

# Zoom Tips and Tricks

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# Introduction

Zoom is an easy to use video conferencing application that offers many settings and options that beginners do not know about. This document will cover some of these. For more information you can use the Zoom customer support website:

<https://support.zoom.us/hc/en-us>

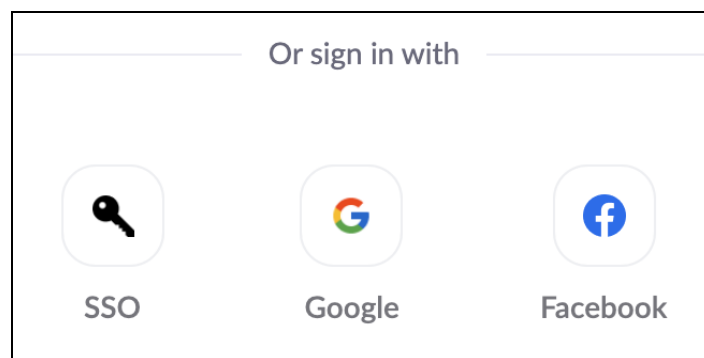
This has a whole page of videos to help you

<https://support.zoom.us/hc/en-us/articles/206618765-Zoom-Video-Tutorials>

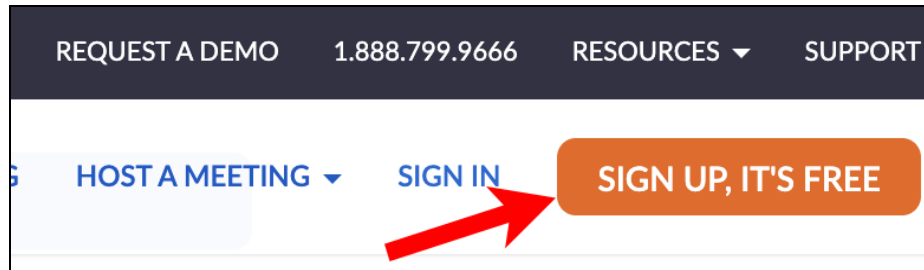
Youtube also has many good videos on how to use zoom.

Zoom looks different on computers than on tablets or phones. I will show examples on the Mac, iPad and iPhone. The Windows PC, android tablets and android phones have similar displays.

If you do not already have one, it is very helpful to have a Zoom account or use your Google or Facebook account to log into Zoom. You can login with a Google or Facebook account by clicking the buttons on the bottom of the SIGN IN page at the [zoom.us](https://zoom.us) web site

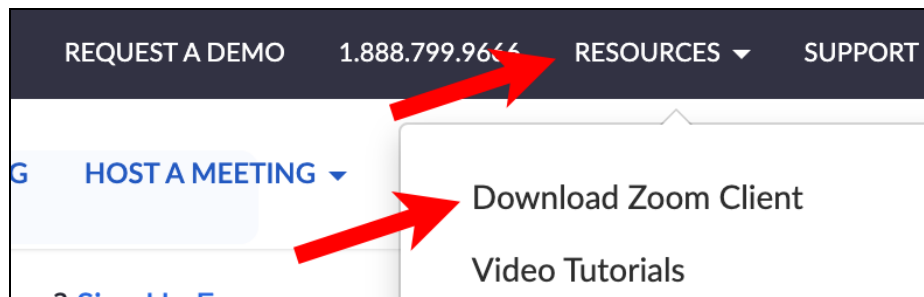


If you don't have a Zoom account and want to create one with your email address, you can click on the orange SIGN UP, IT'S FREE button at the top of the webpage:



Zoom will ask you for your birthdate and email address. This enables you to set up your name and other preferences we will discuss below.

Although you can use a browser to use zoom, it normally works better if you download and install the program. This is done with the RESOURCES menu:



This will take you through the setup process on a computer.

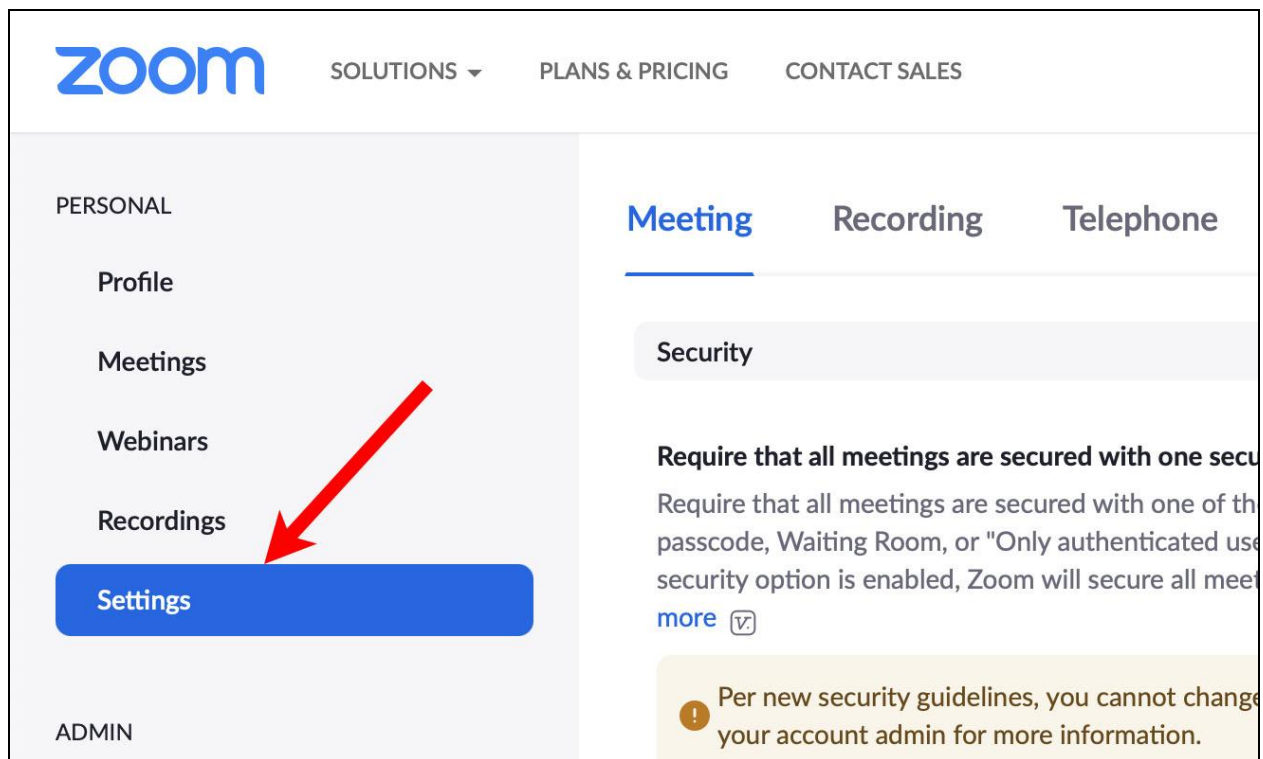
On a tablet or smartphone, you can use the App Store to download zoom and then set up your account if necessary.

# Settings

Zoom has a large number of useful settings. The easiest way to set these is on the Zoom website. Log into your account on [zoom.us](https://zoom.us) or click on the MY ACCOUNT link after you are already logged in:



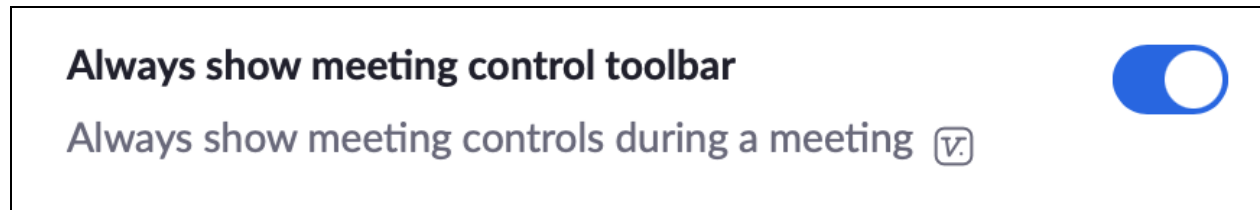
You can then click on Settings on the side bar on the left:





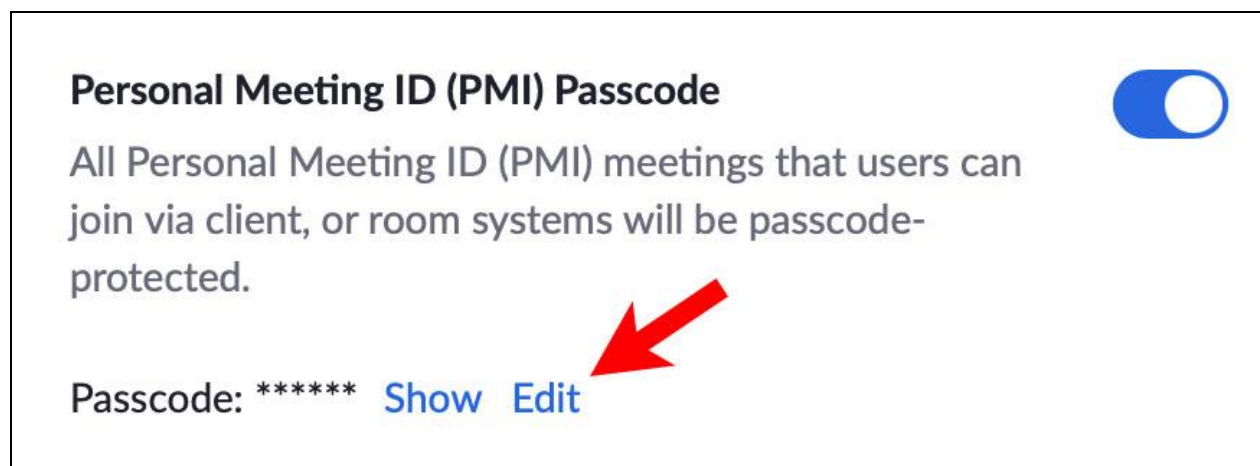
There are settings for Meetings, Recording and Telephone but you will probably be most interested in Meeting settings. You can set the defaults for new meetings (like whether you want a waiting room or whether to mute participants on entry) and many other useful settings.

For example, if you turn on this switch:




The control buttons will not disappear on your device. This is very helpful on phones and tablets but is also useful on computers.

If you use your personal ID for meetings, you can change the password for it at any time:




This switch controls whether the passcode is included in the links for the meetings you set up which means you don't need to send it to participants:

**Embed passcode in invite link for one-click join**

Meeting passcode will be encrypted and included in the invite link to allow participants to join with just one click without having to enter the passcode.

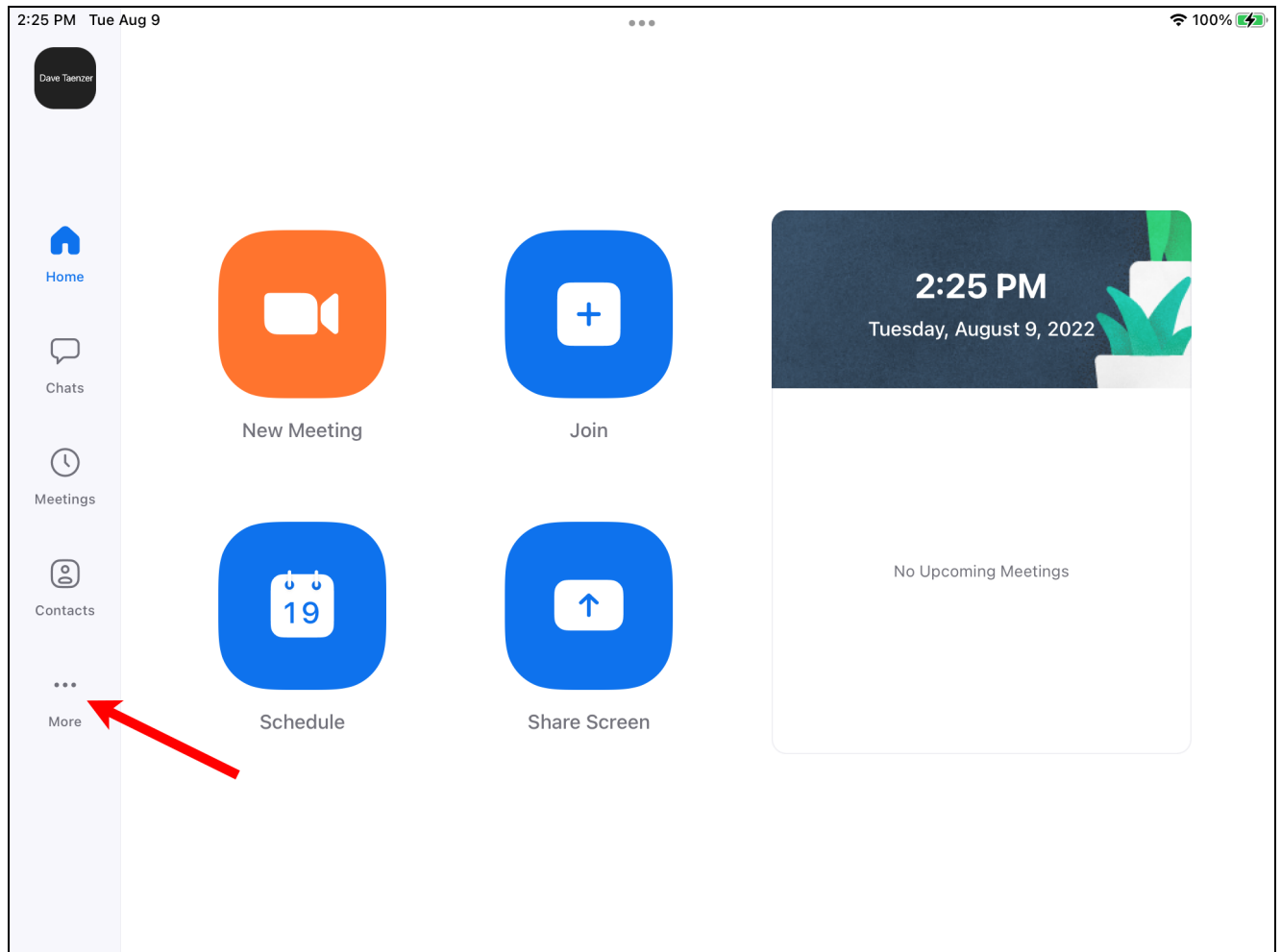
This switch controls whether the meeting chat is automatically saved to your computer at the end of the meetings you host:

**Auto saving chats**

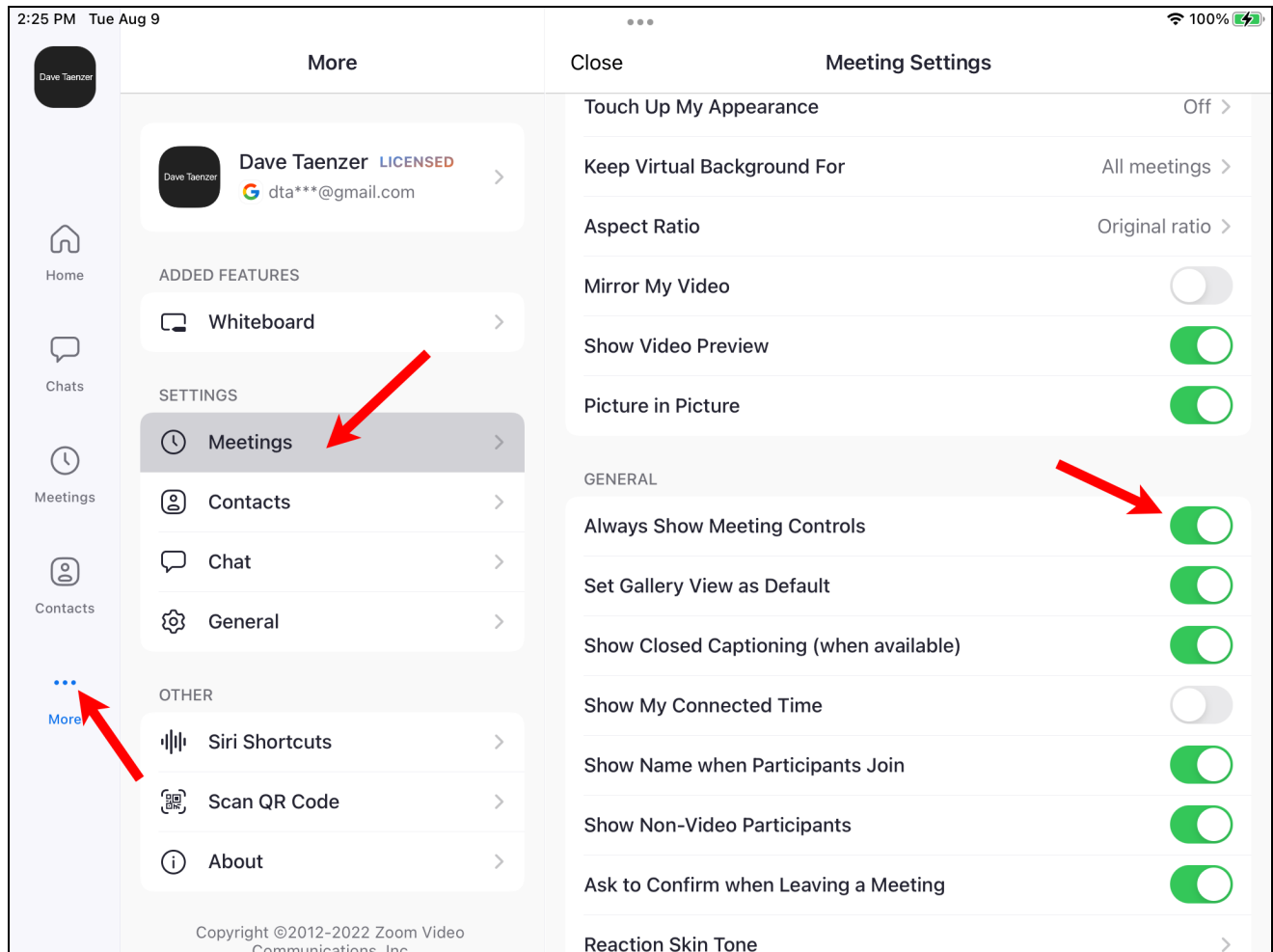
Automatically save all in-meeting chats so that hosts do not need to manually save the text of the chat after the meeting starts.

There are many, many other settings. It is worthwhile to look through these and set up your "Zoom world".

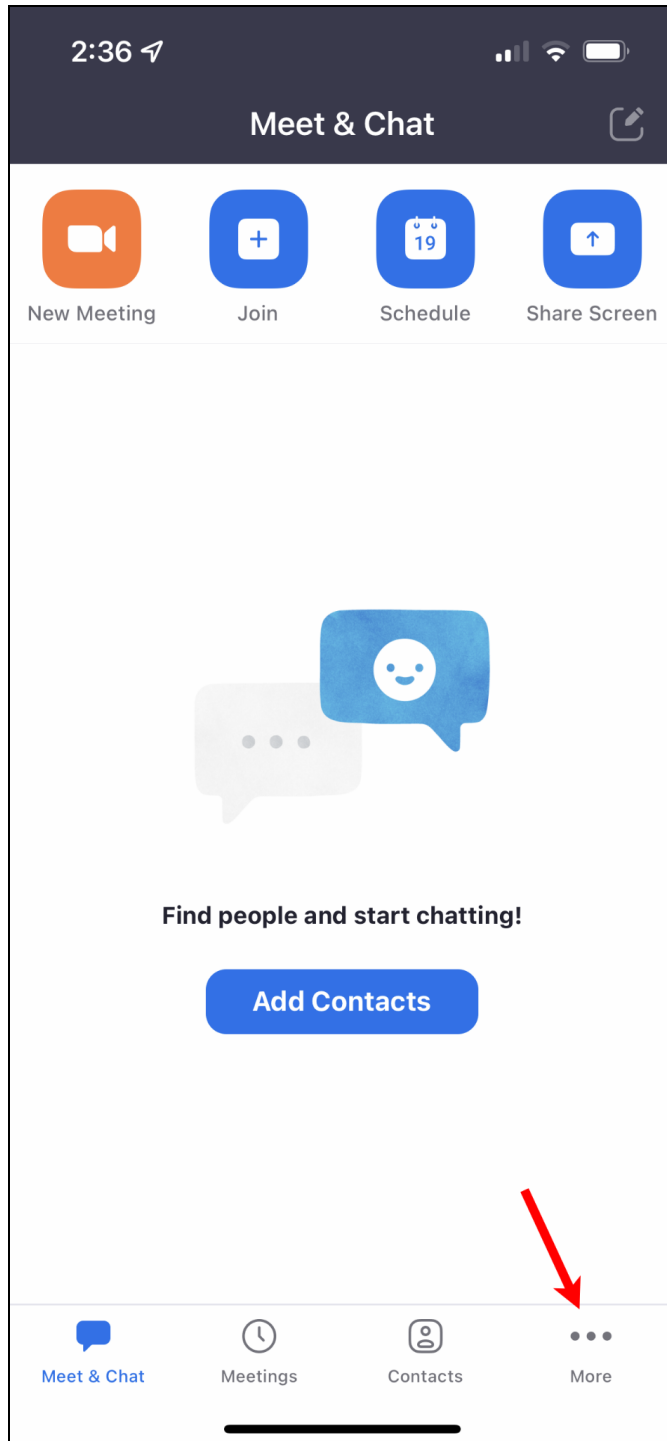
You can also change your settings from the Zoom application on your device. On iPhones and iPads, you click the three dot More button on the left:



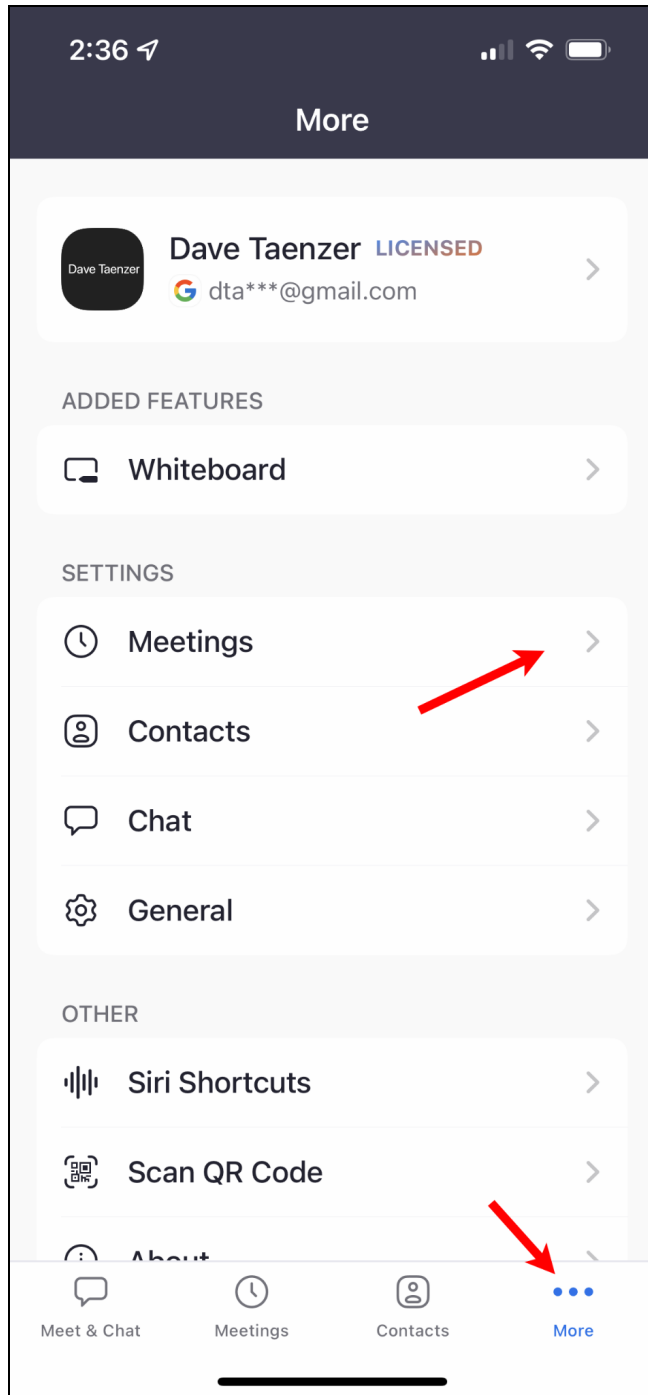
There is a section for various Settings, e.g. Meetings:



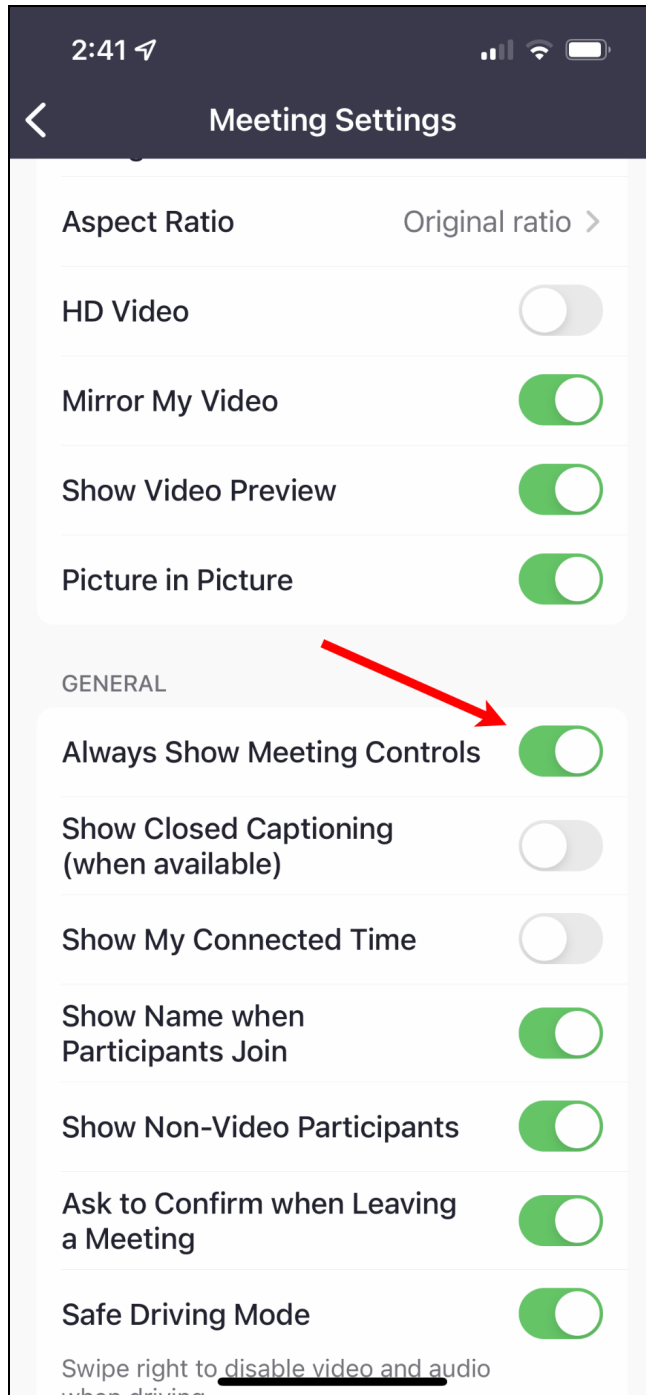
On the iPhone, the three dot More button is on the bottom:



You then click on the Meetings settings:



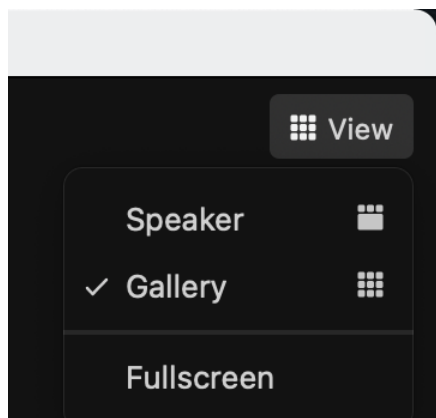
This lets you change various settings, like Always Show Meeting Controls:



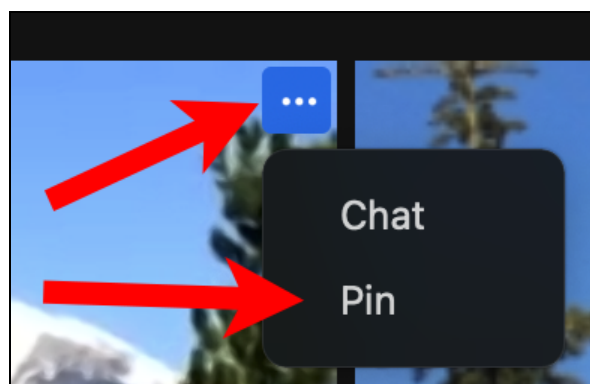
The settings on each device may be limited compared to what is available on a computer. For example, virtual backgrounds and filters are not available on all devices.

# Controlling Your Zoom Display

When you are in a zoom meeting, you can control whether you see the current speaker or a gallery of all the participants in a meeting. On a computer, this is done with the View menu in the upper right corner of the display:



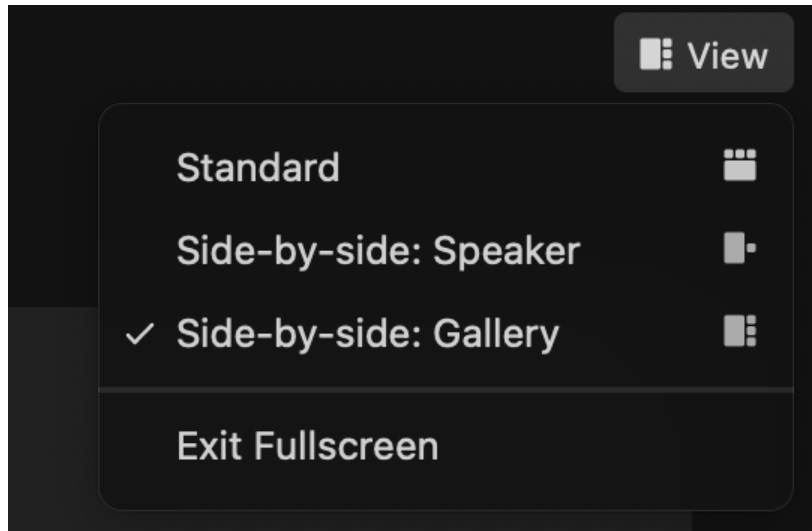
Gallery view (also known as “Hollywood Squares”) shows you multiple people in little boxes. If you are in Gallery view but want to keep a particular person on the screen by themselves, you can use the Pin option on the three dot “more” menu at the top of that person’s display box:



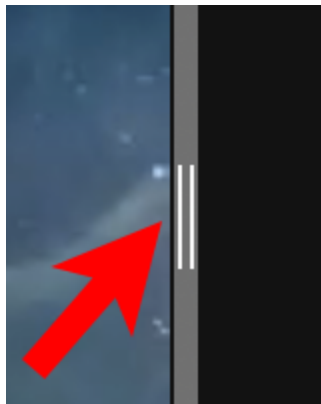


The chat option lets you send a chat message directly to that person via the chat window. If you are hosting a meeting, the three dot “more” menu gives you an option to “Spotlight” a person which means that person is pinned for all the participants.

If someone is sharing their screen, you get more options in the View menu



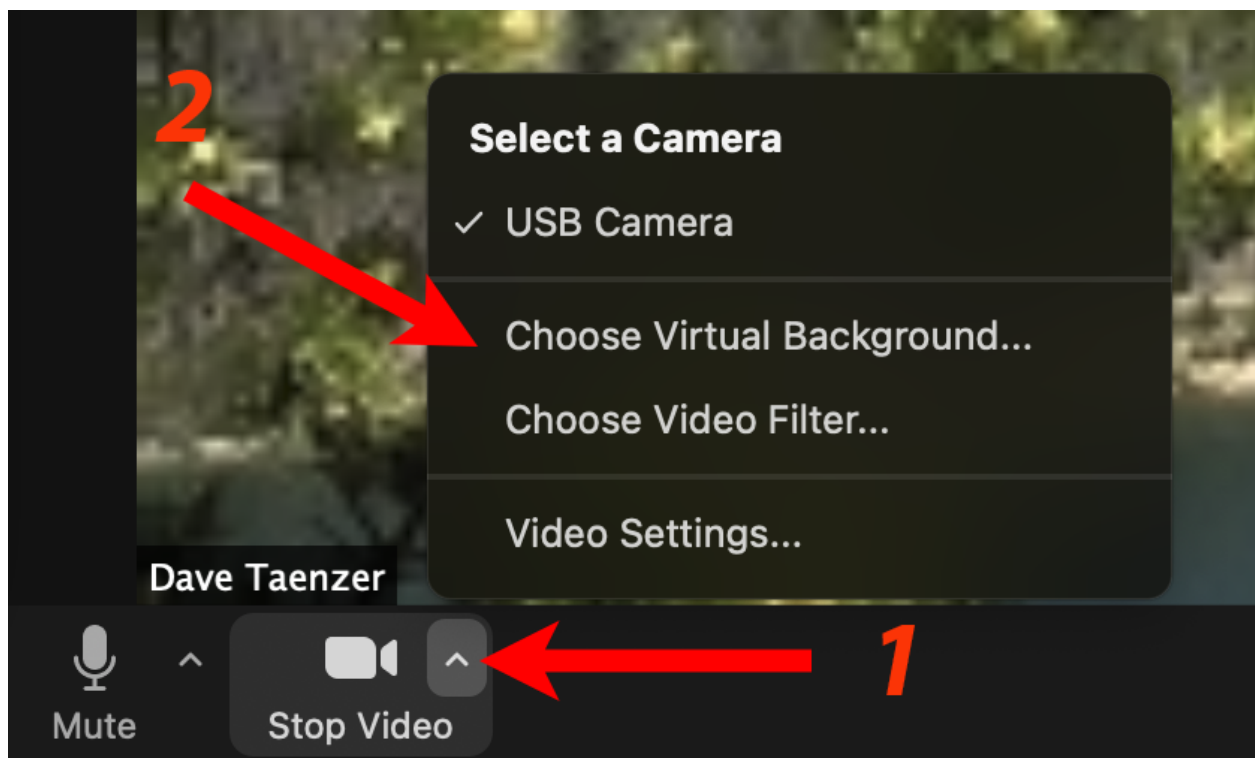
You can have just the current speaker or the whole gallery of participants appear next to the shared screen. You can also adjust the vertical line between these parts of the display to make one bigger. Hover over the mark with two vertical lines to and drag it right or left:



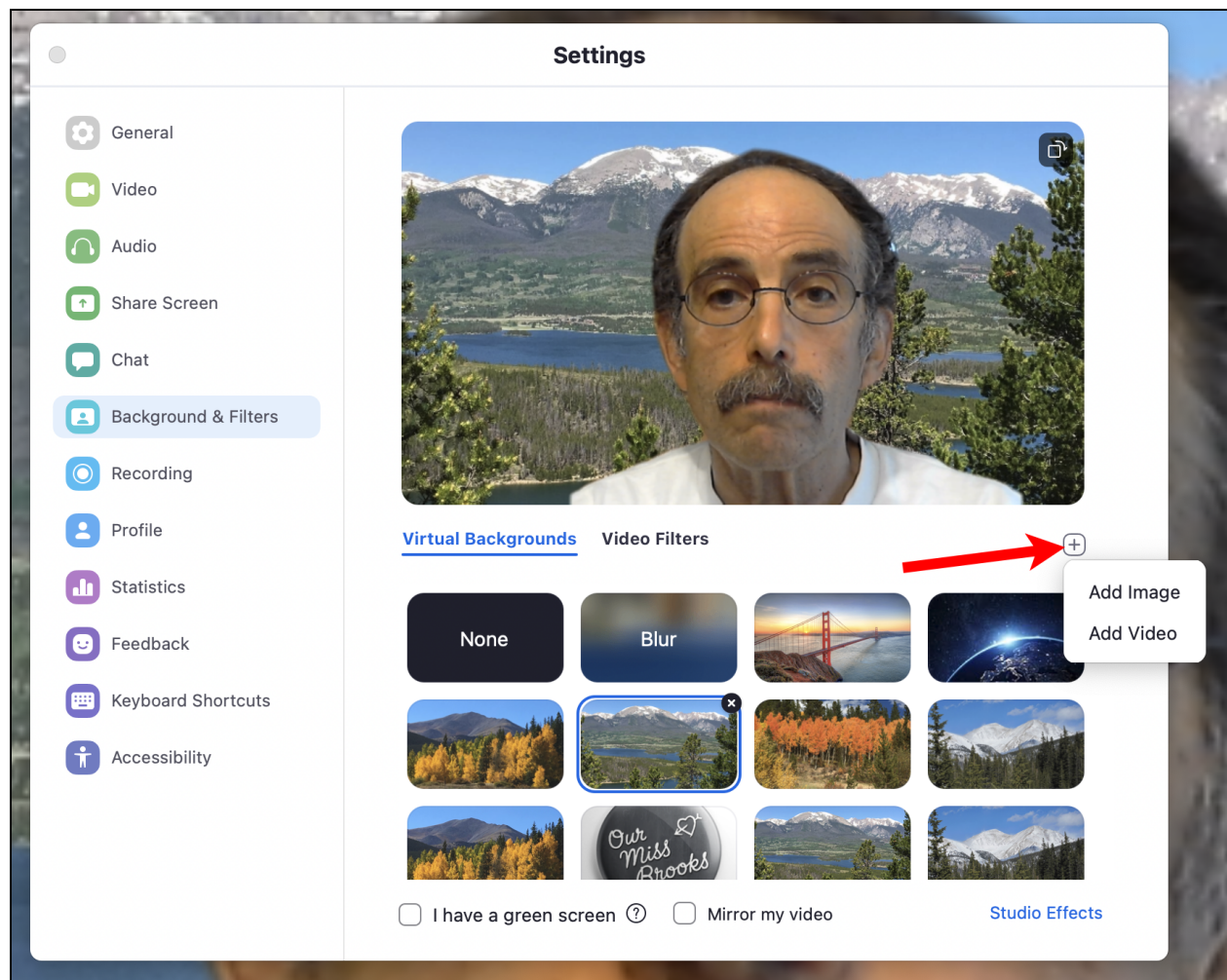
## Setting a Virtual Background

On many devices, you can add a virtual background which will automatically put your image on top of a specified background. Some older computers, tablets and phones do not have enough processing power to do this but more modern ones do.

To set a virtual background in a meeting, click on the up-arrow next to the Stop Video (or Start Video) button in the lower left side of the screen and then click on “Choose Virtual Background”:



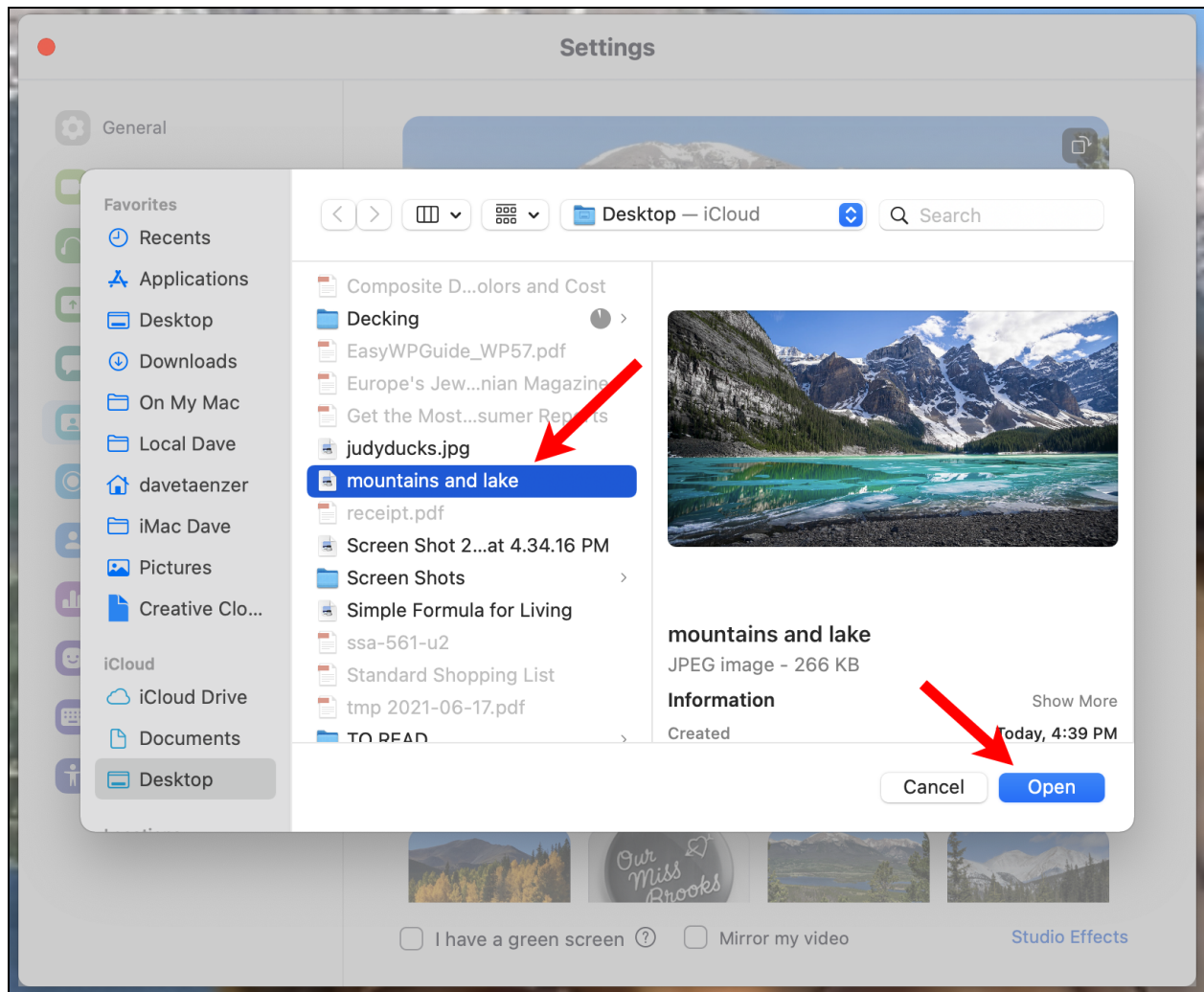
This brings up the Settings window as described above with the “Background and Filters” option selected on the left:



You will see yourself with some options below you to use for backgrounds. You can choose one of those or click the plus button to the bottom right of your picture and then choose “Add Image” or “Add Video”.

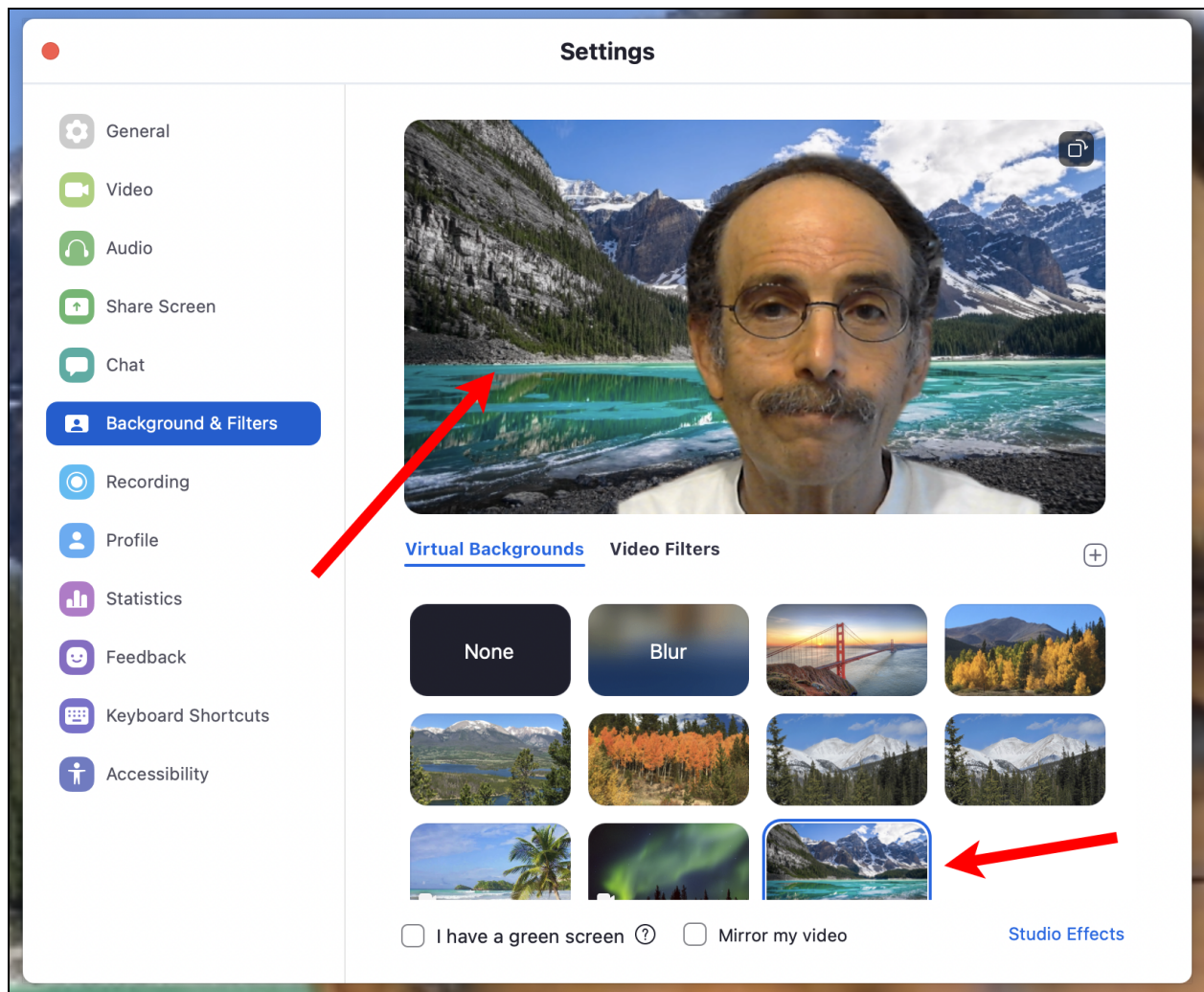
The easiest way of doing this is to save a picture you want to use on your desktop and then click the plus button and Add Image option to load it into Zoom.

This brings up a dialogue box that lets you select your picture. You can then click the Open button to load it into Zoom:





You will see this as your new background and it will also appear in your options below your picture:



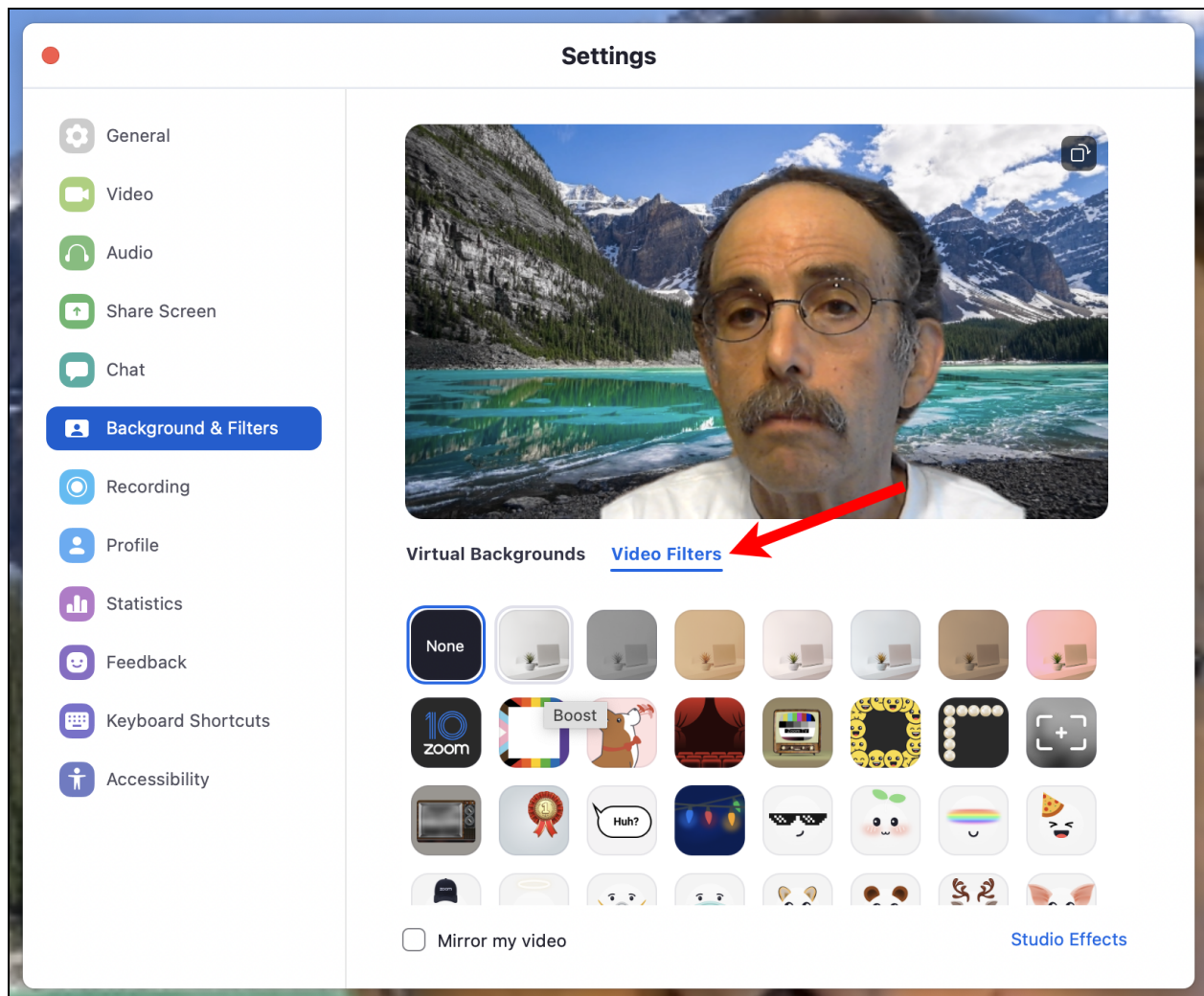
You can click on a different image or video or click None in the black background to turn off your virtual background.

The Blur option will blur show the room you are in but blur it.

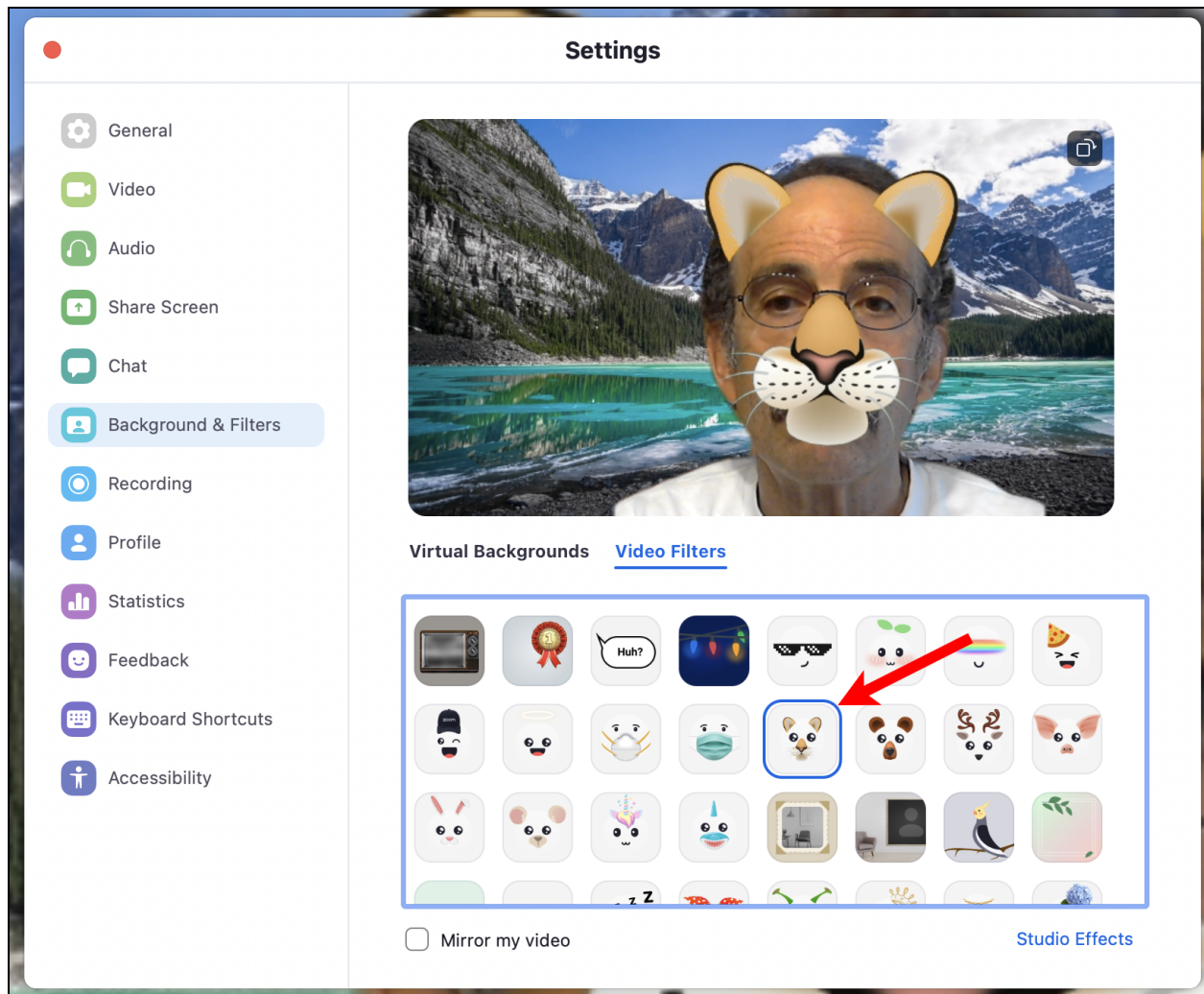
At the bottom of this page is a “I have green screen” button which lets you put a constant color behind you to help with separating you from your background. This is helpful with older computers.

# Adding a Video Filter

The other thing you can do on this setup window option is to add a video filter. This is done by clicking on the “Video Filters” link below your picture which will display many fun options you can add to your Zoom image:



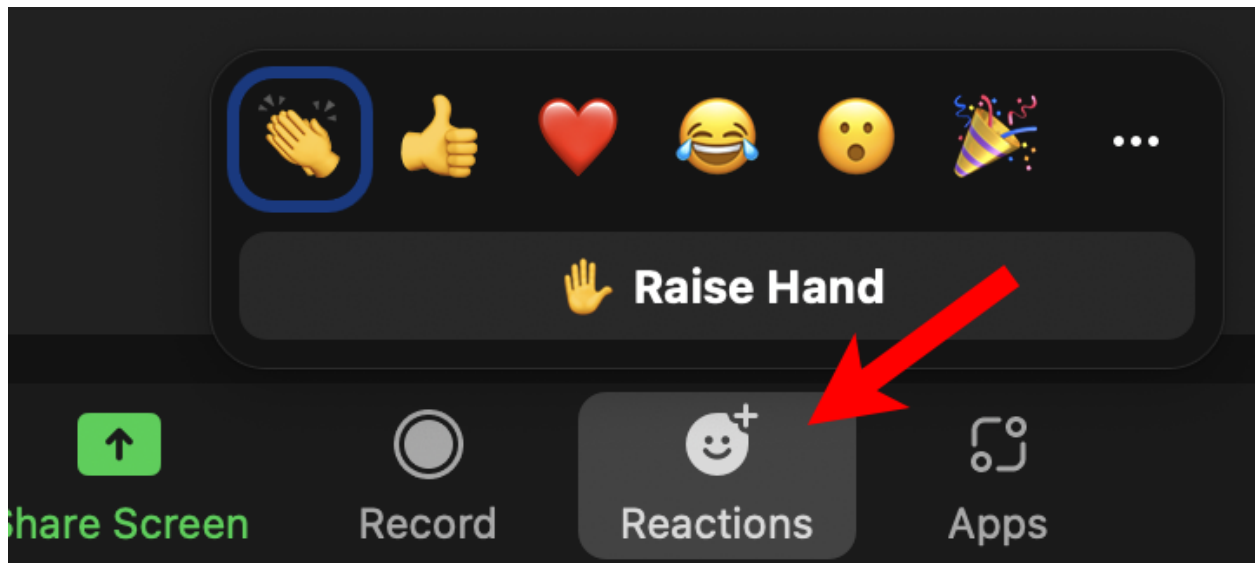
You can scroll through this list until you find a filter you want to try and then you can click on it:



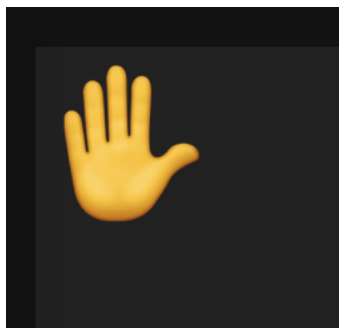
You can click on another filter to try it or the None option in the black background to turn off your filter.

## Reactions

The Reactions button on the bottom of the screen (on computers) lets you add Reactions to your display on Zoom. This button looks like this:



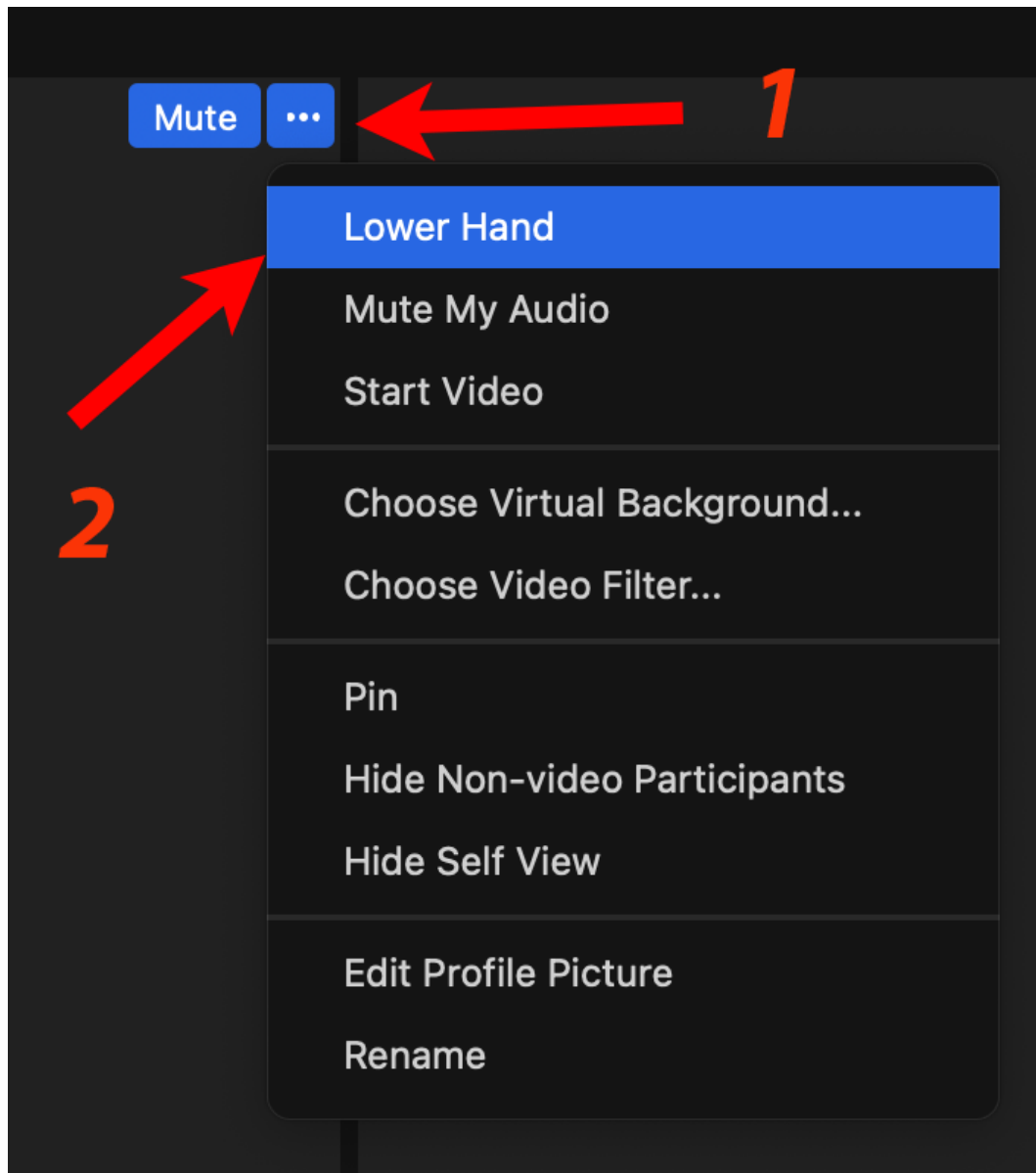
If you click on the Raise Hand button, a hand will appear in the upper right part of your display:



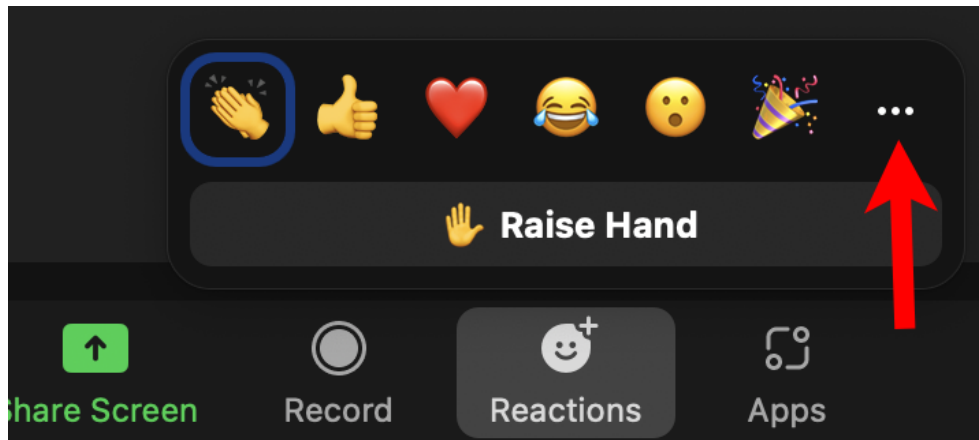
This will also bring your picture towards the upper left corner of the gallery display so the host can see that you want to speak.



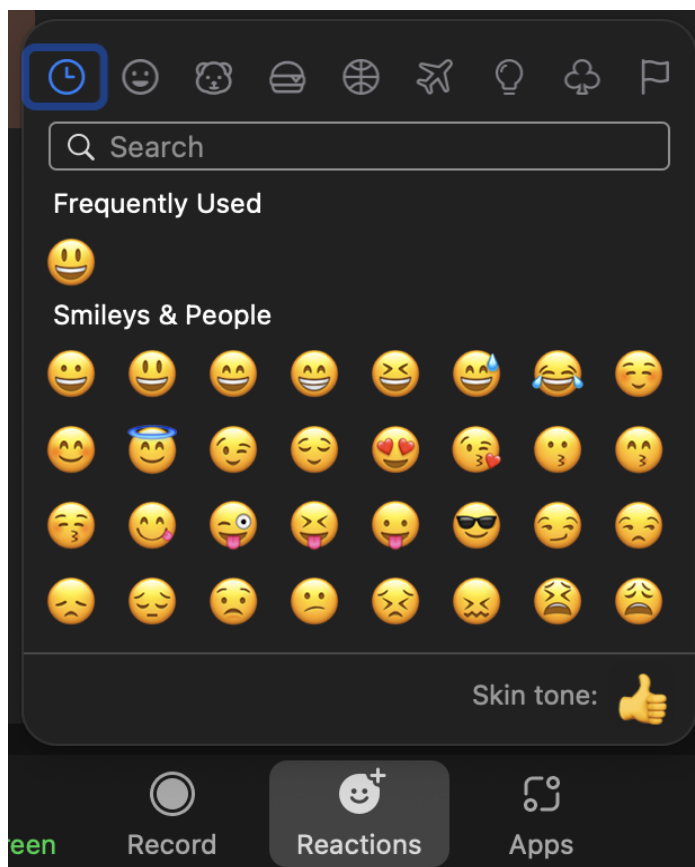
If you click on any of the other emoji buttons, they will appear temporarily on your picture. The hand stays up until you or the host removes it. This can be done by hovering over your picture and clicking the three dot “more” button and selecting “Lower hand”



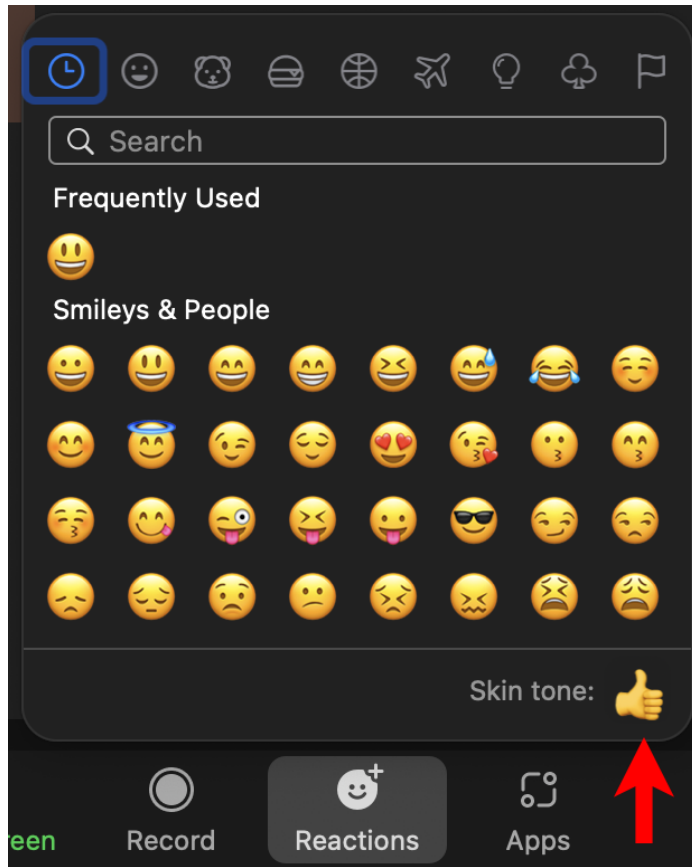
If you click on the Reactions button and then three dot “more” button:



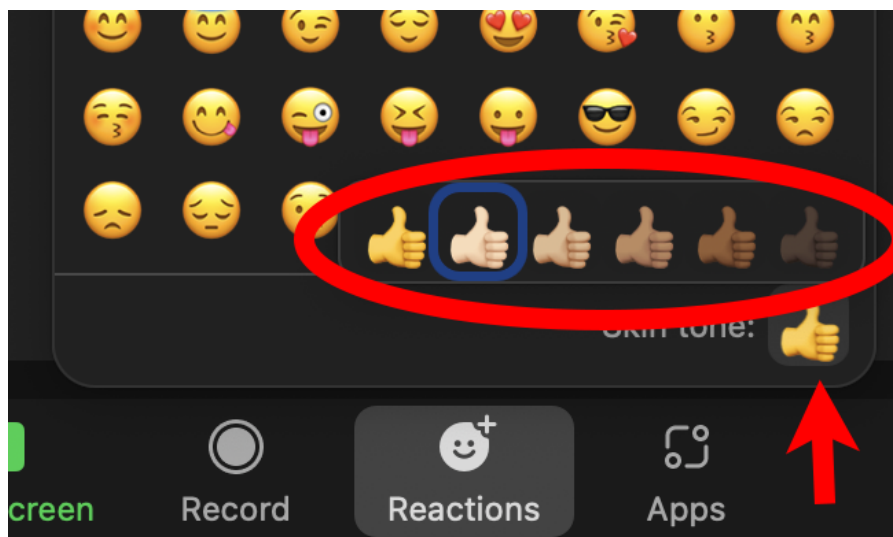
You will see this pop up which gives you lots more emoji choices



If you click on “Skin Tone”:

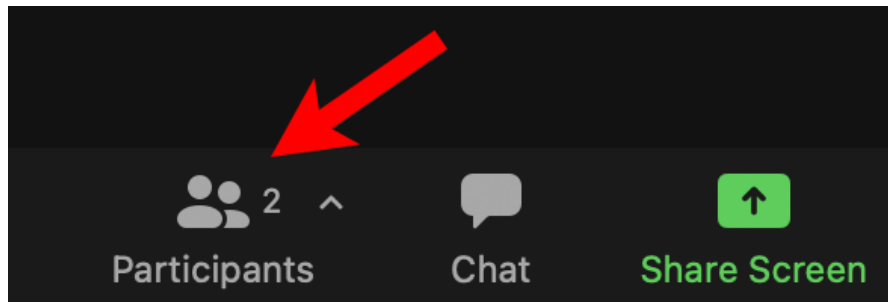


You will see choices to change the skin tone of the hand display:

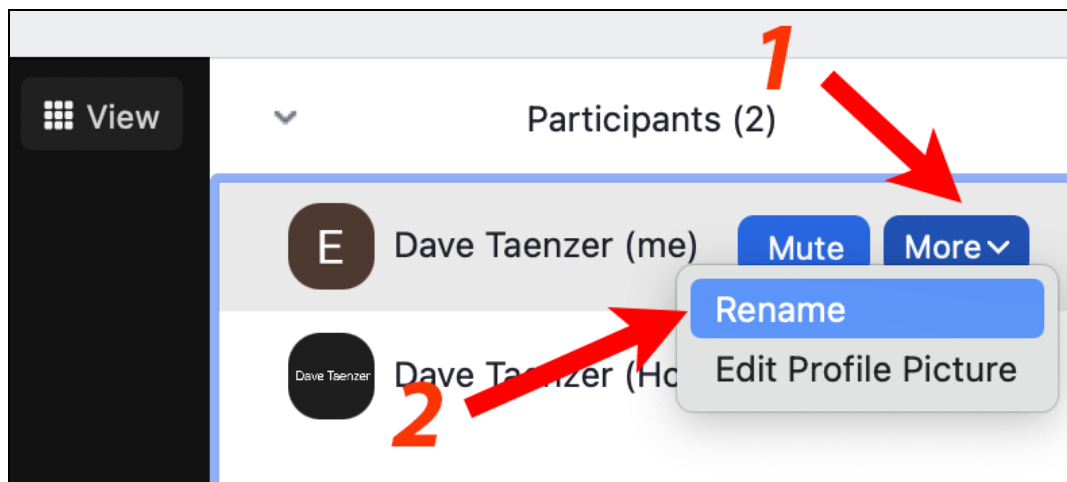


## Changing Your Name

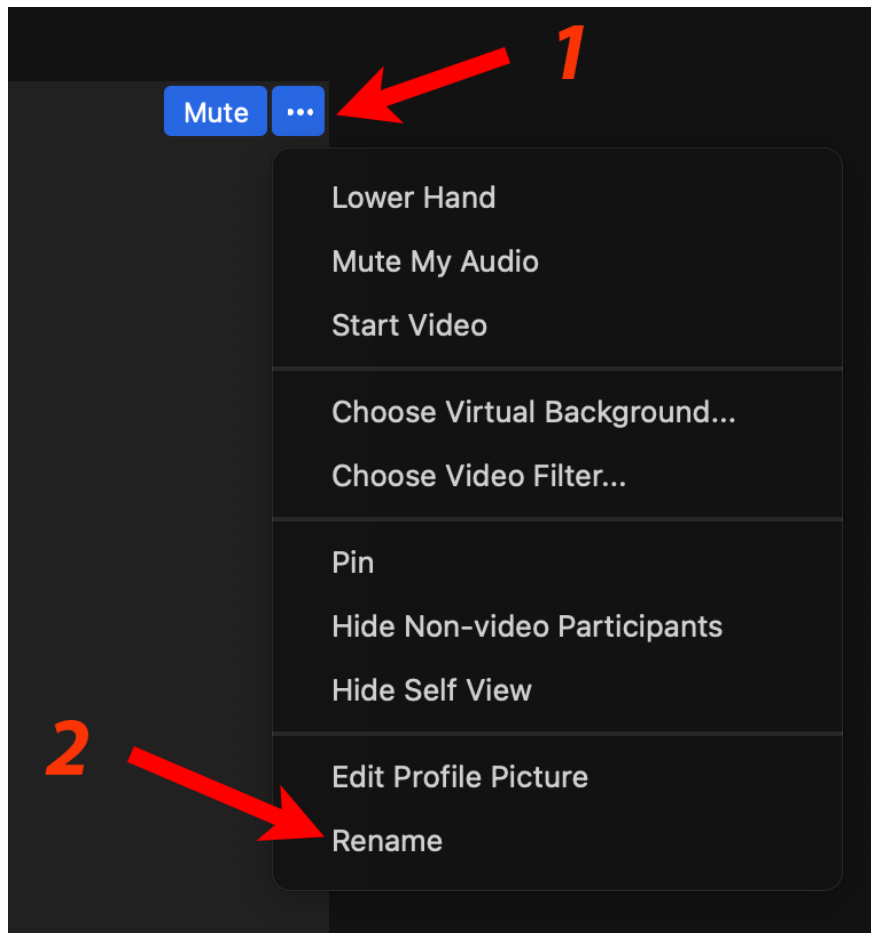
You can change your name by clicking on the Participants button to bring up the Participants window:



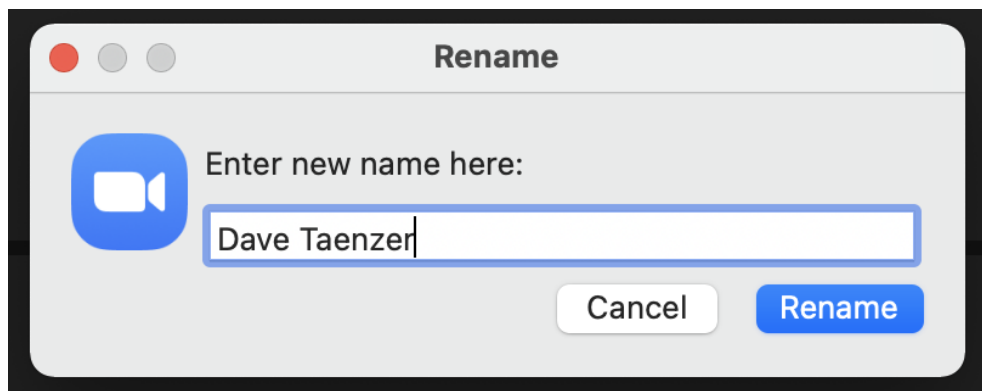
Then hover over your name, then the More button and then Rename:



You can also do this by hovering over your picture and clicking the three dot “more” menu and then Rename:



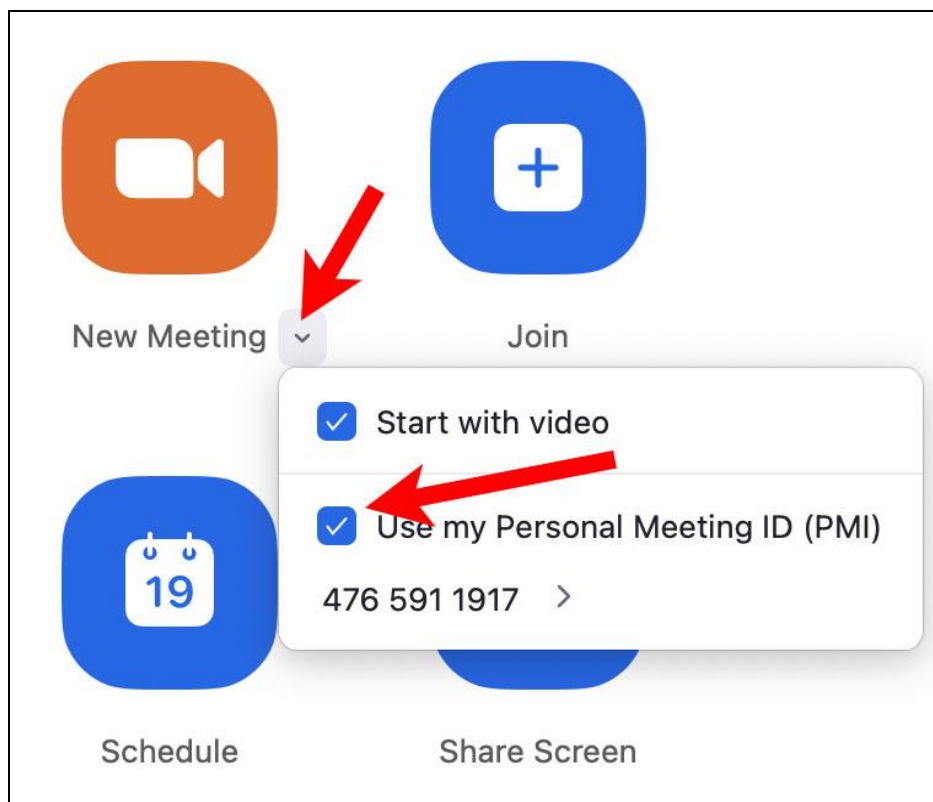
Either approach brings up a Rename window that lets you change your name:



# Hosting a Zoom Meeting

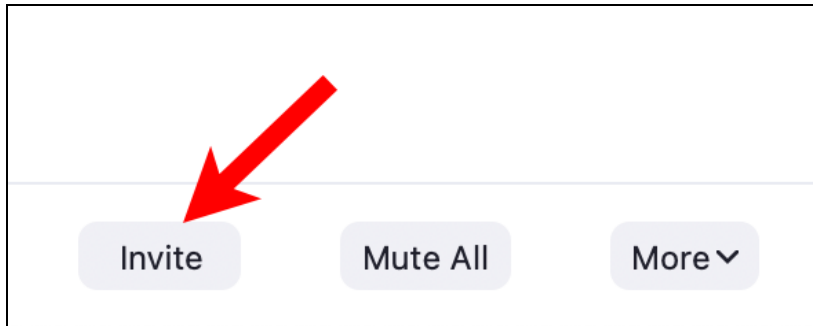
There are two ways to host a Zoom meeting. You can start one at any time in the Zoom app or you can schedule one and start it later.

To start a meeting immediately, in the Zoom app, you should decide if you want to use your personal ID or have Zoom create a unique meeting ID for you. This can be done with the down-arrow menu next to the New Meeting button:

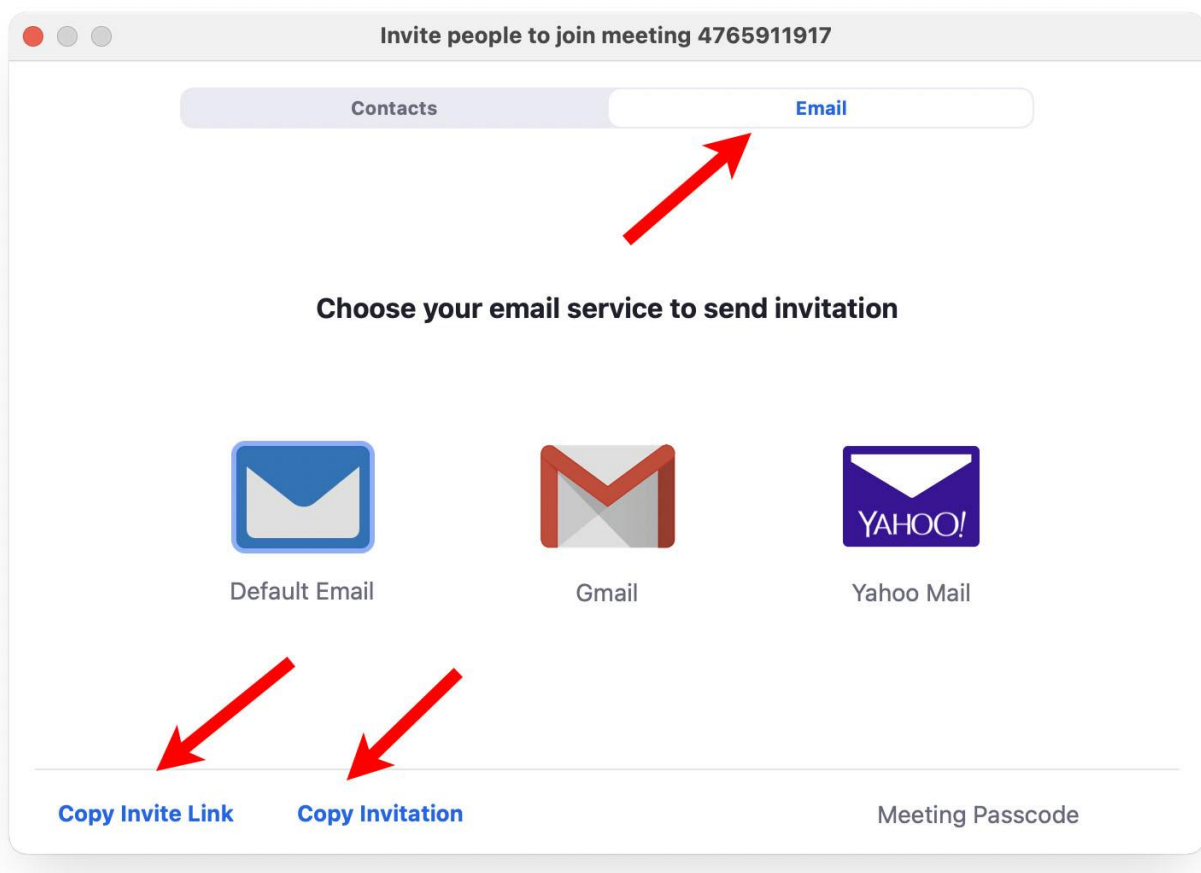


You check the box to use your personal meeting ID. This is an ID you can always send to someone for a meeting because it will not change. There is also a checkbox to control whether you start with video enabled.

Once you start your meeting, you can click on the Participants button (or choose that from the three-dot “more” menu on the portable devices. You can then click the Invite button at the bottom of the Participants panel:



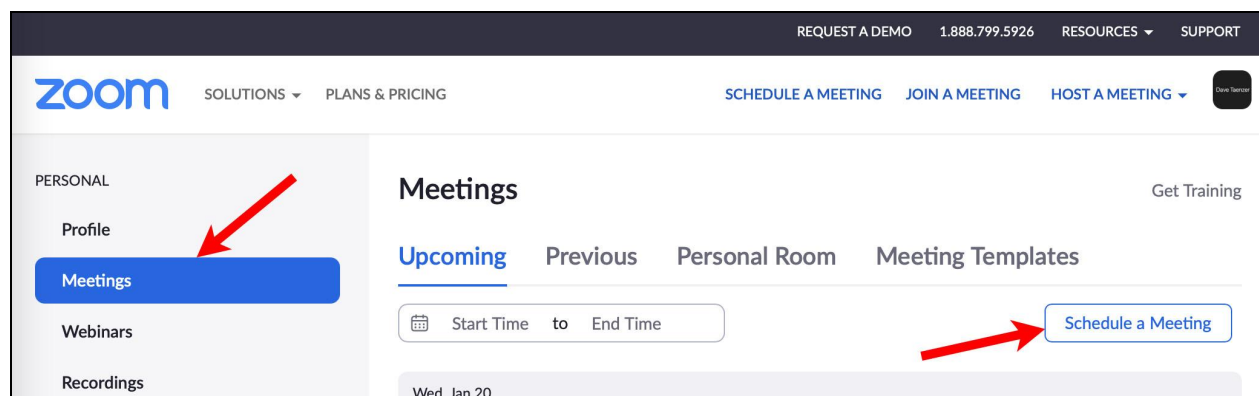
This brings up the a popup window



Make sure Email is chosen at the top. You can either click on one of the email application buttons to bring up the invitation in a new message in your email application or you can copy the invitation (or just the link) and paste it into a new message that you can send to all the people you want to invite to the new meeting.

Keep in mind that if you don't have a paid Zoom account you can invite one person and meet with them as long as you want but if you have more than one other person in the meeting it will be limited to 40 minutes.

The other way to host a meeting is to schedule one using the [zoom.us](https://zoom.us) webpage or the Zoom application. On the webpage, go to the MY ACCOUNT page, click on Meetings and then the Schedule a Meeting button:



You can give the meeting a name and a description. You then enter a date and time for the meeting. The date and time are used for creating the invitation. You can start the meeting any day or time and repeat it if you like. Meetings are not started automatically at the specified date and time but must be started manually.



zoom SOLUTIONS ▾ PLANS & PRICING SCHEDULE A MEETING JOIN A MEETING HOST A MEETING

PERSONAL

- Profile
- Meetings**
- Webinars
- Recordings
- Settings

ADMIN

- > User Management
- > Room Management
- > Account Management
- > Advanced

My Meetings > Schedule a Meeting

Schedule a Meeting

Topic

Description (Optional)

When

Duration  hr  min

Time Zone

☐ Recurring meeting

If this is a meeting that repeats (e.g. weekly, you can check the Recurring meeting box below the date which gives you various options:

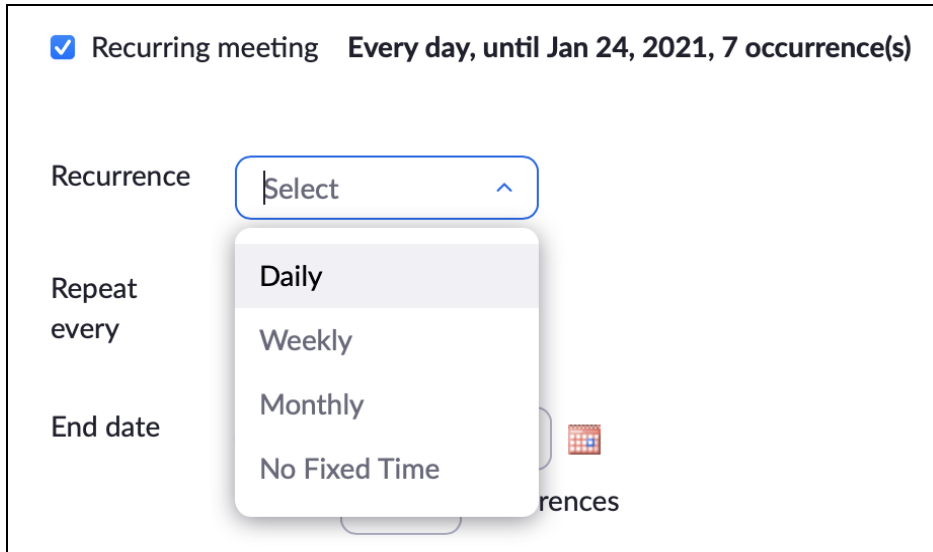
☒ Recurring meeting Every day, until Jan 24, 2021, 7 occurrence(s)

Recurrence

Repeat every  day

End date ☒ By  ☐ After  occurrences

You start by choosing if the meeting repeats daily, weekly, monthly, etc:

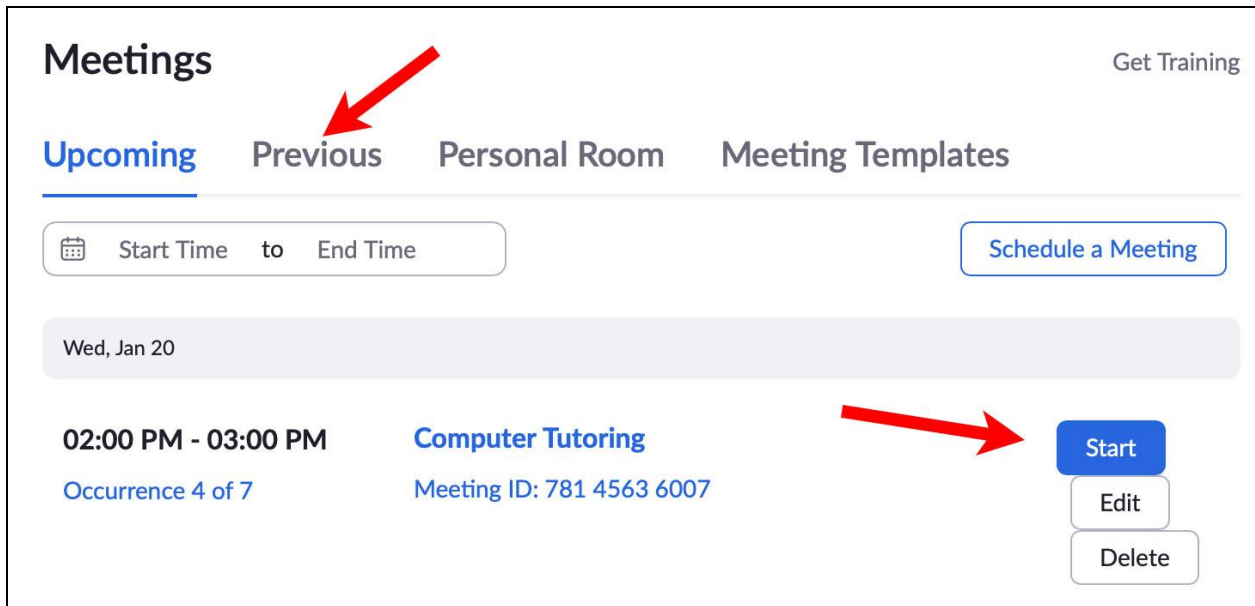


The screenshot shows the Zoom meeting recurrence settings. At the top, there is a checked checkbox labeled "Recurring meeting" followed by the text "Every day, until Jan 24, 2021, 7 occurrence(s)". Below this, there are three labels: "Recurrence", "Repeat every", and "End date". The "Recurrence" label is next to a dropdown menu that currently shows "Select" with an upward arrow. The dropdown menu is open, showing four options: "Daily" (highlighted), "Weekly", "Monthly", and "No Fixed Time". To the right of the dropdown menu, there is a small calendar icon and the text "occurrences".

And then select how many meetings you want to schedule or an ending date. This information is used to create the invitations and will also control whether Zoom thinks you have a meeting on any given date.

When you click on the Meetings on the left sidebar it shows you upcoming meetings and which occurrence of each meeting.

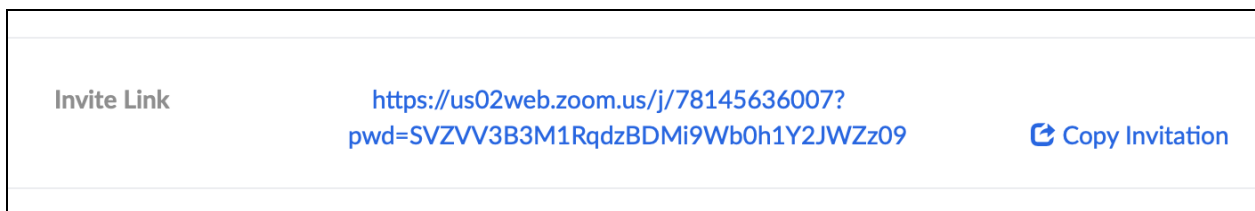
When you move the cursor over a meeting, buttons appear to start, edit or delete the meeting.



The screenshot shows the Zoom 'Meetings' dashboard. At the top, there are tabs for 'Upcoming', 'Previous', 'Personal Room', and 'Meeting Templates'. A red arrow points to the 'Previous' tab. Below the tabs is a filter bar with a calendar icon, 'Start Time', 'to', 'End Time', and a 'Schedule a Meeting' button. A date bar shows 'Wed, Jan 20'. Below this, a meeting entry for 'Computer Tutoring' is shown for the time '02:00 PM - 03:00 PM', labeled as 'Occurrence 4 of 7'. The 'Meeting ID: 781 4563 6007' is displayed. A red arrow points to the 'Start' button, with 'Edit' and 'Delete' buttons visible below it.

You can see earlier meetings by clicking on the Previous heading. You can edit the date of a previous meeting to a date in the future and it will appear in the Upcoming Meetings section.

If you click on a Meeting on the webpage, it will display the link that you can email to your participants:



The screenshot shows the 'Invite Link' section of the Zoom interface. It displays the URL <https://us02web.zoom.us/j/78145636007?pwd=SVZVV3B3M1RqdzBDMi9Wb0h1Y2JWZz09> and a 'Copy Invitation' button with a copy icon.

You can either copy this link or click the Copy Invitation button to copy the whole invitation and then paste it into a new email message in your email application.

## Conclusion:

Zoom has many, many settings and features. For more information, visit the customer support page on the Zoom website to learn more.

<https://support.zoom.us/hc/en-us>