

Filling out a SMART Tool on screen

For Zoom Desktop App and Zoom Mobile Client

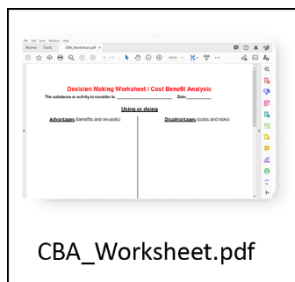
The easiest way to share and work with a document (we'll use the CBA Form as an example) is to open the document in its relevant program (Word, Acrobat, etc.) before you start your meeting and leave it running in the background. That way it will be ready to pop on the screen instantly. (But, since you're sharing your personal screen, you can always use your file manager to go find something that you want to share with the group during the course of a meeting.)

Let's find and work with our form:

1. Click the **Share Screen** button located in your meeting tool bar.



2. Click the **Whiteboard** option. Then click on the Tool that you already have open (CBA Worksheet icon). Click **Share**.



Alternatively, go to the location where you have the file stored on your computer and open it.

3. The [annotation tools](#) will appear automatically, but you can press the **Whiteboard** option in the meeting controls to show and hide them.

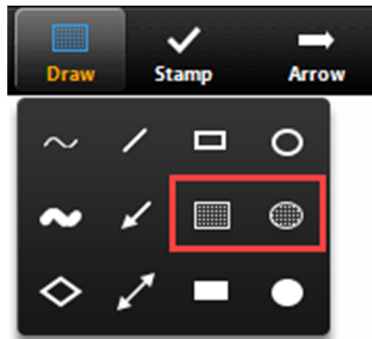
Here is the Annotation tool bar. It's pretty straightforward, but try all the controls to see what it can do::



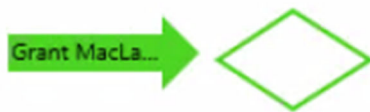
Note: The **Select**, **Spotlight**, and **Save** options are only available if you started the [shared screen](#) or [whiteboard](#).

- **Mouse:** Deactivate annotation tools and switch to your mouse pointer. This button is blue if annotation tools are deactivated.
- **Select** (only available if you started the shared screen or whiteboard): Select, move, or resize your annotations. To select several annotations at once, click and drag your mouse to display a selection area.
- **Text:** Insert text. This is what we'll be doing to fill out a CBA. See below after this section.

- **Draw:** Insert lines, arrows, and shapes.
Note: To highlight an area of the shared screen or whiteboard, select following square or circle icon to insert a semi-transparent square or circle.



- **Stamp:** Insert predefined icons like a check mark or star.
- **Spotlight / Arrow:** Turn your cursor into a spotlight or arrow.
 - **Spotlight** (only available if you started the shared screen or whiteboard): Displays your mouse pointer to all participants when your mouse is within the area being shared. Use this to point out parts of the screen to other participants.
 - **Arrow:** Displays a small arrow instead of your mouse pointer. Click to insert an arrow that displays your name. Each subsequent click will remove the previous arrow placed. You can use this feature to point out your annotations to other participants.



- **Eraser:** Click and drag to erase parts of your annotation.
- **Format:** Change the formatting options of annotations tools like color, line width, and font.
- **Undo:** Undo your latest annotation.
- **Redo:** Redo your latest annotation that you undid.
- **Clear:** Delete all annotations.
- **Save** (only available if you started the shared screen or whiteboard): Save all annotations on the screen as a screenshot. The screenshot is saved to the [local recording](#) location.

Filling out a Cost Benefit Analysis

Simply put the Text cursor where you want to start your list in the first quadrant. This will open a text box. You can use the format button to set type style, size, color, etc. Type in your list as its developed in the meeting.

Click the text cursor in another quadrant to create a new text box there. Your current format choices will carry over.

You'll get the hang of it quite quickly. Not much different that doing this on a whiteboard in a face-to-face meeting.

Here's how it will look:

Decision Making Worksheet / Cost Benefit Analysis	
The substance or activity to consider is: _____ Date: _____	
Using or doing	
Advantages (benefits and rewards)	Disadvantages (costs and risks)
Relieve stress	Hangovers
Feel more confident	Damages health
Socializing easier	Damage relationships
Relieve physical pain	Get arrested
Help me have more fun	Financial troubles
NOT using or NOT doing	
Advantages (benefits and rewards)	Disadvantages (costs and risks)
Won't lose home	Get bored
Clarity/productivity	Can't relieve stress
Better health	Have to cope with problems
Regain self-respect	Have to manage pain in other ways
Stay out of jail	
Label each item either short term or long term.	

Important Note: When completing an online tool, the “annotations” do not scroll with the screen. So if the CBA is not fully on the screen when you start, and you have to scroll down, the comments remain where they are.

Annotation settings

If you started the [shared screen](#) or [whiteboard](#), click **More** in the screen share controls will take you to these annotation settings:

- **Allow/Disable participants annotation:** Allow or prevent the participants from annotating on your shared screen. Allowing others to write on your screen, however, can quickly get out of control. Test this is with a small number of participants before using it more broadly. Most facilitators will not use group annotation.
- **Show/Hide Names of Annotators:** Show or hide the participants' name when they are annotating. If set to show, the participant's name will briefly display beside their annotation.



4. Use the page controls in the bottom-right corner of the whiteboard to create new pages and switch between pages.



Note: Only the participant or host that started sharing the whiteboard has access to create and switch pages.

When you are done, click **Stop Share**