

Overview of Useful Zoom Features

Nonprofit Consultants Network (NCN)

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Note: Session uses a Zoom Basic (free) account.

Major Differences Between Free and Fee Versions

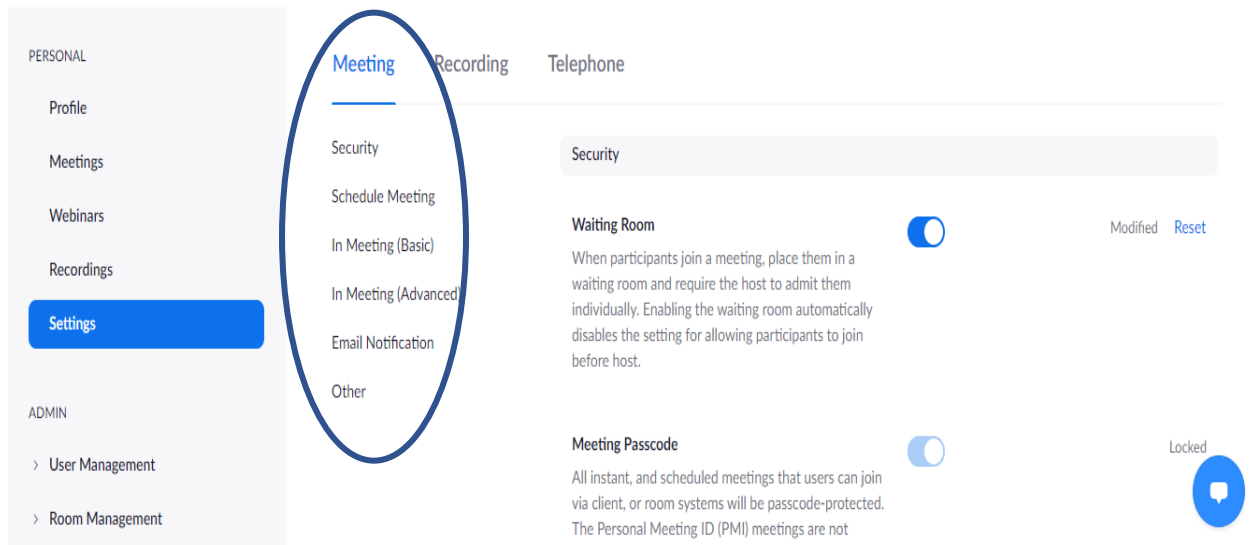
- Time limit – 40 mins only, for 3+ people (free)
- Recording locally (free and fee) vs. cloud (fee)
- Registering for events (fee)
- Add Co-Host (fee)
- Additional options to set up meetings/settings on Zoom Webpage - zoom.us/signin (fee)

Access Points for Zoom (Webpage and Meeting App work together)

Zoom Webpage - [Zoom.us/signin](https://zoom.us/signin)

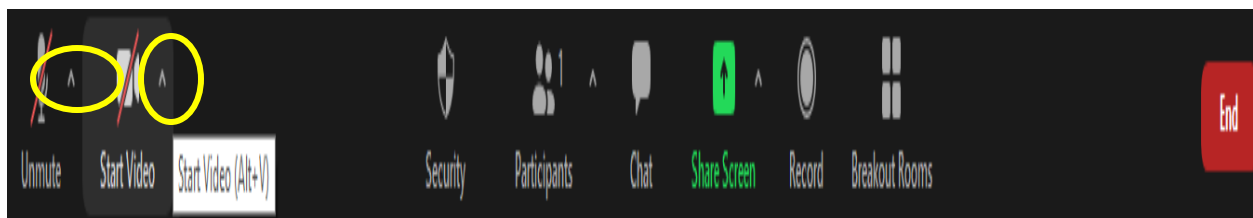
- Schedule a Meeting
- Settings

The screenshot shows the Zoom website interface. At the top, the Zoom logo is on the left, and navigation links for SOLUTIONS, PLANS & PRICING, CONTACT SALES, SCHEDULE A MEETING, JOIN A MEETING, and HOST A MEETING are on the right. Below the navigation is a green banner with two important notices. The main content area shows the user's profile for 'Rog Magnus'. On the left, a sidebar menu under 'PERSONAL' includes Profile, Meetings, Webinars, Recordings, and Settings (which is circled in blue). The profile section shows a placeholder for a profile picture with a 'Change' link. Below the profile picture, the 'Personal Meeting ID' is displayed as '*** ** *299' with a 'Show' link. At the bottom, the full meeting ID URL is shown: 'https://us04web.zoom.us/j/*299?pwd=*****' with a 'Show' link. There are 'Edit' links next to the name and the meeting ID.



Zoom Meeting App (From Zoom Webpage or Started Directly)

- Features (buttons)
- Settings
 - **From buttons** – Meeting ONLY
 - **From Menu** (Access by clicking on arrow to the right of Mute/Unmute – Audio Settings or Start Video/Stop Video – Video Settings) - Permanent



Settings



General



Video



Audio



Share Screen



Chat



Background & Filters



Recording



Profile



Statistics

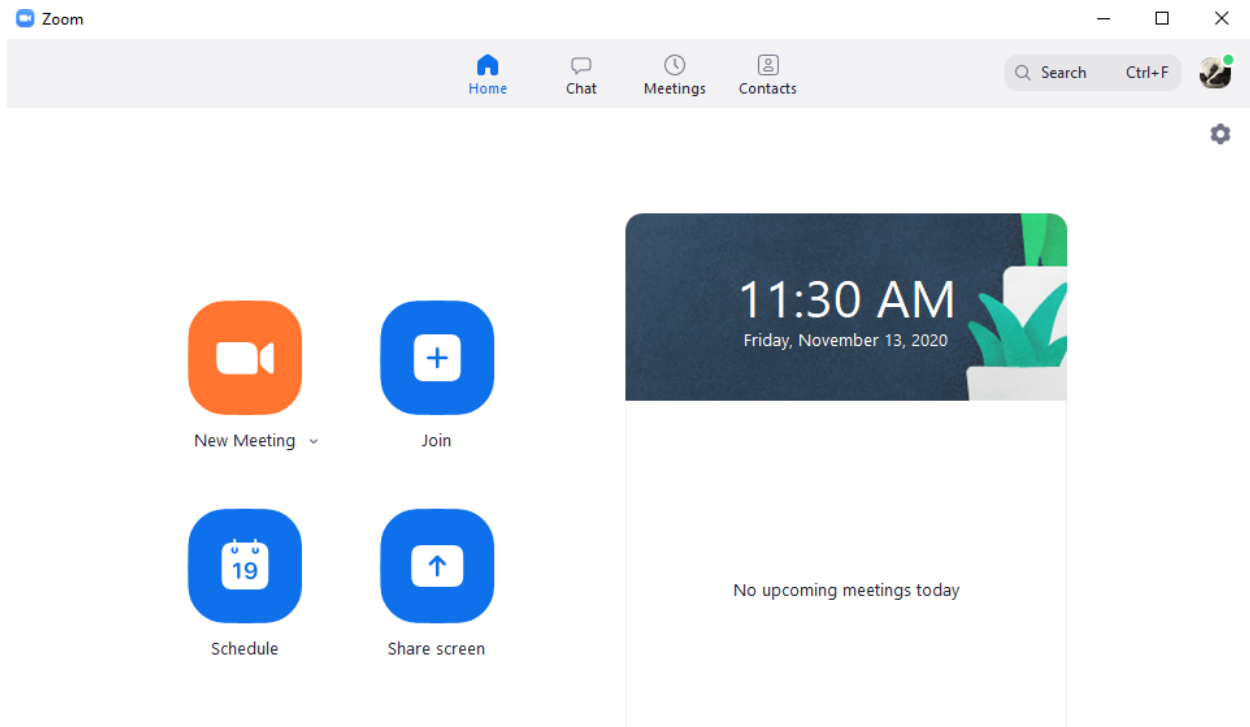


Keyboard Shortcuts



Accessibility

Zoom Meeting App – Started Directly




Roger Magnus

LICENSED

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Add a Personal Note

 Settings

Available

Away

Do not disturb >

My Profile

Try Top Features

Help >

Check for Updates

Switch to Portrait View

Switch Account

Sign Out

Basic Zoom Features/Settings

Participants

- **Renaming** (**To enable:** Zoom website – Settings – In-Meeting (Basic) – Allow Participants to Rename Themselves – Yes)

To access: Zoom meeting app – **Participants button** – Hover over your name – More button – Rename)

- **Mute All**

To access: Zoom meeting app - **Participant button** – Mute All button

- **Invite from meeting**

To access: Zoom meeting app – **Participant button** – Invite button

Backgrounds and Filters (**To enable:** Zoom webpage – Settings – In-Meeting (Advanced) – Virtual Background/Virtual Filter)

To access: Zoom meeting app – settings menu – Backgrounds and Filters

- **Backgrounds** – Photos/videos that replace real background
- **Filters (New)** - Change background colors, frame of current setting, add features to face

Chat (**To enable:** Zoom webpage – Settings – In-Meeting (Basic) – Chat)

To access: Zoom meeting app - **Chat button**

- **... button** –
 - Save Chat
 - Participant Can Chat with (Everyone Publicly, Everyone Publicly and Directly, Host, No One)
- **File button** – Share file - several options

Share Screen (Share Screen button) – Presenting/Demonstrating
(**To enable:** Zoom webpage – Settings -In

-Meeting (Basic) – Screen Sharing– Yes)

To access: Zoom meeting app – **Share Screen button**

Note: To display all open desktop screens to share (Zoom meeting app – settings menu - Share My Screen When I Share My Screen in a Meeting - Show All Meeting Options - Yes)

Note: To share Zoom itself (Zoom meeting app – settings menu - Share My Screen - Show My Zoom Window to Other Participants When I Am Screen Sharing – Yes)

- **Whiteboard (To enable:** Zoom webpage – Settings -In-Meeting (Basic) – Whiteboard – Yes) – electronic chalkboard (If enabled becomes an additional screen to share.)
- **Annotations (To enable:** Zoom webpage – Settings -In-Meeting (Basic) – Annotation – Yes) – markings on White Board (menu already displayed) or any other shared window (press Annotate button to display menu)

Breakout Rooms (To enable: Zoom webpage – Settings – In-Meeting (Advanced) – Breakout Rooms – Yes) – A meeting within a meeting; divide group into smaller sub-groups (sometimes by something in common) to enable more interaction during session

- **Create when Scheduling Meeting (To activate:** Zoom webpage – Schedule a Meeting – Breakout Room Pre-Assign – Yes)
 - Assign manually by entering
 - Assign manually from spreadsheet
- **Create during meeting (To activate** Zoom meeting app – Breakout Rooms button)
 - Assign Manually or Assign Automatically or Let Participants Choose Room)
 - Choose number of rooms

Security

- **Lock Down Meeting** - – Activate after everyone admitted.
To activate: Zoom meeting app - Security button option - Yes)
- **Waiting Room**- Control who can join. (**To enable:** Zoom webpage – Settings - Security – Waiting Room – Yes)
- **Remove Participants**
To activate: Zoom meeting app - Participants button - Hover over participant name – More button - Back to Waiting Room/ Remove)
- **Share Screen** - – If not needed for meeting, it is a good idea to disable since it can be a security risk.
To activate: Zoom meeting app - Security button option – Yes/No)

Please see <http://www.rogermagnusresearch.com/services/video-conferencing-software/> for articles about Zoom recordings, breakout rooms, security, screen sharing, and more.