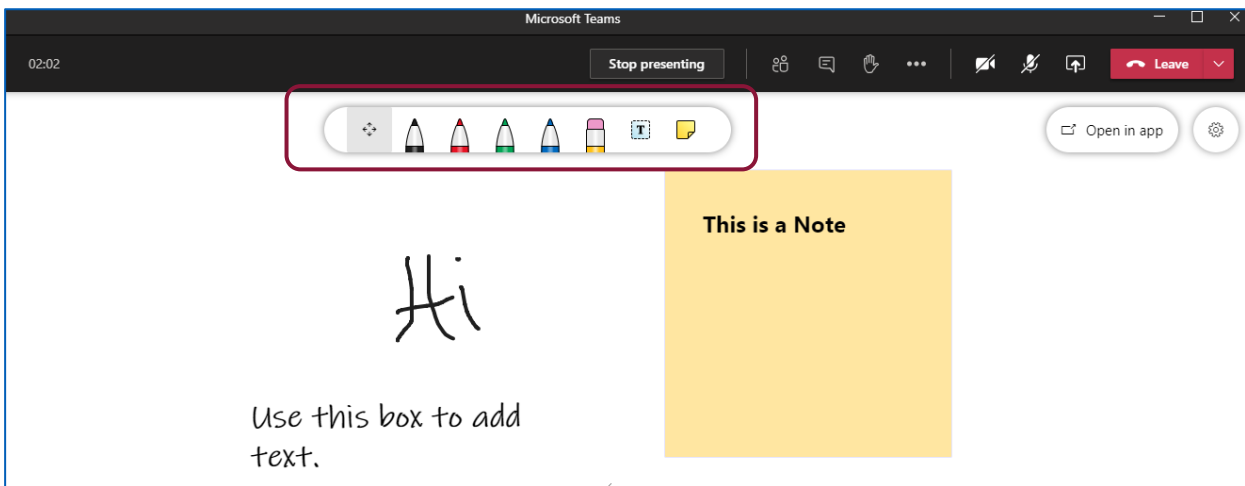
If the Download screen appears but the user does not wish to download anything, select [Continue to use Whiteboard in Teams](#).





[Whiteboard](#) will open integrated within the meeting screen.



- Select from the choice of [pens](#) at the top of the screen.
- Use the mouse to [ink](#) the Canvas.

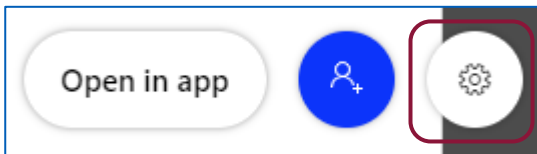


-  - Adds a **Text Box**
-  - Adds a **Note**

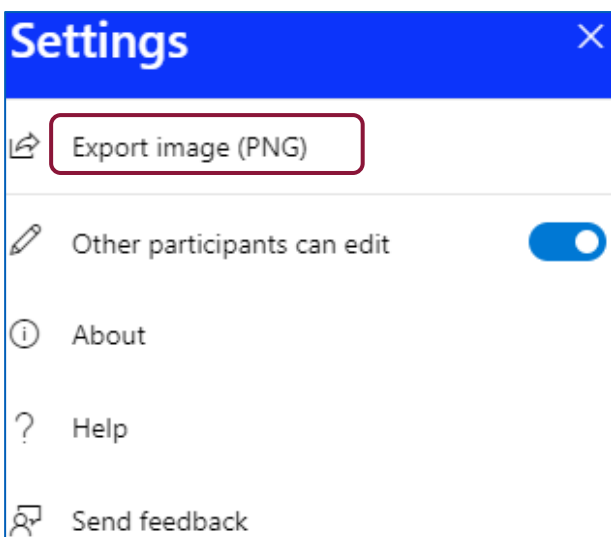
Export and Save the Canvas

Once collaboration has been completed between users, the Canvas can be saved and shared.

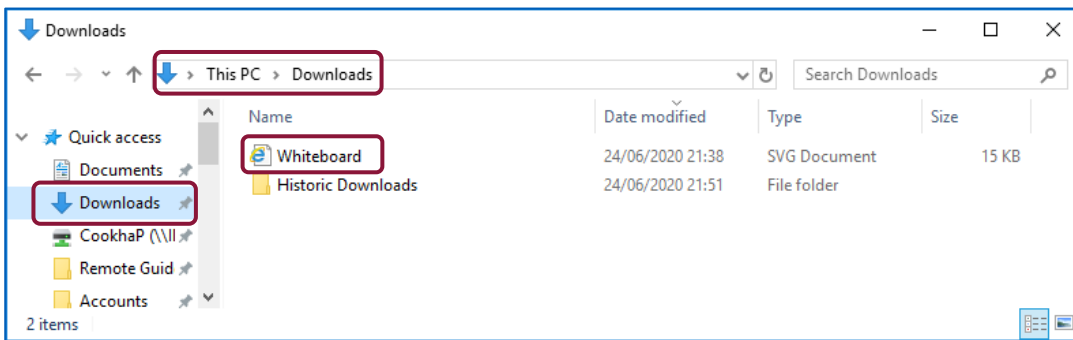
- Select the **Cog Icon** to open up **Settings**.



- Select **Export image (PNG)**.



- The Canvas will download to the PC Downloads Folder, the folder can be changed is required.



Whiteboards can only be opened outside of Teams using [Chrome or Edge](#).

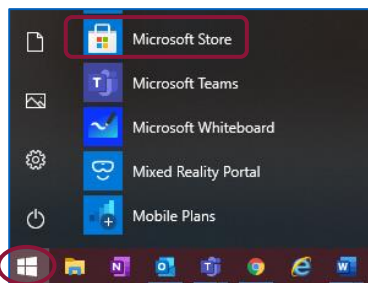
The [Whiteboard](#) for each individual meeting will be saved in the [Chat section](#) for the meeting in question under the [Whiteboard Tab](#).

Download and Install the Windows App

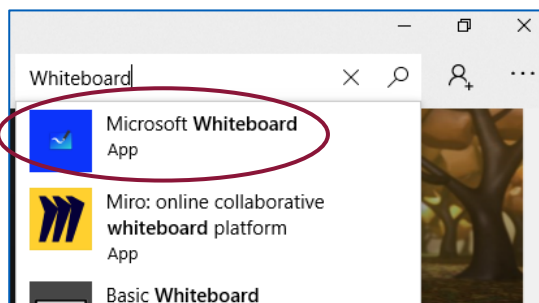
[Microsoft Whiteboard](#) can be downloaded to be used as a stand-alone app in Windows. There is increased functionality when using the downloaded app as opposed to using [Whiteboard in Teams](#).

Download from the Microsoft Store.

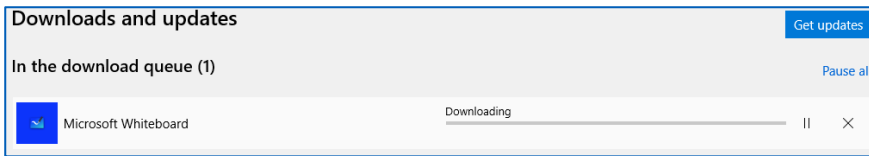
- Select Start → Microsoft Store.



- In the [Search](#) field, type [Whiteboard](#) then select the [Whiteboard](#) app.



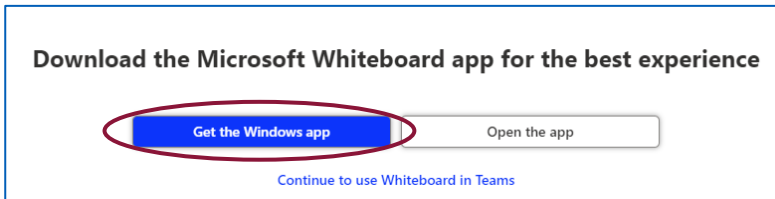
The app will download and install.



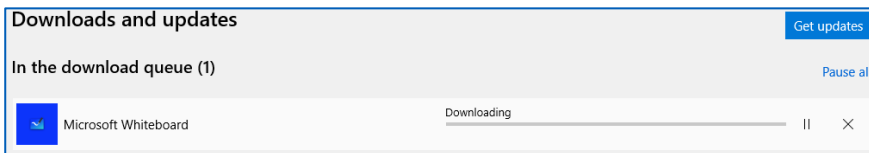
Download the App from within a Meeting


If the app has not previously been installed.

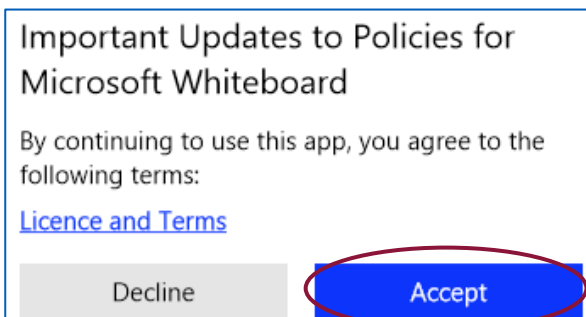
- Select [Get the Windows app](#)



- The Microsoft Store will open, and the App will begin to download.



 When running for the first time or after updating, the user may be required to Accept the Licence and Terms.



Working on the Whiteboard

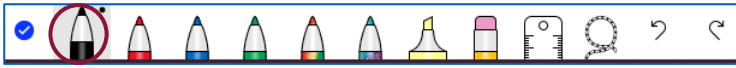
Once the [Whiteboard](#) is installed, it can be used to collaborate and share ideas with meeting attendees.

Drawing (Inking).

- Select the [Pen](#) from the toolbar.



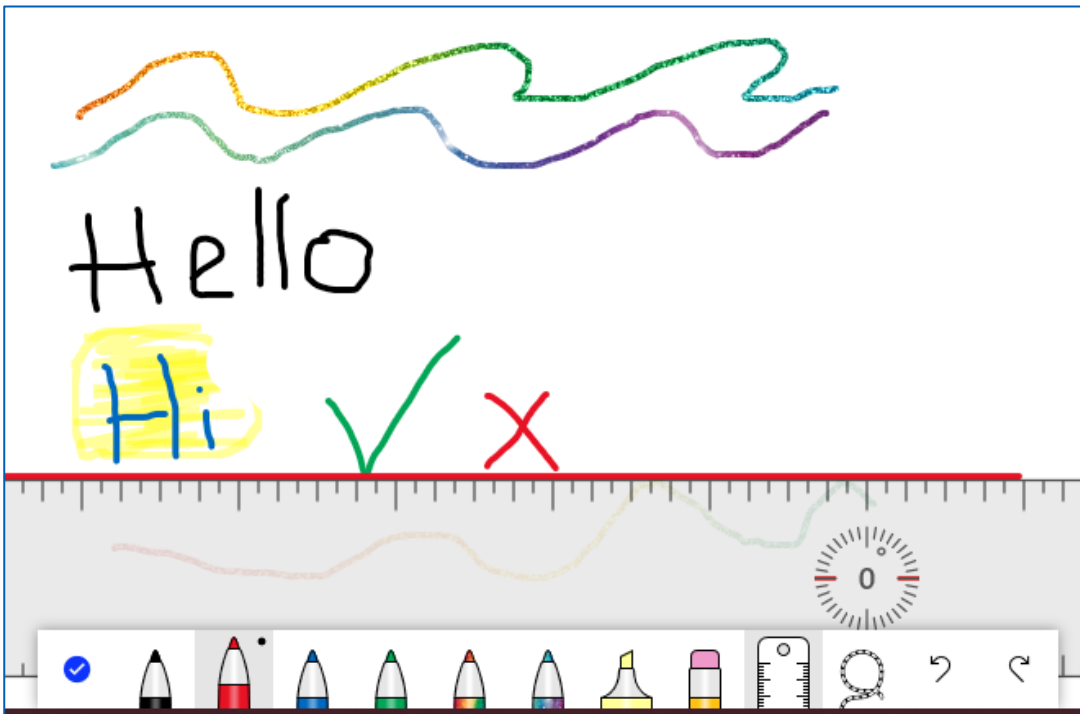
- Select the [Pen](#) colour to be used.



- Select the **Pen** again to change to a custom colour from the palette.



- Holding down the left mouse button, **use the mouse to ink** the canvas.



Rainbow and Galaxy pens

Highlighter

Eraser

Selector

Undo/Redo



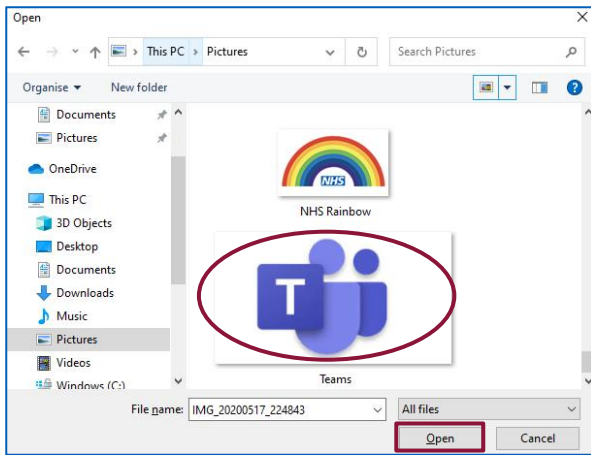
Ruler – Change the angle of the ruler by using the wheel on the mouse. Ink anywhere below the ruler to draw a straight line.

Add an Image

- Select the **Image** icon from the toolbar.



- Browse for and select the image to be added, select **Open**.



- The selected image will be added to the canvas.

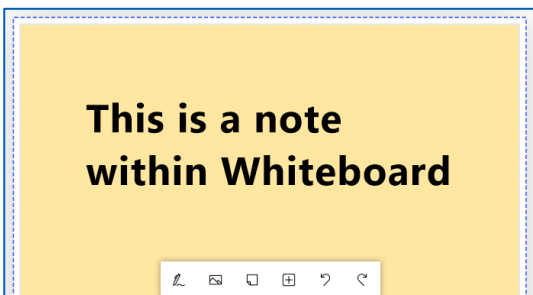


Add a Note

- Select the **Note** icon from the toolbar.



- A **Note** will be added to the canvas.

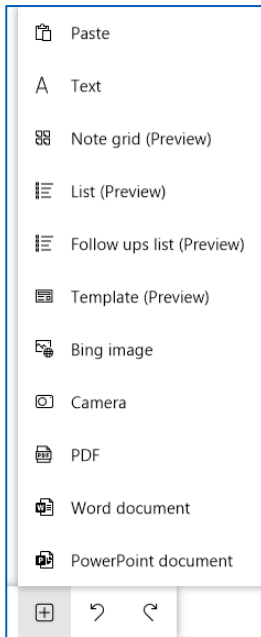


Add additional items

- Select the **Add** icon from the toolbar.



- Select the item or source of the item to be added to the canvas.



Format Canvas Background

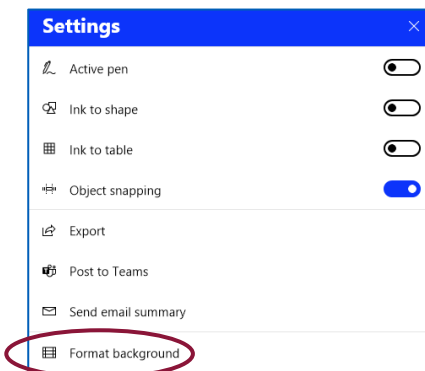
The background of the canvas can be changed to show various patterns and designs. For example, a squared background in which to work.

From the options at the top of the canvas.

- Select the three bars.



- Select **Format background**.



- Choose the desired format.



- Select the back arrow at the top of the section

The background will be changed.



Ink to Shape

Microsoft Whiteboard can detect automatically when a shape is being inked. When turned on, Whiteboard will join the shape up to make it neat.

From the options at the top of the canvas.

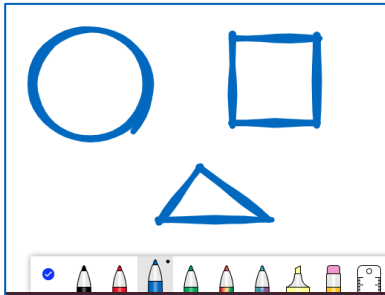
- Select the three bars.



- Toggle the Ink to shape switch on.



- Draw the shape relatively accurately and **Whiteboard** will neaten it.

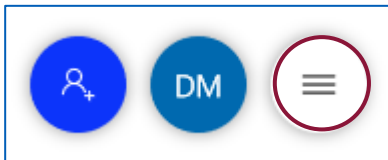


Ink to Table

Microsoft **Whiteboard** will automatically detect when the user is inking a table. It will neaten the table.

From the options at the top of the canvas.

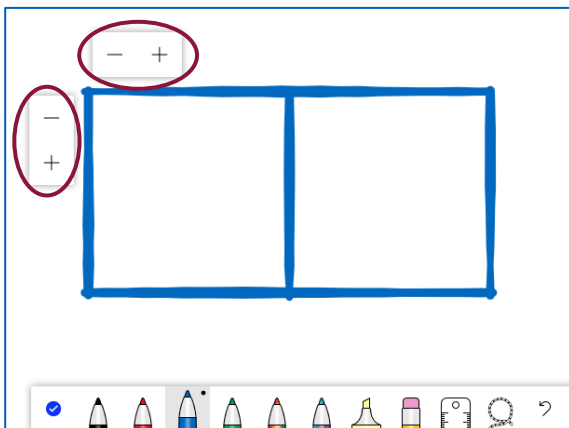
- Select the three bars.



- Toggle **Ink to table** on (Ink to shape will automatically toggle on with this option).



- Begin drawing the table on the canvas. **Whiteboard** will neaten it.



- Use the **+** and **-** at the top to add or remove columns

- Use the **+ and –** at the side to add or remove rows

Clear the Canvas

From the options at the top of the canvas.

- Select the three bars → **Clear Canvas**.



Share the Canvas

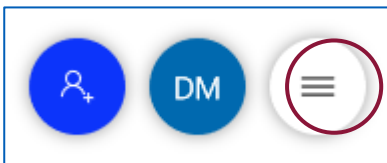
Once the canvas is complete it can be shared with others via various methods.

Export

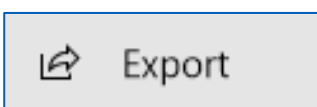
This function allows an image of the full canvas to be shared.

From the options at the top of the canvas.

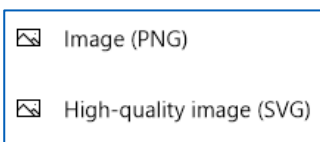
- Select the three bars.



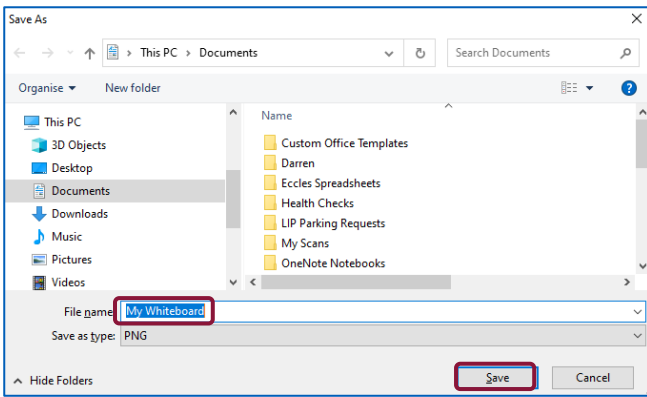
- Select **Export**.



- Select the quality of the image to be shared.



- Choose where to save the image, name it and click **Save**.



The image can now be shared as a file via email as an attachment and other means.

Post to Teams

The canvas can be shared directly to [Microsoft Teams](#) from within [Whiteboard](#).

From the options at the top of the canvas.

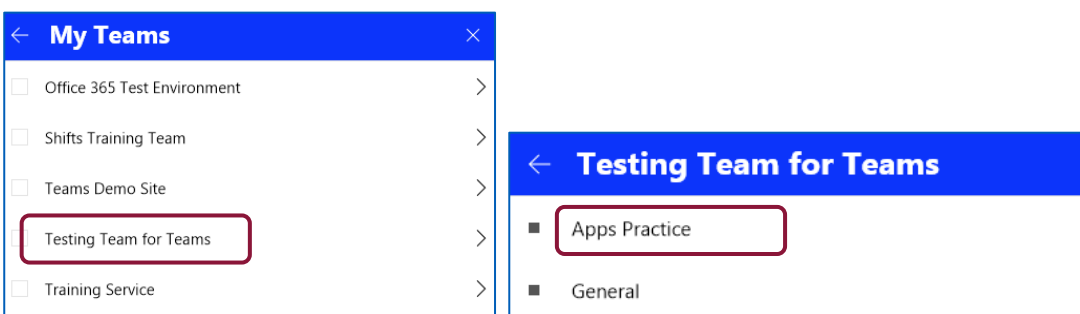
- Select the three bars.



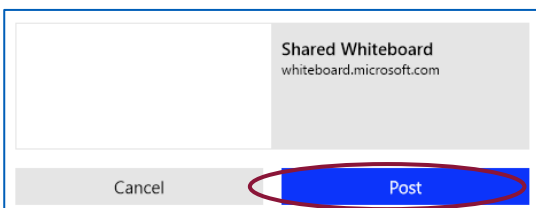
- Select [Post to Teams](#).



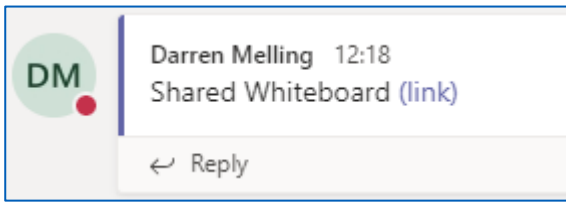
- Select the [Team](#) and [Channel](#) in which the canvas will be posted.



- Select [Post](#).



- A link to the canvas will be posted into the selected **Channel** within **Teams** for its members to access.



Send email summary

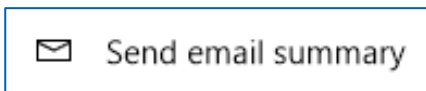
The whiteboard can be sent via email to all attendees of the meeting.

From the options at the top of the canvas.

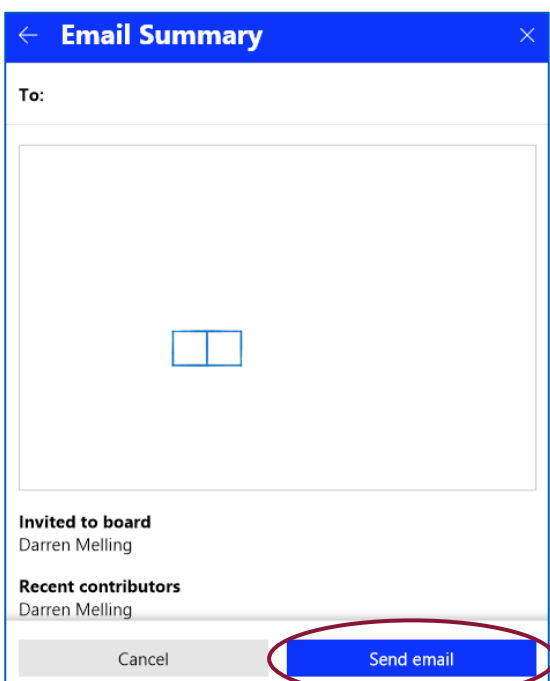
- Select the three bars.



- Select **Send email summary**.



- The email summary outlines who the canvas will be sent to and who recently contributed to it. It will also provide a preview of the canvas.
- Check these details and select **Send email**.



Contact Details

IT Queries	Informatics Merseyside IT Service Desk	0151 296 7777
Training Queries	Informatics Merseyside Training Service	training@imerseyside.nhs.uk