

Zoom - Whiteboards

Zoom Whiteboards is a tool that allows you to draw, write, add shapes, highlight and annotate on a whiteboard screen during a Zoom meeting for brainstorming and interactive discussions.

Create a whiteboard from a Zoom meeting

1. While in a meeting, from the in-meeting controls, click the **Whiteboards** button .
2. Click **New Whiteboard**. The whiteboard will open in the meeting window.

Create a whiteboard from the Zoom Web App

1. Go to <https://rpi-edu.zoom.us/> and click on Sign In.
2. Click **Whiteboards** from the left navigation bar.
3. Click the **+New Whiteboard** button located in the upper right of the whiteboard screen.

Create a whiteboard from the Zoom desktop client

1. Sign in to the Zoom desktop client.
2. Click the **Whiteboards** button .
3. At the top right, click **New** to create a new whiteboard.

Some limitations using Zoom Whiteboard

https://support.zoom.com/hc/en/article?id=zm_kb&sysparm_article=KB0059671

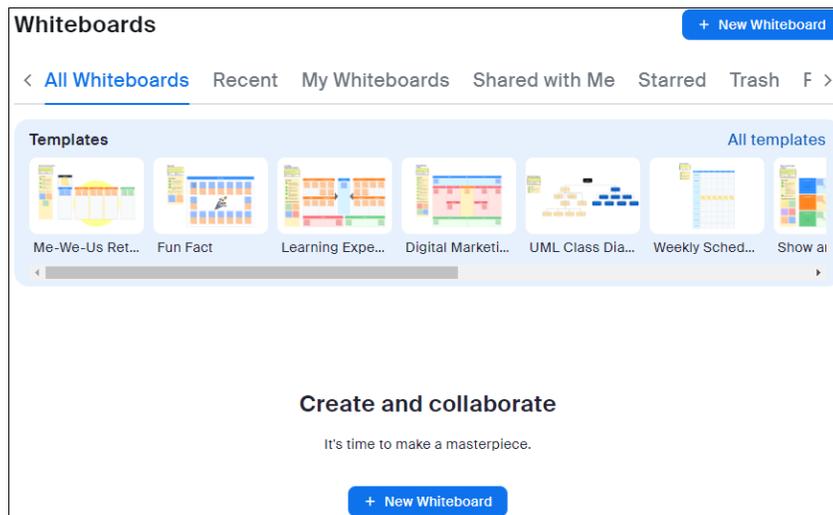
- Whiteboards cannot be sent to individuals who do not have a Zoom account.
- The new Zoom Whiteboard and the [classic whiteboard](#) cannot be used at the same time during a meeting.
- The maximum amount of cloud storage allocated for Zoom Whiteboards for Zoom Basic users is 25 MB.
- The storage capacity of each whiteboard is limited to 200 MB, including any uploaded files. If you upload a PDF, it will generate several smaller files for display purposes, and the total size of these smaller files will also count towards the 200 MB limit.
- The maximum file size for a single PDF upload is 35MB, while images (in PNG or JPG format) are limited to 5MB.
- The maximum number of characters allowed in a text string is 5000. Any extra characters will be removed.

For additional information, please visit [Zoom Whiteboard Security and Privacy FAQ](#).

Zoom Whiteboard Main screen

1. Once logged into Zoom, click **Whiteboards** from the left navigation bar.

The Whiteboards main screen appears.

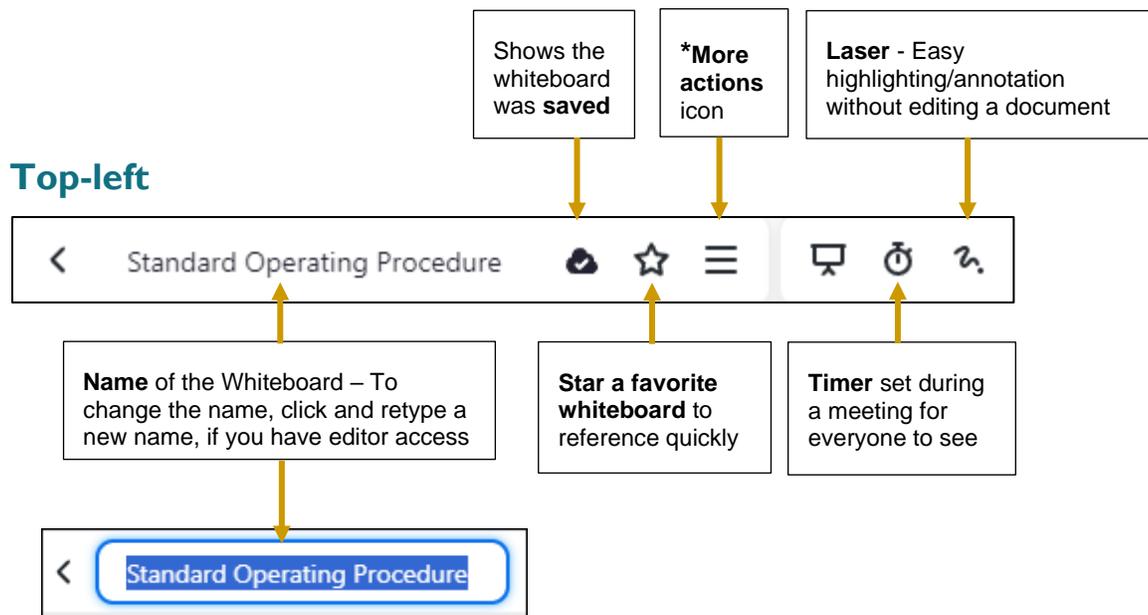


From this screen you can:

- **All Whiteboards** – View all Whiteboards you have created.
- **Recent Whiteboard files** - Appear at the top to quickly open.
- **My Whiteboards** – Quick way to easy find and share a whiteboard you created.
- **Shared with Me** – Whiteboards that were shared to you.
- **Starred** – Favorite whiteboards
- **Projects** – Create a new project

Controls on the top-left and top-right

There are many useful controls located on the top right and left of the whiteboards screen.
https://support.zoom.com/hc/en/article?id=zm_kb&sysparm_article=KB0061925



***More actions** icon includes additional options: Click the link below to learn more about these options. https://support.zoom.com/hc/en/article?id=zm_kb&sysparm_article=KB0061925

Board	>	Duplicate Board, Move Board to Project, Un-star this whiteboard, Lock Board, Board History, Move to Trash
Preferences	>	Grids, Alignment Guides, Gap Guides, Object Size Guides
View	>	Comments, Collaborator Cursors, Votes, Object Dimensions
Find		
Export	>	PDF (.pdf), PNG Image (.png), Comma Separated Value (.csv)

Top-right

All eyes on me – available during meetings only, specific roles force those to join a follow-along

Comment – opens a comment panel

Share whiteboard with others in real-time

Using a Whiteboard Template

Why not use a whiteboard template instead of creating a new whiteboard from scratch.

1. From the Template dashboard, click **All** located in the upper left corner of the Templates screen to view all the templates on one screen and by Categories.

Templates Skip when creating new boards

All Modified (New-Old) ▾

Recent

Starred

Categories

- Agile and Scrum
- Brainstorming and Ideation**
- Design and Research
- Icebreakers and Team Builders
- Mapping and Diagramming
- Meetings and Retrospectives
- Science and Education
- Sports and Games
- Strategy and Planning
- Friends and Family

Brainstorming and Ideation

- Learning Experience ...
- Digital Marketing Ca...
- Standard Operating ...
- Go to Market Strategy ...
- Heuristic Evaluation ...
- BCG Matrix ...

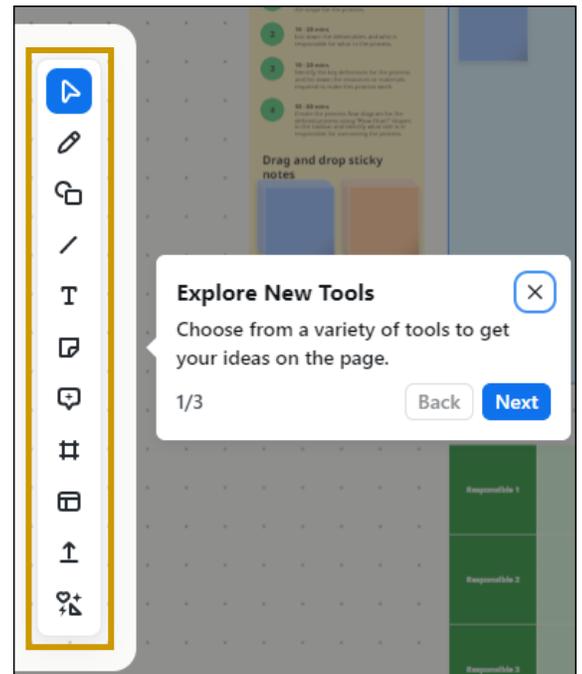
Preview

Use Template

2. Click once on a template to preview. Click **<Back** located in the upper left of the preview window to select another template to preview.
3. Click **Use Template** from the upper right corner of the preview window to insert this template into the whiteboard.

The Template appears on the screen, along with a whiteboard editing toolbar located on the left side of the screen.

- Once a tool is selected, the cursor changes to indicate the current tool being used.
- For most of the controls, move the cursor on the canvas to create an object of that type.
- The cursor will switch once a new tool is selected.



Editing Tool	Description Info below taken from: https://support.zoom.com/hc/en/article?id=zm_kb&sysparm_article=KB0061925
 Select tool	<p>Cursor changes to select mode so you can click objects and change their properties. Clicking an object will bring up that object's context menu. Click the select tool and lasso around objects, etc. on the whiteboard and then you can move all the objects at once.</p> <p>Context menu:</p> <ul style="list-style-type: none">  Select option - 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 option - Places cursor in hand mode to move the canvas freely without unintentionally selecting and moving objects.
 Pen tool	<p>Places cursor into drawing mode to perform freehand sketching with a Pen or Highlighter.</p> <p>Context menu:</p> <div style="display: flex; align-items: center; gap: 20px;"> <div data-bbox="397 1648 625 1701">  Line Thickness </div> <div data-bbox="649 1648 868 1701">  Change color </div> <div data-bbox="893 1648 1120 1701">  Smart Drawing </div> </div>
 Shape tool	<p>Places cursor into shape mode to create basic shapes, callout shapes, flowchart symbols, UML symbols, and equations. You can click and drag and click and tap anywhere on the whiteboard to draw shapes.</p> <p>Context menu: Font Size, Text Color, Fill, Lock/Unlock</p> <div style="border: 1px solid black; padding: 5px; display: flex; align-items: center; gap: 10px;"> 16 AA A ≡ ≡ 🔒 🔗 🔒 ⋮ </div>

Editing Tool	Description
 Line Tool	<p>Info taken from: https://support.zoom.com/hc/en/article?id=zm_kb&sysparm_article=KB0061925</p> <p>Creates line objects. You can drag lines from the toolbar, attach them to shapes, and use them as connectors.</p> <p>Context menu:</p> <ul style="list-style-type: none"> Line types:  straight,  one-end arrow,  double-end arrow  Line Thickness  Change color
 Text	<p>Creates text. Double-clicking a text object puts the object into text editing mode. When you type a text in a text box, the text box width automatically adjusts to fit the text completely.</p> <p>Context menu: Font style (bold, italic, underline), Text Size, Text Alignment, Color</p> <div data-bbox="483 625 1221 699" style="border: 1px solid black; padding: 5px; text-align: center;">  </div> <p>NOTE: The maximum number of characters per text edit is 5000.</p>
 Sticky Note	<p>Creates a note idea that can be used to draw attention. For example, select a sticky note, and then create a poll and send it to others to gather quick feedback.</p> <p>Context menu: Change background color</p>
 Comment	<p>Add comments to specific elements or areas on the whiteboard canvas.</p>
 Frame	<p>Used to organize and sequence content within a canvas. You can easily switch between aspect ratios, such as 16:9, 4:3, 1:1, Letter, and A4. For unique specifications, you have the freedom to define a custom aspect ratio, enabling complete control over the canvas dimensions.</p>
 Templates	<p>Gives a pre-formatted structure and layout that can be used as a base to create many whiteboards.</p>
 Upload to PDF and Images	<p>Can upload files such as word document, PDF, PowerPoint slide and images from the computer onto the board. When files and images are uploaded to the canvas, you can move the files around, adjust the size, crop the unwanted parts, connect to other shapes, and add comments on or around them.</p>
 More Tools	<ul style="list-style-type: none">  Mind Map  Kanban  Chart (Click a link to learn more about that tool)  Table  Card  Embed Content

Insert a template into an existing whiteboard

1. With a whiteboard on the screen, click the Templates icon  from the left navigation bar and the templates dashboard appears.
2. From the left menu, select a category and search for a specific template you want to use.

3. Click the ellipsis ... in the lower right corner of the template you want to use.
4. Click **Preview** (optional) to view the template before choosing the template.
5. Click **Use Template** and the selected template will be inserted onto the opened whiteboard.

Sharing a whiteboard

The quickest way to share a whiteboard is to use a shareable link. This link is accessible to those inside and outside of the organization as long as they have a Zoom account.

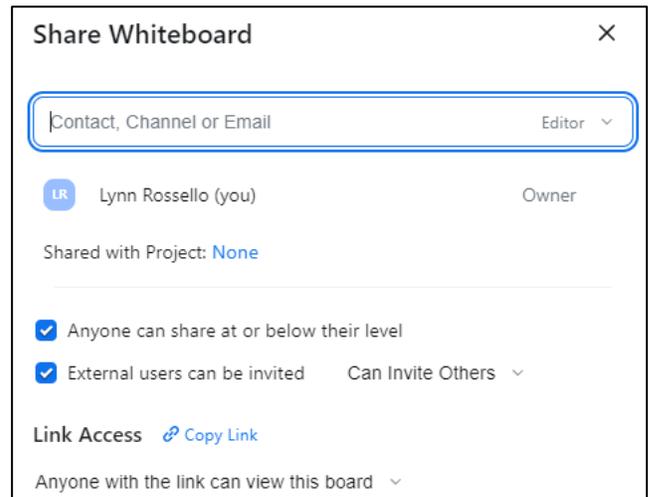
https://support.zoom.com/hc/en/article?id=zm_kb&sysparm_article=KB0058153

1. Click **Share**  located in the upper right corner of an open whiteboard screen.

The **Share Whiteboard** dialog box appears.

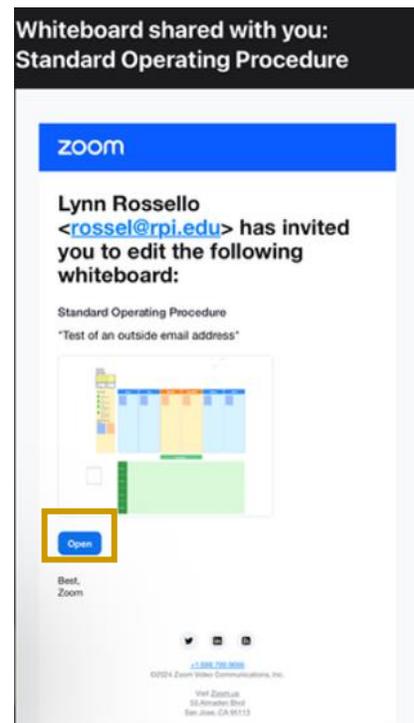
2. Begin typing an email address, if that person has a Zoom account (will need a paid license through RPI) their name will appear below for you to choose.

If they are outside of RPI, type the full email address and that address will appear in the Contact, Channel or Email field.



Email addresses outside of RPI:

1. Person receives the following email on the right.
2. Click **Open** in the email and if they do not have a Zoom account, they will be prompted to download the Zoom app and will need to create a new Zoom account.
3. Once the Zoom account is created, click **Open** again from the original email and the Zoom app will automatically open for them to login and then the whiteboard file opens in the Zoom app.

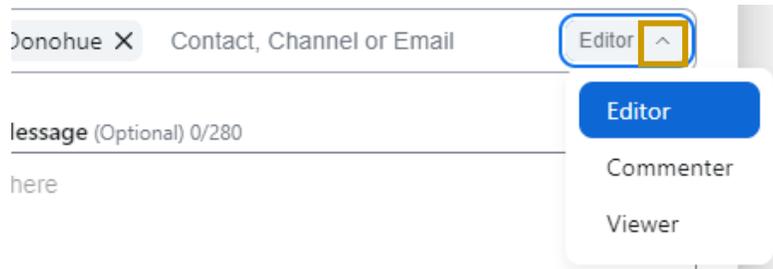


For **Link Access**, click the drop-down arrow to the right, below **Link Access** and choose one of the following:



- **Only invited members can access this board** (default): Only specific individuals or channels will have access.
- **Anyone at (Company Name)**: Enables permission for the entire account without having to name individual users (for example, make the board accessible to your entire company).
- **Anyone with the link can view this board**: Makes the board available to all users with a Zoom account, including users outside your organization.

For **Permission level**: for those who can access the link, click the drop-down arrow to the right of the person's name and choose one of the following:



- **Editor**: Those with link access can edit the board.
- **Commenter**: Those with link access can comment on the board.
- **Viewer**: Those with link access can view the board.
- **Remove**: Remove a person's access or permissions from the board.

Deleting (move to trash) and recovering a whiteboard

Account owners and co-owners can delete whiteboards from the Zoom desktop, mobile app, Zoom Web App, or from the Zoom web portal. Deleted whiteboards are moved to trash. You have up to 30 days to recover the deleted whiteboard.

Move a whiteboard to trash

1. While in the **All Whiteboards** view, locate the file you want to move to trash and then click the ellipsis ... to the far right.
2. Choose **Move to Trash**.

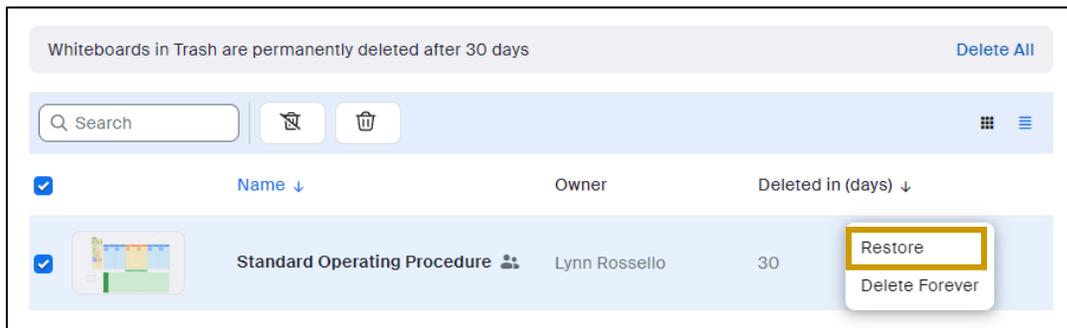
With the whiteboard on the screen

1. Click **More** options icon  from the top left side.
2. Choose **Board** → **Move to Trash**

Recovering a whiteboard

1. Click **Trash** from the top of the Zoom window.
2. Check the box on the left to select the file you want to restore.
3. Click the ellipsis ... and then choose **Restore**.

The file appears under the **All Whiteboards** view.



4. From the dialog box, click **Restore**.

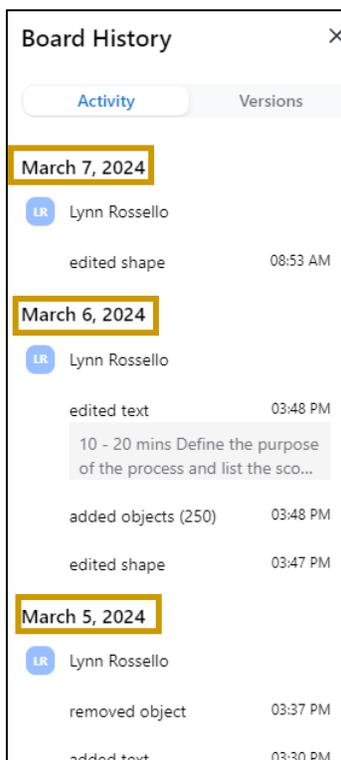
Board History and Versions

Board History allows you to review the activity of changes as well as restoring previous versions of the whiteboard.

Activity

1. Click **More** options icon  from the top left side.
2. Choose **Board** → **Board History**.

The Board History side bar appears on the right showing the Activity tab for that whiteboard.

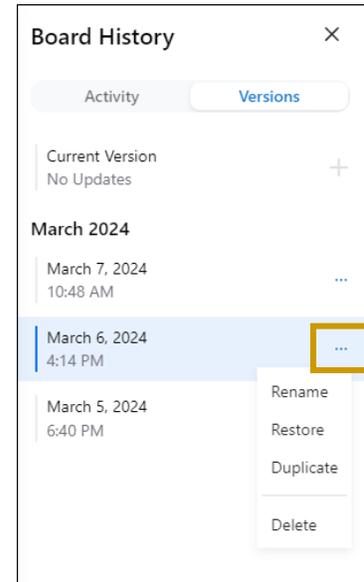


Versions

1. Click **More** options icon  from the top left side.
2. Choose **Board** → **Board History**.
3. Click the **Versions** tab.

Versions for that whiteboard appear.

4. Click once on one of the versions and that version of the whiteboard appears.
5. Click the ellipsis ... and choose to:
 - **Restore** to use that version as current
 - **Rename** to change the name of the whiteboard
 - **Duplicate** to make a copy of the whiteboard
 - **Delete** to delete this version



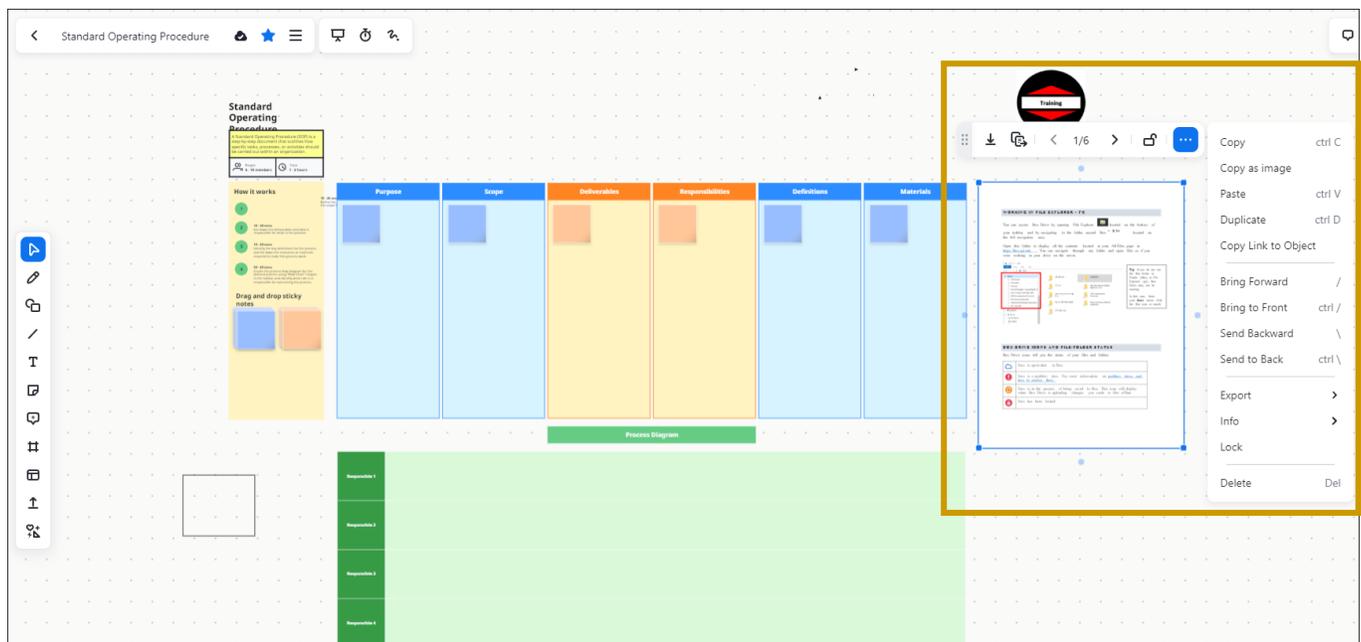
Uploading documents and images to the whiteboard

Sharing diagrams, charts and other documents as well as images can be uploaded into a whiteboard.

1. While in a whiteboard, from the toolbar on the left click the **Upload** tool .
2. Choose a file and then click **Open**.

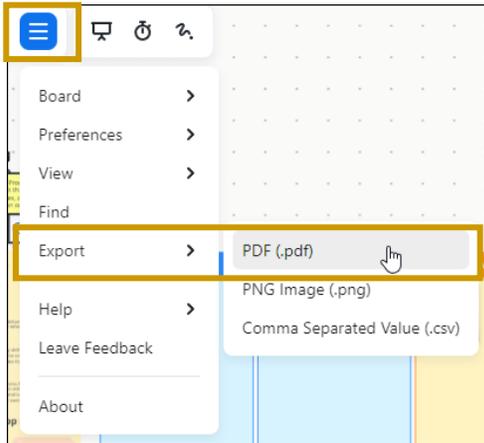
The **file** or **image** file is inserted in the whiteboard.

- Click the file or image and drag to move.
- Click the handle to resize.
- Click once on a file and the context bar appears. There are many features to choose from under the ellipsis ...



Saving the whiteboard as a .pdf, .png or .csv

1. From the top left control bar, click the more options and then click **Export**.
2. Choose **PDF (.pdf)**, **PNG Image (.png)** or **Comma Separated Value (.csv)**



The Export dialog box appears.

3. Choose **Export**.
4. Select a format.

A dialog box appears, with the Export and Format areas already selected for that format.

5. Click **Export**.

NOTE: A different dialog box appears, depending on the format selected.

References

Getting Started with Zoom Whiteboard

https://support.zoom.com/hc/en/article?id=zm_kb&sysparm_article=KB0059671

Zoom Whiteboard Features

https://support.zoom.com/hc/en/category?id=kb_category&kb_category=f358b25a8720391089a37408dabb3587

Using Zoom Whiteboard templates

https://support.zoom.com/hc/en/article?id=zm_kb&sysparm_article=KB0058142