

Tool Tips & Tricks: Zoom 101



SPEAKERS

Kelly Schott
(TheCR)

COMPETENCIES

Tools

MATURITY PHASES

CMM 1, CMM 2,
CMM 3, CMM 4

HIGHLIGHTS

- **Interested in a high-level overview of Zoom Meeting?** Kelly offered 7 Pro Account tips and tricks to help get you started.
- **Curious about how to work the ‘Share Screen’ feature in a Zoom Meeting?** Kelly shared 3 pointers and one caution for navigating the screen sharing function.
- **Wondering about the different recording features?** Kelly gave an in-depth overview of the must-know tips and tricks for the different recording settings. Kelly also stressed that doing this one thing ahead of time will immensely improve the quality of your meetings.

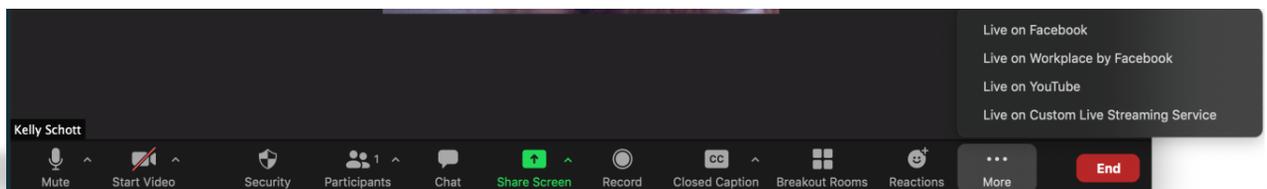
OVERVIEW

- **Background Zoom.** Kelly explained that there are 3 products within the Zoom umbrella: Zoom Meeting, Zoom Webinar and Zoom Phone. The Meeting and Webinar products tend to be the 2 most talked about aspects of video conferencing.
 - Kelly focused the call on Zoom Meeting in the framework of settings and functions that she has found helpful, as well as different ways to utilize some of the features. She also discussed the Pro Account, i.e. the paid account. This allows for unlimited meeting lengths and further features. Those who use the free accounts may not be familiar with some of the features and functionalities within the Pro Account.



OVERVIEW

- **In-Meeting view.** This is the basic feature setting. As an Attendee or as a Host, there will be similar settings on the bottom bar, i.e. the Audio, the Video and the Housekeeping Notes and how to turn them on and off. It also allows you to adjust output/input and ensure that it can be tested while in a meeting.
 - There is also the Participant List and the Chat function as an Attendee and as a Host. There are some slightly different controls for both of these in terms of settings. It allows Attendees to look at 'Reactions', which give people a fun, visual view. If someone wants to showcase something on a video or as a non-verbal feedback option, it is a nice way to determine if it makes sense to people by saying "yes" or "no." You can also raise a hand to denote a question and/or lower your hand when your question has been answered. Hosts and Attendees are able to give and receive non-verbal feedback.



OVERVIEW

- Kelly showed a screenshot of her Host view above. There is an Account Set up and Live Streaming. You will essentially see the Audio and Video options. There will be a 'Security' function, which allows you to lock a meeting. High-Profile Pictures allow participants to do certain things. You can change the settings if you need to pivot on the fly. You also have the 'Record' function and 'Breakout Rooms', etc. If you have the Live Stream option set up, you can stream live at any time, as well.
 - If you open up 'Participants', you can also choose other settings. You can update and change as you go along depending on your needs. This allows you to un-mute people, lower hands, ask people to do certain things, etc. You can also set an audio alert that only you can hear for people entering and leaving the meeting.
 - Keep in mind that you can find many similar settings in different places.
- **Closed captioning.** Participants can access and turn on or off the closed caption feature for their personal viewing. Participants can also view the transcript through the closed-caption function. The host can play with the settings a little more deeply, but that is something that Attendees can see, as well.

OVERVIEW

- **Share screen.** Everyone has the ability to share his/her screen. There is a big green button at the bottom. It can also be disabled so that only a Host can share the screen.
 - The default is a desktop share, which many people find helpful if they share multiple windows. It is excellent for being able to flip through multiple applications. Keep in mind that it shows everything on a person's desktop, so any of the Host's notifications that come through on his/her computer will be seen, as well as any information on open tabs. Make sure that all tabs are closed to ensure privacy.
 - There is an option to share different windows. Along the bottom option bar, any window that is open can be shared. For instance, if you have Chrome, PowerPoint and Excel open and only want to share PowerPoint, you can click on the PowerPoint window and only share PowerPoint. With PowerPoint as the example, this means that even if even you are flipping through Chrome and Excel, participants will only see PowerPoint.

OVERVIEW

- There are basic and advanced features. On the advanced side, there are some nice options that can be useful, such as 'Portion of Screen'. This allows you to only share a portion of your screen. It's helpful if you have a document or a part of your screen that you want to share, but you don't want to share the rest of your screen. For example, if you were using Presenter View on PowerPoint and have a preview of the screen, your notes, etc., you can size the portion of the screen (drag and drop) around the image or the slide you want to share. Everything around that will look slightly darker and you can share only what is in that window. Kelly used this feature quite a bit during TheCR's virtual Conference in October 2020. She would share a slide or video and then have all her notes around the square set up so that they couldn't be viewed in the square window, but she could use them as a reference when she was speaking.

OVERVIEW

- Keep in mind that *anything* that moves into that square will be shared. If you move your mouse or if you drag another window through this screen (even quickly), others will see it. This feature can be very helpful, but you do have to be mindful of what is showing in the window.
- There are other options for sharing a video. You can automatically share a video on the advanced slide. Furthermore, if you want to just share a part of your screen – for instance a video on YouTube or Chrome – clicking on the sound and optimizing the video clip on the bottom of the ‘Share Window’ is essential. ‘Share Sound’ is extremely important because that allows you to share any of the sounds coming from your computer, as well as the shared screen. Optimizing the video clip makes sure that the quality of the screen is clear and visible to participants. When you choose ‘Video’ under the Advanced Option, it automatically clips those features. It is also something that you can do when you are sharing a window or your desktop.

OVERVIEW

- **Whiteboard.** This can be found on the ‘Shared Screen’ option next to your desktop.

Security		
Schedule Meeting		
In Meeting (Basic)		
In Meeting (Advanced)		
Email Notification		
Other		
	Annotation	<input checked="" type="checkbox"/>
	Allow host and participants to use annotation tools to add information to shared screens 	
	<input checked="" type="checkbox"/> Allow saving of shared screens with annotations 	
	<input type="checkbox"/> Only the user who is sharing can annotate 	
	Whiteboard	<input checked="" type="checkbox"/>
	Allow host and participants to share whiteboard during a meeting 	
	<input checked="" type="checkbox"/> Allow saving of whiteboard content 	
	<input checked="" type="checkbox"/> Auto save whiteboard content when sharing is stopped 	
	<input checked="" type="radio"/> Save as PNG	<input type="radio"/> Save as PDF

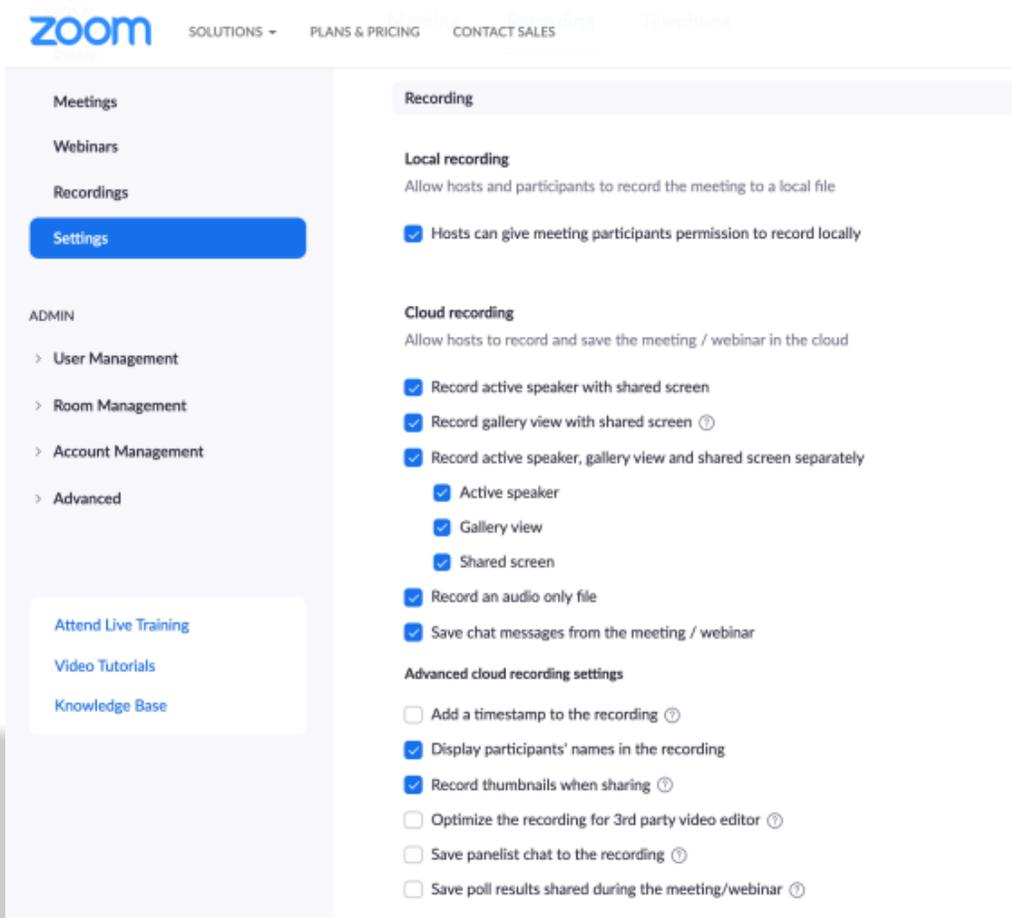
- Kelly demonstrated to participants what the whiteboard looks like as a user. It looks like you’re sharing your screen, but it’s a giant, white space. It’s similar to if you opened up Microsoft Paint or some sort of blank screen to draw on it.
 - A Host has slightly more controls than Attendees, but Attendees can still draw, type, stamp, etc. Hosts can save the board or clear the board. It can be a very helpful way to collaborate virtually, especially if you want to get people engaged through visual means.

OVERVIEW

- Kelly showed the tools that can be used to draw and write. They are called 'Annotation Tools' (see screenshot above). These can be used on other screens, as well. Kelly has used them on PowerPoint slides and/or has had a slide set up as a white board. It can be used to post a question and write responses underneath. This is a great brainstorming tool that can encourage collaboration. These white boards can then be saved.
 - The host can initiate the 'Auto Save' feature, which can be very helpful if using many boards or if you are flipping through very quickly and don't want to forget to save. Keep in mind that it does require some set-up ahead of time.
 - Annotation tools are usually located at the top of the screen in the 'Screen-Sharing' function.

OVERVIEW

- **Recording.** Recording settings are helpful to set-up ahead of time. Put some thought into how you plan to use the recording to determine how you want to set it up.



The screenshot displays the Zoom Admin console interface. At the top, the Zoom logo is on the left, and navigation links for SOLUTIONS, PLANS & PRICING, CONTACT SALES, and Telephone are on the right. A left-hand sidebar contains a menu with 'Meetings', 'Webinars', 'Recordings', and 'Settings' (highlighted in blue). Below this is an 'ADMIN' section with expandable options: 'User Management', 'Room Management', 'Account Management', and 'Advanced'. A white box at the bottom of the sidebar contains links for 'Attend Live Training', 'Video Tutorials', and 'Knowledge Base'. The main content area is titled 'Recording' and is divided into three sections: 'Local recording', 'Cloud recording', and 'Advanced cloud recording settings'. Each section contains a list of settings with checkboxes.

Recording

Local recording
Allow hosts and participants to record the meeting to a local file

- Hosts can give meeting participants permission to record locally

Cloud recording
Allow hosts to record and save the meeting / webinar in the cloud

- Record active speaker with shared screen
- Record gallery view with shared screen ⓘ
- Record active speaker, gallery view and shared screen separately
 - Active speaker
 - Gallery view
 - Shared screen
- Record an audio only file
- Save chat messages from the meeting / webinar

Advanced cloud recording settings

- Add a timestamp to the recording ⓘ
- Display participants' names in the recording
- Record thumbnails when sharing ⓘ
- Optimize the recording for 3rd party video editor ⓘ
- Save panelist chat to the recording ⓘ
- Save poll results shared during the meeting/webinar ⓘ

OVERVIEW

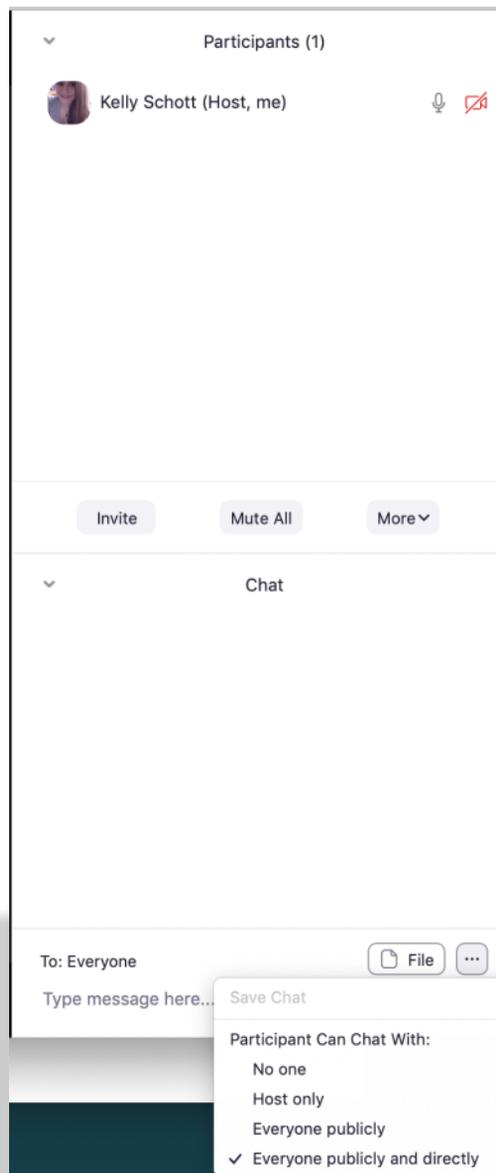
- There are 2 options for where to record in Zoom. One is 'Local', which is the default folder that pops up and asks you where you want to save your content. It will automatically start a folder with the meeting name on it and upload anything that is saved from that meeting to that folder. You can also give permission for others to record.
 - The second is 'Cloud Recording'. This offers more options. Kelly has found it very helpful to have flexibility in terms of your output, i.e. how you choose to use it. You can choose any view that exists. For instance, an active speaker with a shared screen, such as a PowerPoint, will share that person's space with the PowerPoint on the same video. The same applies to a Gallery View. Again using PowerPoint as an example, it will have the option to include all of the people on the call, as well as all of the participants separately. Kelly finds this useful when she wants to share a presentation without someone on it if there are privacy concerns. You can also choose to have each one shared separately. It will give you 3 different videos, one which will be just that shared screen. If there is nothing to share, it will appear black with just the audio. You can always dub over this or add sub-titles or images, etc.

OVERVIEW

- 'Advanced Settings' include time stamps, participant names, editing features, poll results, etc.
- If you are using one recording for one purpose and another for another purpose, you can choose 'Save to Different Places'. Kelly saves some files locally and some to the Cloud depending on the purpose of the meeting. This way, there can be different views for different meetings. It can be used interchangeably and you can decide what you want to use it for and set the settings accordingly.
- It is always a best practice to plan ahead for how you would like to use these meeting outcomes so that you can prepare your settings.

OVERVIEW

- **Chat.** There are some functions at the bottom of the chat window that grant access to people who wish to chat with other attendees within the group.



OVERVIEW

- It can be set so that no one can chat or you can have people only chat with the Host. Alternatively, you can set it so that everyone can chat with each other publically or to private message. TheCR uses the latter function. This is good for troubleshooting, but also to let people continue conversations or make requests.
- **Roles.** Kelly went over the various member roles within a Zoom meeting:
- ***Host.*** The Host is the person who creates and runs the meeting and assumes the most control.
- ***Attendee.*** Participants of the Zoom meeting.

OVERVIEW

- **Co-host and Alternative Host.** These roles are very similar. They have many of the same controls and settings, but they do not have the full Host privileges. There are more privileges than Attendees, but these roles cannot start a meeting. While sitting in the waiting room, a Co-Host is still only an Attendee at this point. Co-Hosts can only be named Co-Hosts once they are actually in the meeting. There is an option to assign a Co-Host from the Participant's List.
 - If a Host has to drop off, loses his/her connection or leaves the meeting for any reason, the Co-Host can then take control of the call.

require authentication to join

Video Host on off

Participant on off

Audio Telephone Computer Audio Both

Dial from United States of America [Edit](#)

Meeting Options Allow participants to join before start time

Mute participants upon entry

Breakout Room pre-assign

Automatically record meeting

Approve or block entry for users from specific countries/regions

Alternative Hosts

Interpretation Enable language interpretation

OVERVIEW

- An 'Alternative Host' is a little different. This role is assigned before the call starts. An Alternative Host can start a meeting instead of the person who created the meeting. For instance, if Kelly created a meeting and she wanted "Joe" to be the Alternative Host, Joe can start the meeting before Kelly gets there if she was delayed.
 - This can be set up at the onset of the meeting or it can be set up at the last minute. It is located at the very bottom of the 'Meeting Creation' screen. Just add the user name or email address and they will get an alert and can then start the meeting. Joe will then be the Host. If Kelly comes later and 'Co-Host' is enabled, Kelly will become a Co-Host. If this isn't enabled, Kelly would simply be an Attendee. Joe could upgrade or promote Kelly to a different role or swap Hosts, but at that point, they would continue to maintain control. It's why Alternative Hosts only exist before the meeting starts and then shift into the Host role.
- Keep in mind that even if Kelly didn't show up for the meeting, it shows as a meeting on her account. Kelly could not be on another meeting at the same time.

Best Practice

- **Read through all settings that exist on the account.** There is a lot within a meeting functionality, but also a great deal on the website to click through. Zoom has been very good about adding new features and beta testing. There are fun settings to play around with in terms of filters, etc., as well as security settings.
 - You can choose to start with 'Video'. If the Host wants to have his/her Video on all the time, you can choose in the meeting settings to always have a Host Video turned to the 'on' position. Furthermore, you can control the audio for participants. For TheCR calls, the Host Video set is generally 'on' and participants are 'off'.
 - Setting your settings isn't a one-and-done. You can flip back and forth to suit your immediate needs. For example, for the Virtual Conference this year in October, TheCR had to switch many of the settings from their usual webinars. They then switched the settings back once the Conference was over.