

Microsoft Whiteboard



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What is it?

Microsoft Whiteboard is cloud-based digital whiteboard that enables teams to collaborate on ideas whilst working in different geographical locations. Whiteboard re-creates the flipchart or whiteboard with highlighter pens and post-it notes in the corner of your meeting room.

It allows users to type, draw, scribble, stack, create shapes, insert pictures and images, attach sticky notes, etc – all on an infinite workspace.

Whiteboard supports input from touch-screen pens, touch, or keyboard.

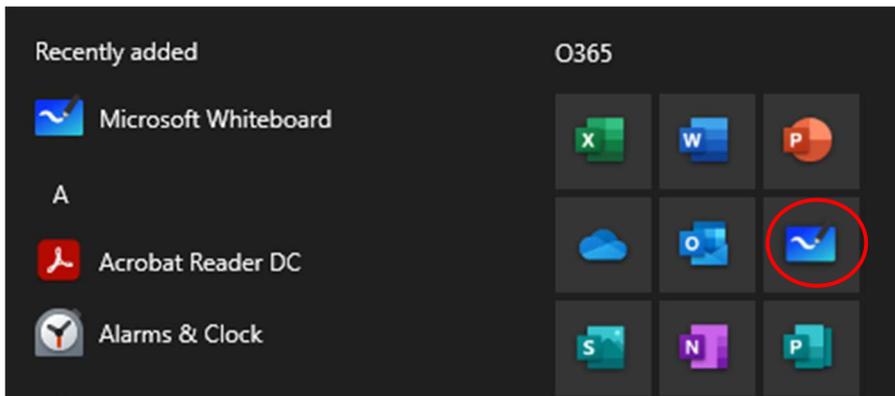
The benefits of Microsoft Whiteboard

- You can visually **brainstorm** together, even when you're apart. It's easy to express your ideas, collaborate on designs, and teach people new things.
- There is **Full integration with Microsoft Teams meetings**. At any time during a Teams meeting, one of you can click the Share button and launch a Whiteboard. From there, anyone on the call will be able to start drawing/writing on the canvas which will be saved in the Chat space and in the Whiteboard app for viewing later.
- **Stop and resume sessions** anytime. Once your team is done working on a whiteboard canvas, it'll be **saved automatically** to the cloud until you return to it.
- Anyone viewing the whiteboard will see your **changes appear in real-time** on their screen.
- There is a Whiteboard app available on **desktop, in Teams meetings and online**.
- There isn't a **Save** button. This is because Whiteboard **automatically saves** your work as you go along. Unless you delete any, your canvasses will always be in Whiteboard's home page.
- Share a digital canvas on **almost any device**. Whiteboard can be used with touch-enabled tablets or laptops, any modern iOS device, or any Windows 10 non-touch device using mouse and keyboard to add notes.

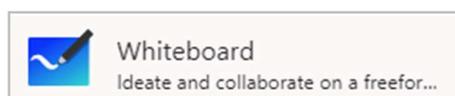
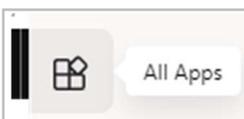
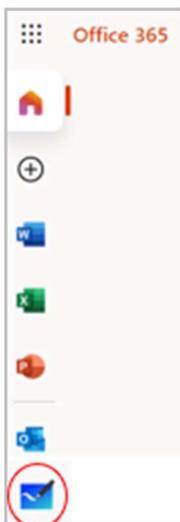
How to open Whiteboard

You can access Whiteboard in 3 ways:

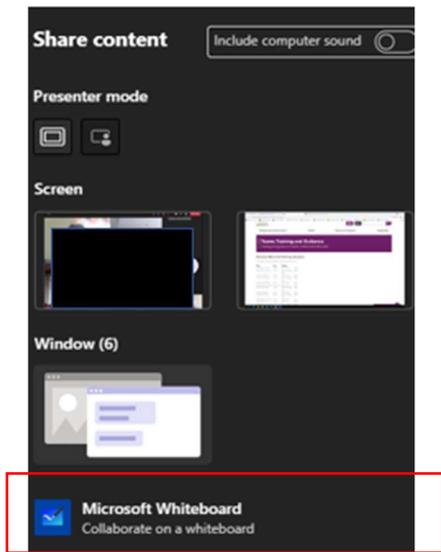
- ❖ Download the **desktop version** from Company Portal in your Start Menu. You can then pin it to your start menu or taskbar for easy access.



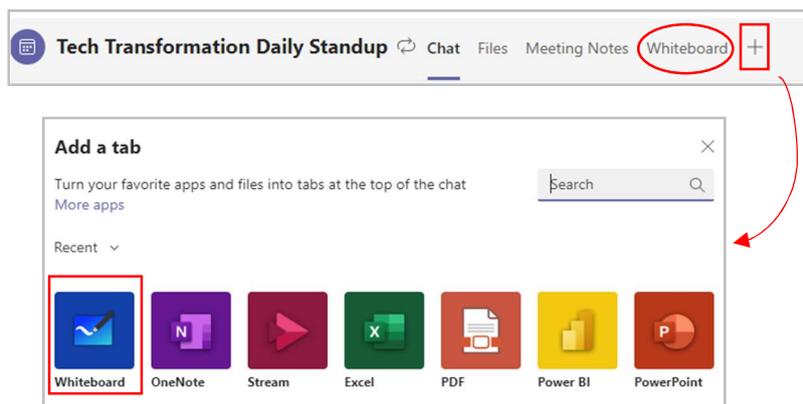
- ❖ Use the **online (web) version** by logging into Office365 via office.com. It will either be in the list of apps down the left-hand side of your O365 landing page, or you can find it in by going into 'All Apps' at the bottom of that list and finding Whiteboard in the display.



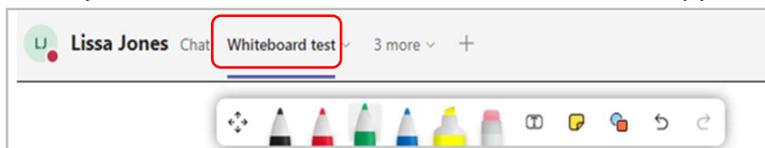
- ❖ Use it during a **Teams meeting**. In Teams, Whiteboard is the web version so either:
 - share your screen and choose Whiteboard from the 'Share content' screen.



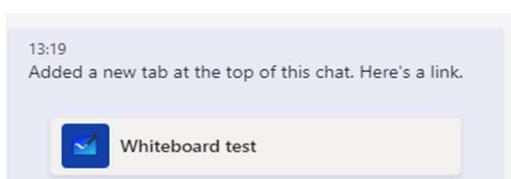
- or add Whiteboard to a meeting chat by using the Whiteboard tab if it is on the top command bar or clicking on the plus sign to open a Whiteboard tab within the Chat.



Once you have added a tab for Whiteboard, it will appear in your chat command bar.

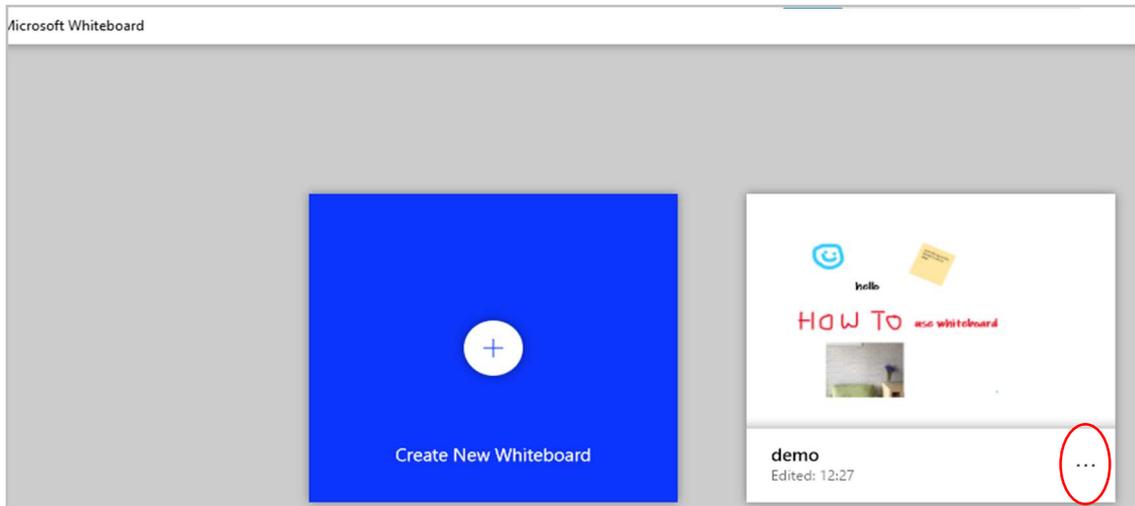


It will then stay in the Chat of that meeting and can be used even after the meeting ends. You can access it either by going into it along the top (as above) or clicking onto the link in the chat (as below)

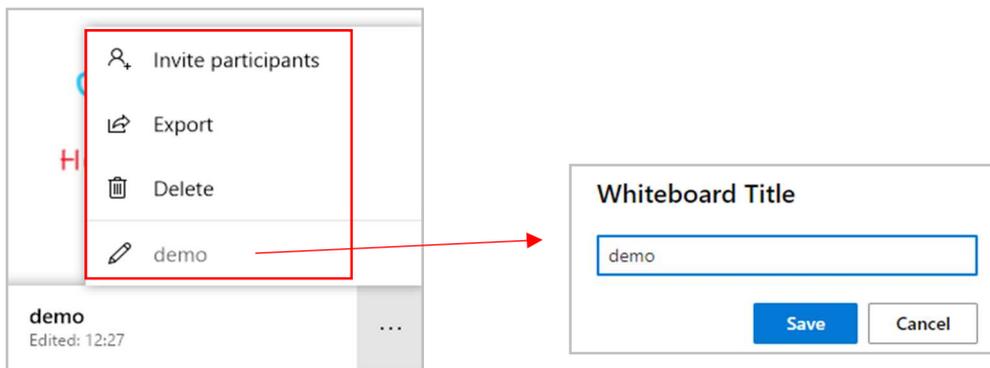


Create a Whiteboard in DESKTOP APP

Once you've opened the Whiteboard desktop app, you will see the Home screen. This shows any previous whiteboards that you have been involved in and has a 'create new whiteboard' option.

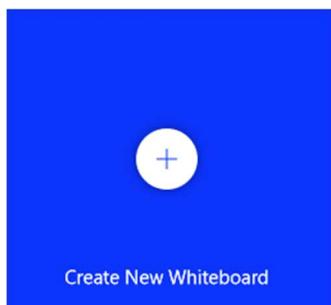


For a canvas already created, you can click onto the ellipsis and either delete it, name/rename it, invite other participants or export it to another location such as OneDrive.



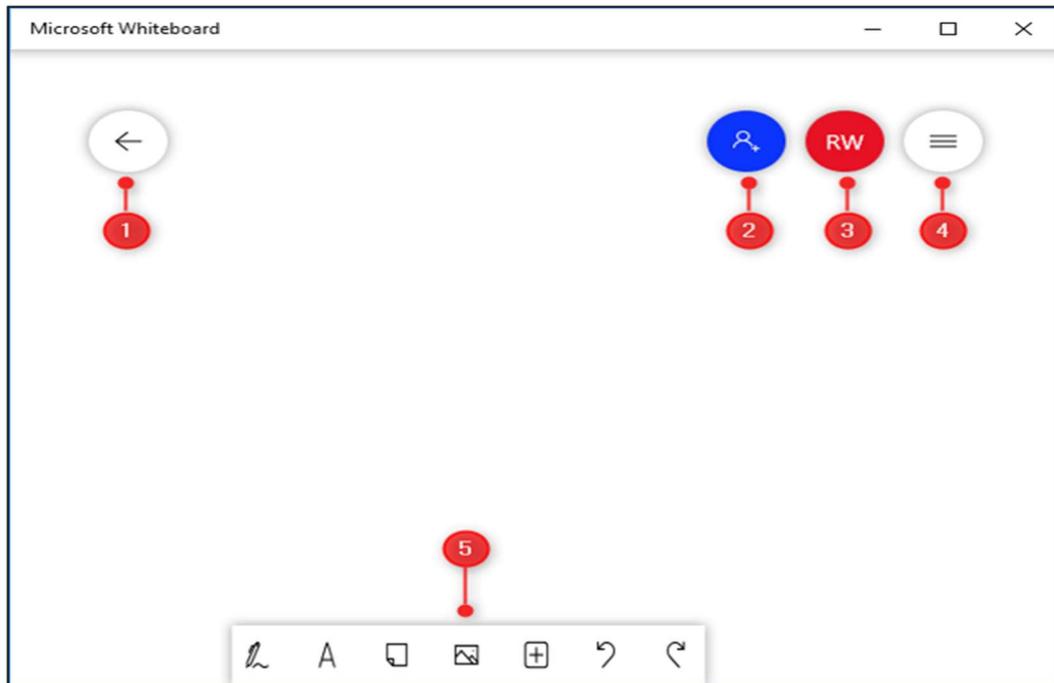
To continue to work on a previously created whiteboard, just click onto it in this home page and it will open.

Click "create new whiteboard" to get started on a new canvas.



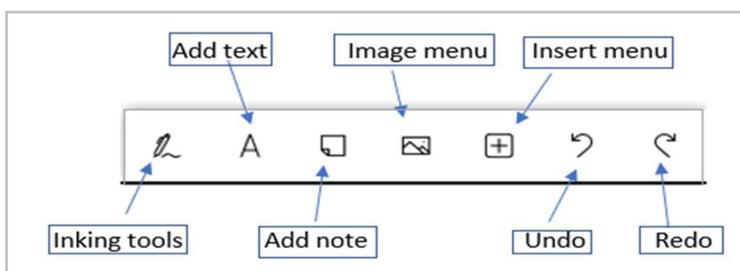
What do all the icons mean?

A new, blank canvas will open with the controls along top and bottom. The icons along the bottom are the 'creation tools'.



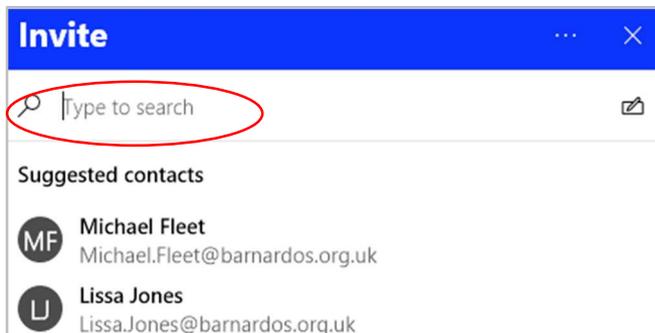
These do the following:

1. The back arrow takes you back to the start page where you can swap to other boards or create new ones.
2. The people icon shows you the sharing options for the board.
3. Your initials or picture takes you to your account details, where you can sign out or switch to another account.
4. The three lines icon opens the Whiteboard app settings.
5. The icons along the bottom open the creation tools - the inking tools, add menu, image menu, add note and insert menu.

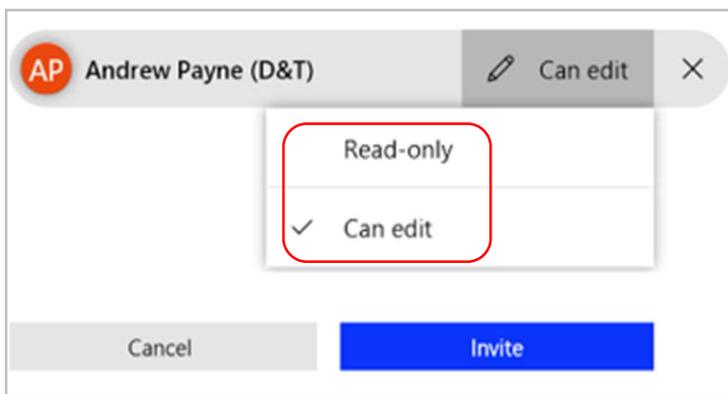


Inviting others

You can click onto the People icon and input the name of anyone you want to participate in your whiteboard. As with all Office365 apps, you get a list of suggested contacts to choose from.



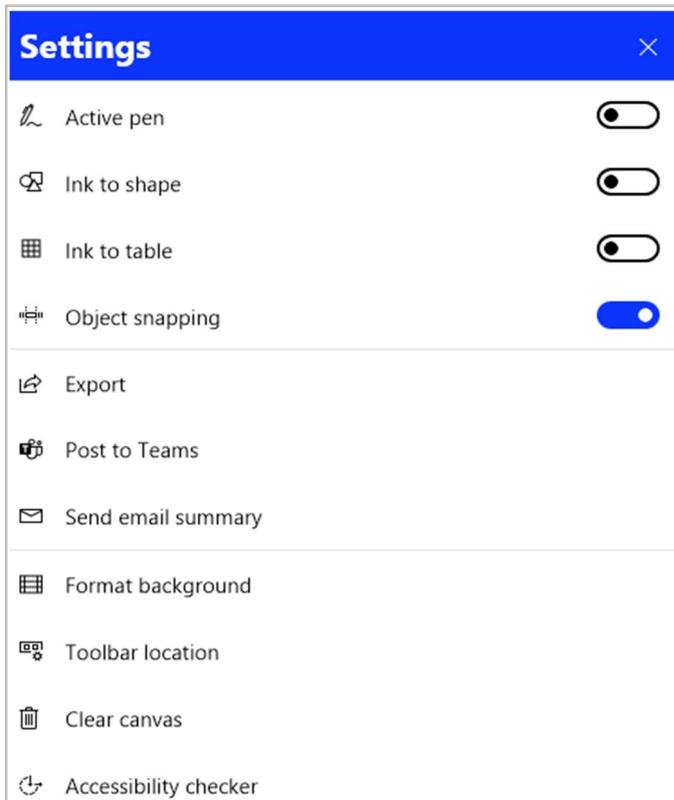
Once you have added a name(s), you can give one of two permissions: Read-only or Can edit.



Then click onto Invite.

Settings

Settings allows you to choose some options as follows.



Active Pen: switching this toggle button to On changes the smaller creation tools box to include inking tools too.



Ink to shape: when you draw a shape it will help straighten the lines and perfect it.

Ink to table: allows you to quickly draw a table and it will automatically recognise it as a table. You can add and remove columns/rows with the plus and minus signs.

Export: lets you capture and print an image of your whiteboard canvas.

Post to Teams: allows you to share a Whiteboard that you created on your desktop app to a Microsoft Teams Channel publication. It will post a link to the whiteboard.

Format Background: lets you select a background colour and a grid from different designs.

Toolbar Location: gives you the option to select where you want the tool bar to be: choose the left-hand side, right or even the bottom to where you feel more comfortable working with it.

Clear Canvas: will erase everything from your canvas.

How to draw and write on a canvas

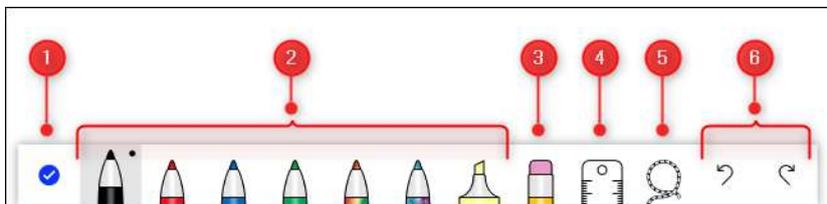
To get started, click the Inking tool on the left of creation tools.



The toolbar will now display the Inking tools – pens and highlighters plus eraser, ruler, Lasso and undo/redo.



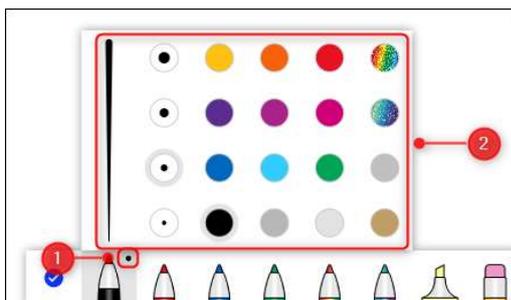
There are six tools within this bar:



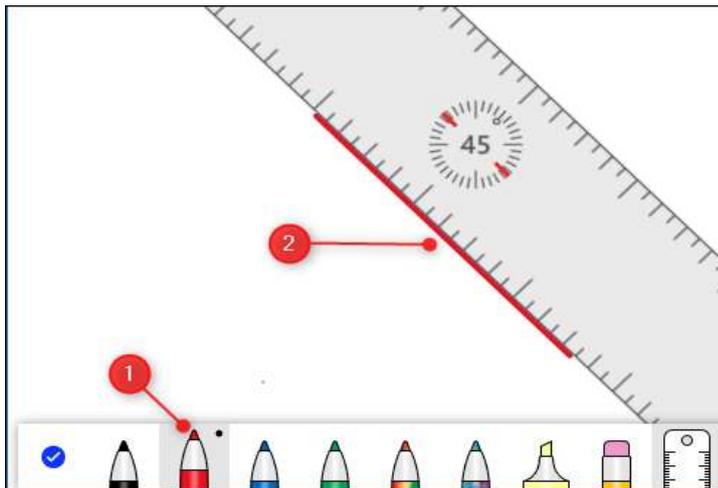
1. Closes the Inking tools.
2. The pens you can use to draw on the board.
3. An Eraser tool.
4. A Ruler tool for drawing straight lines at any angle.
5. A Lasso tool for selecting elements on the board.
6. Undo and Redo actions.

Click a pen to start drawing or writing on your board. If you're using a touchscreen, you can use your finger or a stylus. On a non-touchscreen, you can use your mouse or trackpad.

To alter the colour or width of a pen, click the black dot at the top of the pen and select from the options in the menu. Once you've changed a pen's colour or width, it will stay that way every time you return to the Inking Tools, no matter which whiteboard you're in. This gives you the ability to select your preferred options so they're available every time you use Whiteboard.



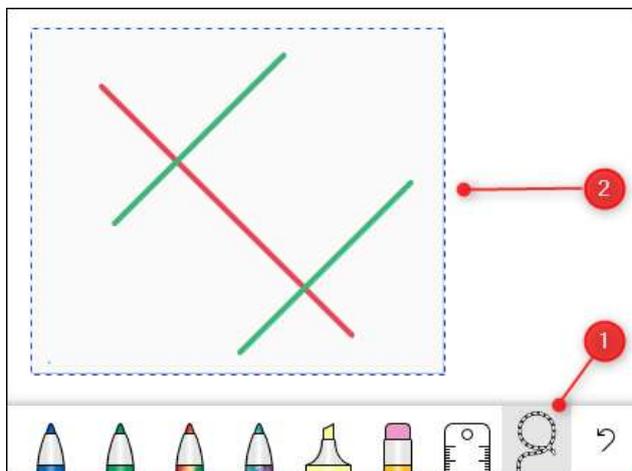
The Ruler helps you draw a straight line at any angle. Click the tool, and a ruler appears.



You can change the angle by using two fingers to rotate it (on a touchscreen) or by scrolling the wheel on your mouse (on a non-touchscreen). Select a pen and draw a line against the rule edge for a perfectly straight line.

Drag the ruler wherever you want to create a straight line on the board. To hide the ruler, click the Ruler option on the toolbar.

The Lasso tool allows you to select one or more elements on the board. Just drag the tool around the elements you want to select. You can then either move them together or delete them.



When you click onto anything you have drawn, a smaller tool bar appears with icons for ink beautification, ink colour, copy or delete.



Ink beautification (magic wand icon) transforms your freehand writing into a neater font.

Ink colour (palette icon) changes the colour of what you have drawn.

If you want to write things on your board, it's easiest to do so with your finger or a stylus on a touchscreen, although you can use your mouse.

You can 'type' onto your whiteboard too.

Click the **A** for 'add text' in the creation toolbar and type into the dashed box that appears. A small toolbar is attached to it to edit text, pick text colour or copy. You can also move this text around anywhere as a whole.



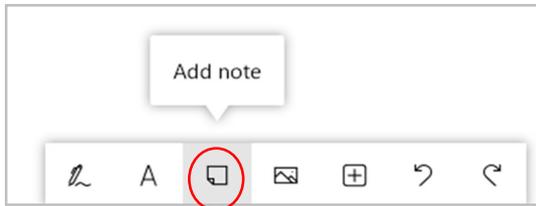
When you've finished drawing or writing, click the 'Done inking' option to come out of the drawing mode.



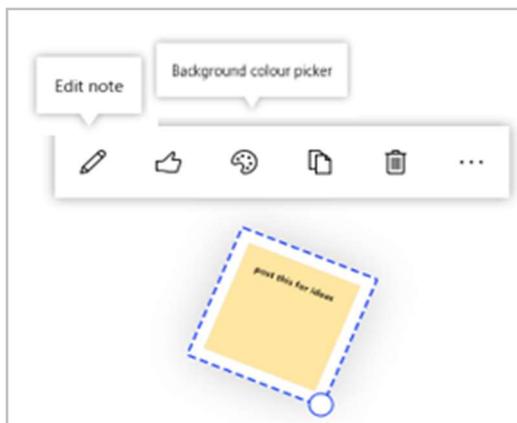
Add Notes

A whiteboard wouldn't be a whiteboard without Post-it notes!

Click onto 'Add Note' icon along the bottom and type into the note box that appears.



You can then drag the note anywhere you want, change the colour using the colour picker, and change note size or angle using the small corner circle.



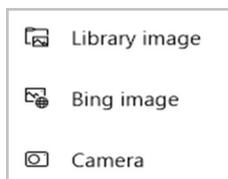
Add Images

You can add images to your board as a memory aid, reference point or simply to have something nice to look at.

To add one, click the 'Add Image' option on the toolbar.



A file box will open, in which you can select an image to insert.



Library image takes you to your File Explorer area. Choose your picture and click Open on File Explorer search box. The picture will appear on your board.

Bing image takes you to the internet to find an image.

Camera allows you to take a photo with your webcam, either of yourself or your surroundings and allows you to crop this before you add it to your canvas.

For any of these methods, click the image to drag it around the board or resize it.



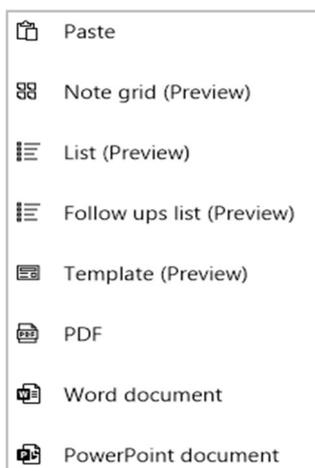
Add Documents

Attaching a document, such as a report or a reference guide, can be useful when you need to look something up while creating things on your board.

To add an item, click the 'Insert menu' option on the toolbar, which is the plus sign.

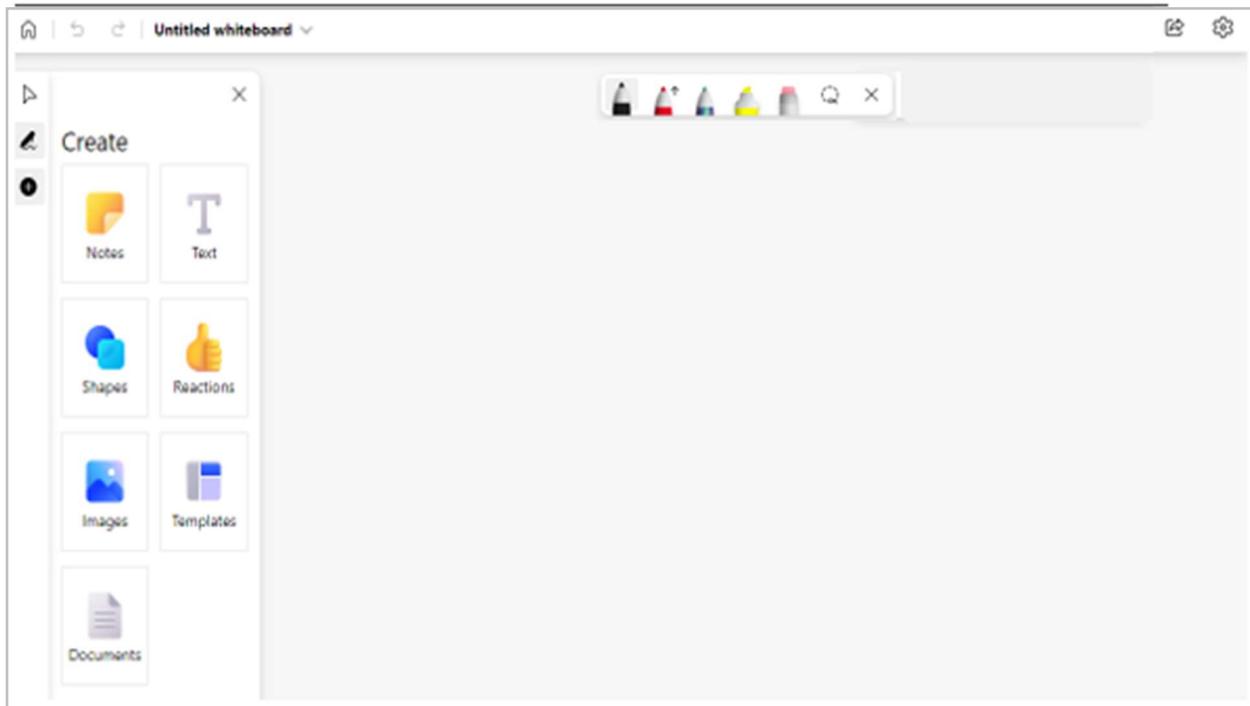


A menu appears with various options you can insert, including documents, slideshows, and lists.

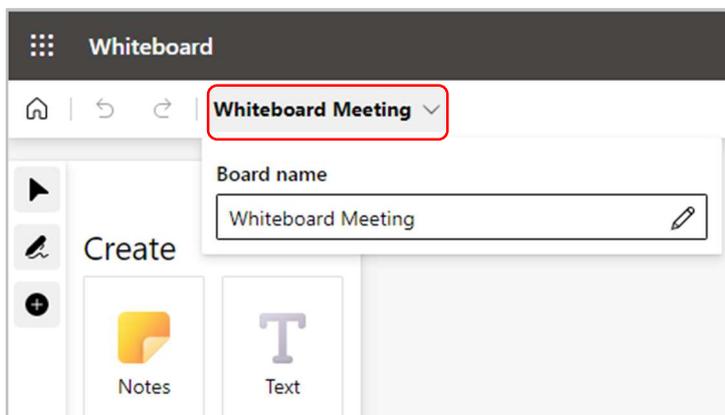


Create a Whiteboard in TEAMS and WEB APP

If you use **the online version**, it looks different but has the same tools.

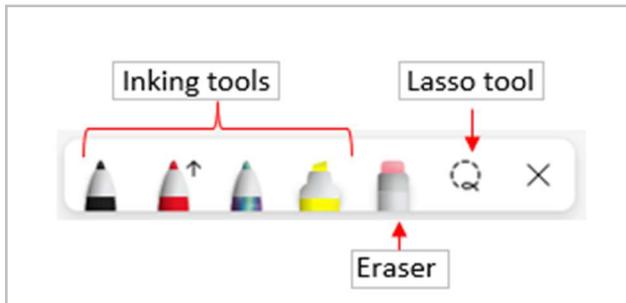


You can rename your whiteboard in this screen by clicking onto the dropdown arrow and typing into the Board Name field.



What do the icons mean?

Along the top are the inking tools, eraser and lasso tool.

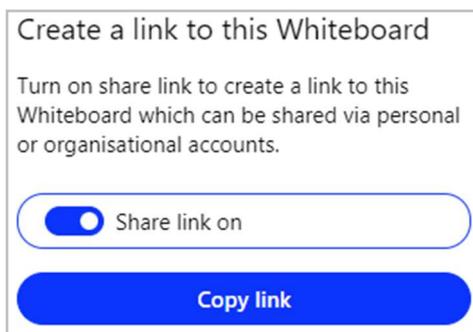


In top right are the Share and Setting icons.



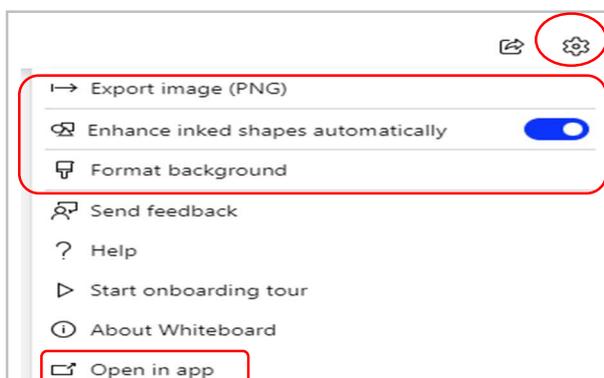
Share

Click onto the Share icon to copy the link to your whiteboard (using the toggle button)



Settings

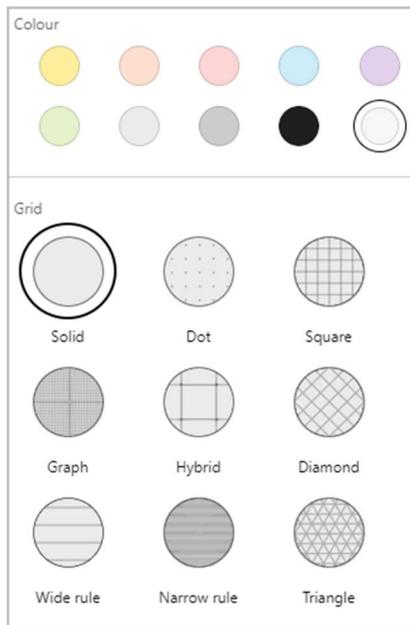
The cog icon is your Settings area and includes the ability to export your canvas image, format the background colour and pattern, or open in desktop app.



Export Image

Downloads your canvas into your Downloads folder on your device.

Format background:



Enhance inked shapes automatically

This toggle button lets you decide if Whiteboard changes your drawn shapes into neater shapes. For example, with the toggle set to On (blue), draw a circle that is not perfect and it will change it the hand-drawn ink strokes to a precise shape on your whiteboard. This is called 'Ink to Shape'.



Whiteboard's shape conversion currently works for squares, rectangles, triangles, circles, hexagons, pentagons, and parallelograms.

Ink shapes with mouse:

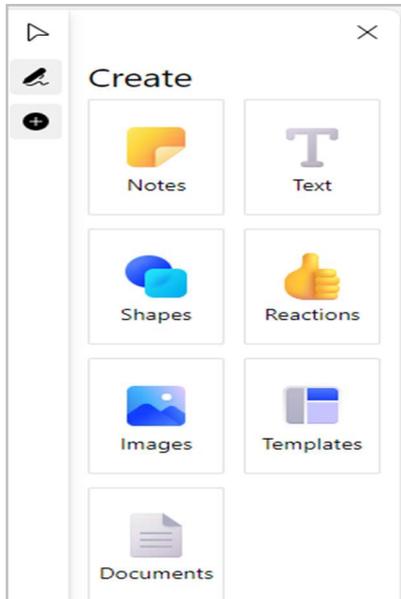
With this setting on, all the ink shapes you draw with a mouse will be automatically converted. If you prefer your original ink, just undo and you'll see your original ink stroke. Not drawing many shapes? You can turn this setting off too.

Ink shapes with pen:

Draw a line, circle, triangle, square, etc using a single ink stroke. Before picking your pen up off the screen, hold it in place for a few milliseconds. The shape will convert, and you can leave the ink as-is, or resize or rotate the converted shape.

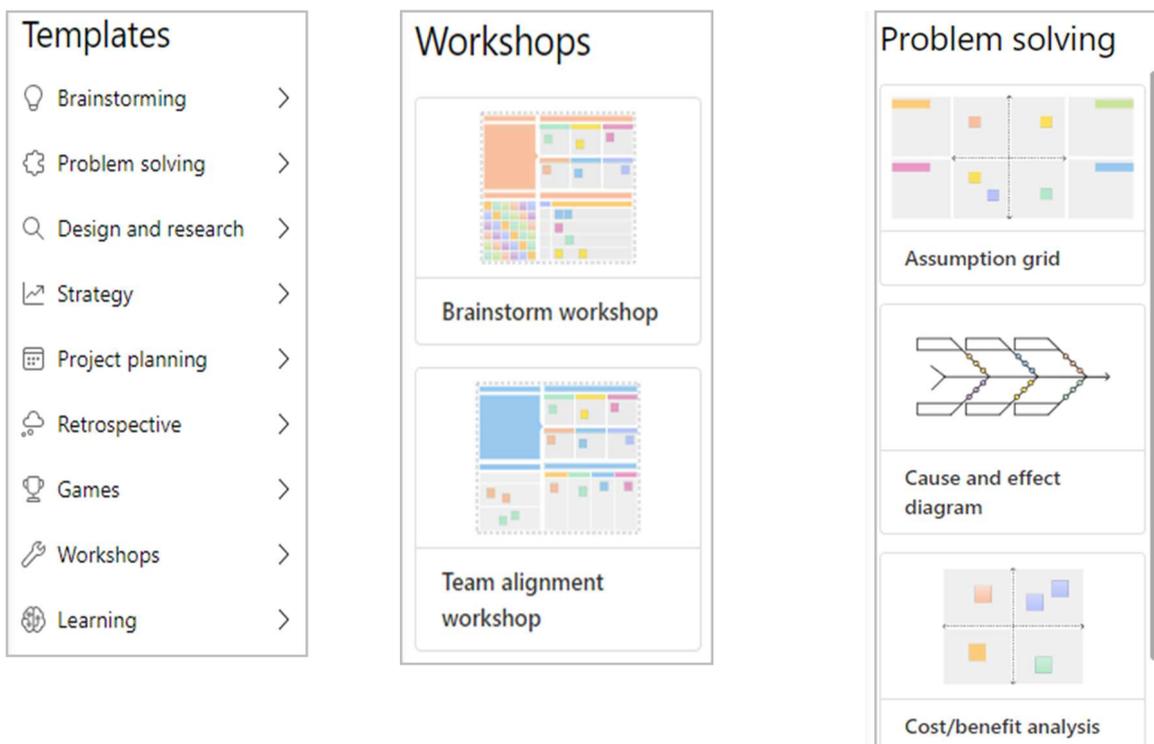
How to draw and write on a canvas

The online and Teams versions of Whiteboard have a new area on the left side of an open blank canvas. As before, you can add note, text, shapes, reactions, images, documents, but can also now use templates.



Templates

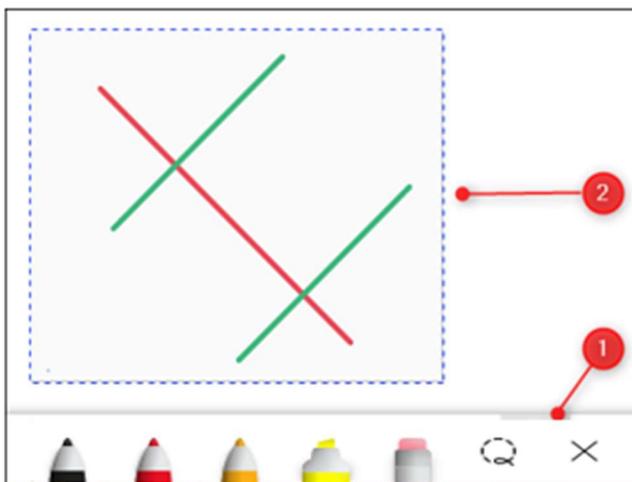
Templates is a new feature and clicking onto any of the headings below will give you access to over 40 new, fully customisable templates to help people get started faster, generate flow, and design structure for their innovative ideas. For example, workshops and problem solving as below.



Inking tools



The Lasso tool allows you to select one or more elements on the board. Just drag the tool around the elements you want to select. You can then either move them together or delete them.

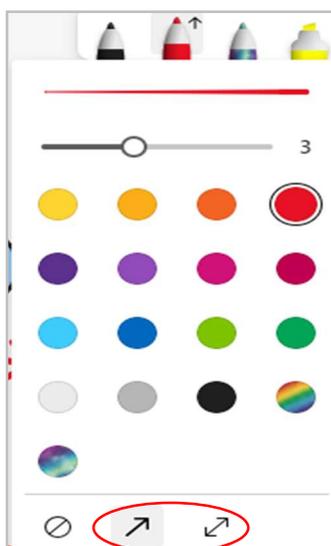


Double click onto any of the drawing tools to access options for colour, thickness, and to reach the Ink Arrows feature.

Ink Arrows

This feature adds a single or double arrowhead to the end of your ink stroke automatically, making inking easier and keeping your diagrams and annotations clean and organised.

When you draw a line, an arrow will be put onto the end of it (or both ends if you choose double arrowhead)



Ink straight lines

If you struggle to draw straight lines just press the **Shift** key as you draw. That's it!

By holding down the Shift key and drawing, you'll automatically create a straight line between the starting point of your stroke and your cursor. You can continue to move your cursor, finger or pen to adjust the length and angle of your line.

This feature works for arrow strokes too, making it easy to create straight ink arrows.

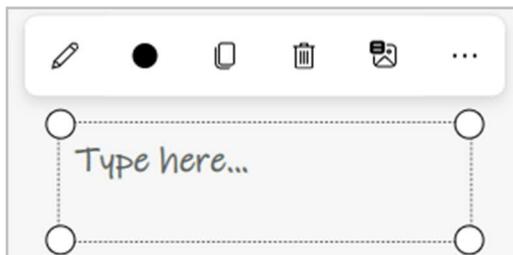
Ink tools keyboard shortcuts

Switch between ink tools seamlessly using keyboard shortcuts. Stay focused on your content without having to change focus to the toolbar.

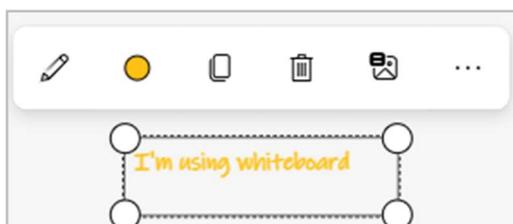
| Function | Shortcut keys |
|---------------------|---------------------------|
| Switch to Draw Mode | Alt + W or Alt + W + 1 |
| Pen 2 | Alt + W + 2 |
| Pen 3 | Alt + W + 3 |
| Highlighter | Alt + H |
| Erase | Alt + X |
| Arrow mode | Alt + A |
| Double arrow | Alt + Shift + A |
| Beautify | Alt + B |

Add Text

Click onto the Text icon in the Create section on the left, then click onto a space in your canvas to add a text box. You can drag the box into a different space if you need to by either clicking and dragging OR using the up/down/side arrows on your keyboard.



Type into the box and use the small toolbar to change the colour of the text by clicking onto the black dot (it will change to the colour you select)

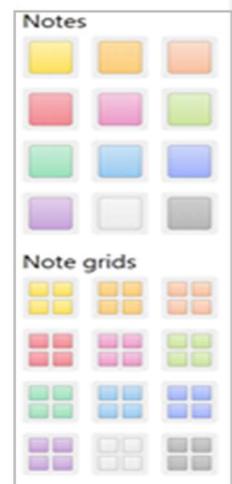


Add Notes

Click onto the Notes icon in the Create section on the left.

You can use different colours to create a colour code system by sorting by different colour categories. Or assign one colour per person to make it easier to see who contributed different ideas.

Note grids help you to build structure in your session with sticky notes in a clear and organised format. You can customise each sticky note by colour order and click to easily add extra sticky notes. You can also organise note grids by adding a title to them.



Add Images

You can add images to your board as a memory aid, reference point or simply to have something nice to look at.

Click onto the Image icon in the Create area on the left.

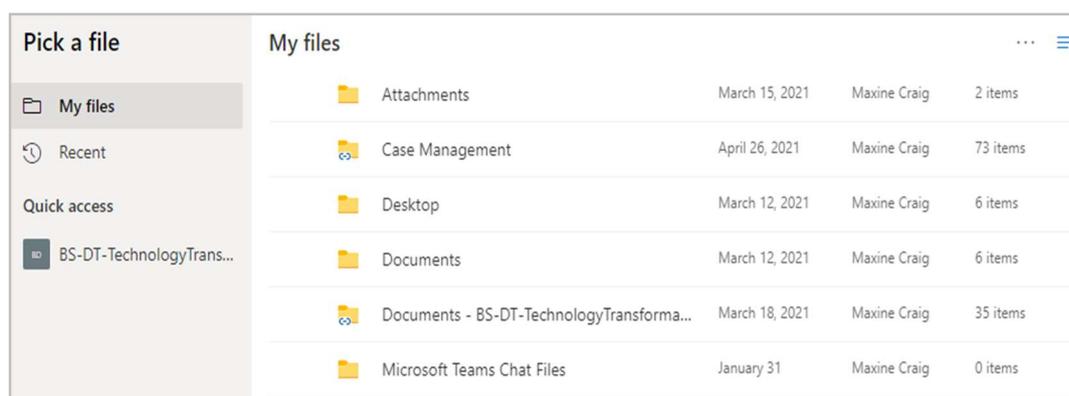
Your File Explorer area will open for you to find the image you want to attach.

Add Documents

Attaching a document, such as a report or a reference guide, can be useful when you need to look something up while creating things on your board.

Click onto the Documents icon in the Create area on the left.

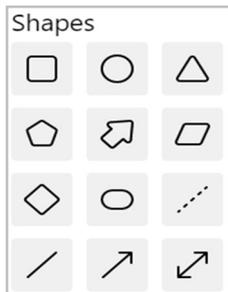
You will be taken to your OneDrive to select the required document.



Add Shapes

Flowcharts and diagrams play important roles in describing processes and organising information. Use shapes to quickly start a flowchart or to create your own diagram.

By clicking onto the Documents icon in the Create area on the left, basic shapes, lines and arrows can be added with the click of a mouse or the tap of a finger. Once added, you can resize, rotate and recolour the shape fill and border.



Once you place a shape into your canvas, you get a small toolbar to recolour the shape and its border or layer your objects with bring to front/send to back (in the ellipsis)

