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This document was created on a Mac; Windows screens are almost identical. There is a separate document for iPad: <http://jt-mj.net/zoomscreensipad.pdf> [which also addresses tablets and smartphones].

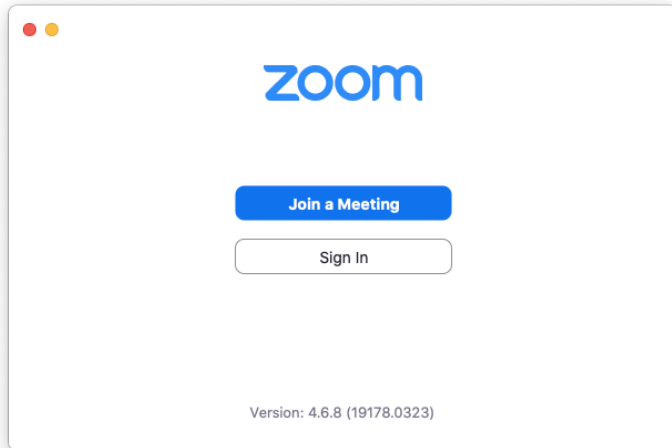
This is up to date as of Zoom level 5.4.4 - screen shots are only updated for later versions if they have changed from the previous version.

**This document applies to Zoom Meetings.** Zoom webinars have similar screens with many of the same controls, but with fewer options for participants.

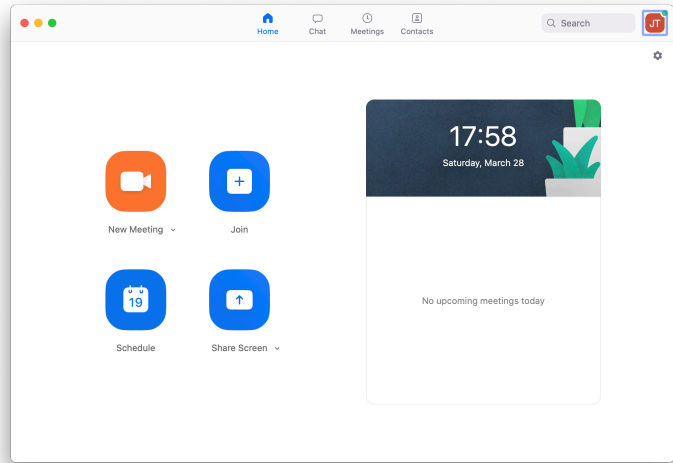
This document is geared to Osher at RIT use of zoom meetings for class delivery; most of it is generally useful. A **wizard** at Osher renders technical assistance and support to the course leader[s].

## STARTUP SCREENS:

If you do **not** have a zoom account



If you **do** have an account



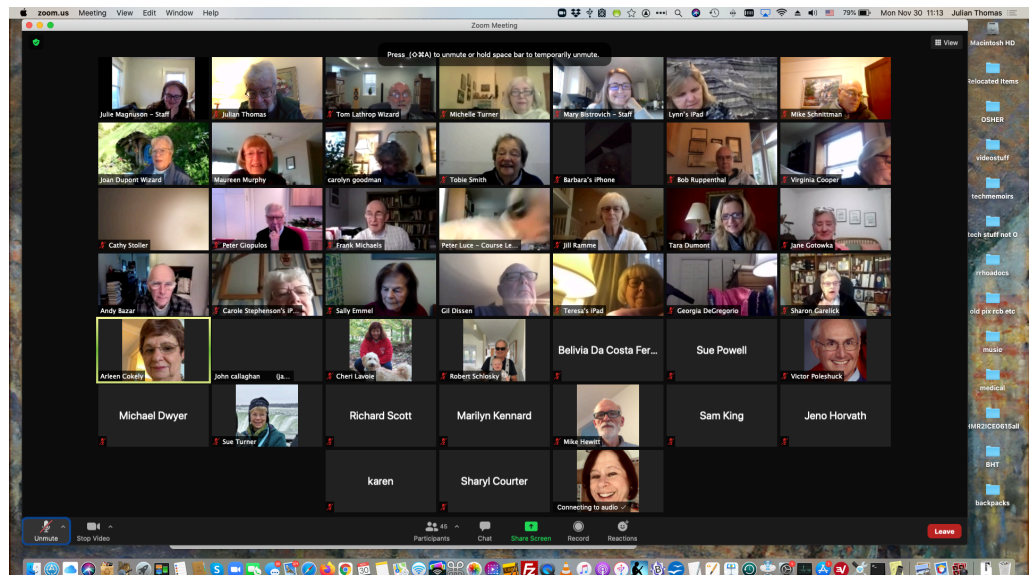
In either case you can click on the gear [upper right] to get to the zoom settings [described below].

Some settings are only available with a free [or paid] account; they will be so noted.

These screens do not appear if you have clicked on a link that will take you directly to the meeting. If you have a meeting ID [usually a 10 digit number] and the corresponding passcode, you can click **join** on either of these screens and enter them

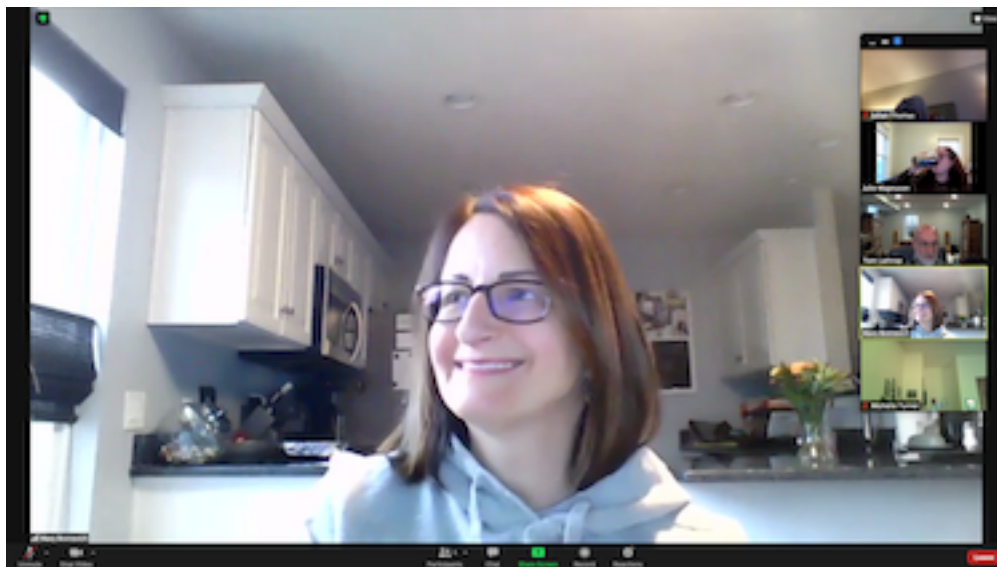
## HOME SCREENS:

### Gallery View



Shows up to 49 participants at a time. Active speaker box has a colored border.

## Speaker View



Shows currently active speaker

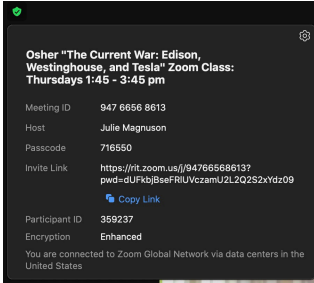
There is a 'Pin Video' option when you are in Gallery mode. Hover over the video of the participant you want to pin, press the ... then select Pin Video. This will cause the window in Speaker mode to remain on the pinned participant even if someone else is speaking. To undo, click 'Remove Pin' or [in gallery mode] click the ... and click 'Remove Pin'.

# HOME SCREEN CONTROLS: [Zoom level 5.4.4]

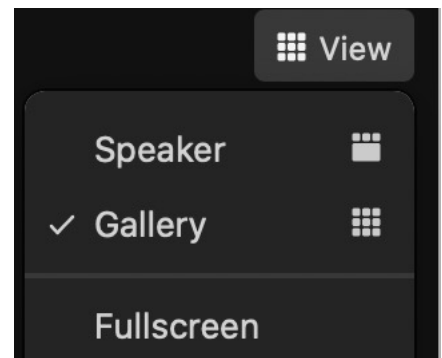
## TOP:



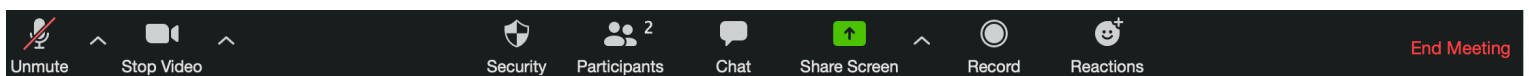
Top left: Info about the meeting; lock symbol indicates encrypted session



Top Right: Switch between Speaker & Gallery view; Turn full screen mode on/off  
You can also get out of full screen by pressing Escape.



## BOTTOM:



Bottom row: [\* = see below for description; \*\* for separate section]

**Mute (microphone) On/Off:** ^ for other options

**Video On/Off:** ^ for other options

**Security:** \*\*

**Participants:** opens [or closes] a white window on the right \*

**Share Screen** \*\*



**Chat:** options to send text message to all or selected participants \*

**Record:** Turns on/off session recording \*

**Reactions:** cute symbols [applause, thumbs up]

**End/LEAVE Meeting:** Ends meeting if you are host; otherwise disconnect

**Participants** (opens/closes the white window on the right)

- There is an option to mute/unmute yourself
- You can rename yourself or edit [change] your profile picture.
- [for meeting host/cohost]:
  - you can mute all participants, or block video for a particular participant. You cannot unmute anyone else but you can invite them to unmute. Clicking on a participant and then More lets you:
    - Chat [see below]
    - Stop video/ask to start video
    - Make host [this can be undone by reclaim host]
- The bottom of this window includes an icon to Raise Hand
- Additional icons for hosts include:
  - INVITE: Gives you the option to Copy the meeting Url or a longer [clickable] invitation [includes information for phone-in participants]; either can be pasted into an email or text message and sent to invitees.  
[NOTE: Contacts does **NOT** have anything to do with your address book; it's a feature for enterprise environments]
  - Other controls to manage participants

**Chat** opens a white message window - you can send a message to Everyone or a specific a specific user in the 'To' window. You will see messages to everyone and those just to you.

Both the Participants and Chat windows can be floated out by clicking on the inverted caret at the top left of the window; this is useful if you need to see them in full screen mode. To undo the float, close the windows and then click participants/chat as needed,

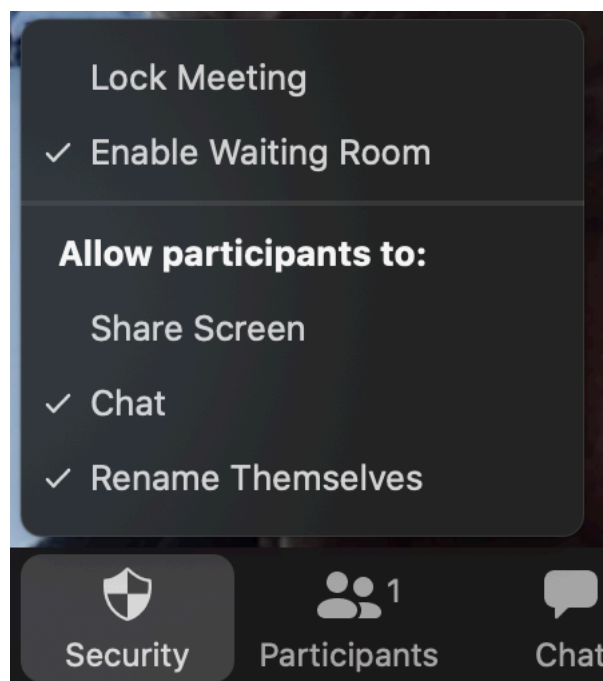
**Record** [if present] Starts/pauses a recording of the session on your machine [unless you have a paid account, when it will go to the zoom cloud]. When the session is completed, the recording is converted and can be found at:

PC: C:\Users\(*username*)\Documents\Zoom

Mac: /Users/(*username*)/Documents/Zoom

There is a folder with an mp4 video, an m4a audio, a txt file with the chat sessions [if there were any], and a windows .m3u playback file. **Warning** - for a long session, the mp3 file will easily be 200MB or more.

**Security** [only for hosts]:



In general it is not a good idea to allow participants to Share Screen.

## SCREEN SHARING:

This is for displaying something from your own machine - e.g. PPT/KeyNote, YouTube, etc. There is a more complete document - <http://jt-mj.net/zoomscreensharing.pdf>

It may be helpful to have multiple desktops open [or a second display] when screen sharing; Mac and Windows have this capability.

**Share Screen** opens a white window with options:

One icon for Desktop 1, and one for 'Whiteboard'

One icon for each relevant app that was open when Share Screen was clicked

### **NOTE - the sequence of the following steps is important!**

1. Open your Keynote/Powerpoint presentation [but do not start play **YET**] and/or other files [e.g. YouTube video, images, etc.]. This can be done ahead of time.
2. Click the green Share Screen icon
3. Click Share Computer Sound [lower left] if the shared screen has sound
4. Click Optimize Screen Share for Video Clip if you are sharing a video.
5. Select the icon for the app and click share [lower right]
6. You should now see the screen you are sharing.
7. Now is the time to click Play or start a YouTube
8. If you want to share a second screen before going back to the normal view, click the **Green** New Share icon. You can repeat this if you want to share a 3rd screen or go back to an earlier screen.
9. **THIS IS VERY IMPORTANT!** When done, click the **Red** Stop Sharing icon on the top or bottom of the screen being shared [you can click the **Green** New Share icon at the top of the screen to go directly to another app]. Otherwise you may have difficulty getting back to your meeting!

Sharing a Powerpoint or Keynote **without** presenter notes is straightforward. Having access to the presenter notes either requires use of a printout that includes the notes, or a second display attached to the presenters computer. If the presenter notes screen [with presenter notes and preview of the next slide] appears instead of the slideshow, for Keynote, click View and Hide Presenter Notes; for PPT, In the Ribbon under Slide Show uncheck "Presenter View". It should change to "Duplicate View".

## ANNOTATING A SHARED SCREEN:

Move the mouse to the top of the window, as you go over the green "You are screen sharing" icon and a black strip will appear with sharing controls - select Annotate to see this set of controls. Particularly useful:

Text: Opens a [movable] text box

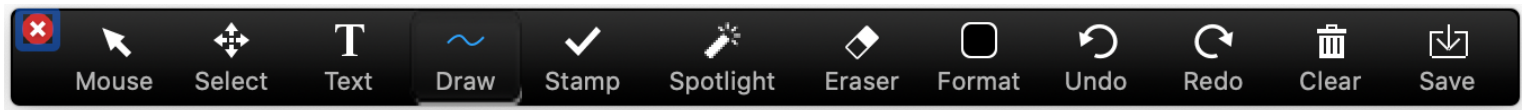
Draw: Offers choice of freehand, lines, arrows, and more

Stamp: Various symbols

Spotlight: Laser pointer

Format: Select color, line width, font

Clear: Remove all annotation. **NOTE** - use this before moving to the next slide; otherwise the annotation will appear on it.



## CLASS QUESTIONS and DISCUSSION:

The procedures for each course will be announced by the course leader or the wizard.

Options include:

- Click on Raise Hand. This will be flagged in the participants window next to your name and the icon changes to Lower Hand; clicking this will cancel your handraise, or the wizard may cancel it.
- Chat [to wizard, not everyone!] who should call on you [and unmute your mike] in the fullness of time.

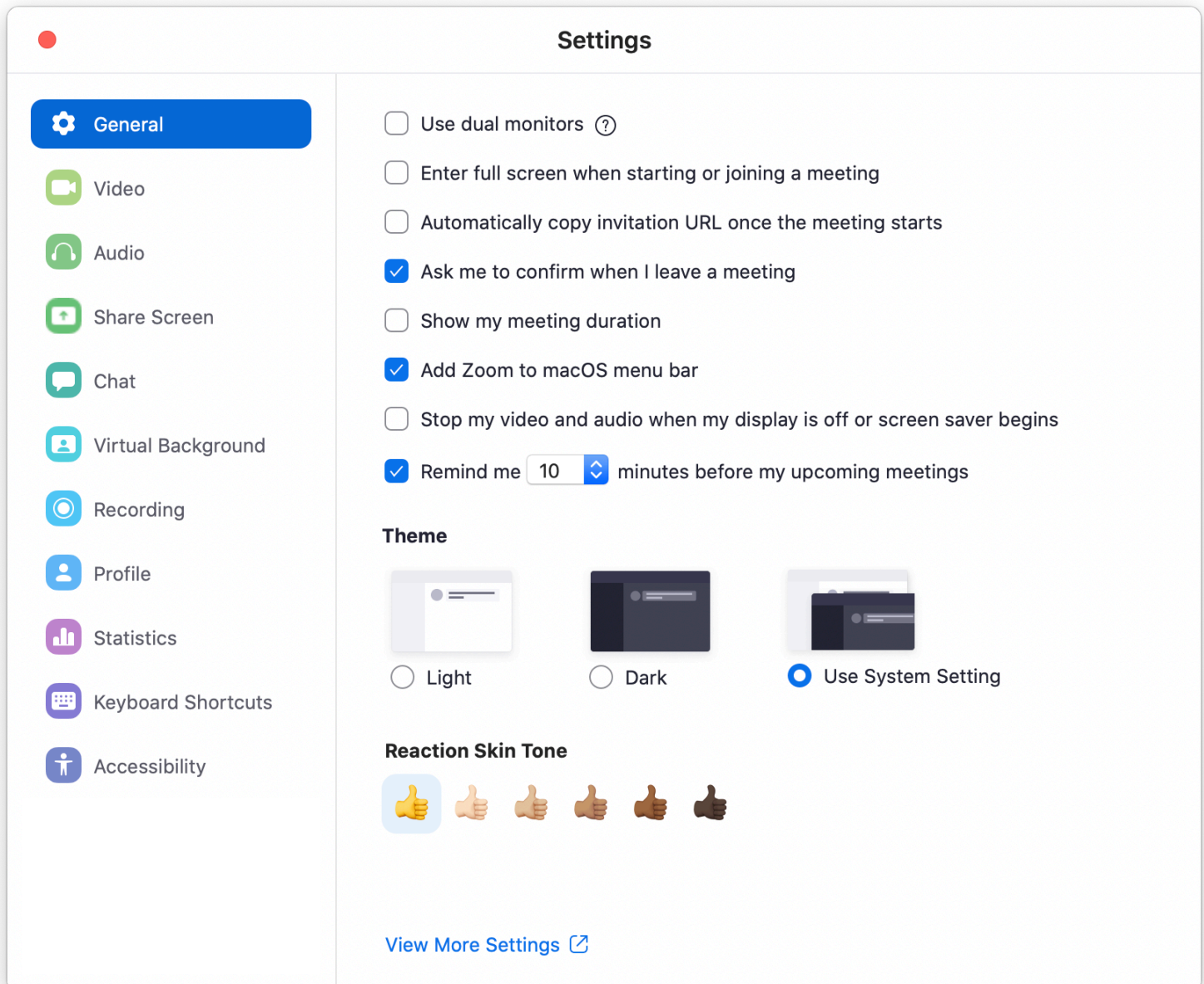
Normally the wizard will mute everyone and only unmute the person who wants to speak. In some discussion classes everyone may be unmuted but it is advisable for a participant to unmute only when planning to speak.

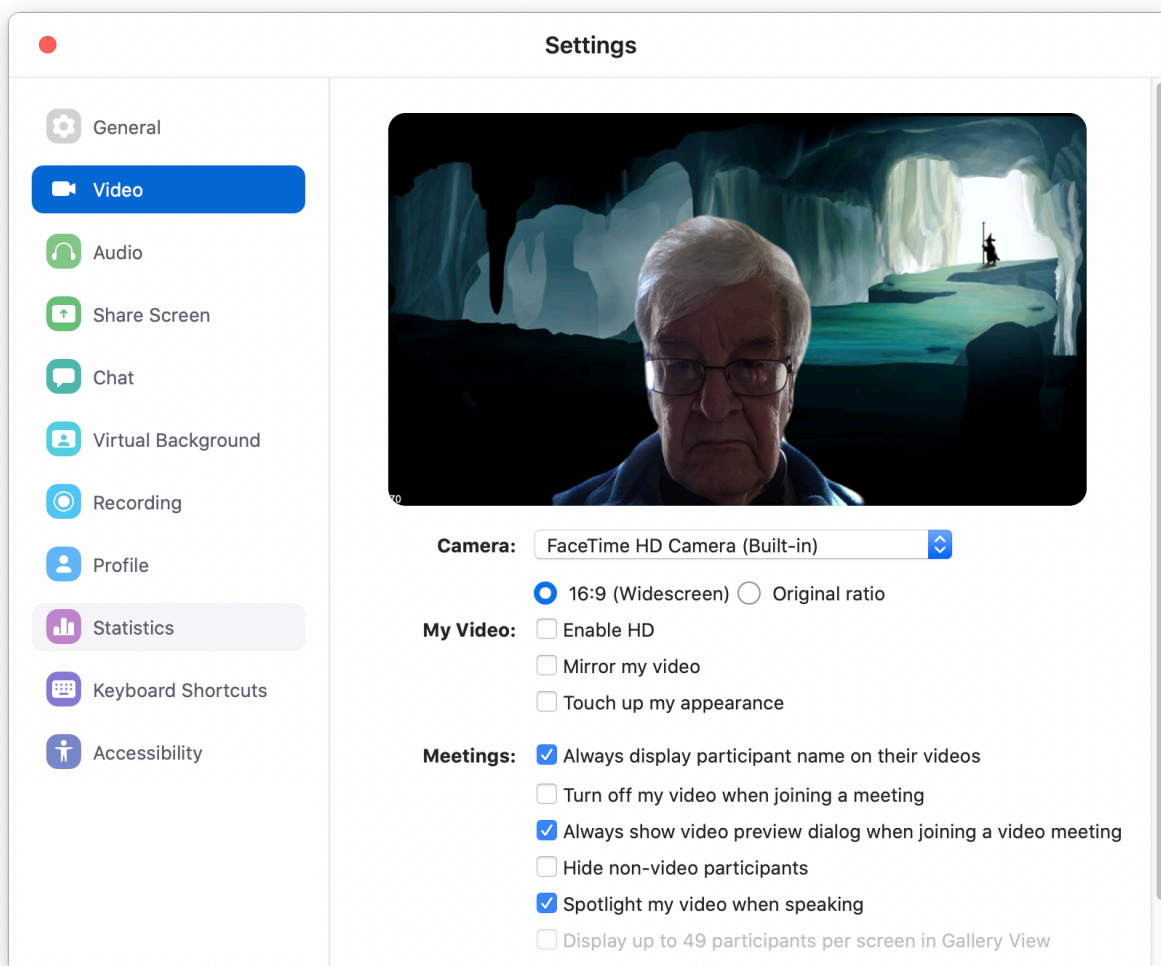
## ZOOM CONTROLS:

### GENERAL:

gear icon top right on entry screen or [Mac: Cmd-<comma>]. From zoom home screen click on either caret at the left of the bottom of the screen..

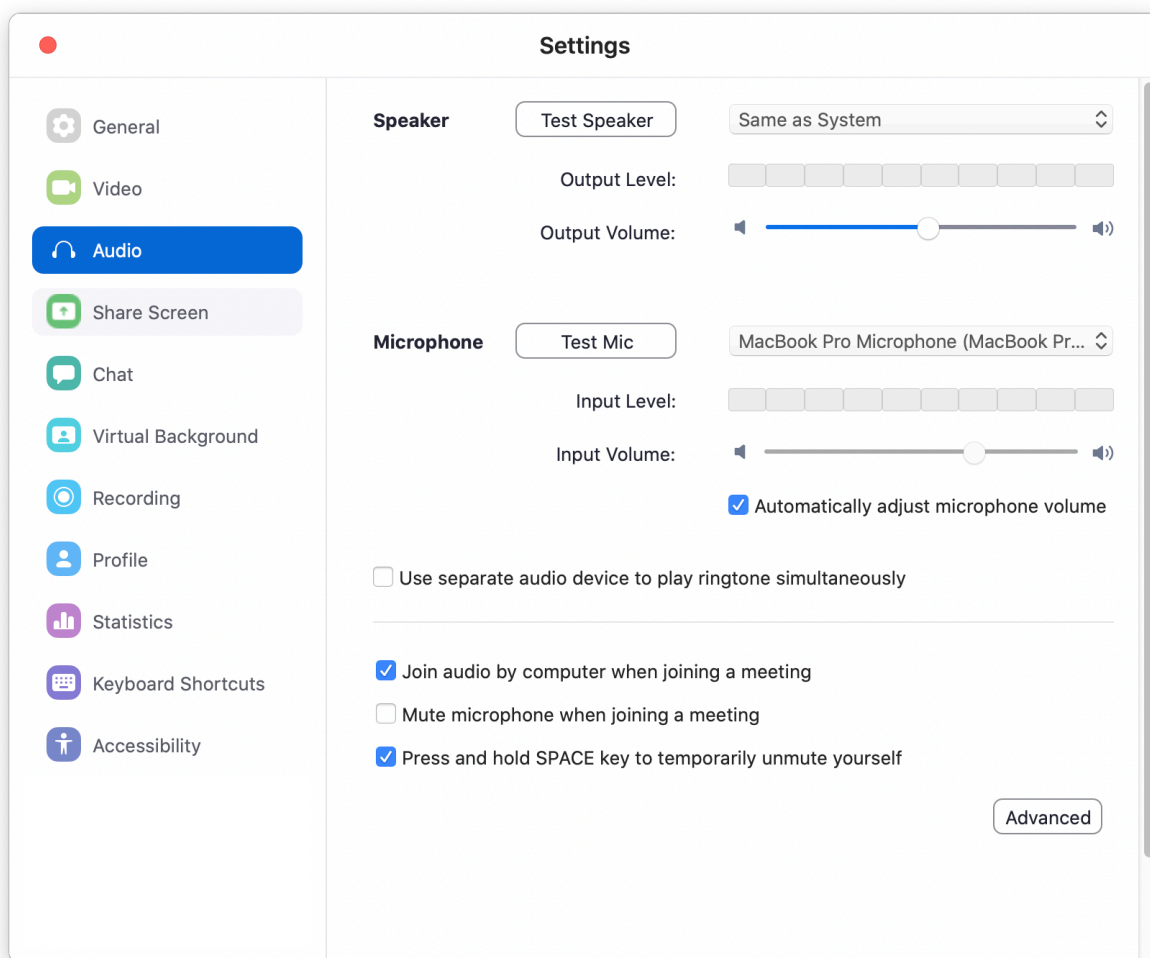
Most settings are self-explanatory. You can't go too far wrong with any of the general settings; they only affect your screen.



**Video:**

**DON'T** click Mirror. If you do and hold up a paper, the text thereon will be mirrored!  
[I'm not sure why they bothered with this one!]

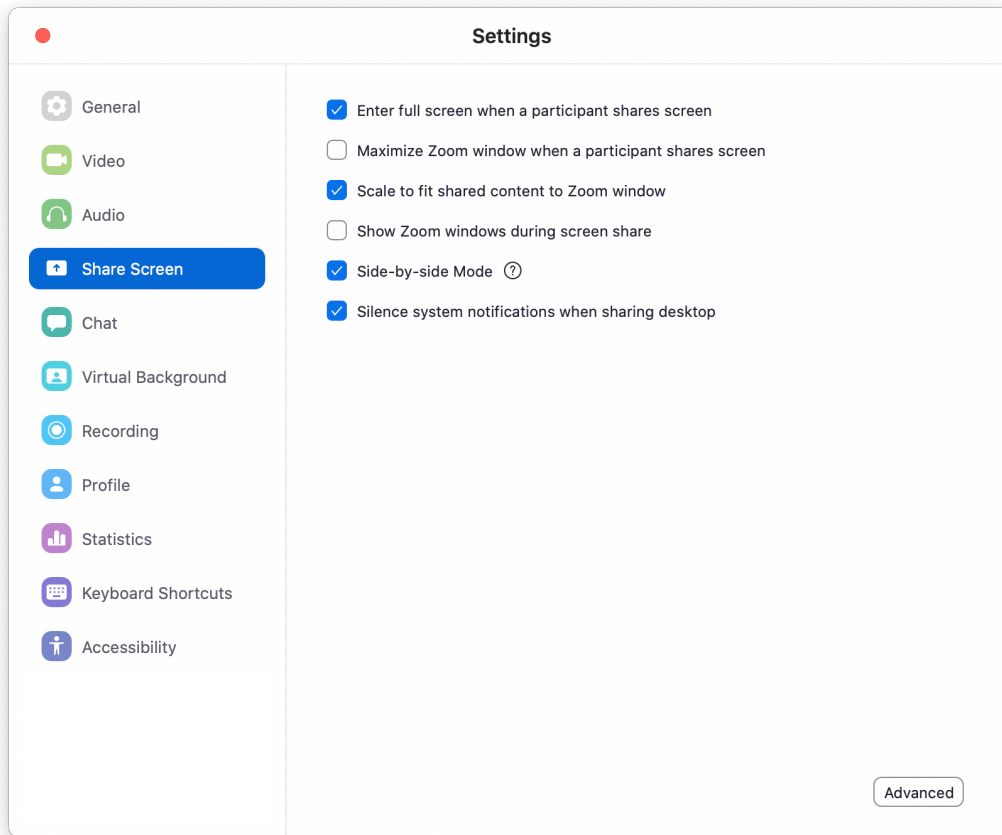


**Audio:**

Test speaker and mike are extremely useful; click for an immediate test.  
You probably should mute mike when the class starts although the instructor/wizard will probably mute all participants.

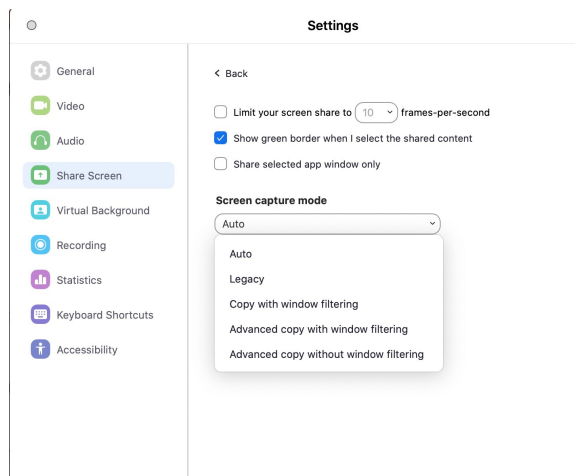
The advanced options mostly relate to audio processing and noise suppression [I haven't tested these]..

## Share Screen:



These settings are recommended; Side by side shows the screen being shared next to participant videos [for a few participants]. Optional.

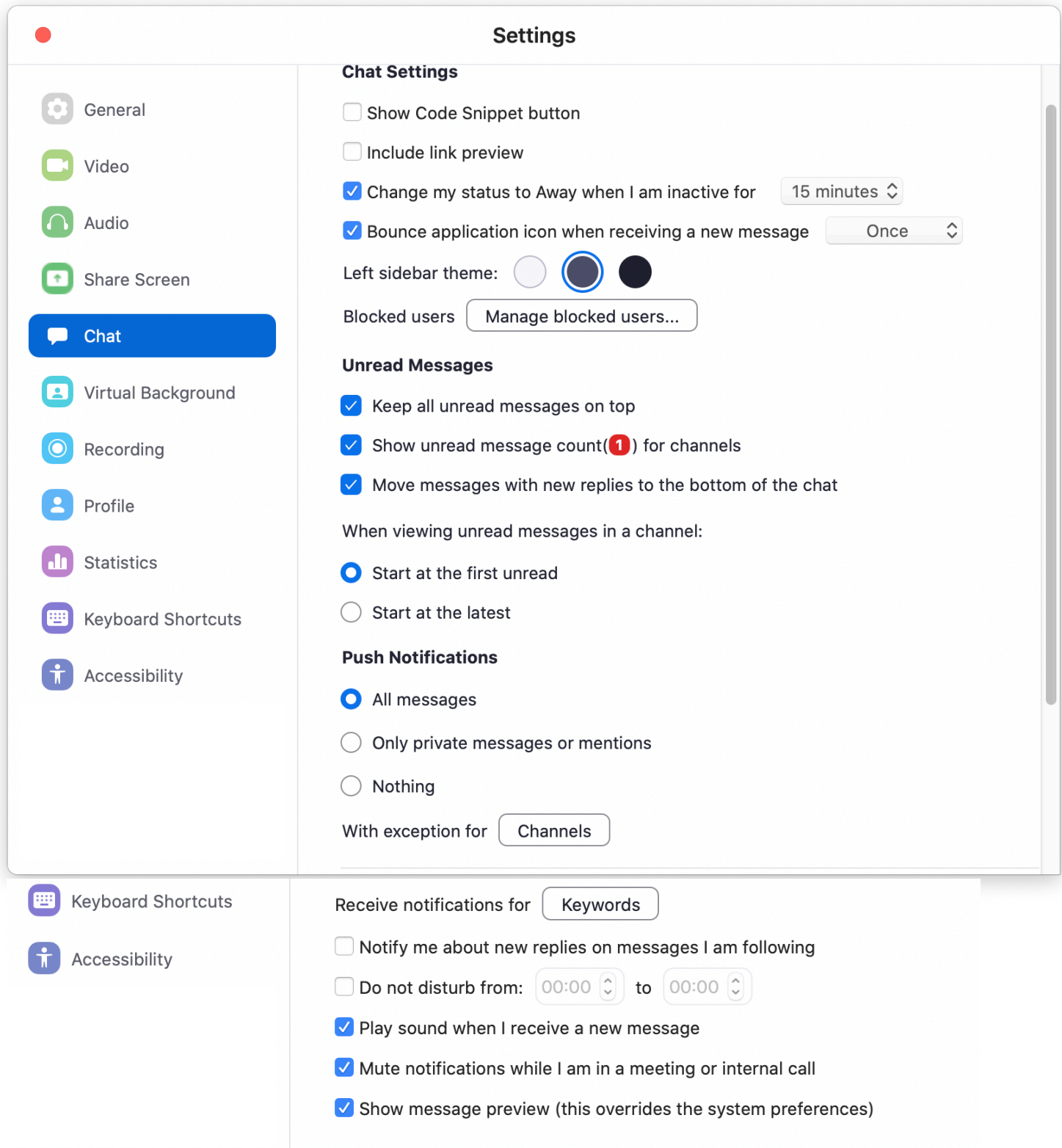
## Advanced:



Be sure 'Screen capture mode' is set to Auto.

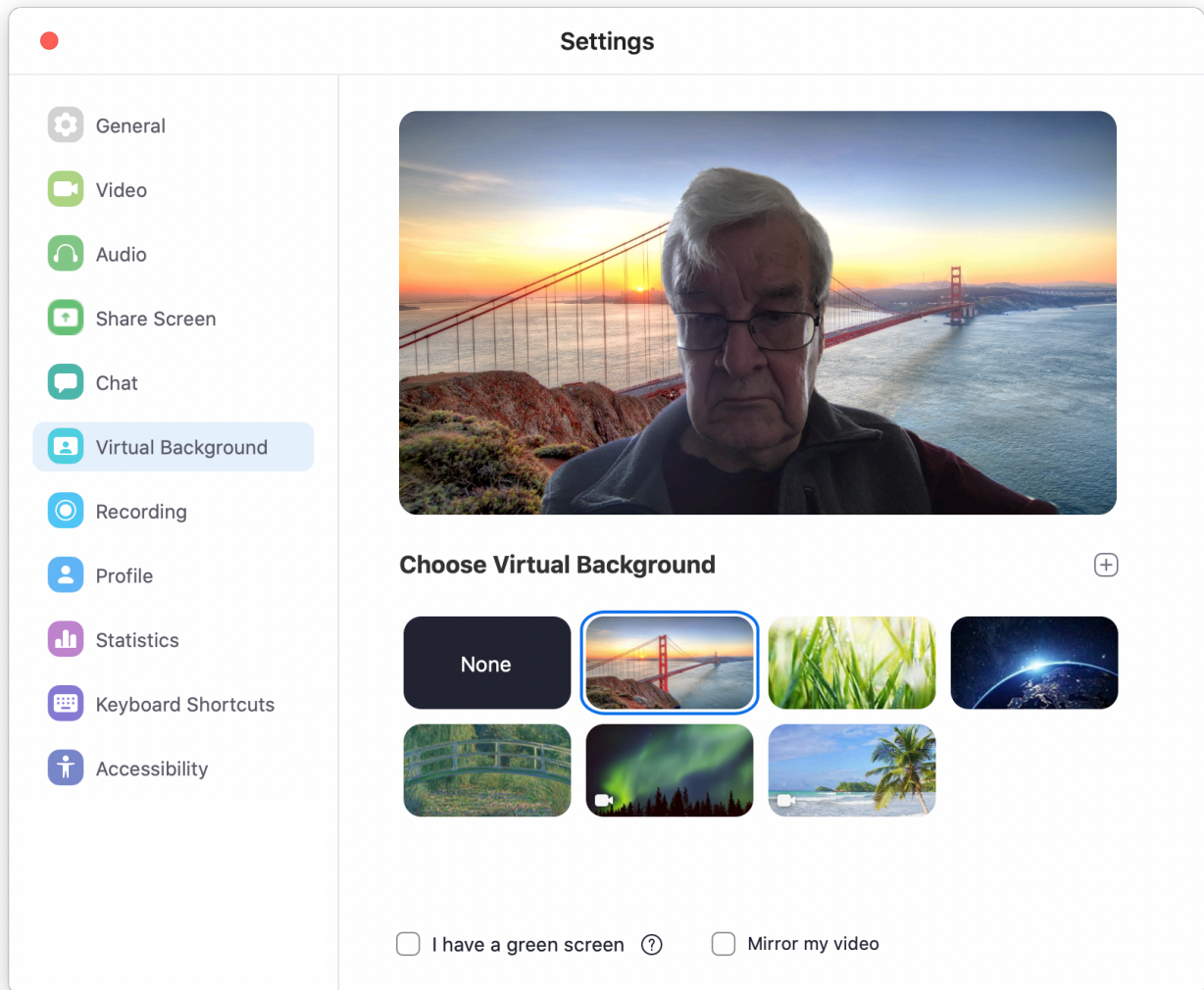


## Chat:



Multiple channels seem to be an enterprise group messaging feature. Otherwise these are primarily chat display and notification options

## Virtual Backgrounds:



Available if you have a zoom account, this is a cool feature with some limitations. **Do not click 'green screen'** unless you have a real physical green background! Virtual backgrounds will not work well [or at all] on slower computers [including some recent model MacBook Air machines].

There are some stock backgrounds [including the one shown above]; you can click the + to add an image from your photo library [which is how I added Monet's Japanese Bridge]. Practice with this; sometimes when you move your head rapidly there can be unwanted effects. It doesn't work well when there is more than one person showing.

The tropical beach is tempting, but it's a repeating video and soaks up upload bandwidth.

If you have a slow internet connection, you may be better off not using this feature.

## **Others [not shown]:**

Recording - controls for session recording [described above]

Profile: [only if you have a zoom account] About you. You can change your name as it is displayed to others; you can also click on the picture above your name to replace it with an image from your computer.

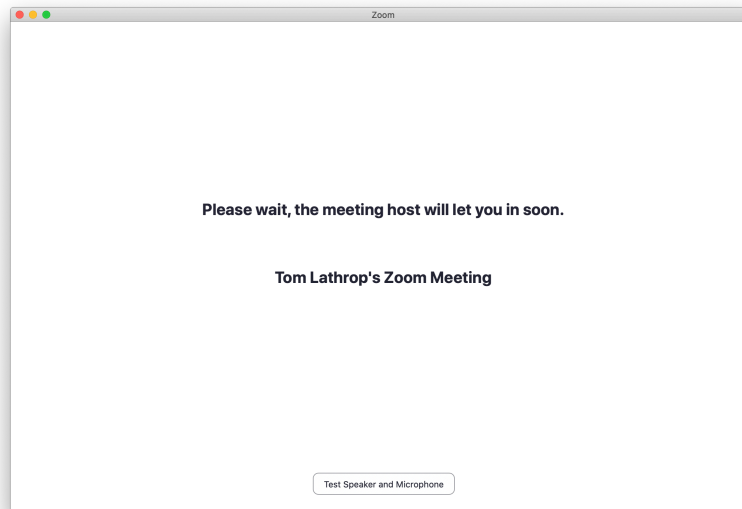
Statistics: for the geeks in the crowd - system status and usage

Keyboard Shortcuts: Can be customized

Accessibility: display options

## **JOINING a MEETING:**

As a security measure, when you first join a meeting, you may not be admitted until a host has approved you. In the meantime, you will see a screen like this:



**REVISION HISTORY:**

29Mar2020: Added startup screens, updated virtual backgrounds, added other clarifications.

03Apr2020: Put startup screens up front where they belong; other amplifications.

05Apr2020: Added 'joining a meeting' [waiting room]; also how to avoid 'presenter mode' in screen sharing a PPT or Keynote.

07Apr2020: Added notes about functions that are only available with a free account.

13Apr2020: new screens for consistency with zoom version 4.6.10

17Apr2020: major update and overhaul for 4.6.11

22Apr2020: 4.6.12 no changes needed

11May2020 5.0.1 update, revised to add security screen

18May2020 5.0.3; added share screen annotation

19May2020 5.0.4 Noted applicability to zoom meetings, not webinars.

07Dec2020 5.4.4 Major overhaul; added TOC; new screenshots