

Screen and File Sharing Features and Tips – An Overview

Introduction

One of the most powerful features of Zoom involves its screen and file sharing capabilities which enable a variety of tasks including teaching, meeting, collaborating, device troubleshooting, and socializing. Screen sharing has its own dedicated button during a session.



Alternatively, file sharing is done via the Chat button and then clicking on File and is the equivalent of sending an attachment to an email.



Files can be shared from the cloud such as Google Drive or locally from your computer. File sharing can be particularly useful for sharing a meeting agenda or any other document that all parties in a meeting can look at individually.

Both hosts and participants can share their screens and they can alternate or share at the same time. These features must be enabled ahead of time on your account page (zoom.us/signin) under Settings → Meeting → In Meeting (Basic) for Screen Sharing, Annotation (see below), and White Board (see below). There are also security risks (including Zoom bombing) associated with screen sharing, so it is best to Lock Down the meeting (under the Security button), as soon as possible.

Navigation

When you share your screen (which is activated by the **Screen Share** button during a live session), there are a number of possibilities of what you can share. There are three tabs to select: Basic, Advance, and File. On all three, you can also select Computer Sound and Optimize Screen Sharing for Videos. After any screen has been shared, a new menu pops up with several Annotation tools available to enhance the screen such as Text, Drawing, Eraser, Spotlight; There are also annotation tools to edit and Save the annotated screen.



The **Basic** tab enables a host or participant to share the desktop, a special Zoom whiteboard, or any open file on the computer from a software application or Web browser. The **Advanced** tab enables sharing a Portion of a Screen (contained within a box that can be moved and resized), Music or Computer Sound Only, or Content from a Second Camera. The **File** tab enables sharing files in the Cloud from Google Drive, Microsoft OneFile, or Box though, in the case of Google Drive, this can also be done by sharing your Web browser (Basic tab) with an open cloud file (Doc, Sheet, etc.) that can be shared ahead of time or during the session with Edit permission to those you want to collaborate with in real time. You just want to be sure you are not in Full Screen mode, so both Zoom and cloud document screens are visible. (Of course, as long as both screens are visible on everyone's device, the shared cloud document does not to be shared on Zoom for all to see the changes being made to it. However, Zoom's Annotation tools such as Drawing, Eraser, and Spotlight may be helpful)

During screen sharing, your own host or participant video is typically also displayed in a small section of the screen and can be resized or moved. Sharing a file is useful for making a presentation such as in PowerPoint, but it is typically best if the file does not cover the entire screen as its contents may get cut off by some participant devices. The Whiteboard can be used as it would be in a classroom and as mentioned above there are special Annotation tools to make it come alive. Please note that, if you decide to share something else, Screen Share automatically returns to the Basic menu.

Conclusion

It is important to note that, because you can only share one file at a time (and if you don't share your desktop), you can also do other work than on the screen you are sharing as long as the shared screen is not in Full Screen mode.

I would be interested in your feedback of this article if there are any other screen and file sharing features or applications you find particularly useful. Please feel free to email me at roger@rogermagnusresearch.com