

# The complete Zoom guide: From basic help to advanced tricks

Video conferencing has never been so critical to our work and personal lives. Here's everything you need to make your meetings more productive.

By [Charlie Osborne](#) | May 15, 2020 -- 11:15 GMT (04:15 PDT) | Topic: [Working from home: The future of business is remote](#)

Offices are closing. Travel is restricted. Employers are scrambling to [knock together hasty virtual setups](#) and access to corporate networks for workers now required to [work from home](#).

## Zoom Tips from techrepublic

- [How to turn on virtual backgrounds](#)
- [How to hide and unhide video](#)
- [How to record a Zoom meeting](#)
- [How to share documents onscreen](#)
- [How to transfer files during a meeting](#)

At the beginning of the year, few predicted that the spread of [COVID-19](#) would have such an effect on our daily lives, our work environments, and day-to-day business operations.

As the coronavirus outbreak spread worldwide, we become reliant on our household internet connections, and for many, the dream of being [able to work from home](#) has dissolved into a confusing nightmare.

There are many freelancers and contractors out there who are used [to remote work](#); however, countless employees once based in the office are now left to master [the tools available](#) for teleconferencing on their own.

Once, [Skype was a key tool](#) for communicating remotely. However, Microsoft's software has been overtaken by [Zoom](#), a video communications platform that [many of us at ZDNet](#) consider easier to use, more lightweight, and without the same spam problems.

One of Zoom's key strengths is its simplicity, but this does not mean that the platform is without a variety of advanced features that remote workers will find useful for improving their productivity. Below, we'll show you how to get started, and also offer some tips and tricks that experienced users may be missing out on.

## Let's get started: Zoom basics

First of all, head over to [Zoom](#) in your browser. The platform is compatible with Windows, Mac, Linux, iOS, and Android. The layout will be slightly different depending on whether you are on desktop or mobile.

There are four plans available; the most popular now likely being the free tier, in which virtual meetings can be held with up to 100 participants, 1-on-1 meetings without a time limit are possible, and meetings with multiple participants can be held for up to 40 minutes. (When your time is up, you can simply restart a meeting if need be.).

The free option also allows users to conduct meetings in HD video and with audio, participants can join via their PC or a telephone line, and both desktops and apps can be shared.

Zoom's Pro, Business and Enterprise packages come with additional features, including an increase in meeting duration limits, cloud recording and storage, Skype for Business interoperability, single sign-on options, and company branding.

It is possible to join a meeting just from your browser, but in the interests of longevity and avoiding browser limitations, you should download the application.

To start using Zoom, make your choice (browser or a direct download) and then sign up. You will be prompted to type in your work email -- but any will do -- or sign in through either Google or Facebook.

At the next prompt, Zoom will ask for permission to send resources including product videos and how-to guides your way. Either click "confirm" or "Set Preferences;" the latter option being to receive emails once a week, once a month, or never. Make your selection.

By now, a confirmation email should have landed in your inbox. Open the message, click "Activate Account" or paste the included confirmation link into your browser, and then at the next prompt, you will need to complete account creation with your name and a [strong password](#).

If you wish, on the next screen, you can invite your colleagues to also create an account. If not, click "Skip this step."

Now you can choose to create a test meeting if you like, as well as add Zoom as an extension. There are [various plugins available](#) including a Google Chrome extension, Mozilla Firefox extension, Microsoft Outlook plugin, and IBM Notes plugin. If you will be using Zoom for the foreseeable future for work purposes, you may want to select and install appropriate add-ons now.



## Start your test meeting.

Excellent! Now it's time to start meeting.

Your personal meeting url:

<https://us04web.zoom.us/j/4562333018>

Start Meeting Now

Go to My Account

Save time by scheduling your meetings directly from your calendar.



Microsoft Outlook Plugin  
Add Zoom

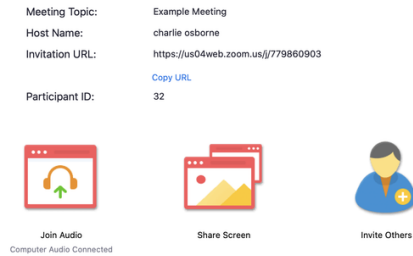


Chrome Extension  
Download

Once you've launched your test meeting, you will be met with a screen similar to below, containing the meeting's URL and the option to invite others. We will go through the core features of the meeting system in a moment, but for now, let's head over to the web portal, [zoom.us](https://zoom.us), to make sure that the correct settings are enabled -- and that you know how to create and launch a meeting.



Exit Full Screen



## The web portal

On the Zoom [website](#), head to "**Your Account**" in the top-right to manage your profile.

You can change details under the "**Profile**" tab such as your name, picture, default meeting ID, password and time zone.

Next, head to "**Settings**." Here, you can adjust settings implemented by default, including whether or not video is automatically enabled when you -- or participants -- join a meeting; whether or not participants can join a scheduled meeting before the host arrives.

In the interests of security and to [prevent scammers from hijacking a meeting](#), you should make sure you use strong passwords.

Passwords were not always enabled by default, but after Zoom founder Eric Yuan [apologized](#) for "falling short of the community's -- and our own -- privacy and security expectations," a rush of security changes were made, including the enabling, by default, of passwords for scheduled, instant, and personal meetings.

Next up is audio type. You can pick telephone and computer audio or one or the other to be automatically permitted. However, given the rapid rise of users, Zoom has warned:

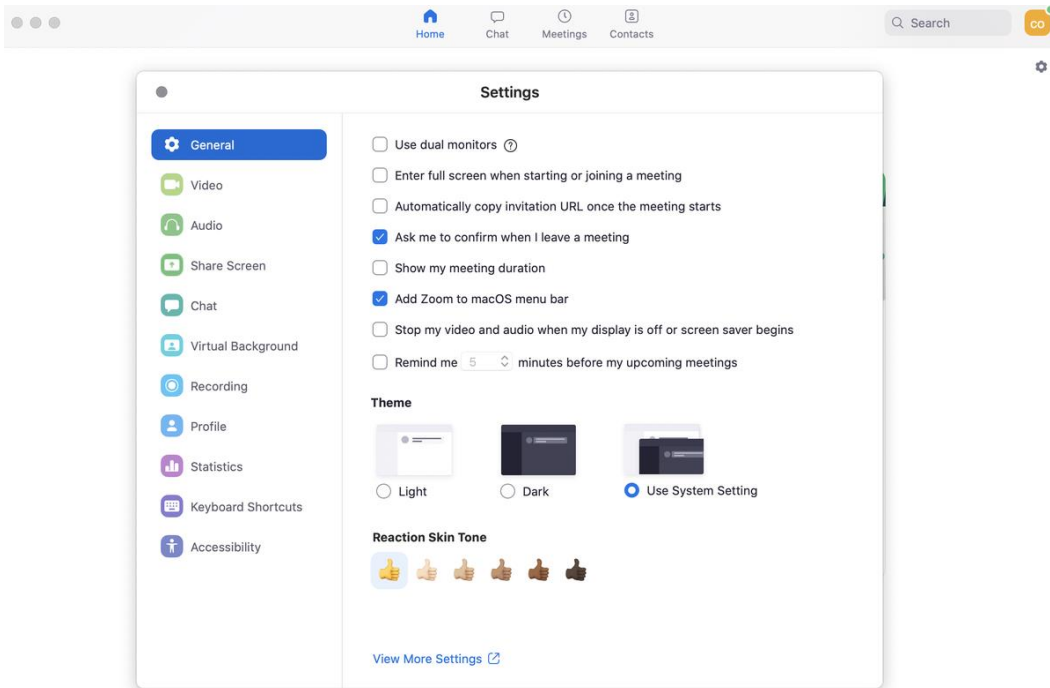
"Due to increased demand, dial-in by phone audio conferencing capabilities may be temporarily removed from free Basic account[s]. During this time, we strongly recommend using our computer audio capabilities."

You can also decide whether or not to allow public and private chats when you host a meeting; you can give permission for files to be transferred, and who can share their screen -- just the host, or participants, too.

There are other, more advanced controls, but these are the main settings you should be aware of for now.

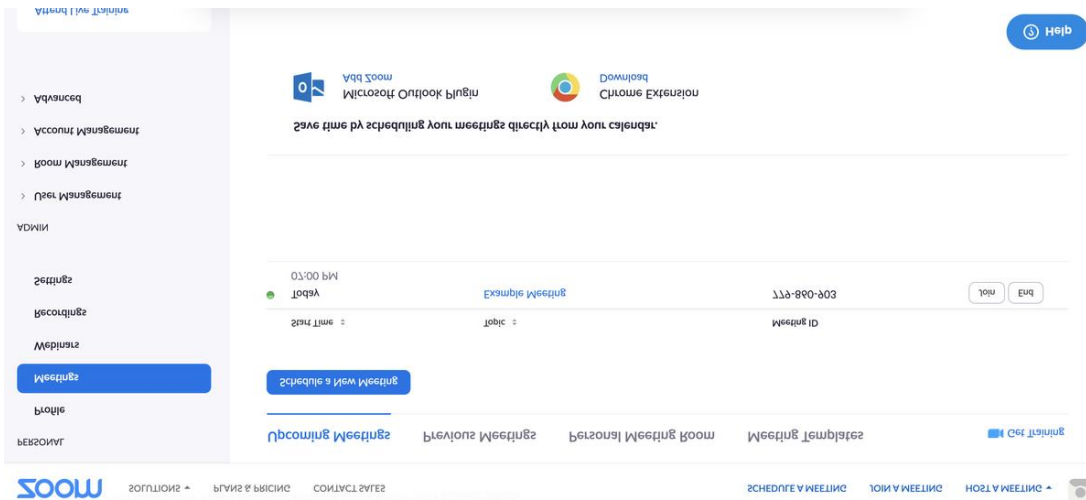
The **Zoom desktop app** has a similar layout, with "Settings" accessible from the top-right corner. The options you can access here are related to your PC, such as whether or not you want to use dual monitors or automatically enter a full-screen mode when a meeting starts.

You can also test your microphone and speaker setup, choose a color theme, select a default location for recordings, and tweak accessibility controls, among other functions.



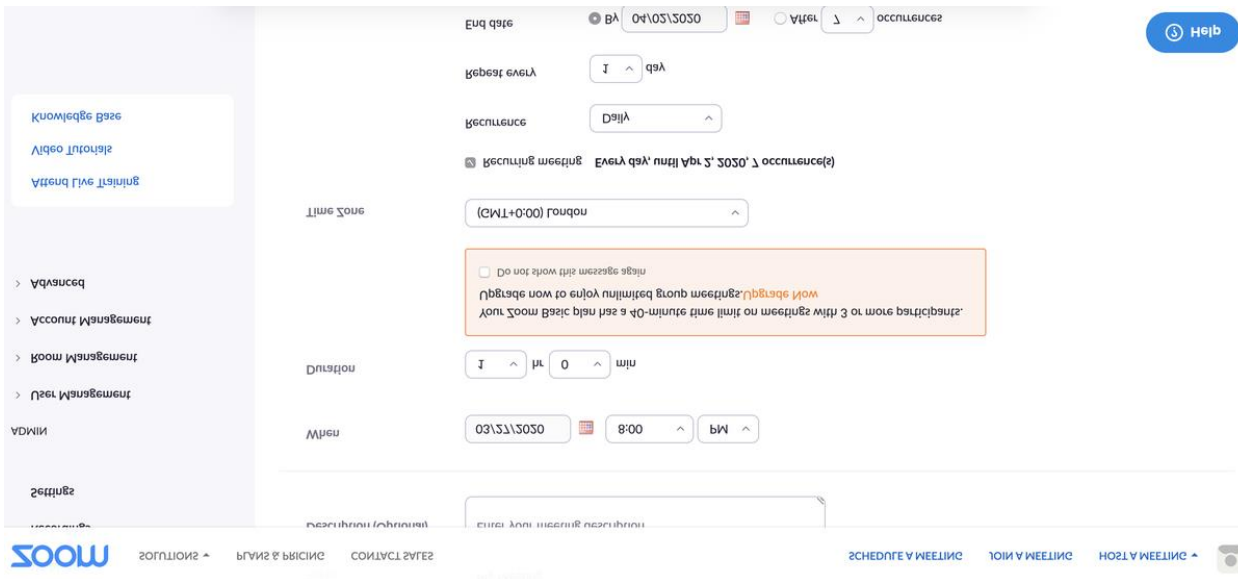
With your basic preferences in place, let's go to the "Meetings" tab in your profile.

## Scheduling and hosting a meeting



The first screen you will see reveals any scheduled meetings in your diary. Click "schedule a new meeting" and a new screen will appear, in which you can name your meeting, add a description if you want, and choose the date or time.

If this is to be a continual meet up with colleagues, there is a handy "recurring meeting" checkbox under the timezone tab. If you select it, you can then choose how often the meeting needs to be repeated -- whether daily, weekly, and monthly.



Once you have input these details, scroll down and click "save."

## The meeting is set, but how do you invite others?

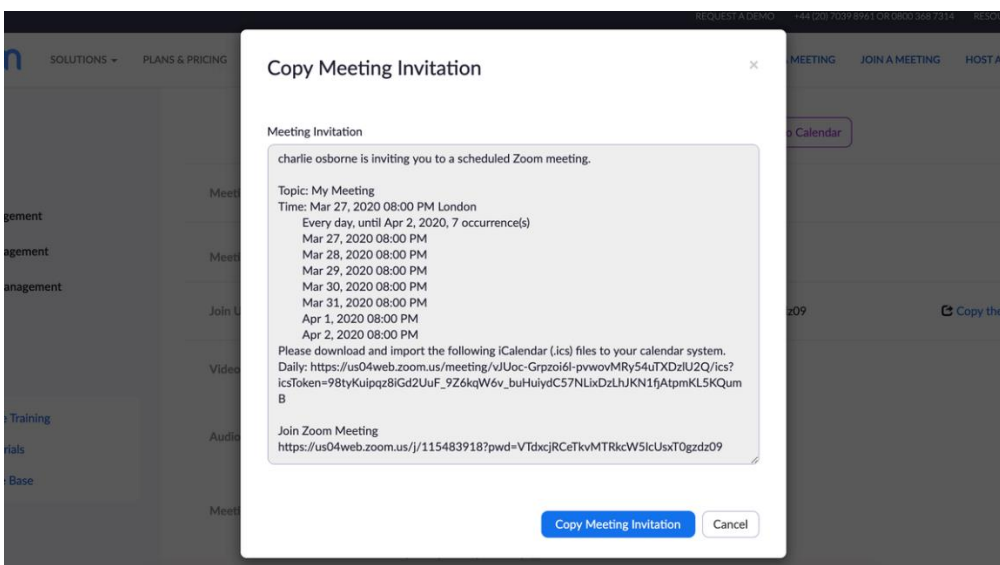
The short answer is: you must do so manually. There are two ways to do this: through calendar invites, or via your own email account.

If you wish to invite others through a calendar, links to Google Calendar, Outlook Calendar, and Yahoo Calendar are displayed once your meeting has been saved.

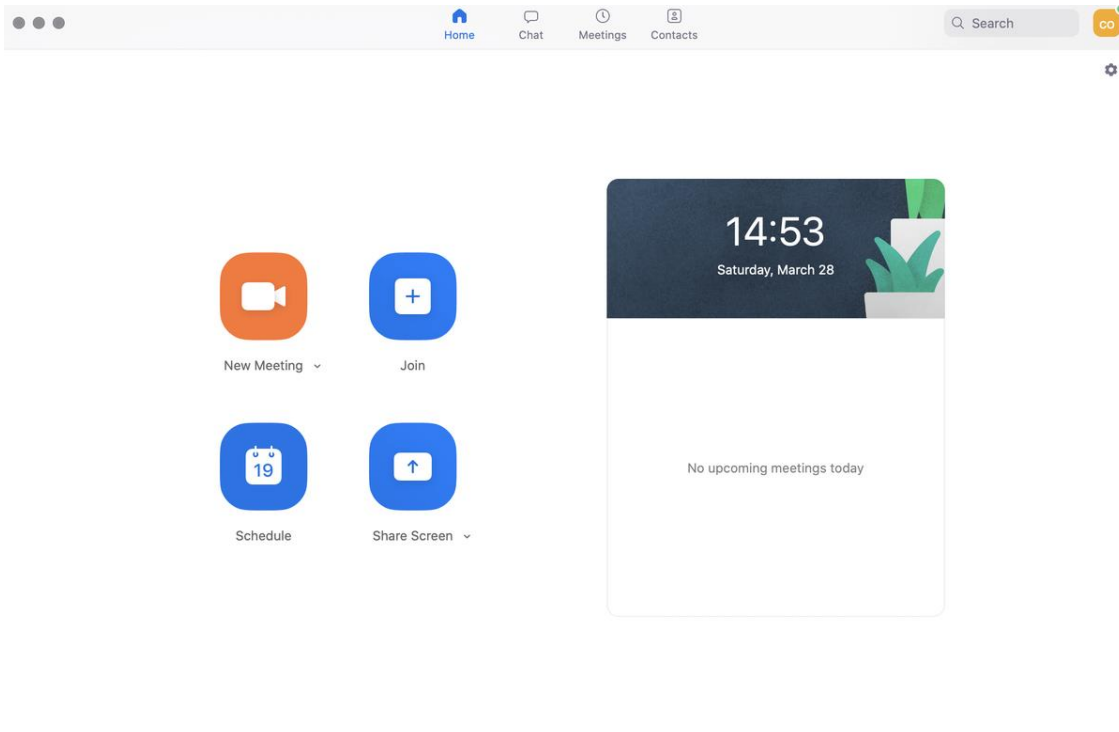
Alternatively, next to the "join URL" link on this screen, there is an option to "copy this invitation."

Clicking on this page element brings up a screen with all of the important information required for the meeting, including the URL, of which the meeting ID is already embedded. Copy this to your clipboard, open your email client, paste the details into a new message, and invite away.

So, in short, all participants need is the **meeting URL**, **date and time**, and a **password** if applicable.



If you want to try out features before bringing other people in, create a test meeting at this stage and select "Start this meeting." Alternatively, you can do exactly the same within the first page of the Zoom desktop app:



The first prompt, in either case, will ask you to join with computer audio if you are on PC, and will also give you the option to test your speaker and microphone. At the top right of the meeting window, you can choose to go full screen.

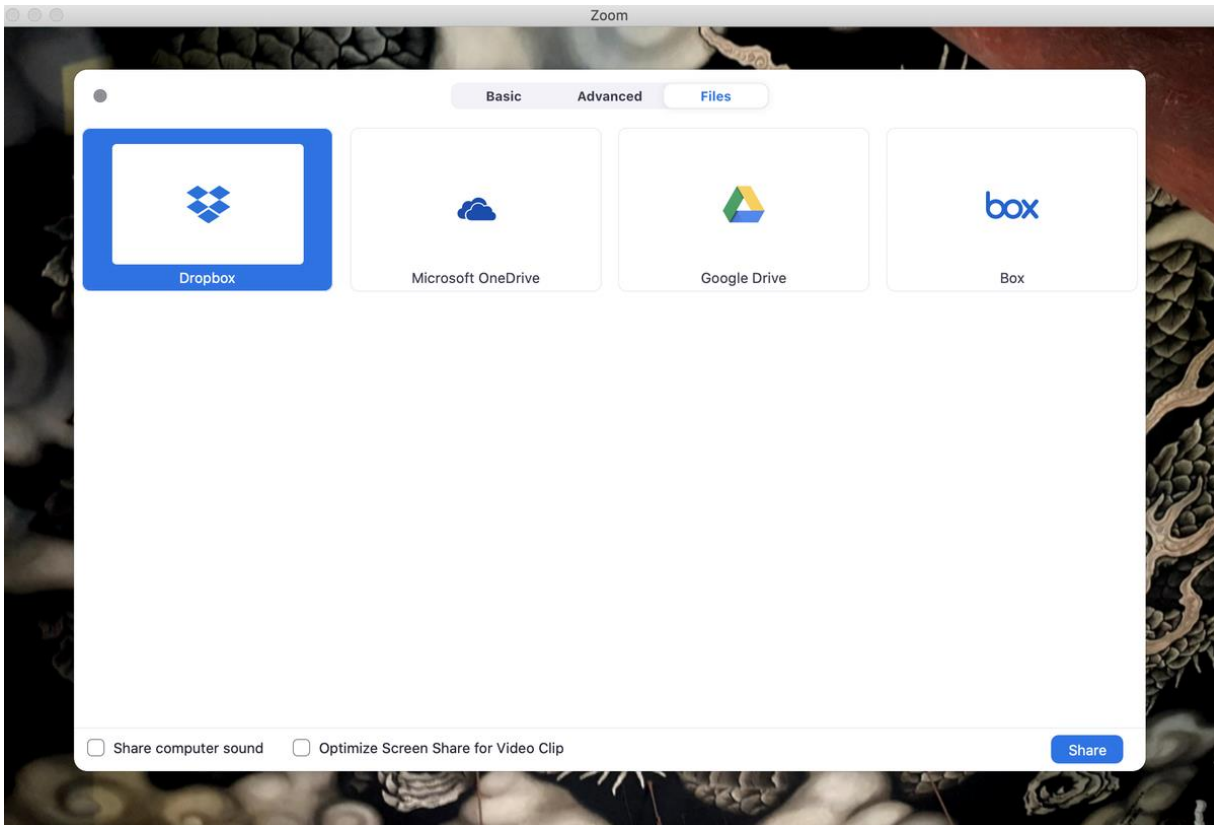
We are now going to go over the basic settings you need to know about in meetings for management purposes.

Two fundamental options can be found in the bottom-left part of the black menu tab: the option to mute/unmute your microphone and either [start/stop your camera](#). If you are using an external microphone, speaker, or camera, open up the arrow tabs next to these options to choose which equipment you want to use (external or inbuilt).

Moving on, the "**Manage Participants**" tab is particularly important. Under this tab, you can find "**invite**," which is useful if you've forgotten to bring someone into a session.

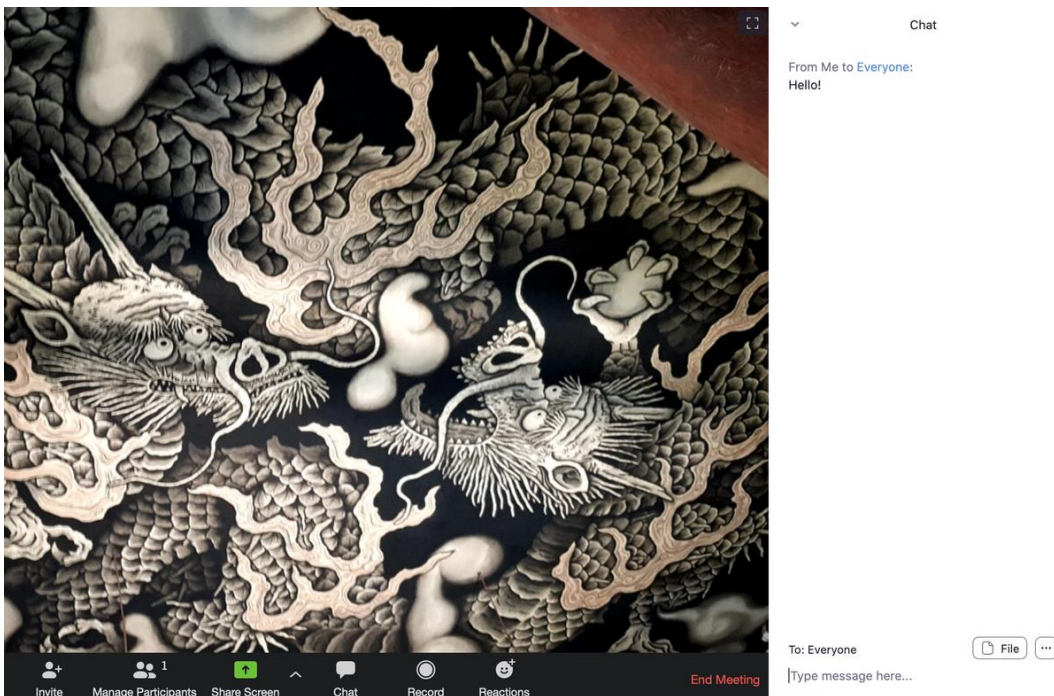






As a host, you can also use the arrow next to the "Share Screen" tab to control whether participants are limited to one screen share at a time, or alternatively, you can give permission for multiple screens to be shared at once.

Now, let's talk about messaging. The "**Chat**" tab on the main bar is designed for users to type out questions and messages, [as well as share files](#) either hosted by cloud storage providers or stored directly on your PC.



As a host, you can also select the "..." button to save a chat session and control who participants can talk to -- no one, the host alone, everyone publicly, or everyone publicly and privately.



The final tab of note is the "**Record**" option, which you may want to use if you are discussing work matters and want to save the session in order to email a copy of it to others later. By default, no one except the host can record a session unless the host gives permission to do so. (More: Check out [TechRepublic's guide to recording Zoom meetings.](#))

Finally, the "**End Meeting**" tab finishes the session. If the host needs to leave but the meeting should carry on, they can assign the host status to another participant -- but enabling co-hosts has to be selected first in the "Meetings" tab and can only be selected by subscription holders. Alternatively, you can leave the meeting or end the meeting for all.

## The new security tab

In April, the company added a new "Security" icon for meeting hosts to more easily access settings including lock, waiting room, and remove participants.



Under this tab, scattershot security settings are now clustered together. This includes the "lock meeting" function, whether or not to enable the "waiting room," and participant control -- allowing or disabling screen sharing, chat functions, renaming, and annotating. In addition, you can quickly remove gatecrashers or disruptive participants.

## Advanced tips and tricks

Now the basics have been covered, there is a range of settings and features that more experienced users might want to use.

Let's head back over to the **web portal** to run through a few options. If you are using the **desktop application**, you can quickly access this area by going to "Settings" -- > "View More Settings."

Under "Settings," select "**In Meeting: Advanced**," to find features including:

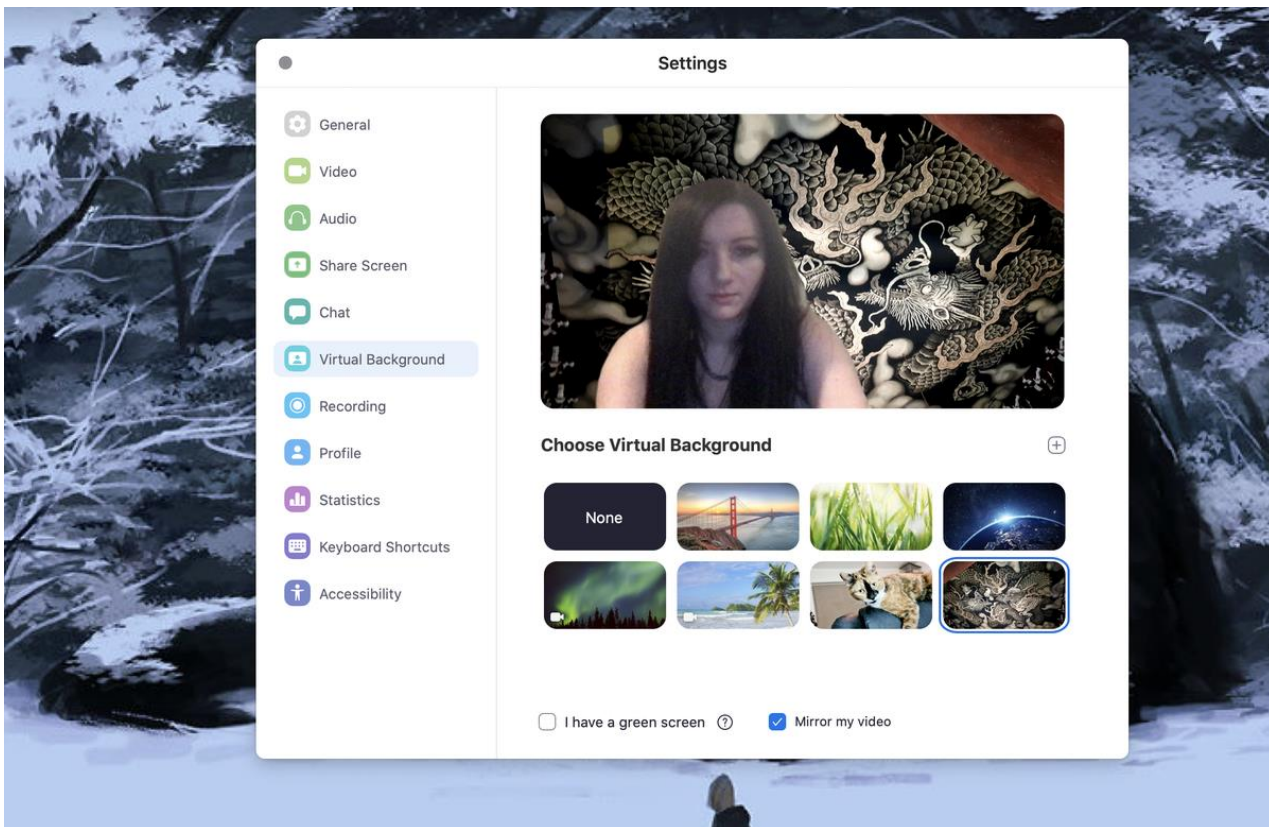
- **Breakout room:** split meeting participants into separate, smaller rooms. This can also be done [before a meeting begins](#) to prevent logistics problems
- **Remote support:** allows a host to provide 1:1 support to a participant
- **Camera control:** you can allow a participant to take remote control of your camera
- **Show a "Join from your browser" link:** a workaround for users that can't download Zoom software
- **Invitation languages:** You can choose from a variety of languages for meeting invitations, including English, Spanish, French, and Russian.
- **Virtual backgrounds:** enabling/disabling
- **Waiting room:** a feature to keep participants in a 'waiting area' until the host is ready for them -- particularly handy for remote interviews or office hours. This feature is now on as default for education, Basic, and single-license Pro accounts.

## Webinars

If you have a Pro, Business, or Enterprise plan, you can take advantage of the [webinars option](#). Webinars can be set up that broadcast to up to 10,000 view-only attendees at a time. Screens, video, and audio can be shared; chat sessions between attendees and panelists can be hosted, and webinars can be run on either a pre-registration or open basis.

## Virtual Backgrounds

[Virtual backgrounds can be used](#) to hide the chaos and clutter of your home. There are specific hardware requirements, which can be [accessed here](#). Most modern PC setups should be able to manage -- but the virtual background works best with a green screen and uniform lighting.



To set up a virtual background, go to the desktop app, "Settings," and choose "Virtual Background." You will be prompted to download a virtual background package -- just once -- and then you can try out different screens or add your own image/video instead. You may see a warning that says your hardware isn't good enough -- but give it a go, anyway.

Once you've enabled and selected a virtual background, while in a meeting, you can toggle them off/on next to the "Stop Video" tab.

## Whiteboards

Earlier, we mentioned the "**whiteboard**" option under the "**Share Screen**" tab. This is a useful option if you are canvassing ideas or soliciting feedback and it comes with different annotation options, including text boxes, arrows, and more. The "spotlight" is a form of highlighter which can be used to bring user attention to a particular area or point.

## What about Zoom gatecrashers?

When software is popular, scammers come out of the woodwork to try and find a way to capitalize. [Zoom is no different](#); the appearance of scammers jumping into unprotected meetings and posting malicious links and pornography has given rise to the phrase "Zoom-bombing."

The problem has become common enough for Zoom to [publish a guide](#) on how to prevent gatecrashers from disrupting your meetings, including pointers such as:

- Keep your meeting links off social media
- Do not use your Personal Meeting ID (PMI) to host public events. Instead, generate a [random ID](#).
- Choose "only host" for screen sharing control during a meeting
- Only allow [signed-in users](#) to join a meeting
- Use the "lock" feature to prevent random users from joining in. You might also want to consider using the Waiting Room.
- If you are gatecrashed, hover over the user's name in the Participants menu to bring up a "remove" option.

## Zoom security

Since the video conferencing software's popularity exploded due to COVID-19, the vendor has been playing catch-up to improve the security of the software, together with the help of researchers and security experts.

As of May 14, the company has introduced a range of new measures, including:

- Permitting meeting hosts to configure minimum meeting password requirements
- Changing the 9-digit setup for randomly-generated meeting IDs to 11 digits
- Removing [Facebook's iOS SDK client](#) to stop unnecessary data collection
- Removing attendee attention tracker features
- Resolving vulnerabilities in the Zoom installer and Windows client
- Using personal meeting IDs (PMIs) can [now be disabled](#)
- Showing profile pictures can be disabled
- An expiration date for cloud recordings can be set, as well as whether or not they can be shared

Zoom has also announced the [acquisition of Keybase](#). Zoom has been using a substandard AES-128 key in ECB mode, but paid users may eventually be able to use end-to-end encryption on their calls.

The latest version of Zoom, version 5.0, will become a [forced upgrade](#) for users by May 30. Users will not be able to join calls unless they upgrade. The reason for this is that Zoom 5.0 implements AES-256 GCM encryption, an upgrade from the substandard key.

Zoom 5.0 [includes](#):

- Support for AES 256-bit GCM encryption and a new icon to show the security measure is in place
- A 'report user' function
- Meeting hosts can choose the data center region they wish to connect to
- The option to 'end' or 'leave' a meeting -- making it easier to close down the session or choose a new host with meeting privileges

## Zoom plugins and integrations

To extend the video platform's functionality, Zoom offers a variety of plugins and extensions to make meeting scheduling and joining more convenient. At present, there is a Microsoft Outlook extension, Chrome browser extension, Mozilla Firefox add-on, Skype for Business plugin, and IBM Notes plugin available.

The guides for each are below:

- [Microsoft Outlook plugin, add-in](#)
- [Chrome extension](#)
- [Firefox add-on](#)
- [Skype for Business](#)
- [IBM Notes](#)
- [Slack](#): Zoom integration with Slack is also possible for subscribers. The app can be [downloaded here](#).

## Zoom Rooms

[Zoom Rooms](#) is a more advanced software offering available as a \$49 per month subscription. (There is also a 30-day free trial.) Zoom Rooms, a potential option for business owners who believe remote working will be the norm for the foreseeable future, combines audio conferencing, video conferencing, and wireless screen sharing. A PC running Zoom Rooms is the bare minimum requirement, but iPads, TV displays, and external speakers, cameras, microphones can all be integrated within one room.

You can find the Rooms client and controller software (iOS, Android, or Windows) in the Zoom [Download Center](#).

## Additional points

- When screen sharing, the "[optimize option](#)" is especially useful when sharing YouTube and other online videos as it can prevent distortion, lagging, and buffering issues.
- Hot Keys and keyboard shortcuts are available for Mac and Windows machines. A full list can be found [here](#).
- Meeting times: If you are experiencing connection issues at peak times, consider scheduling a meeting at times other than on-the-hour or on a half-hour.
- Need training for specific purposes, such as for education? Zoom offers over 30 [live training sessions](#) per week.
- If you need additional technical support, Zoom has an [online help center](#) that is worth a visit.

## Zoom's best practices

- Double-check meeting default settings
- Test your audio and video as you join
- Use a USB-connected headset
- Mute your microphone when not speaking
- Position your webcam properly
- If hosting, connect from a large screen
- For best results, use the app and not a browser
- Use a stable/wired connection
- Join meetings in quiet areas

## More Resources

- <https://blink.ucsd.edu/technology/file-sharing/zoom/guide/index.html>
- <https://www.zdnet.com/article/zoom-101-a-starter-guide-for-beginners-plus-advanced-tips-and-tricks-for-pros/> (The website that this document is taken from)
- <https://www.youtube.com/watch?v=bTSJ0YDoF7o> (20 minute YouTube video)
-