



How to use the Zoom Whiteboard tools

The whiteboard editing tools available for use are located on the left side of the screen. To activate a tool, click its icon. Once selected, the mouse cursor will change to indicate the current tool mode. For most controls, clicking on the canvas will then create an object of that type. If using the select tool, you will be able to select one or more objects and change their properties.

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Editing Tools (1 of 5)

Helpful Hint: Clicking a link below will open the specific topic in the Zoom Knowledge Portal

Select tool: Places cursor in select mode so you can click objects and change their properties. Clicking an object will bring up that object's context menu.

- Context menu:
 - **Select:** Selecting an element will bring up the settings menu allowing you to copy, paste, and duplicate the selected element. You can also use this menu to adjust the element layers.
 - **Grab:** Places cursor in hand mode to move the canvas freely without unintentionally selecting and moving objects.

Pen tool: Places cursor into drawing mode to perform freehand sketching.

- Brush types: **Pen** or **Highlighter**
- Context menu:
 - Change line thickness
 - Change color



Editing Tools (2 of 5)

Helpful Hint: Clicking a link below will open the specific topic in the Zoom Knowledge Portal

Shape tool: Places cursor into shape mode to create basic shapes, callout shapes, flowchart symbols, UML symbols, and equations. Users can click + drag and click + tap anywhere on the whiteboard to draw shapes.

- Context menu:
 - Change fill (full, opaque, hollow)
 - Change shape
 - Change color

Line tool: Creates line objects. Users can drag lines from the toolbar, attach them to shapes, and use them as connectors.

- Line types: straight, one-end arrow, double-end arrow
- Context menu:
 - Change line thickness
 - Change color



Editing Tools (3 of 5)

Helpful Hint: Clicking a link below will open the specific topic in the Zoom Knowledge Portal

Text: Creates text. Double-clicking a text object puts the object into text editing mode. When users type a text in a text box, the text box width automatically adjusts to fit the text completely.

- Context menu:
 - Font style (bold, italic, underline)
 - Font size
 - Font alignment
 - Font color

Note: The maximum number of characters per text edit is 5000.

Sticky Note: Creates a note idea that can be used to draw attention. When users select a sticky note, they can conveniently create a poll and send it to others to gather quick feedback.

- Context menu:
 - Change background color



Editing Tools (4 of 5)

Helpful Hint: Clicking a link below will open the specific topic in the Zoom Knowledge Portal

Comment: Allows users to add comments to specific elements or areas on the whiteboard canvas.

Frame: Allows users to organize and sequence content within a canvas. Users can easily switch between aspect ratios, such as 16:9, 4:3, 1:1, Letter, and A4. For unique specifications, users have the freedom to define a custom aspect ratio, enabling complete control over the canvas dimensions.

Templates: Gives a pre-formatted structure and layout that can be used as a base to create many whiteboards.

Upload PDFs and Images: Allows users to upload files such as word document, PDF, PowerPoint slide and images from their computer onto the board. When files and images are uploaded to the canvas, users can move the files around, adjust the size, crop the unwanted parts, connect to other shapes, and add comments on or around them. Additionally, users can extract individual PDF pages to add annotations and download the files that have been uploaded to the Whiteboard.



Editing Tools (5 of 5)


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More Tools: Allows users to add advanced tools such as:

- [Tables](#)
- [Mind Map](#)
- [Kanban](#)
- [Zoom card](#)
- [Embed Content](#)

Controls on the top-left section (1 of 4)

Helpful Hint: Clicking a link below will open the specific topic in the Zoom Knowledge Portal

Star icon  : Allows users to star or favorite a whiteboard for quick reference. Starred whiteboards are displayed in the **Starred** tab on the [Zoom Whiteboard dashboard](#).

More actions icon  : Contains additional options and features that are not displayed on the main whiteboard menu.

Board

- **Duplicate Board:** Create an exact copy of a whiteboard.
- **[Save Page as Template](#):** Save a copy of a whiteboard page as a reusable template.
- **Star this whiteboard:** Allows users to star or favorite the opened whiteboard.
- **Lock Board:** Temporarily prevents editors, commenters, and viewers from opening and editing the whiteboard content, while owners and co-owners retain full editing functionality.
- **Board History:** Allows users to view activity and restore previous versions of a whiteboard.
 - **Activity:** Allows users to review changes, select a change to show where the change was made on the board, and see changes grouped by dates.
 - **Version:** Allows users to preview and restore old whiteboard versions.
- **Move to Trash:** Delete a whiteboard.



Controls on the top-left section (2 of 4)

Helpful Hint: Clicking a link below will open the specific topic in the Zoom Knowledge Portal

Preferences

- **Grid:** Helps users align and organize content on the canvas. There are 3 background options for whiteboard:
 - **None:** Displays a blank canvas without any visible gridlines. This can be useful for creating free-form drawings or designs.
 - **Line Grid:** Displays a grid of evenly spaced horizontal and vertical lines on the canvas. These lines can be helpful for aligning text, images, and other elements on the canvas.
 - **Dot Grid:** Displays a grid of evenly spaced dots on the canvas. This can be useful for creating precise drawings or diagrams that require precise measurements and alignment.
 - **Snap to Grid:** Aligns objects perfectly, eliminating the need to manually create a grid with boxes. The snap to grid feature is applicable to all canvas objects, including shapes, text boxes, sticky notes, lines, images, and more.
- **Alignment Guides:** Allows users to align objects or elements relative to each other or to specific reference points on a canvas.
- **Gap Guides:** Helps users in maintaining consistent spacing between objects.
- **Object Size Guides:** Helps users maintain consistent object sizes or proportions.



Controls on the top-left section (3 of 4)

Helpful Hint: Clicking a link below will open the specific topic in the Zoom Knowledge Portal

View: Enables users to see certain elements while working on a whiteboard, such as comments, collaborator cursors, alignment guides, gap guides, and object size guides.

- **Comments:** Allows users to view the comments.
- **Collaborators Cursors:** Allows users to see other people working on the same whiteboard when their cursors appear as they move their mouse, even without clicking on the canvas. Up to 10 active cursors can be displayed at a time.
- **Votes:** Allows users to easily create a poll and send it to others for quick feedback when they select a sticky note. The poll results are then displayed in real-time, making it easy to see what others are thinking.



Find: Performs a search and find text within a whiteboard, including text located within sticky notes, text fields, and shapes.

Export: Allows users to export whiteboard content as a PDF, PNG, or CSV file.



Controls on the top-left section (4 of 4)


Helpful Hint: Clicking a link below will open the specific topic in the Zoom Knowledge Portal

- **Help:** Provides users with Help Center resources and information on whiteboard keyboard shortcuts to help them use the platform more effectively. This also allows users to report any inappropriate content or behavior that they encounter while using the platform.
- **Leave Feedback:** Directs users to a survey where they can provide detailed feedback about their experience with the whiteboard.
- **About:** Provides information about the version of the whiteboard application currently being used.
- **Timer** icon  : Allows users to set a countdown timer for a specified amount of time. Timers set outside meetings are not visible during meetings and timers set during meetings only affect users in the same meeting.
- **Laser** icon  : Enables easy highlighting and annotation without editing the document. This feature is designed to address the difficulty in following along while presenting content, especially when the canvas supports multiple content types and multiple users are editing the document at the same time.










Controls on the top-right section (1 of 1)

Helpful Hint: Clicking a link below will open the specific topic in the Zoom Knowledge Portal

- **Invite All to Follow Me** icon: As a presenter, you can invite or require all participants to follow you in the Whiteboard presentation. This icon is only available for [in-meeting whiteboards](#).
- **Binoculars** icon: As a viewer, you can click the collaborators small profile pictures next to the **Invite All to Follow Me** drop-down and then the **Binoculars** icon next to a participant to follow that participant. This icon is only available for [in-meeting whiteboards](#).
- **Share** button: Allows users to share their whiteboard with others in real-time.
- **Comment** icon : Opens the Comment panel to view the

Controls on the bottom-right section (1 of 1)

Helpful Hint: Clicking a link below will open the specific topic in the Zoom Knowledge Portal

- Undo icon  : Undo the last action.
- Redo icon  : Redo the last action.
- Zoom out icon  : Zoom out from a specific area of the whiteboard.
- Zoom in icon  : Zoom in on a specific area of the whiteboard.
- Zoom percentage icon  100% ▼ : Sets the level of magnification or reduction of the whiteboard content on the screen.
- Mini Map icon  : Allow users to see where the content is located on their canvas and easily navigate to a specific area of the board.
- [Page](#) icon  : Allow users to organize the content better, create additional space for collaboration, and provide a clear separation between different sections of whiteboard.



Controls when you right-click on the canvas (1 of 1)

Helpful Hint: Clicking a link below will open the specific topic in the Zoom Knowledge Portal

- **Paste:** Allows users to insert or add copied or cut content from the clipboard onto the whiteboard canvas.
- **Add Sticky Note:** Creates virtual sticky notes on the whiteboard canvas.
- **Add Text:** Adds text directly onto the whiteboard canvas.
- **Add Shape:** Adds predefined shapes to the whiteboard canvas.
- **[Add Card](#):** Creates and organizes content on individual cards that can be moved around the whiteboard canvas.
- **[Add Comment](#):** Allows users to add feedback or annotations to specific areas of the whiteboard canvas.
- **Snap Rotation:** Can be turned on to allow users to quickly and easily align objects on the canvas to specific angles or orientations.
- **Snap to Grid:** Can be turned on to allow users to easily align objects on the canvas to a predefined grid pattern.
- **[Save Page as Template](#):** Allows users to save a copy of a whiteboard page as a reusable template.