

# Zoom tips & tricks

## Contents

<b>1. SCREENSHARING – OVERVIEW.....</b>	<b>2</b>
Overview.....	2
To allow or prevent participants from screensharing .....	2
To share your screen or content: .....	2
Share screen menu .....	4
To Stop Sharing.....	5
<b>2. BREAKOUT ROOMS.....</b>	<b>5</b>
Enabling breakout rooms in Zoom .....	5
Creating breakout rooms .....	6
Options for breakout rooms .....	6
Managing breakout rooms in progress .....	7
Share screen to breakout rooms .....	7
Broadcasting a message to all breakout rooms .....	8
<b>3. ZOOM WAITING ROOMS.....</b>	<b>8</b>
Enabling Waiting Room .....	8
Customizing the Waiting Room .....	8
Enabling or disabling Waiting Room during a meeting.....	9
Admitting participants during a meeting .....	9
Admit all participants from the Waiting Room .....	10
Sending participants to the Waiting Room during a meeting .....	10
Sending messages to participants in the Waiting Room.....	10
<b>4. ENABLING UPCOMING MEETING REMINDERS.....</b>	<b>12</b>
To enable Upcoming meeting reminder .....	12
Turning on upcoming meeting reminders.....	12
<b>5. RECORDING ON ZOOM .....</b>	<b>13</b>
Enabling local recording .....	13
Starting a local recording.....	14
Stopping or pausing a local recording.....	15
<b>6. SAVING IN-MEETING CHAT.....</b>	<b>15</b>
Saving chat manually.....	15
Auto-saving chat .....	16
Default chat save location on computer .....	16
Speaker view.....	16
Gallery view.....	17
Full screen.....	17
Customizing the video order.....	18
Floating thumbnail window .....	19
Layout when screen sharing.....	19
Hide non-video participants .....	19
Switching between Gallery view and Speaker view .....	20

# 1. SCREENSHARING – OVERVIEW

## Overview



While in a meeting, you can share the following content:

- Entire desktop or phone screen
- One or more specific applications
- A portion of your screen
- Content from a second camera
- Whiteboard
- A locally stored video
- Device audio
- iPhone/iPad screen


## Notes:

- The host can disable participants' ability to share their screen.
- For Basic accounts, screen sharing is set to **Only Host** by default.
- In a webinar, only the host, co-hosts, and panelists can share their screen.
- If you're using the desktop client, you can show Zoom windows during screen share.

## To allow or prevent participants from screensharing

1. Once you've started the meeting, in the host controls, click the arrow  next to **Share Screen**  and click **Advanced Sharing Options**.
2. Under **Who can share?** choose either **Only Host** or **All Participants**.
3. Close the window.

## To share your screen or content:

1. Click **Share Screen**  located in your meeting controls.
2. Select one of these screen share options:
  - **Basic:** Share your entire desktop, specific application windows, [whiteboard](#), or [iPhone/iPad](#) screen.  
**Note:** Users can select multiple desktop programs at once instead of sharing their entire desktop, but all selected programs must be on the same screen to be visible. Only the user employing this feature will need to be on version **5.4.3** or higher while viewers can be connected with older versions. Hold the **Shift** key on macOS or the **Ctrl** key on Windows to select more than one application.
  - **Advanced**
    - **Slides / PowerPoint as Virtual Background:** Allows you to utilize a slideshow presentation as your virtual background, providing a more immersive presentation.



- **Portion of Screen:** Share a portion of your screen represented by a green border. The border can be adjusted as needed during the share by clicking and dragging any side or corner.



- **Computer Audio:** Only [share your computer's audio](#) (your selected speaker in your [audio settings](#)). Select the down arrow ▼ to the right of **Computer Audio** option to view audio options and switch between **Mono** and **Stereo (high fidelity)** audio options.



- **Video:** Share locally stored [video content through Zoom's native video player](#).



- **Content from 2nd Camera:** Share a secondary camera connected to your computer; for example, a document camera or the integrated camera on your laptop.



- **Files:** Share a file from a third-party sharing service like Google Drive or Microsoft OneDrive. Follow the on-screen prompts to sign in to the third-party service and grant Zoom access.

**Note:** Alternatively, you can open the file in a web browser then share the browser window. For example, to share a Google Doc, open the Doc in Chrome, then share the Chrome window. The end result is the same as using the sharing options in the **Files** tab.

- (Optional) Enable these features, located in the bottom-left corner of the share window:
  - **Share sound:** If you check this option, any sound played by your computer will be shared in the meeting. Select the down arrow ▼ just to the right of the **Share Sound** option to switch between **Mono** and **Stereo (high fidelity)** audio options.
  - **Optimize for video clip:** Check this if you will be sharing a video clip in full screen mode. Do not check this otherwise, as it may cause the shared screen to be blurry.
  - **Share to breakout rooms:** Allows the host or co-host to share their screen from the main session [directly into all open breakout rooms](#).
- Click **Share**.  
When the sharing process is started and 80% of devices acknowledge receiving the shared screen, you will see a notification banner stating **Participants can now see your shared screen**, or whatever you have chosen to share.

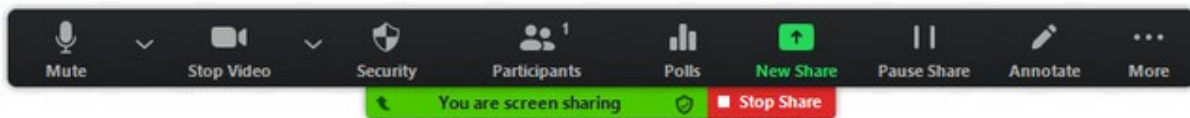
## Notes:

- Zoom will automatically switch to full screen to optimize the shared screen view. To exit full screen, click **Exit Full Screen** in the top-right corner or press the **Esc** key.
- To disable automatic full screen when viewing a shared screen, adjust the **Window size when screen sharing** behavior in your [desktop client settings](#).
- If you selected **Content from 2nd Camera**, click **Switch Camera** in the top-left corner to switch the shared camera.

## Share screen menu

When you start sharing your screen, the meeting controls will move into a menu that you can drag around your screen.

**Note:** Some of the options detailed below may not be visible due to account admin restrictions or the feature is only visible to the meeting [host or co-host](#).



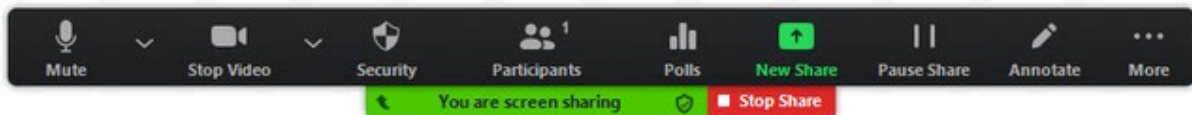
- **Mute/Unmute:** Mute or unmute your microphone.
- **Start/Stop Video:** Start or stop your in-meeting video.
- **Security:** Access [in-meeting security options](#).
- **Participants:** View or [manage the participants](#) (if you're the host).
  - Click the down arrow ▼ to access **Invite**, where you can [invite others](#) to join the meeting.
- **Polling:** Allows you to create, edit, and launch your [polls](#). The options to create or launch polls will open up the Zoom web portal in your default browser. When the poll closes, you can view the results and can download the full poll report. If a poll has already been created, both host and co-host can launch the poll, but only the host can edit or add polls to the meeting.
- **New Share:** Start a new screen share. You will be prompted to select which screen you want to share again.
- **Pause Share:** Pause your current shared screen.
- **Annotate:** Display [annotation tools](#) for drawing, adding text, and so on.
- **More:** Hover over **More** for additional options.
  - **Chat:** Open the [chat window](#).
  - **Record:** Start recording [locally](#) or [to the cloud](#).
  - **Meeting Info:** Shows the current [meeting's ID](#), host, [passcode](#), invite link, your participant ID, and encryption status.
  - **Closed Caption / Live Transcript** (only available to the host): If you have enabled [closed captioning and live transcription](#) for your account, click here to access those options.
  - **Breakout Rooms:** Start [breakout rooms](#).
  - **Enable annotation for others:** Allow or prevent the participants from [annotating on your shared screen](#).

- **Show/Hide Names of Annotators:** Show or hide the participants' name when they are annotating on a screen share. If set to show, the participant's name will briefly display beside their annotation.
- **Hide / Show video panel**
- **Hide / Show Floating Meeting Control**
- **[Share Sound](#)**
- **[Optimize for video clip](#)**  
**Note:** Do not enable this setting if you are not sharing a full screen video clip, as it will blur your screen share. This should be enabled/disabled before and after the video you wish to play.
- **Live on Facebook:** Broadcast your meeting live on [Facebook](#).
- **Live on Workplace by Facebook:** Broadcast your meeting live on [Workplace by Facebook](#).
- **Live on Youtube:** Broadcast your meeting live on [Youtube](#).
- **Live on Custom Live Streaming Service:** Broadcast your meeting live on a [custom streaming platform](#).
- **End Meeting:** Leave the meeting or end the meeting for all participants.

## To Stop Sharing

To stop sharing your screen, just click the Red button on the Screen Share menu.

This will stop the screen share, but KEEP the meeting open.



## 2. BREAKOUT ROOMS

### Enabling breakout rooms in Zoom

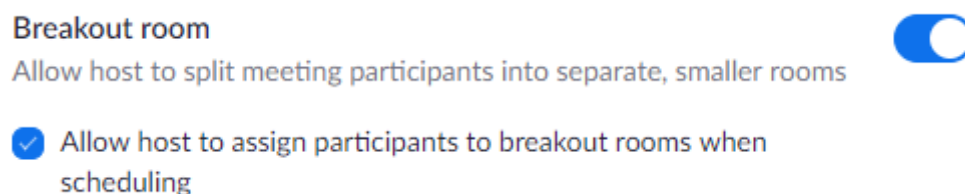
1. Sign into the Zoom web portal (NOT the app – you need to go to <https://zoom.us/signin> and log in)
2. In the navigation menu, click **Account Management** then **Account Settings**.


Using Zoom

PI er

3. Navigate to the **Breakout Room** option on the **Meeting** tab and verify that the setting is enabled.


If the setting is disabled, click the toggle to enable it. If a verification dialog displays, choose **Turn On** to verify the change.




4. (Optional) Click the checkbox to allow meeting hosts to [pre-assign participants to breakout rooms](#).
5. (Optional) If you want to make this setting mandatory for all users in your account, click the lock  icon, and then click **Lock** to confirm the setting.

## Creating breakout rooms

**Note:** You can also [pre-assign participants to breakout rooms](#) when you schedule the meeting instead of managing them during the meeting.

1. Start an instant or scheduled meeting.
2. Click **Breakout Rooms** .
3. Select the number of rooms you would like to create, and how you would like to assign your participants to those rooms:
  - **Automatically:** Let Zoom split your participants up evenly into each of the rooms.
  - **Manually:** Choose which participants you would like in each room.
  - **Let participants choose room:** [Participants can select and enter rooms](#) on their own.
4. Click **Create Breakout Rooms**.
5. Your rooms will be created, but will not start automatically. You can manage the rooms prior to starting them by following the instructions below.

## Options for breakout rooms

1. After creating the breakout rooms, click **Options**(on Windows) or the gear icon  (on macOS) to view additional breakout rooms options.
2. Check any options that you would like to use for your breakout rooms.
  - **Allow participants to choose room:** [Participants can select and enter rooms](#) on their own once rooms are launched.
  - **Allow participants to return to the main session at any time:** If this option is checked, the participants can move back to the main session

from their meeting controls. If this is disabled, they need to wait for the host or co-host to end the breakout rooms.

- **Automatically move all assigned participants into breakout rooms:** Checking this option will move all participants into the breakout rooms automatically. If this option is unchecked, the participants will need to click **Join** to be added to the breakout room.
  - **Auto close breakout rooms after ( ) minutes:** If this option is checked, the breakout rooms will automatically end after the configured time.
  - **Notify me when the time is up:** If this option is checked, the host and co-hosts will be notified when the breakout room time is up.
  - **Set Countdown timer:** If this option is checked, the participants will be given a countdown of how much time they have left before being returned to the main room.
3. Follow the steps below to assign participants to rooms or click **Open All Rooms** to start the breakout rooms.

Participants who are not assigned to breakout sessions will remain in the main meeting when the rooms are started.


## Managing breakout rooms in progress

Once the breakout rooms have been started, the assigned participants will be asked to join the Breakout Session. The host, or co-host that launched the breakouts and the original host, will stay in the main meeting until joining a session manually. If a participant has not joined the session yet, it will be noted by **(not joined)** next to their name. You can click these options in the breakout rooms window:

- **Join:** Join the breakout room.
- **Leave:** Leave the room and return to the main meeting (only shows when in a breakout room).
- **Close All Rooms:** Stops all rooms after a 60 second countdown, which is shown to the host, co-hosts, and participants, and returns all participants back to the main meeting.

## Share screen to breakout rooms


Once breakout rooms are open, the host or co-host can [share their screen](#) from the main session directly into all open breakout rooms. This allows the presenter to share visual information to all breakout rooms as once, guiding them on next steps or tasks.

1. Click **Share Screen**  in the meeting controls.
2. Enable the **Share to breakout rooms** option along the bottom of the share window.
3. Choose what you would like to share, including an entire screen, a specific open program, or others.

4. Click **Share**. The selected content will be shared to all breakout rooms. Any active shares in any breakout rooms will be interrupted for the host's/co-host's shared screen. Annotation or whiteboarding is saved before the host's shared content is viewed.

### Broadcasting a message to all breakout rooms

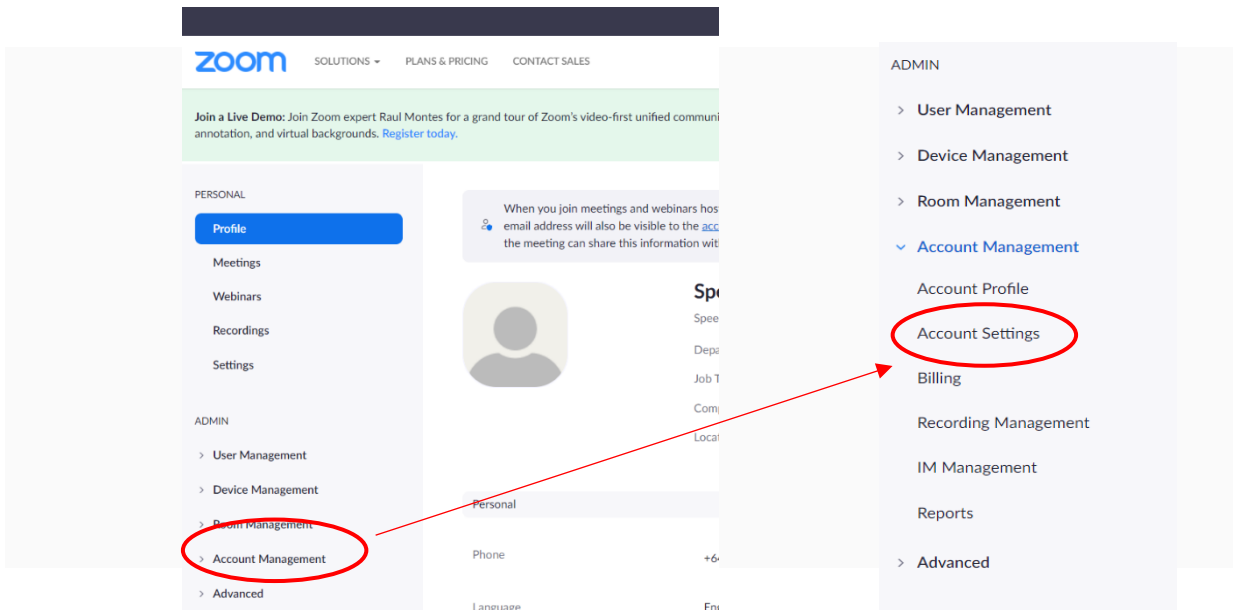
The host or co-hosts can broadcast a message to all breakout rooms to share information with all participants. This can be done from the main session or from within a breakout room.

1. Click **Breakout Rooms**  in the meeting controls.
2. Click **Broadcast message to all**, enter your message, and click **Broadcast**.
3. The message will now appear for all participants in breakout rooms.

## 3. ZOOM WAITING ROOMS

### Enabling Waiting Room

1. Sign in to the Zoom web portal as an administrator with the privilege to edit account settings.
2. In the navigation panel, click **Account Management** then [Account Settings](#).



3. Under **Security**, verify that **Waiting Room** is enabled.
4. If the setting is disabled, click the toggle to enable it. If a verification dialog displays, click **Turn On** to verify the change.
5. Click **Edit Options** to specify [Waiting Room options](#).
6. (Optional) If you want to make this setting mandatory for all users in your account, click the lock icon, and then click **Lock** to confirm the setting.

### Customizing the Waiting Room

You can customize the Waiting Room title, logo, and description at an account, group, or user level.



**Note:** You will need to enable Waiting Room before you have the option to customize it. If the Waiting Room has been previously customized at the user level then disabled after, when Waiting Room is enabled in a meeting's settings, the meeting will use the user-level setting until it has been reset, or the [account setting has been locked](#).

1. After [enabling Waiting Room](#), scroll to the **Security** section.
2. Click **Customize Waiting Room**.

This will open the Waiting Room customization options.

- **Title:** Click the pencil next to **Please wait, the meeting host will let you in soon**. to update the meeting title. Click the check mark (✓) when you are done.

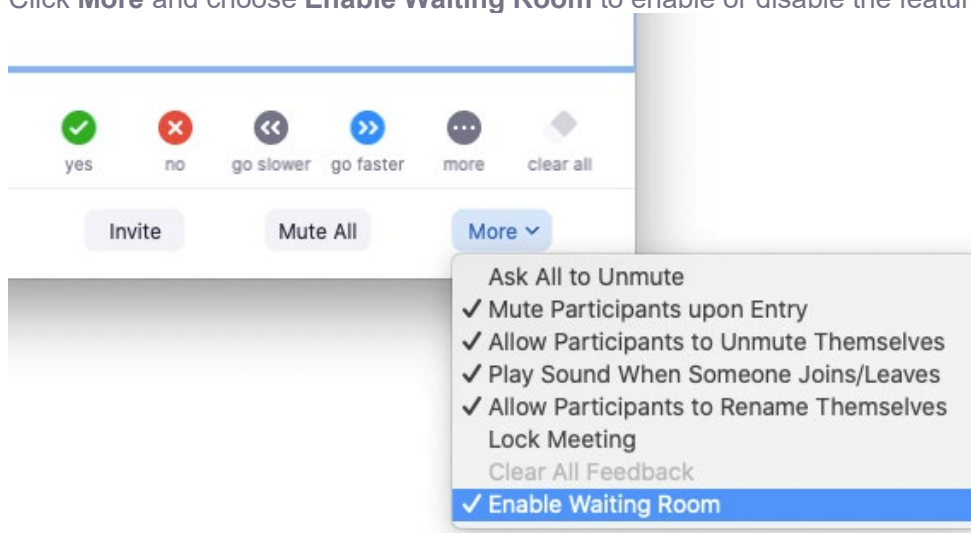
**Note:** Titles are limited to 64 characters.

- **Logo:** Click the pencil icon to upload a logo.  
**Note:** Logos can be in GIF, JPG or PNG format. They cannot exceed 1MB. The minimum height and width is 60px and the maximum is 400px.
- **Description:** Click **Add waiting room description** to add a description to the Waiting Room. Click ✓ when you are done.  
**Note:** The description is limited to 400 characters.

3. Click **Close** when you are done.
4. Participants will see your custom Waiting Room branding when they join the meeting.

### Enabling or disabling Waiting Room during a meeting

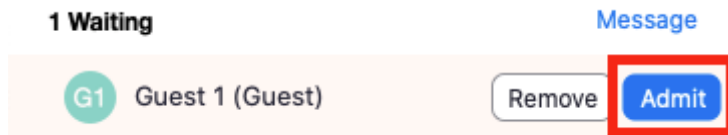
1. As the meeting host, click **Participants** .
2. Click **More** and choose **Enable Waiting Room** to enable or disable the feature.




### Admitting participants during a meeting

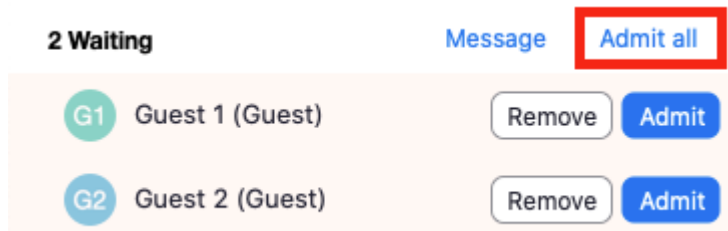
1. As the meeting host, click **Participants** .

2. Click **Admit** to have the participant join the meeting.




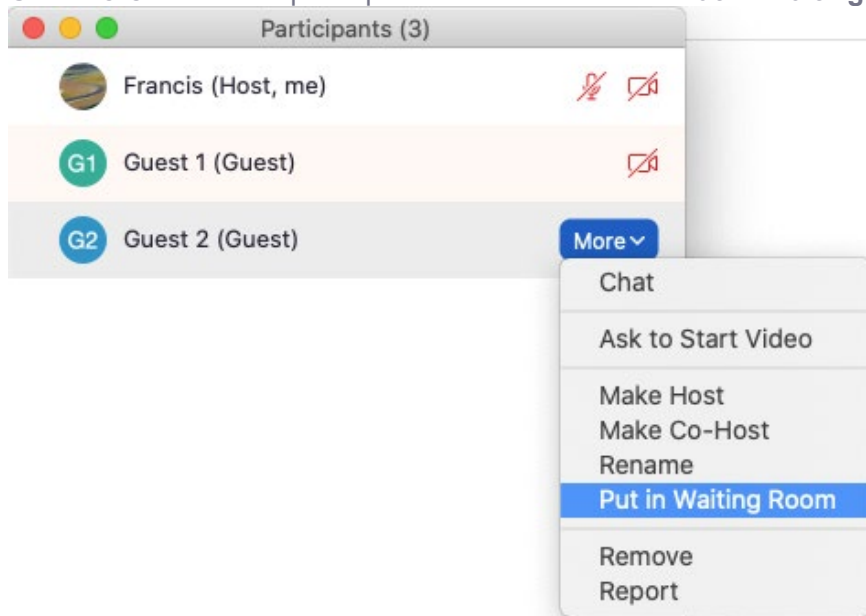
### Admit all participants from the Waiting Room

1. As the meeting host, click **Participants** .
2. Click **Admit all**.



### Sending participants to the Waiting Room during a meeting

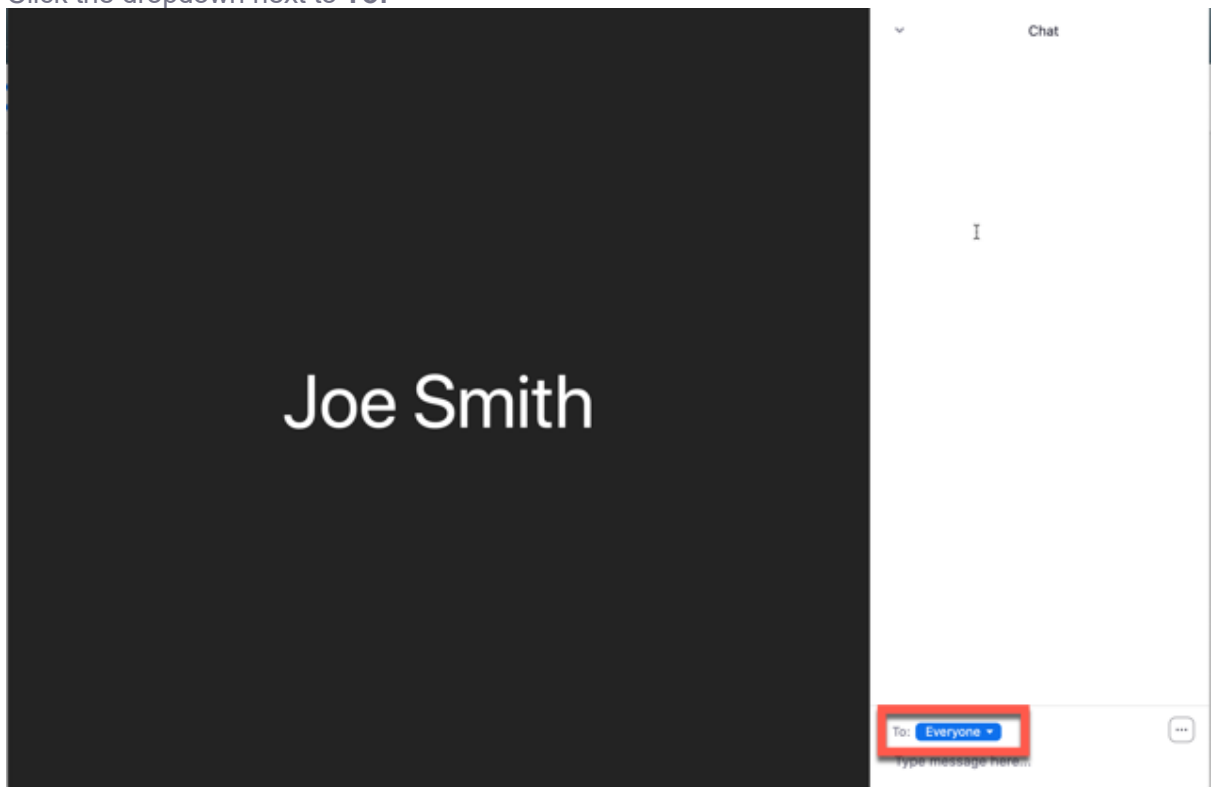
1. As the meeting host, click **Participants** .
2. Click **More** next to the participant's name and choose **Put in Waiting Room**.



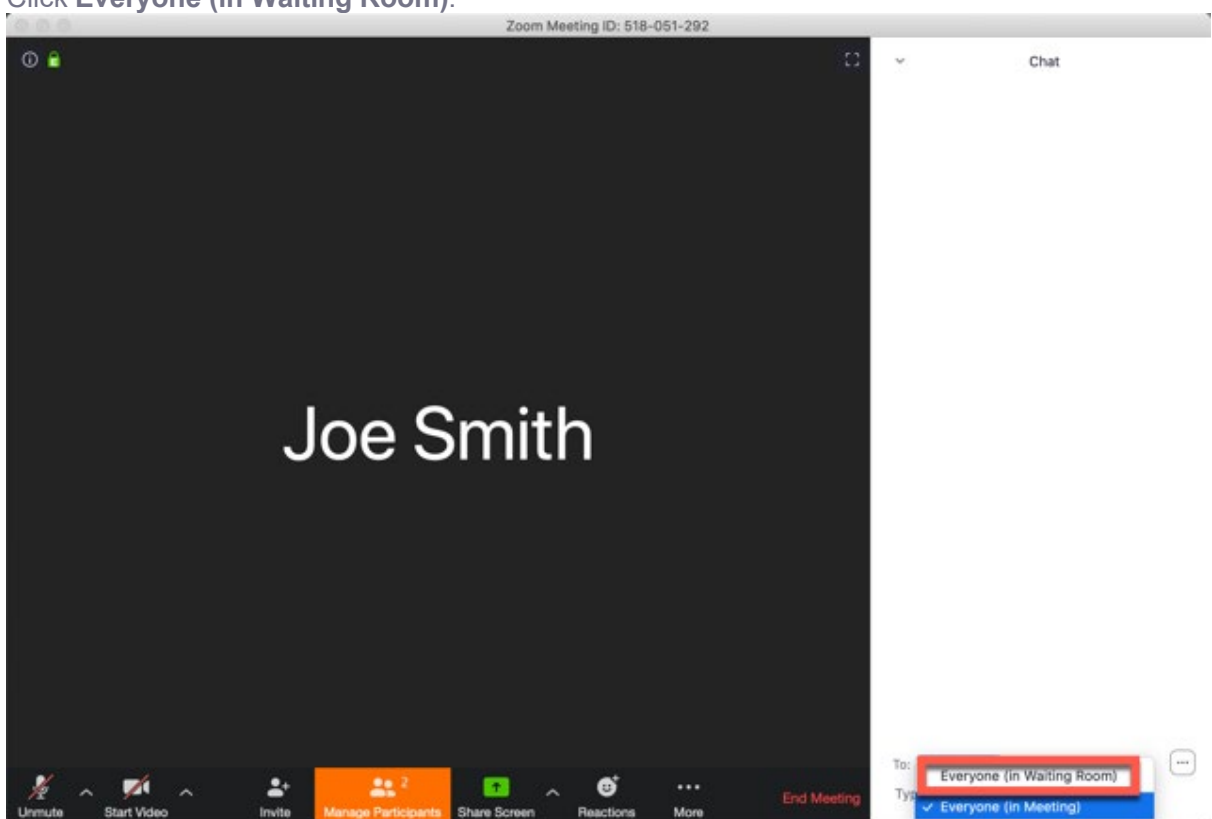
### Sending messages to participants in the Waiting Room

1. As the meeting host, click **Chat** .

2. Click the dropdown next to **To:**

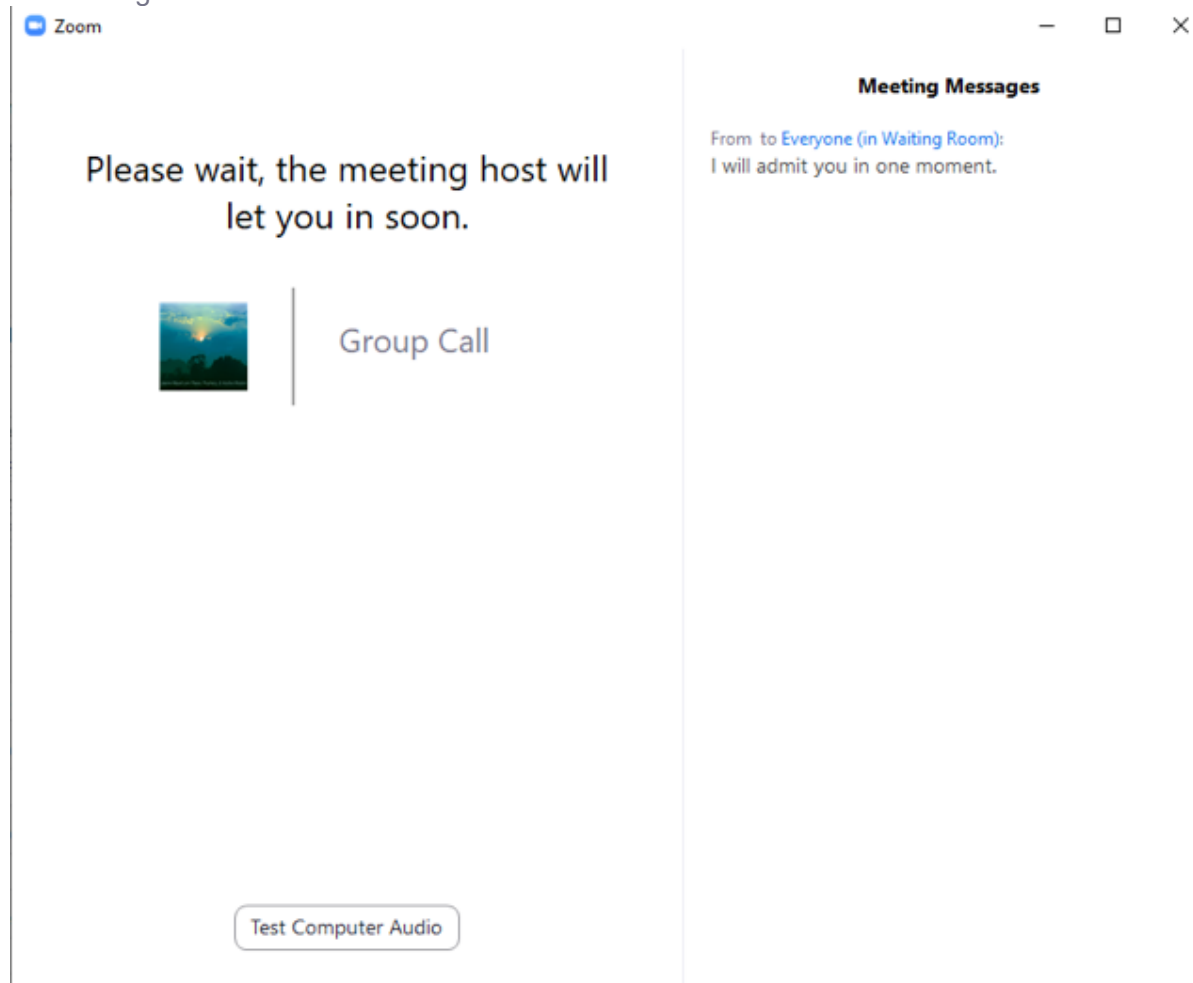


3. Click **Everyone (in Waiting Room)**.



4. Type and send your chat message to the Waiting Room.

Once the message has been sent, the participants in the Waiting Room will see the message on the Waiting Room screen:



## 4. ENABLING UPCOMING MEETING REMINDERS


**To enable** Upcoming meeting reminder

1. Sign into the Zoom web portal (NOT the app – you need to go to <https://zoom.us/signin> and log in)
2. In the navigation panel, click **Settings**.
3. Click the **Meeting** tab.
4. Under **Schedule Meeting**, verify that **Upcoming meeting reminder** is enabled.
5. If the setting is disabled, click the toggle to enable it. If a verification dialog box appears, click **Turn On** to verify the change.  
**Note:** If the option is grayed out, it has been locked at either the group or account level. You need to contact your Zoom admin.

### Turning on upcoming meeting reminders

If you enabled **Upcoming meeting reminder** in the Zoom web portal, this setting should be automatically turned on in the Zoom desktop client after you sign out of the desktop client and sign

in again. However, if you are not receiving reminders or if you want to adjust when you receive reminders, follow the steps below:

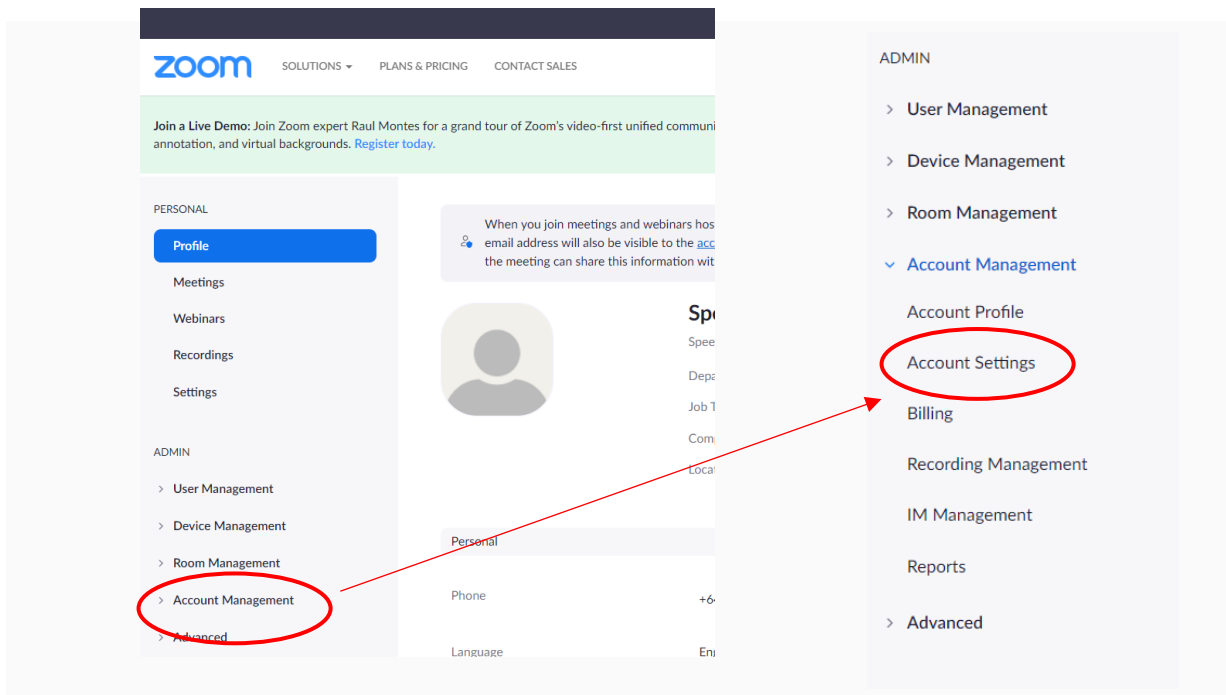
1. Sign in to the Zoom desktop app.
2. Click your profile picture then click **Settings**.
3. Click **General** .
4. Select **Remind me \_\_\_ minutes before my upcoming meetings**.
5. (Optional) If you would like to be reminded of your upcoming meetings earlier, select a different number from the dropdown menu.

A reminder will notify you of the meeting at your selected time. Click or hover over the reminder to start/join the meeting or close the reminder.

## 5. RECORDING ON ZOOM

### Enabling local recording

1. Sign into the Zoom web portal (NOT the app – you need to go to <https://zoom.us/signin> and log in)
2. In the navigation menu, click **Account Management** then **Account Settings**.



3. In the **Recording** tab, navigate to the **Local Recording** option and verify that the setting is enabled.
4. If the setting is disabled, click the toggle to enable it. If a verification dialog displays, click **Turn On** to verify the change.
5. (Optional) Enable the **Hosts can give meeting participants permission to record locally** option to allow the host to give permission to record locally as well.

- (Optional) If you want to make this setting mandatory for all users in your account, click the lock icon, and then click **Lock** to confirm the setting.

## Starting a local recording

The host must record the meeting or grant the ability to record to a participant.

- Start a Zoom meeting as the host.

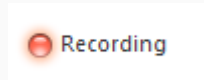
- Click **Record** .

- If there is a menu, select **Record on this Computer**.

Hosts will see the following recording indicator in the top-left corner while recording is active.



Participants will see the following indicator in the top-left corner while the recording is active.

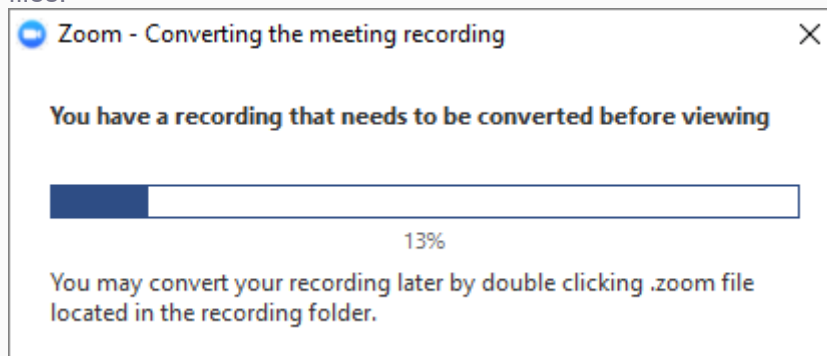


- Click **Participants** to see which participants are currently recording.



**Note:** [Dial-in participants](#) will hear a message informing them that the meeting is now being recorded unless disabled by the host.

- After the meeting has ended, Zoom will convert the recording so you can access the files.



- Once the conversion process is complete, the folder containing the recording files will open.

**Note:** By default, the audio/video file (MP4) will be named **Zoom\_0.mp4**. The audio only file (M4A) is named **audio\_only.m4a**.

### Note:

- If the meeting unexpectedly shuts down or if the conversion process is interrupted, the recording files could become corrupted and non-recoverable. Restarting or

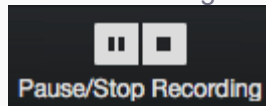
shutting down your computer, putting the hard disk to sleep, or closing your laptop will interrupt the conversion process.

- If the conversion process is not successful after the meeting has ended, you can try to convert the files again by navigating to the recording location and double clicking the recording files.
- You can record the meeting in different [layouts including Active Speaker, Gallery View, and shared screen](#).

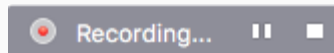
## Stopping or pausing a local recording

During a Zoom recording, a participant can **Stop** or **Pause** the recording. If a participant stops the recording and starts it again, a **new** video file will be created for the next recording segment. If a participant pauses the recording and starts it again, Zoom will record to the same video file for the recording segment.

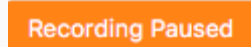
1. After a recording has been started, click Pause or Stop Recording at the bottom.



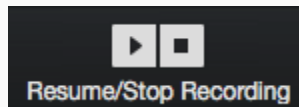
The recording can also be stopped or paused by clicking the indicator in the top left corner.



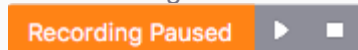
2. When a recording is paused, the following indicator will be displayed in the meeting.



3. To resume the recording, click **Resume Recording** at the bottom



The recording can also be resumed by clicking the indicator in the top left corner.



4. After you stop the recording, you can [access the local recording files on your computer](#).

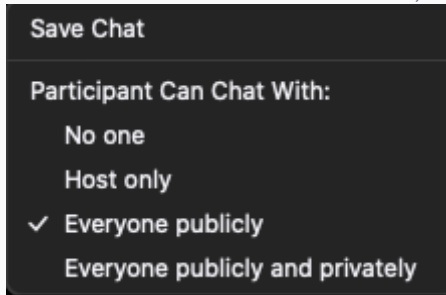
## 6. SAVING IN-MEETING CHAT

### Saving chat manually

You can save your in-meeting chat manually during the meeting. This will save it locally to your computer.

1. When in meeting, click on **Chat** .

2. At the bottom of the chat window, click ..., then **Save Chat**.



3. This will save your chat to your local recording location. The default is your **Documents** folder / **Zoom** / **Folder with meeting name, date, and time**.

**Note:** If the **Prevent participants from saving chat** option under the **Chat** setting in [web settings](#) is enabled, this prevents all meeting participants from being able to save the chat transcript, including the host.

### Auto-saving chat

1. Sign in to the Zoom web portal.
2. Click **Settings**.
3. In the **Meeting** tab under the **In Meeting (Basic)** section, find the **Auto saving chats** option and verify that the setting is enabled.

**Note:** Auto-saving chat will only auto-save for the host, and thus the host must be present in the meeting for a local chat transcript to be saved.

### Default chat save location on computer

The in-meeting chat will be saved to your local recording location. The default is your **Documents** folder / **Zoom** / **Folder with meeting name, date and time**.

## 7. CHANGING VIDEO LAYOUT (SPEAKER/GALLERY VIEW)

You need to have at least 3 people in the meeting for this to be able to be done.

### Speaker view

Speaker view will switch the large video window between who is speaking with 3 or more participants in the meeting. If it is just you and one other participant, your video will be smaller at the top and their video will appear below.





## Gallery view

Gallery view lets you see thumbnail displays of participants, in a grid pattern, which expands and contracts as participants join and leave the meeting. Depending on your CPU, the desktop client can display up to 49 participants in a single screen of the Gallery view. If more than 49 attendees are in the meeting, additional pages are created with up to 49 thumbnails on each page. Cycle through the pages and view up to 1,000 thumbnails by clicking the right or left arrows in gallery view to display the next page of 49 participants.

When in Gallery view and a participant begins speaking, that active speaker is relocated to the current page you are viewing, making it easier to recognize who is speaking. This functionality is not possible when using a custom gallery order.

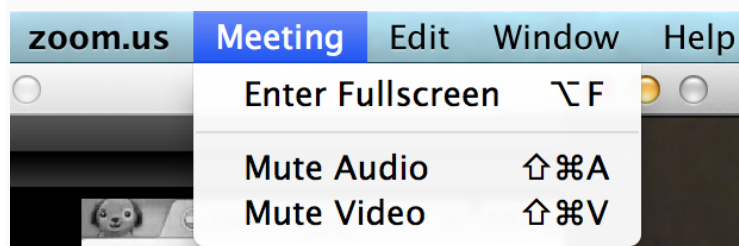


## Full screen

You can switch any of the layouts (except floating the thumbnail window) to full screen mode by double-clicking your Zoom window.

You can exit full screen by double-clicking again or using the **Esc** key on your keyboard.

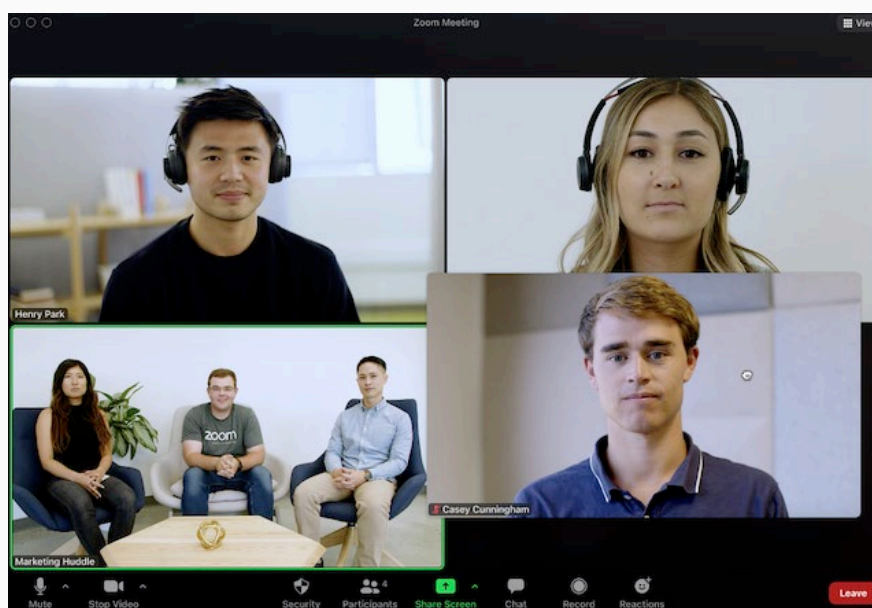
**Note:** In older versions of macOS, click **Meeting** and **Enter Fullscreen** in the Top Menu bar.




## Customizing the video order

When in Gallery view, you can click and drag videos to create a custom video order. After the first change, all other participant tiles will remain in place until moved. New participants will be added to the bottom-right, on the last page if multiple are present. Your custom order will be seen only by you, or the host can deploy their custom view to all participants. This order can be released and the order will revert to the default.

1. Click and drag any participant video to the location on screen you want.



2. Continue as needed to achieve your desired on-screen order.
3. (Optional) As the host, click **View**  to enable or disable these options:

- **Follow Host's Video Order** (only available to the **host**): Force all participants to display your custom video order. Participant will not be able to change the order when this is enabled.

**Note:** The custom order will apply to Gallery View and Active Speaker View for participants using the desktop client, mobile app, or [Zoom Rooms](#).






- **Release Video Order:** Release the custom order and revert to the default order.

**Note:** When non-video participants enable their video, they will be added to the last page of the gallery view, in the bottom-right corner spot.

## Floating thumbnail window

The floating thumbnail window allows you to minimize the main Zoom window, but keep the video on top of other applications you have open. You can move the window around your screen as needed, or hide the video entirely.

To switch to floating thumbnail view:



1. Click on the minimize icon, located at the top-right corner for Windows, or top-left corner for macOS.
2. Once in mini-window view, you can collapse the video by clicking on the arrow  on the left side. Click the arrow again to expand the video thumbnail. 
3. While in this mode, you can also easily mute/unmute yourself or turn on/off your video by clicking the  and  buttons respectively.
4. To close the floating thumbnail window and return to the full Zoom window click the arrow  on the right side.

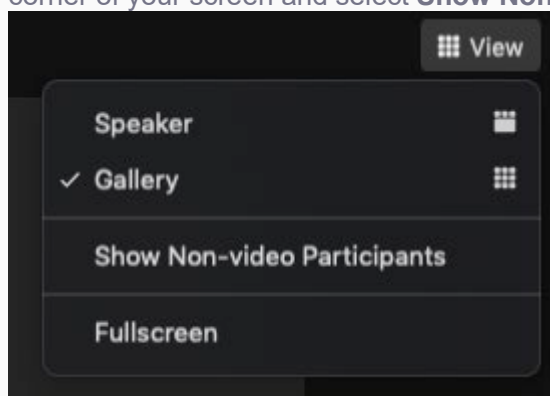
## Layout when screen sharing

When viewing shared content, you will see a layout similar to Speaker view, where the shared content is below and other videos tiles are along the top. If in fullscreen, the shared content will fill the screen and video tiles will become smaller, movable thumbnails.




You can also view the shared screen in [Side-by-side mode](#).

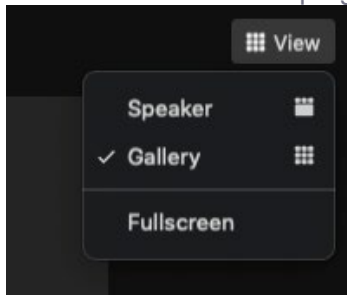
## Hide non-video participants

1. When you are in Gallery view, you can click on the 3 dots  at the top-right corner of any participant box that either has their video off or joined by telephone.
2. Click **Hide Non-video Participants** to hide all participants without video.
3. To show non-video participants again, click the **View**  button at the top-right corner of your screen and select **Show Non-Video Participants**.



## Switching between Gallery view and Speaker view

1. Start or join a meeting.
2. Click **View**  in the top-right corner, and then select **Speaker**  or **Gallery** .



**Note:** If you're displaying 49 participants per screen, you may need to change to [full screen](#) or adjust the size of your window to accommodate all 49 thumbnails.