



TAKE CONTROL OF

ZOOM ESSENTIALS

by **GLENN FLEISHMAN**

Table of Contents

Read Me First.....	3
Introduction	4
What Zoom Can Do	5
Get Set Up with Zoom	6
Upgrade Audio and Video	9
Improve Your Video.....	11
Look Sharp	15
Identify Yourself.....	18
Join a Meeting	19
Adjust the View	21
View a Shared Screen	25
Interact in a Meeting	32
Stay Safe in a Meeting	35
Share Your Screen	27
Chat in a Meeting	36
About This Book	37
Copyright and Fine Print	40

Read Me First

Welcome to *Take Control of Zoom Essentials*, version 1.1, published in December 2020 by alt concepts inc. This book was written by Glenn Fleishman and edited by Joe Kissell.

This book gets you up to speed on Zoom, from installation and setup, including your physical space, through joining and participating in meetings. For a much more in-depth look at Zoom, including full details on hosting and recording, see [Take Control of Zoom](#).

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What's New in Version 1.1

This version brings the book up to date with changes Zoom has made in its app interfaces and features since mid-2020.

Updates and More

You can access extras related to this ebook on the web (use the link in [Ebook Extras](#), near the end). On the ebook's Take Control Extras page, you can:

- Download any available new version of the ebook for free.
- Download various formats, including PDF, EPUB, and Mobipocket. (Learn about reading on mobile devices on our [Device Advice](#) page.)
- Read the ebook's blog. You may find new tips or information, as well as a link to an author interview.

If you ordered this ebook from the Take Control website, it has been added to your account, where you can download it in other formats and access any future updates.

Introduction

Zoom swept the world in 2020, providing a way without much pre-arrangement to create meetings of dozens to hundreds of people for business, social, or academic purposes, as well as for public events, including government meetings, concerts, and much more. It's also incredibly handy and frequently used for one-on-one meetings, audio-only calls, and even events in which many attendees call in by phone.

While hundreds of millions of people have already started using Zoom, if you're not one of them, start with basic installation and setup in [Get Set Up with Zoom](#).

For those who already have Zoom installed or use it routinely and want more guidance about improving your hardware and physical set up, configuring Zoom before and during meetings, participating in meetings, and using several Zoom features, this book is also for you. That's true if you use Zoom as an employee, as a student, for personal purposes—and any other reason. Everything you learn about Zoom helps you use it better and lets you focus on what you're talking about or listening to.

This book will help you become a comfortable Zoom meeting participant, understanding all the basic controls and options available to you as well as some more advanced features useful for sharing images, documents, and presentations.

If you'd like to step up further, to being a Zoom master, or if you want detailed advice on how to host and manage meetings, consult my more in-depth book, [Take Control of Zoom](#).

What Zoom Can Do

Zoom lets two or more people connect via audio and video to communicate with each other in a live session. One person has to be the *host*: the one who creates a meeting and can manage what participants can do, as well as end the meeting.

Everyone else is a *participant*, someone who has varying abilities in a meeting depending on what the host permits them to do and what's available in their app. This book focuses on how to be a meeting participant and understand all the tools available to you.

While Zoom emphasizes live video streaming of all participants in a meeting, there are a lot of variations in how Zoom can be used. You can also:

- **Participate by audio only:** A Zoom meeting member doesn't necessarily have to have a camera or can choose to keep it turned off. You can dial in from a regular telephone or use only the audio features in Zoom's apps.
- **View/listen only:** A Zoom participant can be a completely passive observer and send neither their audio nor video into the meeting.

Zoom videoconferencing also includes features that aren't about sharing video streams. These include:

- **Screen sharing:** A Zoom host or participant can share their live screen, a video, or still images. If the host allows it, multiple people can share screens simultaneously from desktop apps at once.
- **Screen annotation:** Participants can mark up a shared screen in a way that everyone can see.
- **Public and private chat:** Zoom allows participants to send text messages within the meeting that everyone can see, as well as private messages to the host or among participants.

Get Set Up with Zoom

Zoom participants never pay Zoom a fee to use the software or be part of a meeting. The person or organization hosting the meeting you join pays any applicable fees (or none if they are using Zoom's free tier). You don't even need an account, nor is it mandatory for you to install an app! In-browser web apps with no download requirements exist, as I describe below.

However, I find it easier to use Zoom routinely, configure my setup the way I like it, retain preferences, and use the service with both a registered account and an app. Let's start with registering an account.

Create an Account

Some meetings may require a Zoom account, which is managed from the Zoom website, so it makes sense to set one up. But it's also handy to have an account, as it lets you make sure that the settings you want to use with Zoom are already in place whenever you use the service and are logged in.

To sign up for an account:

1. Visit zoom.us/signup.
2. Instead of being asked for an email address, you're first prompted for your birthdate! (Zoom says it uses this only for verification.)
3. Enter an email address and click Sign Up. You may be prompted to solve a CAPTCHA. (Zoom says to enter a "work" email address, but that's an outdated message.)
4. Zoom sends you an email. Click the confirmation link in the email.
5. This link opens a page that asks, "Are you signing up on behalf of a school?" For most of us, that's no. Select No and click Continue.

6. You can now finish account signup by entering your name and password, which you can change later; see [Identify Yourself](#). Click Continue and you're all set with a free-tier account.

Each account may be used simultaneously with a single desktop or laptop computer, tablet, and smartphone.

Download or Use a Zoom App

You don't have to install a Zoom app, but the service works best with a "native" app—one that's written for the operating system on which it runs. Plus, some features are only available in native apps, which are faster, less choppy, and more reliable than the web apps that Zoom offers.

Use a Native Zoom App

Zoom offers native apps for every major platform, including Android, iOS, iPadOS, macOS, and Windows. To get a native app, you can do any of the following:

- Visit the [Download Center](#), which automatically figures out what you need. Click or tap the Download button.
- Wait until you join your first meeting on a given device. The meeting webpage will prompt you to download the software, but this will delay joining the meeting.
- Download directly via these links to [Google Play](#) (for Android), the [iOS App Store](#) (for iPhone and iPad), or the [Mac App Store](#).

On desktop operating systems, run the installer and follow prompts to install the software. On mobile devices, install the software through the familiar app store process.

Use Zoom in a Browser

You can use Zoom in a desktop browser on nearly all major operating systems without installing additional software. Zoom relies on built-in web standards. (Chrome OS requires an extension.)

Here are the browsers Zoom supports with the minimum version number of the browser you need to have installed, as well as any limitations:

- **Google Chrome 30 or later:** It's your best choice on every desktop platform, and offers the closest set of features to Zoom's native desktop apps. (On a Chromebook, you need to [install this Chrome extension](#).)
- **Microsoft Edge 38 or later:** You can't share your screen using Edge with Windows 10 Home, only with Windows 10 Pro or Enterprise.
- **Safari 7 or later:** Safari users can't share their screen or audio, requiring a dial-in call to listen or speak.
- **Firefox 27 or later:** Firefox users also can't share their audio, but can hear streaming sound.

Dial In to Zoom

In some cases, you may be invited to a Zoom meeting that also offers dial-in phone numbers. While your best option is to use digital audio via a Zoom app, sometimes an unreliable connection or limited bandwidth issues make a phone call necessary.

The invitation you receive for a meeting should contain all the available call-in numbers, most of which will be "toll" calls, which may have a per-minute cost attached if not considered local from the number from which you're calling *and* you don't have a long-distance plan that covers such calls. Check the number before you call to ensure you know if there's a phone-company cost attached.

Upgrade Audio and Video

Most modern computers and mobile devices have built-in cameras, microphones, and speakers, as well as headphone jacks, USB, and Bluetooth. That makes it easy to rely on an included camera, but enhance your audio for your comfort and to be understood more clearly.

Upgrade Your Audio

Few computers, phones, and tablets include built-in mics that can match something placed closer to your mouth. (Don't put your mouth too close to built-in mics, or your head will appear enormous on the Zoom video feed!)

Some computing devices include high-quality speakers, but even with the echo cancellation built into your device and in Zoom, you might sound as if you're in an echoey room or cause some mild feedback if you use those speakers with your mic active during the session. If so, listening to in-ear or over-the-ear audio will be better.

If you'd like to enhance your audio, consider these two options:

- **Headset:** A USB or Bluetooth headset with a “boom” style mic in front of your mouth can cost relatively little while dramatically improving the quality of any meeting in which you're involved. Headsets offer the most comfort for spending hours a day talking.
- **Earbuds:** Earbuds can vary widely in quality, but you may already own a set, whether wired or wireless. As the path of least resistance and a technology you already know, it might work best. Earbuds can be very comfortable, but some people tire of them after a while.
- **Mic:** An inexpensive mic (used with headphones or built-in audio), readily available for podcasting and other purposes, can make you sound like a million bucks. The bonus: You can record high-quality audio by itself or in a meeting or a presentation you make.

Upgrade Your Video

Picking a camera other than a front-facing built-in one can provide a crisper, better-lit feed of you, as well as offering you more flexibility.

Smartphones and Tablets

If you're broadcasting or presenting, the Zoom mobile app uses the standard camera interface in both iOS and Android: you can just tap to switch cameras and use an *even better* rear-facing camera.

Just make sure you have the camera in a fixed position relative to you—on a tripod, say—and that you can check you're in frame and remaining in focus before the meeting starts.

For some kinds of physical demonstrations, you might want to have multiple devices set up and connected to the same meeting at once, mounted in different places, including on tripods, and ready for you to mute/unmute or start/stop video as you move among them.

USB Webcams for Computers

A long-running alternative to often low-quality built-in cameras on desktop and laptop computers—and a supplement for those with none—is an external USB camera.

A USB camera typically offers many additional features beyond those the computer's maker provides. That includes better positioning and angling options, higher resolution (up to 4K), image color/balance controls, or even a tripod mount. Most third-party cameras produce a less noisy video feed in low-light conditions than built-in webcams. USB cameras can also be moved among devices if you use multiple computers or work at multiple locations.

Tip: Zoom [has a list of cameras](#) that work with controls built into Zoom apps across a wide range of prices. The deep-dive review site Wirecutter [has a guide for web cameras](#), too.

Improve Your Video

You can fix lighting, add a backdrop, and make other changes that bump up your video quality. Here are a few tips that can help you produce the best conditions.

Manage Your Camera

Whatever kind of camera or device you're using, make sure the camera is positioned and angled well to show your entire face, mostly, er, head on (**Figure 1**). Nobody wants to look up your nose or see just your eyes and forehead.



Figure 1: Standing in his fabulous basement, the author demonstrates good face-to-camera positioning.

Stabilize a Mobile Device

If you own a relatively recent smartphone or tablet, it may have a very nice front-facing camera for selfies and videos. But other people will find it distracting if you're holding the device in your hand and it's constantly jiggling or moving.

There are a zillion smartphone and tablet tripods in the \$15 to \$40 range that include an adjustable clamp to fit any size of device. Or, you can buy an adapter for about \$10 to \$20 for smartphones and tablets that works with a tripod you already own.

Frame Yourself on the Desktop

Depending on the type of camera you use, you might try these tricks:

- **Laptop:** Put a laptop on a higher surface than you would normally use to type and work on. The screen should be close to level with your head. You can use a stack of books, an adjustable riser used to convert a table into a standing desk, or a laptop stand.
- **Integral display:** For cameras built into a monitor's top, you may need to adjust the display's height or tilt it while in meetings to get the optimum angle.
- **Add-on:** Cameras designed to plug in to a computer (typically via USB) almost always come with a clip, stand, or tripod mount. Whatever the case, place the camera lens at nearly eye height—or just a bit above—without obscuring your view of the monitor.

Change the Lights

Your lighting may not be ideal. In fact, it almost surely isn't. At my workspace, my face is entirely blown out unless I tweak the placement of lights. You can try a few options:

- **Balance:** Balance lights so there's some light behind and some ambient light cast over you. Make sure you're not lit entirely from behind. You will be hard to make out. Don't point a light directly at you. This causes a webcam to overexpose your face, removing detail.
- **Adjust shades:** Close or open window shades depending on the time of day and their position relative to the camera.

- **Add a ring light:** Search on retailers for “studio ring lights,” which are simple rings of LEDs designed to cast a glow on your face. Some “selfie lights” are battery powered and clip on to a laptop or display.

You should also make sure that you don’t have an unintentional light source. On a desktop system, a display’s background color—especially on a two-monitor system—can wind up illuminating your face with an odd color or from the wrong angle. Try to remember to bring up a dark background or hide windows that are all or mostly white.

Let Zoom Add a Virtual Background

Zoom can swap in a background via the Settings > Background & Filter > Virtual Backgrounds option, which you can use to choose a still image or a looped video with a desktop app or a still image in iOS or iPadOS (**Figure 2**).

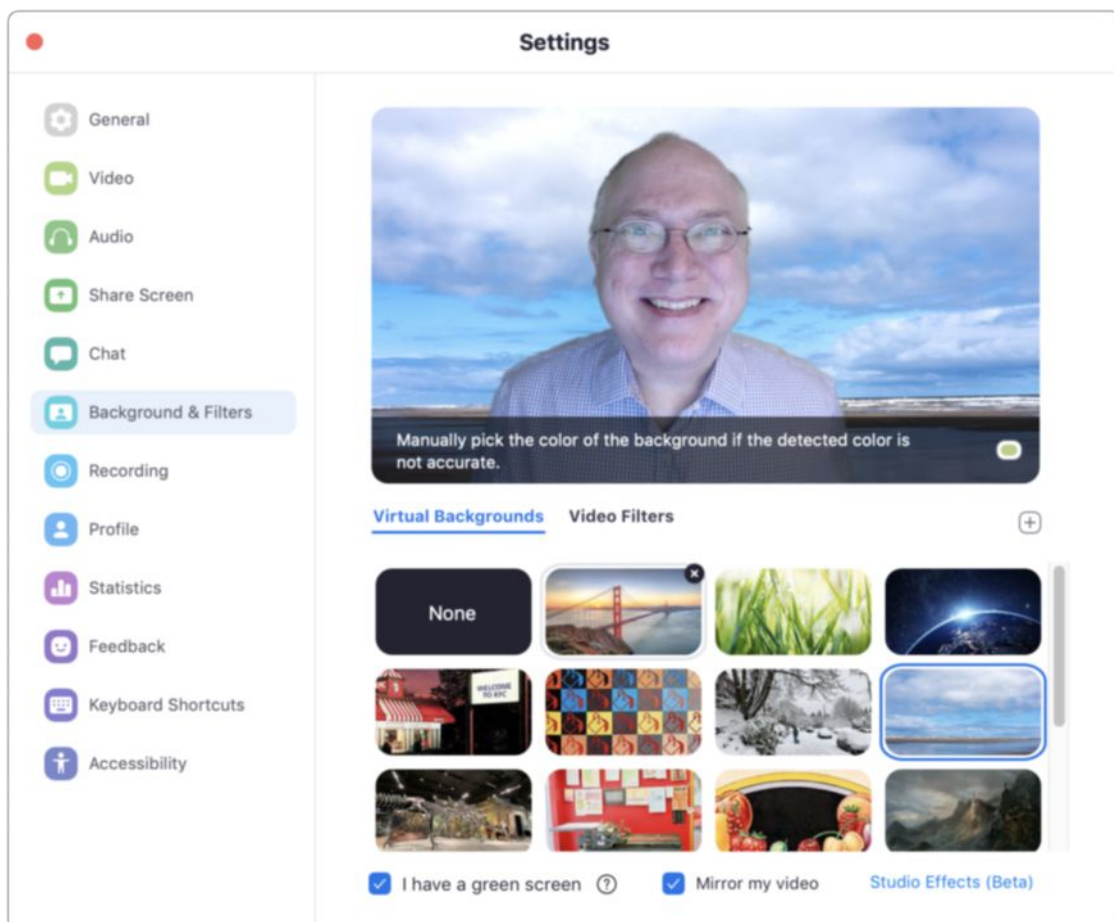



Figure 2: A virtual background adds whimsy and hides shame.

Zoom uses an algorithm to determine the edge between you and whatever is behind you. The algorithm is smart, but doesn't always neatly cut out a background; consider a green screen (see below).

In iOS/iPadOS apps, you can add a background when joining or during a meeting:

- When joining a meeting, Zoom displays a video preview by default, and offers a Change Virtual Background button to tap in the upper-left corner.
- During a meeting, tap the More  icon and then tap Virtual Background.

In both mobile and desktop apps, turn off the background by clicking or tapping None in their respective background settings.

Hang a Green Screen

You can improve your silhouette in Zoom by hanging a solid-color backdrop behind you. While traditionally a neon green, the “green screen” can be any tone.

In the Zoom desktop apps in settings shown in **Figure 2**, check “I have a green screen” and the app will subtract the physical background much more accurately than it otherwise could. If the color doesn't subtract correctly, you can click the background color picker to match your backdrop.

Look Sharp

There are two sides to how you look on camera: one is how you look or present yourself, some aspects of which you can control if you wish; the other is people looking *at* you, who will notice if you don't appear to be tuned in to what's going on.

Tweak Your Appearance

You don't need to turn yourself into a TV presenter, but you can also be confident and well received with very little effort:

- **Smooth your appearance (Zoom desktop apps, iOS/iPadOS app):** Zoom offers a “Touch up my appearance” checkbox (**Figure 3**) in Settings > Video in desktop apps and in Settings > Meetings in iOS/iPadOS. When selected, the app identifies the area of your face and applies a live smoothing algorithm that removes some of the variation of texture of your skin. The desktop app lets you control the intensity, from mild to anime-style smoothness.



Figure 3: My smiling, slightly grizzled face (left) becomes sleeker, as my pores and uneven skin tone have been removed.

- **Adjust low light:** Zoom desktop apps have an option to adjust the brightness of your video feed if your scene appears too dark. In Settings > Video, select “Adjust for low light.” If the automatic compensation doesn’t seem to fit or you want to set and hold the change, choose Manual from the pop-up menu that appears and use the slider to find the right level.
- **Consider makeup:** If you have an interest in appearing in a particular way on screen, consider whether makeup might assist, no matter your gender. For people who generally avoid makeup, a little light powder applied correctly can reduce glare—especially for folks like me who are follically challenged. [This guide from Shutterstock’s The Beat](#) offers some good advice and links for the “no makeup” makeup style.
- **Wear clothes you find appropriate:** Because Zoom can be used for a variety of purposes, you may have a wide range of choices about what you wear. You may want to test tops or dresses using the Zoom video settings preview to see what presents well on camera.

Look Like You’re Paying Attention

Nobody has yet cracked the problem that the camera lens that captures your face isn’t in the middle of the screen where you’re watching video of other people. Mobile devices are better optimized for that, because their screens are smaller, and thus the angle of difference between looking at the screen and look at the camera is smaller.

On the desktop, it can be much harder. Zoom’s default view shows the currently speaking person front and center, and the most recent ones in a small row at the top. With the alternative, Gallery View, the grid of videos means your eyes might dart left and right, up and down as people talk. (See [Adjust the View](#) for more on how other participants can appear in your app.)

You can improve how people see how you're paying attention, and also how they read your facial expression and feedback in a few ways:

- **Stay close:** Keep yourself close to the screen so your head is most of the top-to-bottom space in the camera. Many people lean way back. You may need to adjust your setup to make this feasible. (See also [Manage Your Camera](#).)
- **Move your preview:** In a desktop or web Zoom app, move the thumbnail of your feed shown on screen as close to the physical position of the camera on your computer as possible. There's a psychological tendency to want to look at oneself, and if you do that while your image is close to the camera, your gaze will look more as if it were aimed at the other person.
- **Avoid darting glances:** Remember to not glance around your space, at a second or other monitor, check your cell phone in your hand, or engage in other obviously distracted activities that people can easily pick up. (Disabling notifications during meetings is a big help.) We're really good at noticing differences in patterns.
- **Use in-person cues with the camera:** When you're talking or listening, look regularly into the camera directly. When listening, provide visual, non-verbal feedback, like nodding.



Identify Yourself

Zoom relies on what participants provide as their name and (optional) profile picture to share with the group when they join.

If you have a registered Zoom account and are logged in to a Zoom app, Zoom picks up your profile settings when you join a meeting. If you're joining without an account, Zoom asks when you join what name you want to use. That name remains in place for future meetings if you're using a native app.

Warning! If you register with an email address and don't add a name to your profile, Zoom will reveal your email address when you join a meeting.

You can rename yourself one of three ways and add or change a photo in two places:

- **Zoom website:** With a registered account, [go to your profile](#) on the website. Click Change to add or change your photo, including framing and zoom an existing or new one, or Delete to remove your photo. To change your name, click Edit on the far right.
- **Desktop app:** Click Participants, hover over your name in the list and click More , and then choose Rename. You can also click More  and Add Profile Picture to select, frame, and zoom one, or Edit Profile Picture to swap it out or change the frame and zoom.
- **Mobile app:** Tap Participants, your entry in the list, and Rename. You can't modify your profile photo.

A host can disable name changes in a meeting, and they can also force-change yours. If you don't see an option to rename yourself in a desktop or mobile app, or you see your name change, that's why.

Join a Meeting

A Zoom meeting is a sort of virtual room to which you're invited. Every meeting has a unique meeting ID (a 9 to 11 digit number), and nearly all have a passcode. The passcode could be a series of numbers, a word, or jumbled nonsense.

You may be sent an invitation that contains the meeting ID, the passcode, and a URL that will use Zoom's website to connect you to the meeting. Click or tap a meeting URL to join.

If there's a passcode set, the host can embed it in the URL, where it appears as `&pwd=` followed by an encrypted version that the Zoom website can read and convert back to the original. If not, the Zoom website prompts for the passcode, and the host will have had to provide it to you through another means; enter it to proceed.

Some hosts might give you just the meeting ID and a passcode (if required). Visit the [Join a Meeting webpage](#), enter the meeting ID, and click Join; enter a passcode if prompted.

The webpage that appears next in all of the above cases prompts the browser to ask you if it may open the Zoom app. Approve that action—the button and text varies by browser and platform—and the Zoom app launches if it's installed.

Tip: If a host enabled joining via a web app, you may also see "If you cannot download or run the application, [join from your browser](#)." and you can click that link whether or not you have an app installed.

You may next pass through as many as *four* stages:

- **Waiting for the host:** Before a host has started the meeting or joined a session, a message appears: "Waiting for the host to start this meeting."
- **Hanging out:** When the host sets the meeting so they have to start it, or if you join after they have already started it, you are likely to be

placed into the Waiting Room. You see a message that usually reads, “Please wait, the meeting host will let you in soon.”

- **Prompted about audio or video:** Depending on your app settings, you may see a preview of your video and be asked if you want to join with video already streaming. You may also be prompted what kind of audio to use, such as Computer Audio to use a mic and speaker built in or connected to a desktop computer. You can make any choice you like if prompted.
- **Joined to the meeting:** You’re allowed in and meeting controls appear in the app.

The meeting now starts and you see the main Zoom interface and controls. What you see varies by default choices; whether you’re using a mobile, desktop, or web app; the size or type of your mobile device; and the processing power on a desktop computer.



Some meetings involve breakout rooms, in which the host creates a set of “rooms,” which are like little Zoom meetings. These lets a large meeting get divided into smaller topics of conversation, or even have private discussions not appropriate for the main session. You may be assigned to a room, or you might be allowed to pick one to join. The Zoom apps will offer you the option to join if you have a choice, or show you an alert that you’re being transferred into a room, if the host assigns you to one. Breakout rooms can last for minutes, for an entire session, or for a set period of time the host picks.

Tip: For more in-depth details on joining a meeting and entire chapters on how host and manage meetings, get my over-220-page book, [*Take Control of Zoom*](#).

Adjust the View

Zoom's apps let you view participants in a meeting in a number of ways, with controls that vary by whether you're using a desktop, web, or mobile app, and whether you're in full-screen mode or not.

Speaker

All meetings start in Speaker view—sometimes listed as Active Speaker—which places the video stream of the person currently making sound into a large portion of the view in desktop and web apps (**Figure 4**). (In a desktop app, click the / View icon to select between Speaker and Gallery view; in a mobile app, swipe right.)

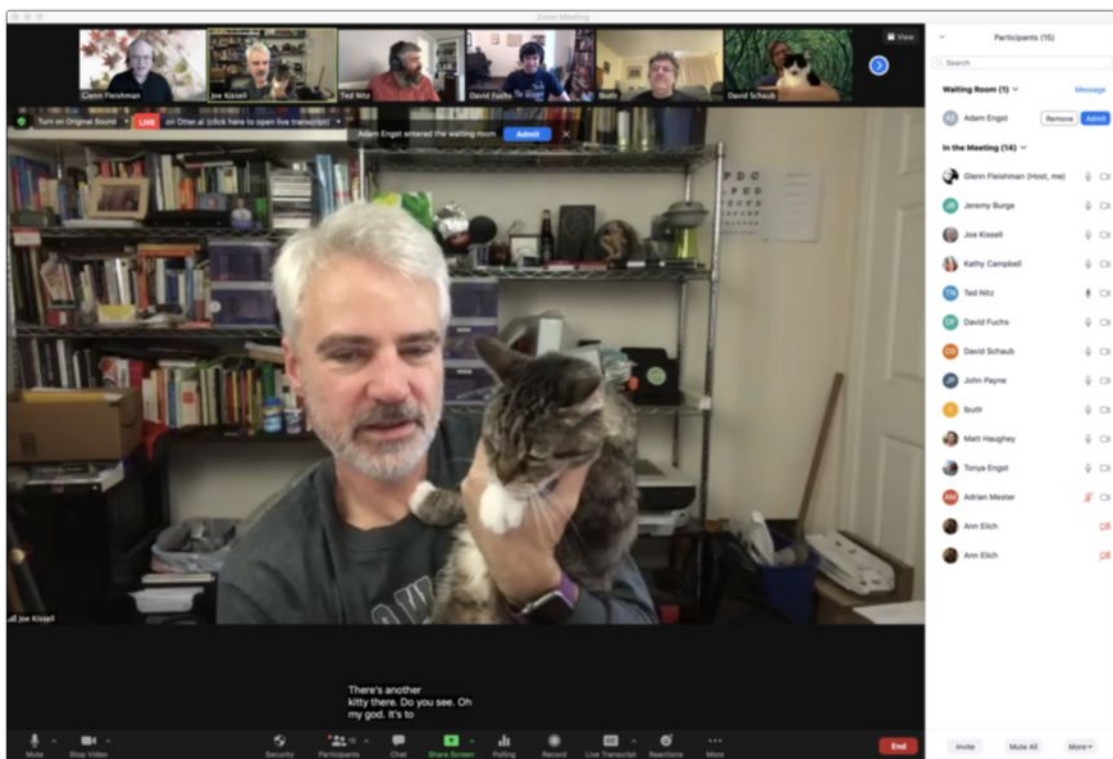







Figure 4: Speaker view highlights the person talking.

In desktop apps with a regular window, members appear as live, scaled-down videos in a row above the speaker, organized by the most recent speakers; the number varies by window size. You can page

through previews with forward and back arrows. (Your selfie video always appears farthest left.)

Mobile versions show the most recent speakers filling the center, while your live stream appears as a smaller view. Web apps only offer that view, and only show the *latest* active speaker plus your stream.

Desktop apps set to full-screen mode change up how previews are shown. (Click the View icon and click Fullscreen  to enter that mode.) The active speaker appears in a floating window, which you can drag larger or smaller. Click the appropriate icon in the window's upper-left corner to change to the following modes:

- **Talking:** A horizontal line  icon to hide all video and show only the Zoom name of the current speaker.
- **Speaker:** A squat rectangle  icon to see just your video.
- **Multiple speakers:** An icon with two stacked rectangles  to see recent active speakers if the session involves three or more people.
- **Gallery view:** If one or more people are sharing a screen for a presentation or other purpose, you can click a grid  icon and see a gallery of people, the number of which depends on how wide and deep you shape the window.

Gallery View

Gallery view displays equally sized live videos of each participant, divided into pages of people you can click or swipe through (**Figure 5**). The number shown on each page varies from up to four on a smartphone, nine on older iPad models, 16 to 25 on newer iPad models, and 25 to 49 on a computer.

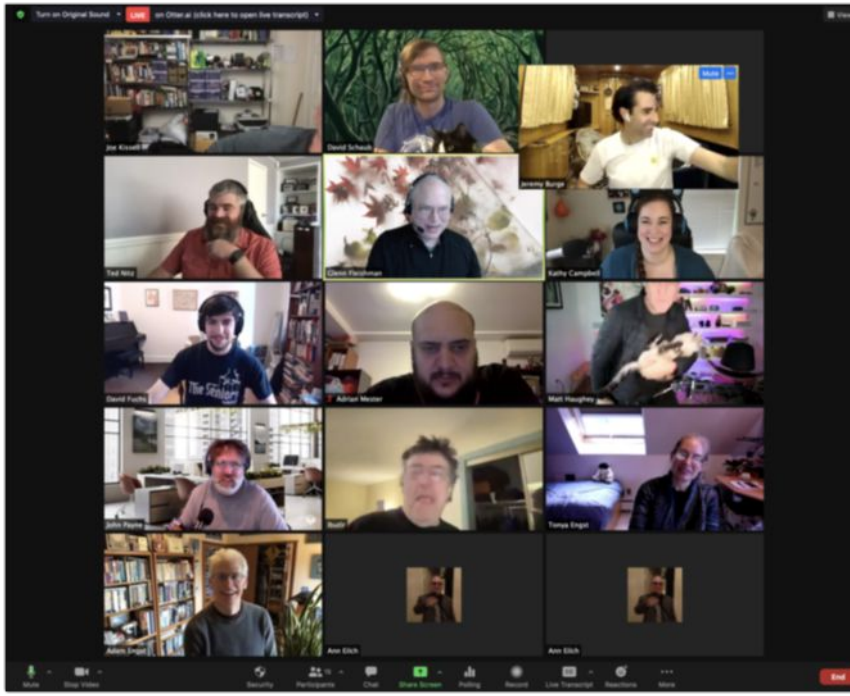






Figure 5: In Gallery View, you can see everyone who fits on a page.

If not in Gallery View in a desktop app, click the  View icon and select Gallery ; in a mobile app, swipe left. You can click or swipe to show additional screens of people, if any.

In full-screen mode in desktop apps, Gallery View works just as it does in a regular window.

Minimize for a Floating View

There's *yet another* view: the Mini Window. In desktop apps, you can click the minimize button in the Zoom window, and the display switches to a tiny floating window of just the active speaker.

Click the downward pointing arrow  to switch between the Talking and Active Speaker modes as described above for the Active Speaker view (**Figure 6**). You can mute audio and video by clicking those icons. To return to the regular Zoom view, tap the expand  icon.

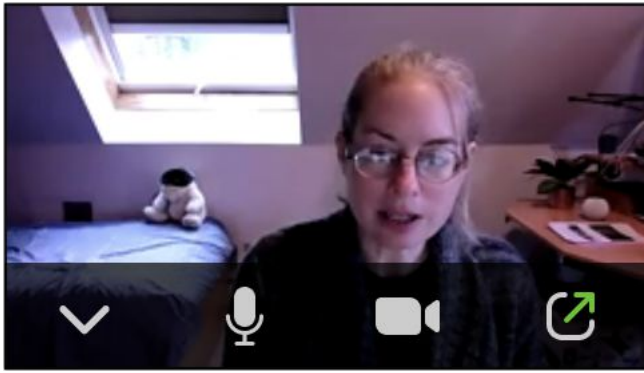




Figure 6: The Mini Window reduces Zoom screen territory.

In mobile apps, you can tap the More  icon and choose Minimize Meetings. The active speaker shrinks to a thumbnail in the upper-right corner. You can drag that thumbnail to any point along any side of your screen. Tap the video to re-enter the meeting.

Pop Out a Window in Desktop Apps

The Participants list and chat are normally connected to the desktop app's righthand side as a slide-out pane with participants on top.

However, you can click the downward-pointing arrow to the left of either the Participants or Chat pane's name and select Pop Out to have either or both become freestanding windows. To reverse this, click the More  icon and choose Merge to Meeting Window.

Tip: There's a lot more to learn about views, which are covered in greater depth in [Take Control of Zoom](#).

View a Shared Screen

Zoom is often used to share someone's screen for a presentation or demonstration in a browser or app. Zoom's view options change in desktop apps when screen sharing is involved.

View in a Desktop App

Zoom has a handful of screen-sharing options for viewers in their desktop apps in Settings > Share Screen; several options can also be engaged in during an active meeting:

- **Fill your screen:** You can opt to enter full-screen mode or maximize the window's zoom. You can also toggle full-screen mode in an active meeting by clicking the Enter Full Screen button in the upper-right corner. Click a meeting window's normal maximize button to zoom it to its largest available non-full-screen size or to restore it to previously scaled dimensions.
- **Don't fill your screen:** Pick "Scale to fit shared content to Zoom window" to retain a window's proportions.
- **Side by side:** In the previous three modes for window management in the two bullet points above—full-screen, maximized window, and scale to fit—you can also enable Side-by-side Mode as a setting, or click View Options during an active meeting when someone is sharing. the shared screen appears at left and the active speaker or a grid of participants at right. Drag a vertical line between the two parts to the left or right to make the shared side or videos side larger or smaller in proportion to each other.


The shared screen notes "You are viewing *person name's* screen" in a green bar at the top of the Zoom view or second window.

You can resize the window if it's not in full-screen mode, or click View Options to choose an enlargement or reduction size.

View in a Mobile App

On any touchscreen mobile device, you can pinch or spread your fingers to zoom out or in, and hold to pan, to see more, less, or a different aspect of the shared screen.

You can also give yourself more territory, particularly when you use a landscape view on your mobile device to view the shared screen—almost always desirable as most shared items will be wider than tall.

Tap More , then Meeting Settings, and disable Always Show Meeting Controls. Tap Done. Now the controls will disappear after a few seconds (**Figure 7**). You can tap the screen or move the image to have them re-appear.

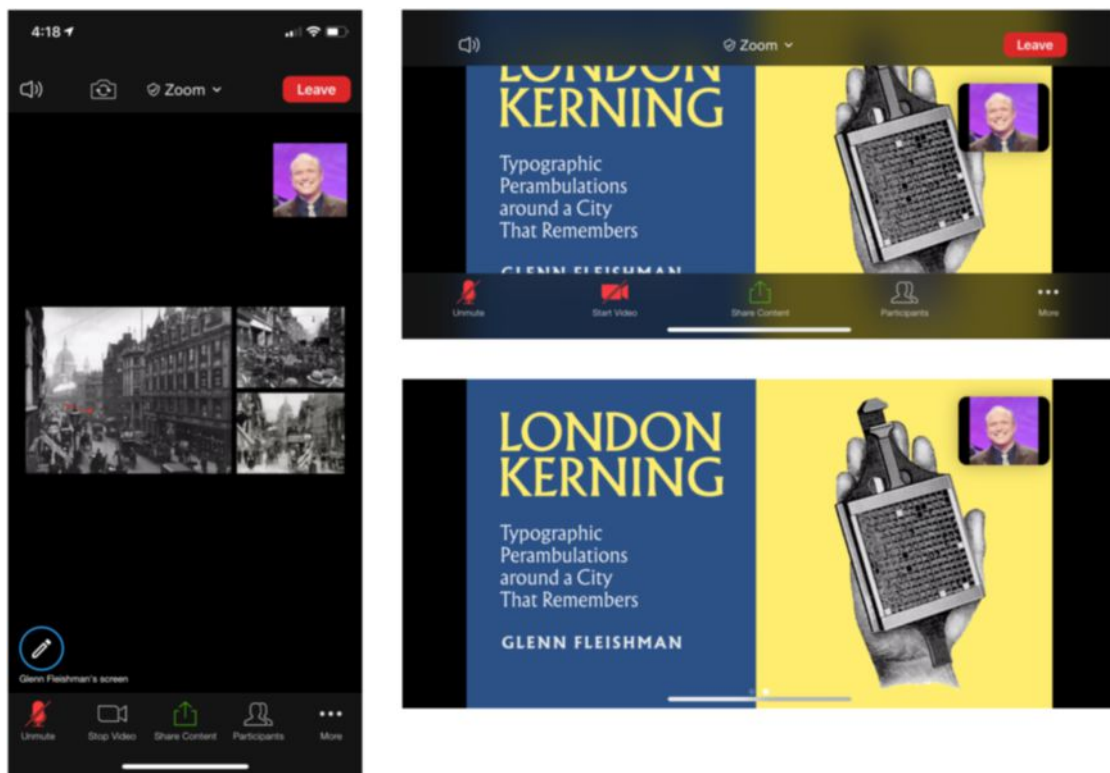


Figure 7: Portrait screen-share viewing might lead to a too-tiny image. Landscape (top right) offers a better view, but using the option to fade controls (bottom right) improves it.

Tip: You can set that auto-hide option for all your meeting across apps in [your account settings](#) by disabling “Always show meeting control toolbar.”

Share Your Screen

Zoom makes it easy to share your screen to from a few to as many as hundreds, or even thousands, of people. Knowing a few key settings will help you from the get-go.

Note: The Zoom host may have to enable screen sharing for all participants; you may need to prod the host if you're asked to share.

Pick What You Share

What you can share varies by platform, but it includes photos, apps, a full monitor or device screen, and files that an operating system can show natively without requiring another app, like video and PDFs.

Share from a Desktop App

Desktop apps offer a very long list of what you can share to other participants. Start by selecting an item and then proceed to share.

Choose a Desktop Option to Share

Click the Share Screen button and Zoom reveals a three-tabbed window with an array of choices. Shared items either have a green outline or appear in a green-outlined window in Zoom, depending on the item.

The Basic tab includes screen-based options (**Figure 8**):

- **Any display:** Zoom notes these as Desktop 1, Desktop 2, and so forth, and overlays large numbers on the corresponding displays.
- **Whiteboard:** A blank screen appears that you (and others) can draw on with annotation tools available in a toolbar.
- **iPhone/iPad via AirPlay or via Cable:** Zoom can stream the screen from a device connected via Wi-Fi or via USB (macOS only). The device's display appears as a resizable window in Zoom.

- **Any app window:** All app windows appear as available choices; hold down Shift to select multiple windows. To limit which windows are shown across an app, click Share Screen, click Advanced, and select “Share selected app window only.” Zoom switches to the app’s window, and your interactions in the app are shared to the meeting.

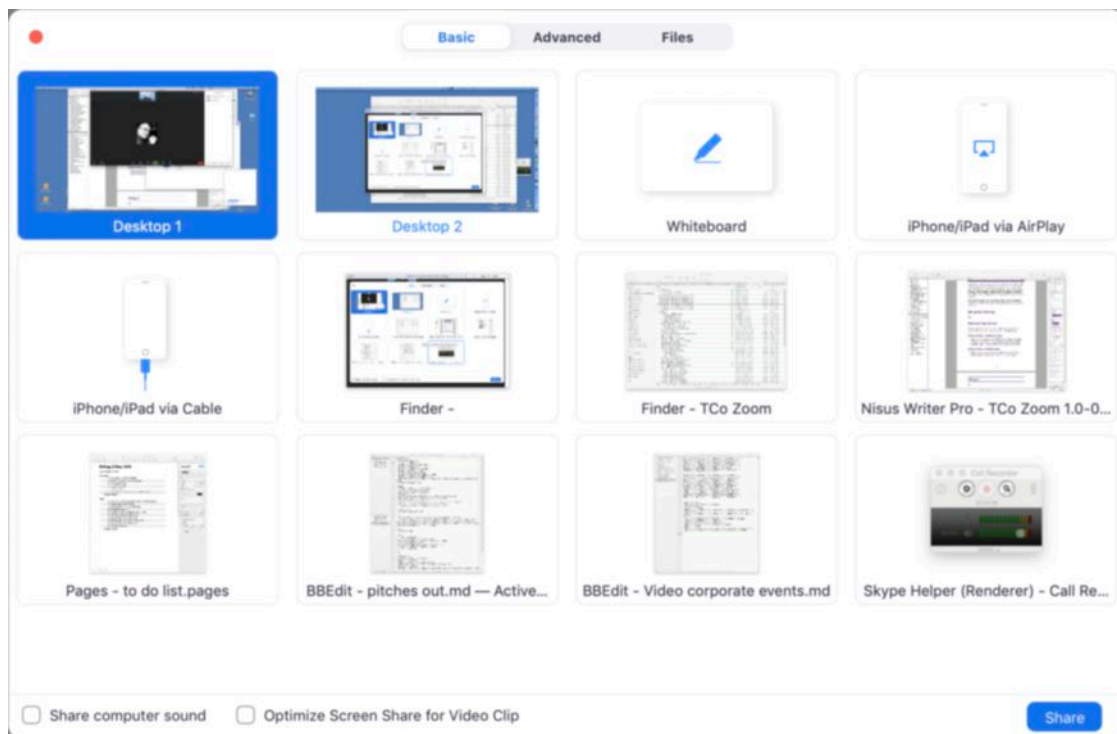


Figure 8: The Basic tab for desktop screen sharing offers access to displays, apps, a whiteboard, and mobile devices.

The Advanced tab isn’t that different from some items in Basics, but presents four choices:

- **Slides as Virtual Background (beta):** Zoom can export PowerPoint (macOS, Windows) or Keynote (macOS only) slides from a deck you specify, and overlay your live video as a silhouette on top, letting you be effectively *in* your presentation.
- **Portion of Screen:** An outline appears that you can drag around your display (or across displays) and then drag on a corner to resize. This is an extremely useful way to take a portion of a window in an app without interface elements.
- **Music or Computer Sound Only:** If you want to pump in just audio, you can pick this option.

- **Content from 2nd Camera:** This allows you to share an additional video input, such as a document camera, instead of selecting it as a different source for your participant video stream.

The Files tab reveals integrations with online cloud file services, including Box, Google Drive, and Microsoft OneDrive. Sharing a file this way—as opposed to within an app you’re running on the same computer—opens it using a Zoom viewer that relies on formats supported natively on the operating system.

Control Sharing from the Desktop

When you’re ready to share, click Share and the selected content or item is shared. Instructions appear if you need guidance on how to proceed, like connecting an iPhone or selecting part of a screen.

Zoom brings up a control bar that shows meeting options alongside screen-sharing controls, including showing your status and a Stop Share button to end the session (**Figure 9**).

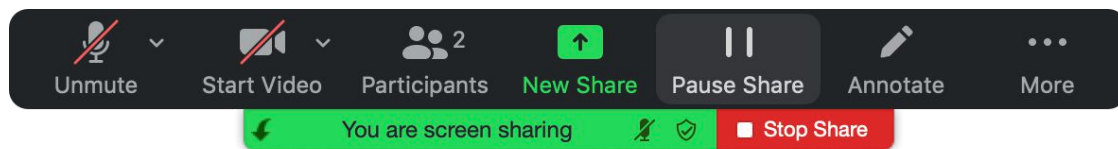




Figure 9: Control options while sharing through this bar.

Click the More  icon, and you have several granular controls:

- **Disable Attendee Annotation:** Even when you’re not the host, you can prevent others from marking up your screen.
- **Hide Names of Annotators:** Enabled by default, Zoom labels attached to all on-screen markup. Select hide to remove those.
- **Hide Floating Meetings Controls:** If you want to avoid having this bar float around, choose this option or press \mathbb{A} -Control-Shift-H in macOS or Control-Alt-Shift-H in Windows. Press Esc to restore it.
- **Share Computer Sound:** You can toggle this option, which is also found when originally selecting a shared item.

- **Optimize Screen Share for Video Clip:** Zoom can be optimized for shared videos, but only if you check the box shown in **Figure 8**.
- **Meeting Info:** Select this if you need the particulars of the current meeting, such as its ID, while sharing.

Share from a Mobile App

Choose what to share in a mobile app by tapping the Share Content  icon. You can then select from a set of options:

- **Screen:** Stream the device's screen (**Figure 10**). You can navigate among apps. Exit by tapping Stop Broadcast (iOS) or Cancel (Android) as it starts or Stop Share in Zoom when it's running.

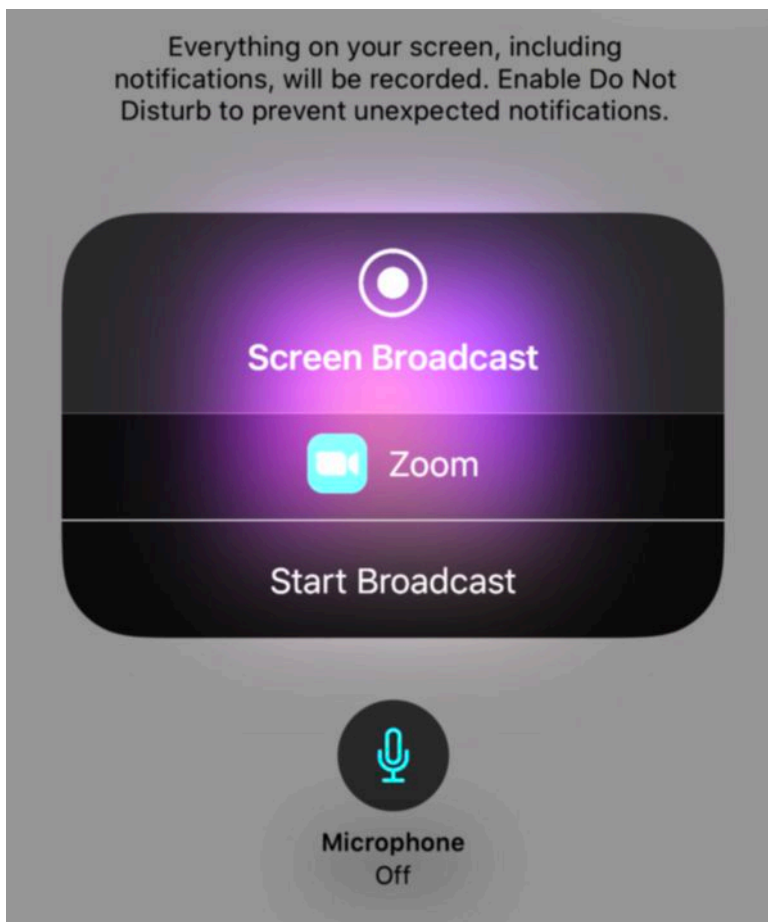


Figure 10: iOS provides a strong warning before you start “broadcasting” your screen via Zoom (or any app).

Tip: Read the directions on how to enable the iOS blur feature in the next section to preserve app-switching privacy.

- **Photos (iOS); Google Photos, another photos app, or a file manager (Android):** Select an image to share.
- **Documents (Android):** Android's Documents option only allows sharing PDFs, which can be paged through in Zoom.
- **iCloud Drive (iOS); Google Drive and several others (Android):** The broader file-selection options allow both images and PDFs of one or more pages.
- **Website URL and Bookmark:** Type in a URL or select a bookmark and the mobile app opens a browser window within the app. The browser can be used as if it were freestanding.

Tip: When viewing a website, you can tap the Bookmark icon to add its URL to your app's bookmarks list.

- **Share Whiteboard (Android):** Share a whiteboard you can annotate on, just like in desktop apps.

Mobile apps offer no control for managing the session after selecting a sharing option. Tap Stop Sharing and share again to change selections.

Tip: [Take Control of Zoom](#) features a long section with details on using presentation software and full-screen mode in Zoom.

Protect Your Privacy While Sharing

Browser tab names aren't designed to preserve your privacy, and might contain information you don't want anyone to see—like "UP-COMING EMPLOYEE FIRIN...", "How to get better job...", or "Local divorce lawyers."

On an iPhone or Android device, an errant notification might plop onto the screen that you're streaming, and contain absolutely private or intimate information from a texting app.

Make sure and close all tabs in the browser window you're using, disable notifications, and hide all other apps. On a desktop computer, you might consider using a separate account only for Zoom.

Interact in a Meeting

Meetings occur for a lot of different reasons, and for those that require or expect your participation, you have many ways to manage your interactions within the session. This is, of course, true of both social and professional meetings.

Take Actions

Zoom offers a lot of options for taking an active role in a meeting. Your choices are always limited by powers granted by the host to participants or to you as an individual. But they can include:

- Speak up over audio.
- Share a file, screen, presentation, or app from your computer or mobile device. See [Share Your Screen](#).
- Mark up a shared screen using the Annotate tool on the screen-sharing toolbar.
- Click or tap buttons to indicate responses, described in [Interact in a Meeting](#).
- Type in a chat sessions to the host, the entire set of participants, or specific other members. See [Chat in a Meeting](#).

Mute Audio and Manage Video

Generally, the mute button is your friend. For most sessions, mute yourself unless you're actively speaking or playing sound for the other participants. Zoom provides a visual cue that mute is active and that no sound is being sent by showing the mic in red with a line through it.

When you need to speak:

- **Use the Space bar:** In desktop apps, leave audio muted and rely on the Space bar. Whenever you press and hold the Space bar, Zoom unmutes your audio and shows a visual indicator. Release it, and you're back to being muted.
- **Click the mic icon:** In any Zoom app, you can click or tap the mic icon to toggle mute. You can click Unmute in the Participants sidebar in a desktop app. Remember to mute yourself again when you're not speaking.

A host can mute all participants in a meeting and then unmute individuals or request that everyone turn audio back on. (Zoom asks each person the host wants to unmute if they want to start sending audio.)

You can also start and stop video. A host may ask people not to stream video when they're not speaking (or at all). But you might choose not to be on camera all the time. (A host has the option to disable participants' video, too.)




Turning off video also reduces your upstream bandwidth and the bandwidth consumed by other participants. Depending on who organized the meeting and under what expectations it takes place, you can click or tap the Stop Video button whenever you like.

Get Attention

In interactive meetings, if everyone talks whenever they like, things can get out of control. It can mean the loudest or most determined talker-overs dominate discussions.



A meeting host may implement technical controls or set and enforce terms. However, you can be part of setting a social or business culture in the absence of anyone else.


Here are a few methods to try:

- **Your physical hand:** Raise your actual hand or wave or make physical movement.
- **Your virtual hand:** Raise your virtual hand: click a button at the bottom of the Participants list in desktop apps or tap Raise Hand in the More  menu in mobile apps. The host is alerted. You can also lower your hand after raising it.
- **Use tiny signs:** Small pre-printed signs with large, bold type legible in a small video screen can be a nice quiet way to express feedback, like “yes,” “no,” and “question.”
- **Nonverbal feedback:** A host unlocks a set of options by enabling nonverbal feedback in their meeting settings. Icons appear at the bottom of the Participants list (desktop) or in the More  menu (mobile), and appear next to your name. Options include Raise/Lower hand, as well as “yes,” “no,” “go slower,” “clap,” “need a break,” and so on. A full list is available [on a Zoom help page](#).
- **Use Reactions:** Click Reactions in a desktop app or tap the More  icon in mobile apps, and you can select either the applause or thumbs up emoji. These appear briefly overlaid on your screen on everyone else’s meeting.
- **Send a message to the host:** If chat is enabled, you can tell the host you have a question, concern, or comment—but only if they have said up front that they welcome those messages, or if you know the host and don’t feel that it’s a problem to message them.
- **Send Files and Chat:** While in a meeting, you can also send files and chat with other people. See [Chat in a Meeting](#).

Stay Safe in a Meeting

Participants in Zoom meetings largely rely on the host taking action. A meeting's host and any attendee can report a user to Zoom within an active meeting by using the Report feature available.

Click or tap the meeting's security icon,  or , in the upper-left corner in any client, then click or tap the Report button at the bottom of the screen that appears. You can then fill out an abuse report and send it to Zoom.


Tip: If a host can't find the host-centered reporting option, tell them this: in a desktop or web app, open the Participants list, hover over the person's name, click the More button, and click Report; in a mobile app in the Participants list, tap the More  button, tap Report, and then select the person's name.

As a participant, you can also take manual steps before a session and also act within a session if you see behavior that violates the rules of a meeting, societal norms, or laws. You can also protect yourself with some guidelines. Here are my suggestions:


- Don't share invitations for public meetings with anyone you don't know, unless you've been asked to be the organizer.
- Decline to accept meeting invitations that appear without knowing why you're receiving them.
- In a public meeting, don't accept or interact privately with strangers via a Zoom chat session.
- Backchannel to the host via chat as soon as someone starts to engage in problematic or abusive behavior. Describe briefly and specifically what you're seeing. Ask them not to identify you as the source to avoid retribution.


Chat in a Meeting

Zoom's chat is fairly primitive compared to modern instant messaging systems, but it gets the job done during a meeting.

To get started with Chat in a meeting, click the Chat button at the bottom of a desktop app or tap the More  icon and tap Chat.

From a menu, you can select to whom your messages are sent, whether that's everyone in a meeting or individuals. Zoom doesn't let you set up groups to talk to, however. Enter a message and press Return (desktop) or tap Send (mobile).

When you receive a message and are *not* displaying the Chat view in your app, a brief overlay appears showing the sender and message, which then fades. A red badge with the number of missed chat messages appears over the Chat button in desktop apps and on the More  icon in mobile apps.

Tip: It is *very* easy to overlook chat. The Chat pane doesn't display by default in the desktop app and it's not apparent that you have to tap More  > Chat in a mobile app to get there.

All messages appear in a single Chat stream. A label above each message that indicates whether it was sent you individually or if it was sent to the whole group.

You can also select any member's name in the Participants list to highlight them or open the Chat view. Select yourself in the desktop app, and Chat opens to Everyone as the destination.

Participants can also send files in a desktop app by clicking the File button and selecting a document. Only desktop app users can receive these files, which they click to download.

About This Book

Thank you so much for downloading *Take Control of Zoom Essentials*. Every topic in this book, large and small, is covered in greater depth in [Take Control of Zoom](#), which also includes chapters on creating and managing meetings as a host, recording Zoom meetings, and a huge array of tips on presenting in Zoom using PowerPoint and Keynote and effectively using full-screen mode.

We hope you find it both useful and enjoyable to read. We welcome your [comments](#).

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Glenn Fleishman never stops writing about technology and its implications. He's in his third decade of writing for publications as varied as *American History*, *Fast Company*, the *Economist*, *Smithsonian* magazine, *Increment*, the *New York Times*, *Macworld*, and *TidBITS*, and many others. In 2012, he was a two-game champion on *Jeopardy!*

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