

Zoom User Guide

Joining a Zoom Meeting

Before joining a Zoom meeting on a computer or mobile device, download the [Zoom app](#), otherwise, you will be prompted to download and install Zoom when you click a join link.

You can also [join a test meeting](#) to familiarize yourself with Zoom.

Each meeting has a unique 9, 10, or 11-digit number called a [meeting ID](#) that will be required to join a Zoom meeting.

Note: If you are joining via telephone, you will need the [teleconferencing number](#) provided in the invite.

1. Open the Zoom desktop client.
2. Join a meeting using one of these methods:
 - Click **Join a Meeting** if you want to join without signing in.



- Sign in to Zoom then click **Join**.



Join

3. Enter the [meeting ID](#) number and your display name.
 - If you're signed in, change your name if you don't want your [default name](#) to appear.
 - If you're not signed in, enter a display name

Join a Meeting

Do not connect to audio

Turn off my video

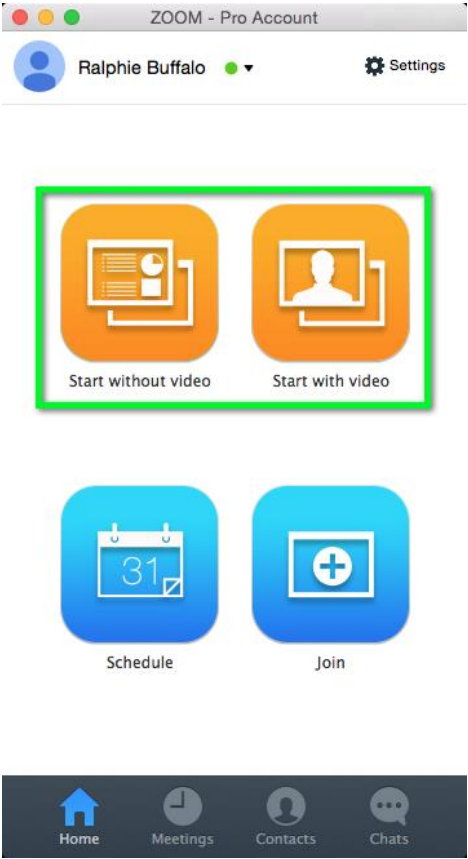
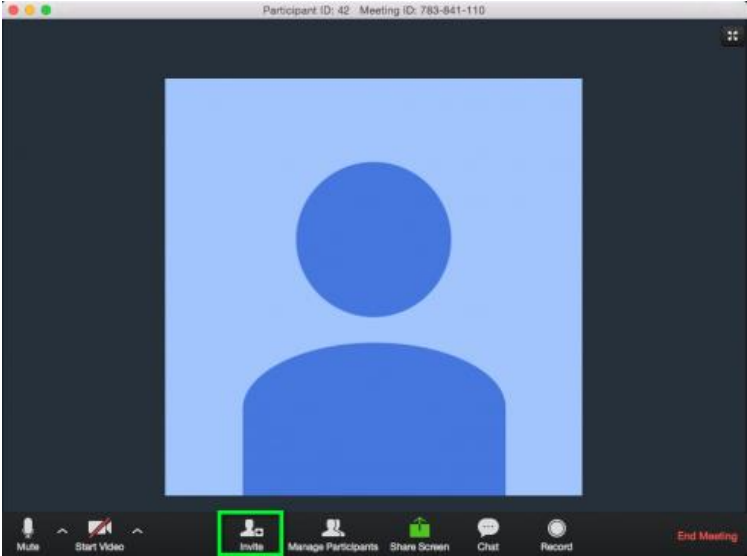
4. Select if you would like to connect audio and/or video and click **Join**

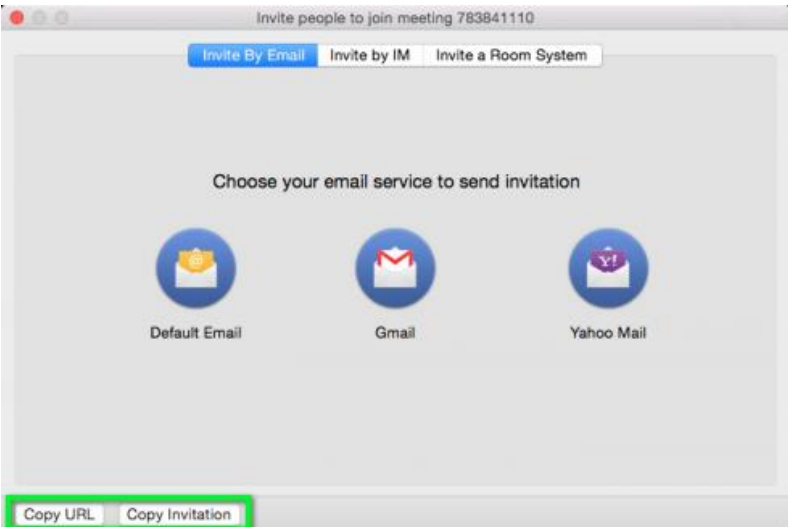
How to Host or Schedule a Zoom Meeting

Open the Zoom.us application.

Choose whether you wish to **HOST** a meeting immediately or **SCHEDULE** a meeting for later.

HOST a Meeting

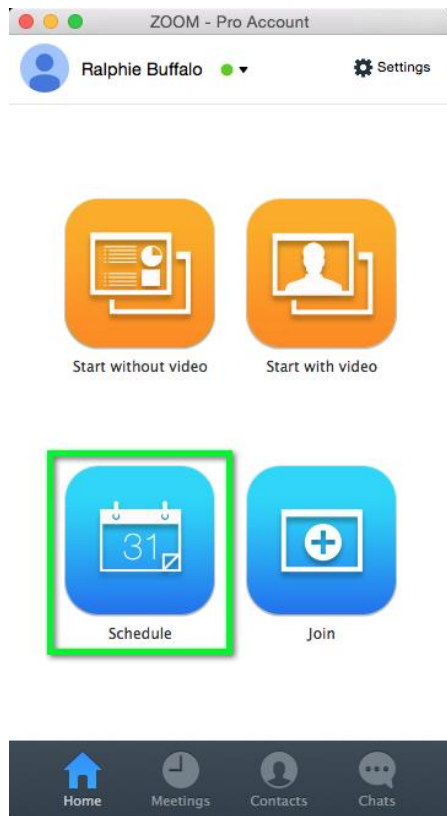
Step 1	Step 2
<p>Click either the Start without video or Start with video button, depending on your needs.</p>  <p>The screenshot shows the Zoom desktop application interface. At the top, it says 'ZOOM - Pro Account' and 'Ralphie Buffalo'. Below that are two orange buttons: 'Start without video' and 'Start with video', both of which are highlighted with a green border. Below these are two blue buttons: 'Schedule' and 'Join'. At the bottom, there is a navigation bar with 'Home', 'Meetings', 'Contacts', and 'Chats'.</p>	<p>Click the Invite button at the bottom of the meeting window.</p>  <p>The screenshot shows a Zoom meeting window. The title bar says 'Participant ID: 42 Meeting ID: 783-841-110'. The main area shows a blue placeholder for a video. At the bottom, there is a toolbar with several icons: Mute, Start Video, Invite (highlighted with a green border), Manage Participants, Share Screen, Chat, and Record. An 'End Meeting' button is visible in the bottom right corner.</p>

Step 3
<p>You can share the invitation in a few different ways:</p> <ul style="list-style-type: none">• Clicking the Copy URL button, then paste the URL into an email message to the participants you wish to invite.• Click the Copy invitation button, then paste the message into an email to the participants you wish to invite.• Click one of the email service buttons. Your chosen email service will appear with a preformatted invitation.  <p>The screenshot shows the 'Invite people to join meeting 783841110' dialog box. At the top, there are three tabs: 'Invite By Email' (selected), 'Invite by IM', and 'Invite a Room System'. Below the tabs, it says 'Choose your email service to send invitation'. There are three icons for email services: 'Default Email', 'Gmail', and 'Yahoo Mail'. At the bottom, there are two buttons: 'Copy URL' and 'Copy Invitation', both of which are highlighted with a green border.</p>

SCHEDULE a meeting

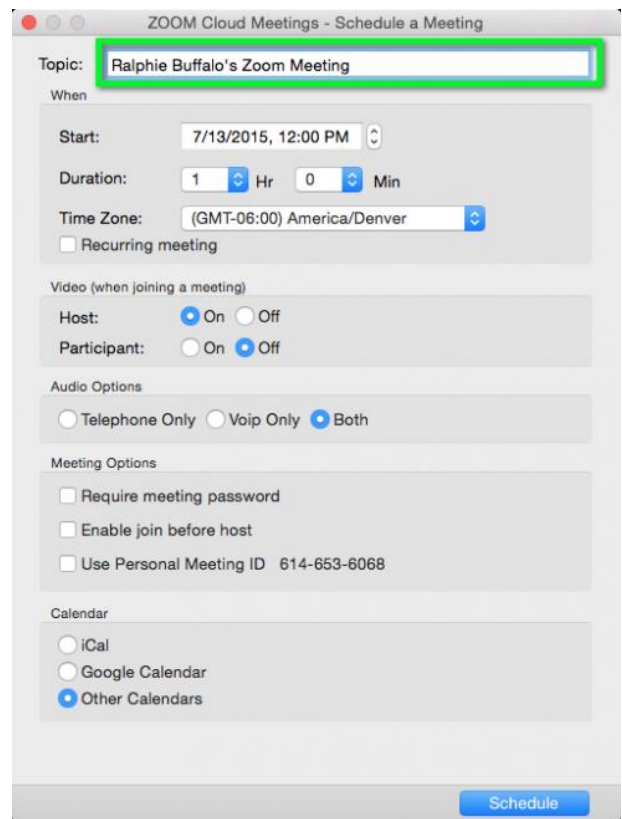
Step 1

Schedule a Meeting. Click the **Schedule** button.



Step 2

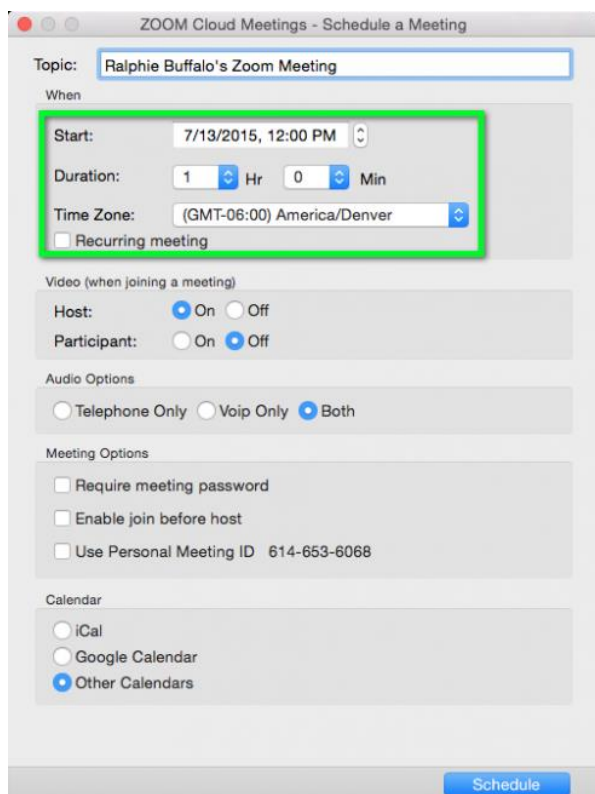
Enter a meeting title, in the **Topic** field



Step 3

In the *When* options, enter:

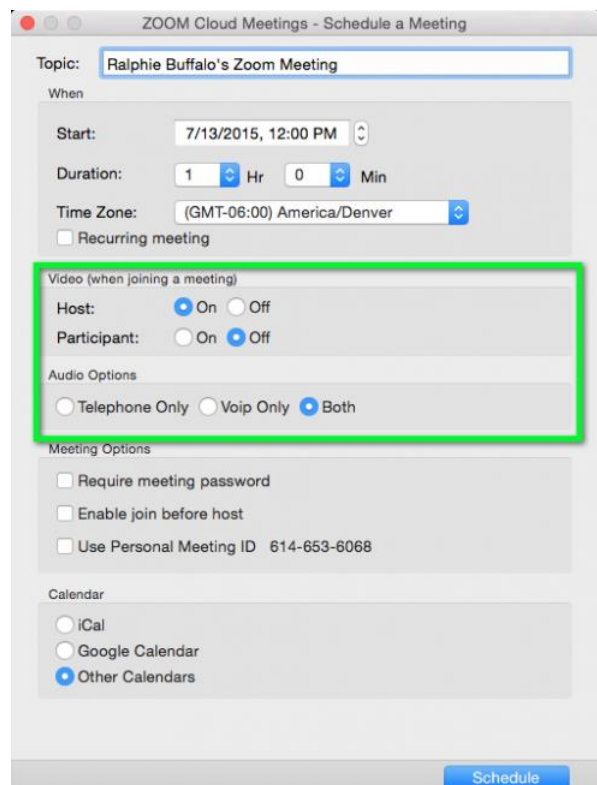
- **Start time, Duration** (only 45 minutes allowed for Basic accounts) and **Time Zone**.



Step 4

Choose from the following options:

- **Video:** *Host* and *Participant* video appearing when joining a meeting
- **Audio:** *Telephone*, *Voip Only* or *Both*



Step 5

Select additional **Meeting Options**, including Require meeting password, if desired.

Zoom Cloud Meetings - Schedule a Meeting

Topic:

When

Start:

Duration: Hr Min

Time Zone:

Recurring meeting

Video (when joining a meeting)

Host: On Off

Participant: On Off

Audio Options

Telephone Only Voip Only Both

Meeting Options

Require meeting password

Enable join before host

Use Personal Meeting ID 614-653-6068

Calendar

iCal

Google Calendar

Other Calendars

Step 6

Select which Calendar type you wish to create the invitation with. ***Note:** Selecting **Other Calendars** will allow you to copy and paste the meeting information into any calendar program.

Zoom Cloud Meetings - Schedule a Meeting

Topic:

When

Start:

Duration: Hr Min

Time Zone:

Recurring meeting

Video (when joining a meeting)

Host: On Off

Participant: On Off

Audio Options

Telephone Only Voip Only Both

Meeting Options

Require meeting password

Enable join before host

Use Personal Meeting ID 614-653-6068

Calendar

iCal

Google Calendar

Other Calendars

Step 7

Click the **Schedule** button.

Zoom Cloud Meetings - Schedule a Meeting

Topic:

When

Start:

Duration: Hr Min

Time Zone:

Recurring meeting

Video (when joining a meeting)

Host: On Off

Participant: On Off

Audio Options

Telephone Only Voip Only Both

Meeting Options

Require meeting password

Enable join before host

Use Personal Meeting ID 614-653-6068

Calendar

iCal

Google Calendar

Other Calendars

Step 8

Your meeting will be scheduled.

Click the **Copy to clipboard** button, then paste the information in your desired calendaring program in order to invite other participants

Zoom Cloud Meetings - Schedule a Meeting

Your meeting is scheduled.

Click the button below to copy the invitation to clipboard.

Hi there,

Ralphie Buffalo is inviting you to a scheduled Zoom meeting.

Topic: Ralphie Buffalo's Zoom Meeting
Time: Jul 13, 2015 12:00 PM (GMT-6:00) Mountain Time (US and Canada)

Join from PC, Mac, iOS or Android: <https://cuboulder.zoom.us/j/173861585>

Or join by phone:

+1 646 558 8656 (US Toll) or +1 408 638 0968 (US Toll)
Meeting ID: 173 861 585
International numbers available: <https://cuboulder.zoom.us/zoomconference>

Zoom Video Tutorials

Zoom can do more than a virtual face-to-face meeting. It can show what's on your screen to everyone else on the call, pass control of the meeting to another person, and record the call as a video...and so much more.

Zoom has developed training reference guides for; Meetings, Webinars and Online Events. They are located [HERE](#)

[Zoom Video Tutorials](#) are available to assist and have been broken down into the following:

Zoom Meetings and Webinars

Joining a Meeting	Scheduling a Meeting
Meeting Controls	Scheduling a Meeting with Google calendar
Scheduling a Meeting with Outlook	Assigning Scheduling Privilege with Outlook
Scheduling a Zoom Webinar	Breakout Rooms
Closed Captioning	All About Zoom Webinar

Audio, Video and Sharing

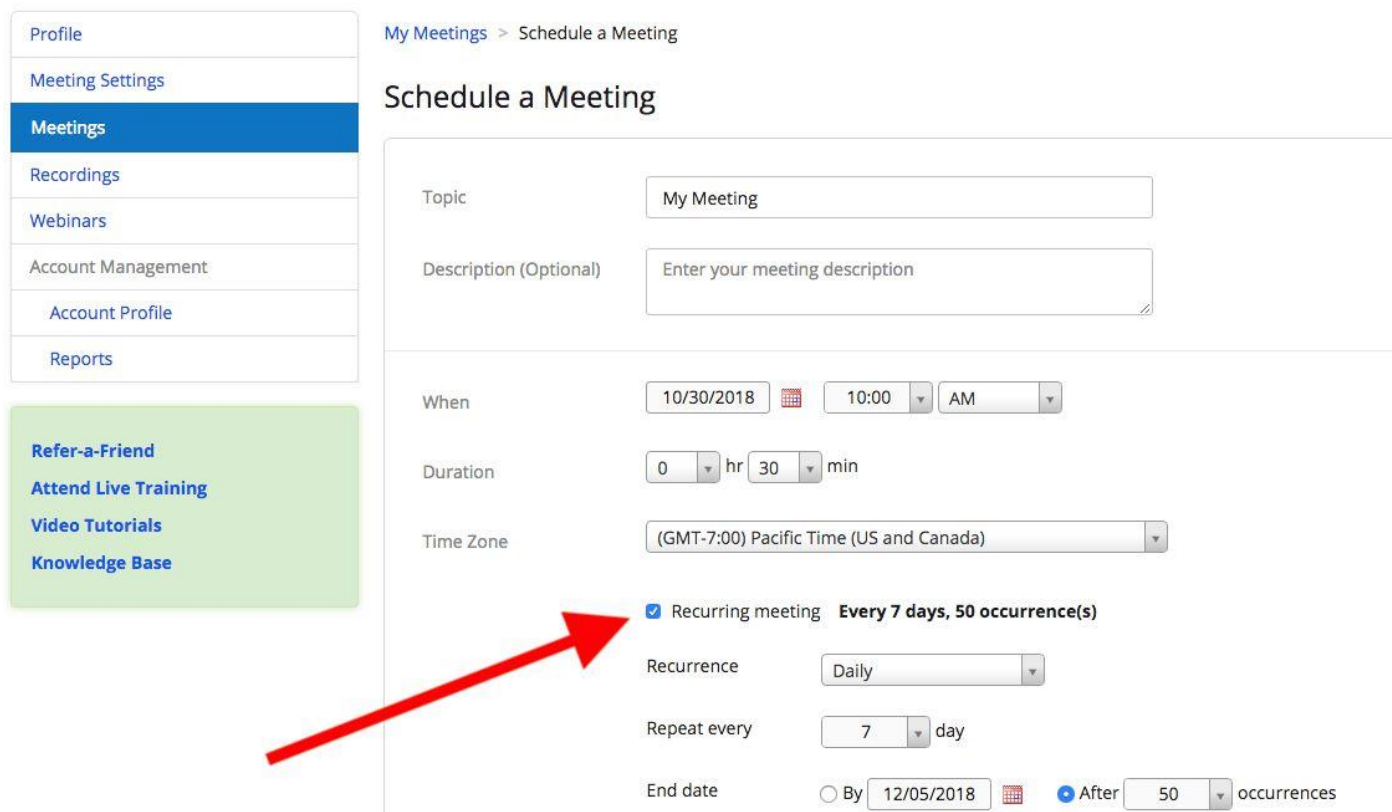
Recording a Zoom Meeting	Joining and Configuring Audio and Video
Sharing Your Screen	Sharing Multiple Screens Simultaneously

Live Training webinars. Zoom provides these daily and can be accessed [HERE](#) alternatively watch a recorded training session [HERE](#)

Zoom Conference Rooms – additional cost. Further information [HERE](#)

Zoom Top 10 Tips and Tricks:

1. Create recurring meetings with saved settings and one URL



The screenshot shows the 'Schedule a Meeting' page in the Zoom web interface. On the left is a navigation menu with options like Profile, Meeting Settings, Meetings (highlighted), Recordings, Webinars, and Account Management. Below the menu is a green box with links for 'Refer-a-Friend', 'Attend Live Training', 'Video Tutorials', and 'Knowledge Base'. The main content area is titled 'Schedule a Meeting' and includes fields for 'Topic' (My Meeting), 'Description (Optional)', 'When' (10/30/2018, 10:00 AM), 'Duration' (0 hr 30 min), and 'Time Zone' ((GMT-7:00) Pacific Time (US and Canada)). A red arrow points to the 'Recurring meeting' checkbox, which is checked. Below this, the recurrence is set to 'Daily', repeating every 7 days, and ending after 50 occurrences.

For weekly meetings, monthly check-ins, and other regularly-scheduled calls, create a recurring meeting.

There are two benefits. First, it lets you lock in all the call settings you want once and have them be in place every time you meet. Second, recurring calls use the same join URL each time, so you never have to send a fresh one to attendees.

Additionally, if you meet with the same group regularly but not on a regular schedule, you can choose an option called No Fixed Time, which lets you use the same settings and meeting ID over and over with the same group, no matter when you get together.

Note: All recurring meeting IDs expire after one year, so you'll have to generate a new one then.

2. Record the call as a video

Zoom lets you record your web conferencing calls as videos, a handy feature for sharing the meeting with people who may have missed it or for reviewing what was said.

When you record, you must choose whether to use the local or cloud option.

Local means you store the video file yourself ie on your computer. With Cloud, which is for paying members only, Zoom stores the video for you in its cloud storage (different account types come with different amounts of storage). One convenience of the cloud option is that people can stream the video in a web browser once it's ready.

When creating a video from a conference call, it makes a big difference in the final quality to optimize a few settings in advance. For example, some calls might be broadcast-style, where only the host appears on screen. In that case, set Zoom to only record the audio and video of the host. Other calls might be in the style of a collaborative meeting, in which case you want to record everyone. Be sure to [explore Zoom's settings](#) at least a few minutes before recording a call.

Requirements: To record videos, you need Zoom on macOS, Windows, or Linux. If you don't see the option to record, check your settings in the web app (under [My Meeting Settings](#)).

If you record meeting attendees' video or audio, inform them before you do.

3. Co-host calls

Meetings can have more than one lead person.

To use co-hosting tools, first enable it in [Zoom's Meeting Settings](#). Look for the Meeting tab and choose the **Co-host** option. Then, when you start a meeting, wait for your co-host to join, and add the person by clicking the three dots that appear when you hover over their video box.

Alternatively, you can go to the Participants window, choose **Manage Participants**, hover over the co-host's name, and select **More** to find the Make Co-Host option.

Requirements: To use co-hosting, you need a Pro, Business, Education, or API Partner account with Zoom, and you need to run on macOS, Windows, Android, or iOS (not Linux or web). If the option doesn't appear, ask your account administrator to enable the settings in the Meeting tab for co-hosting privileges.

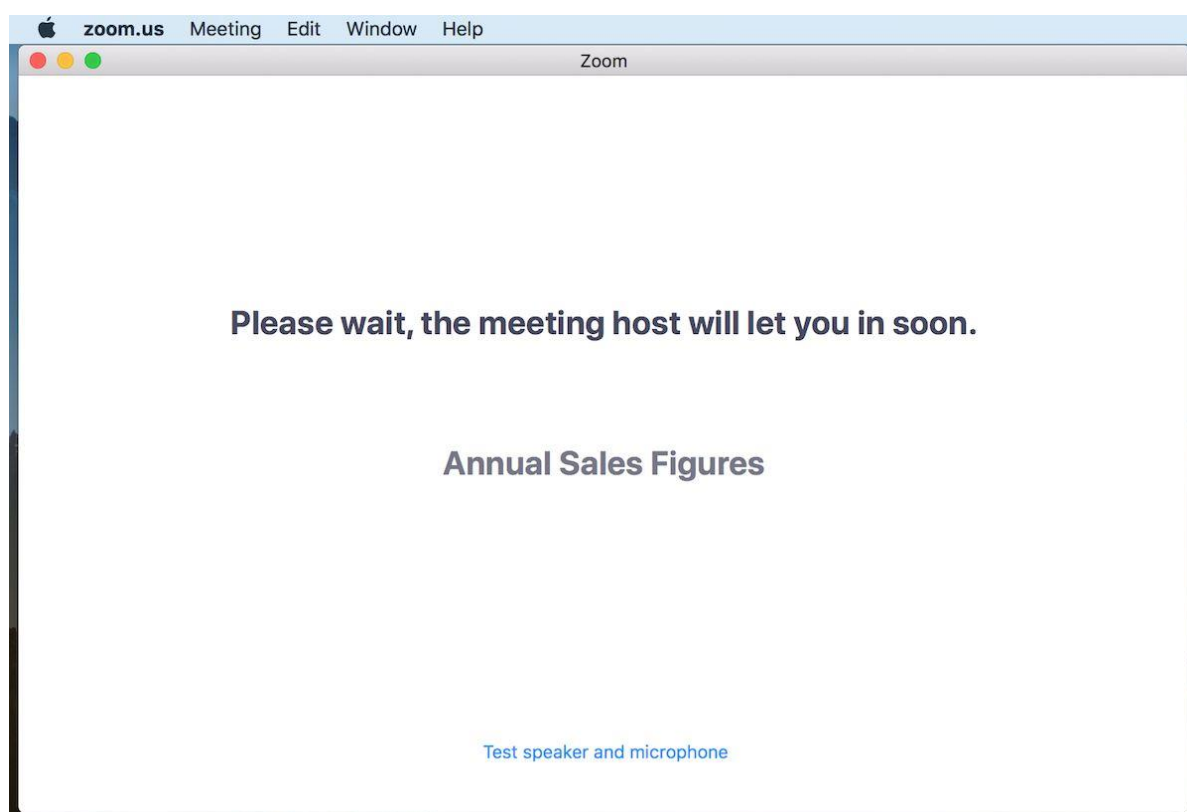
4. See who attended

Say you're using Zoom to hold a press conference or training session. You probably want to know who attends. You can get that information from a report once the meeting is finished.

The attendee list for all meetings lives in the Zoom Meetings tab in the Reports section. You'll see a list of both previous and upcoming meetings, which you can filter by time range or meeting ID. When you find the meeting or meetings you want, click **Generate** and then select **Registration**.

Requirements: To generate an attendee list, you need to be the 1) the host of the meeting, 2) in a role with Usage Reports enabled, or 3) an account administrator or owner. You also need a Pro, API Partner, Business, or Education plan.

5. Give attendees a waiting room

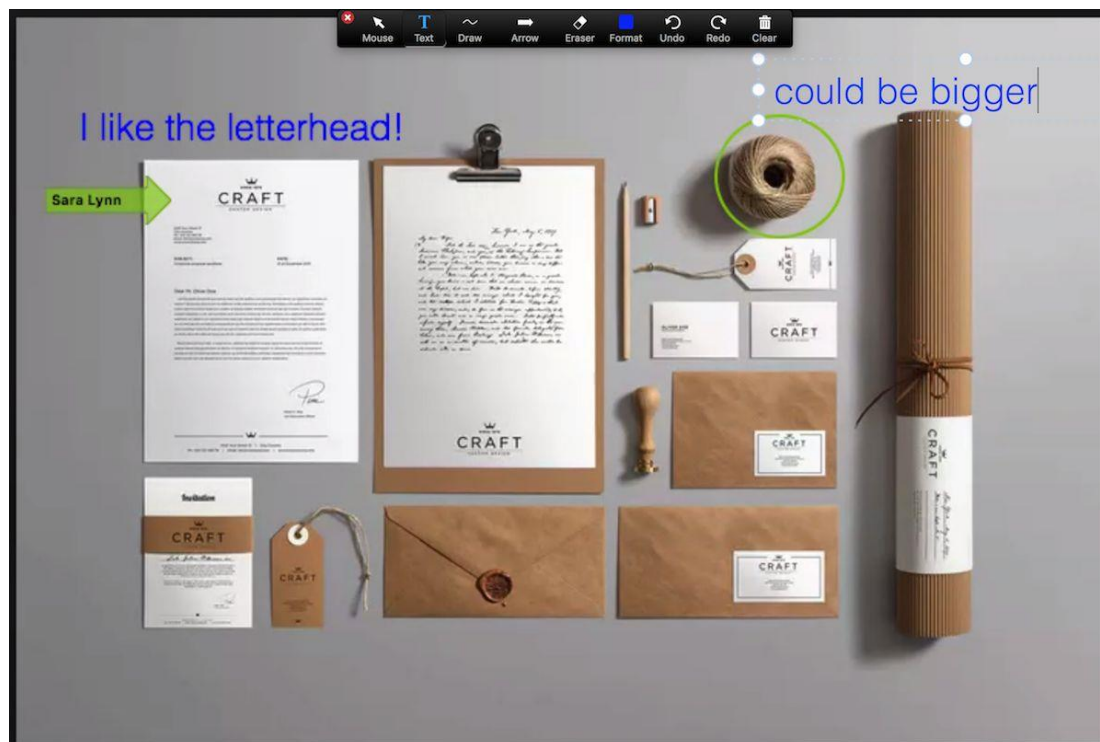


Zoom lets attendees get into a video call with or without the host being present. Small groups sometimes like this option because they can have a few minutes to chit-chat before the meeting officially kicks off.

In some situations, however, it could be in poor form to have attendees in a virtual room together, waiting for you to start. A better solution is to create a virtual waiting room, where attendees remain on hold until you let them in all at the same time or one by one.

Precisely [how you enable a waiting room](#) depends on the type of account you have. When you set one up, however, you can customize what the attendees see while they await your grand entrance.

6. Have a collaborative annotation session



Screen sharing allows the host of a call to display whatever's on their screen to everyone else on the call. Annotation tools let all the meeting participants draw and highlight what's on screen, which can be immensely helpful when discussing visual materials, such as mockups, graphic designs, and so forth.

To annotate while viewing someone else's shared screen, select **View Option** from the top of the Zoom window, and then choose **Annotate**. A toolbar appears with all your options for annotating, including text, draw, arrow, and so forth. The presenter can use the save button on the toolbar to capture the complete image with annotations as a screenshot. You can also disable attendee annotation altogether.

7. Collect information from attendees

Meeting Registration



Topic	Jill's Test Collaborative Meeting for Mockups
Description	A collaborative annotation meeting for testing purposes
Time	Oct 25, 2018 4:00 AM in Pacific Time (US and Canada)

First Name*	Last Name*
<input type="text"/>	<input type="text"/>
Email Address*	Confirm Email Address*
<input type="text"/>	<input type="text"/>

In addition to getting an attendance sheet, you can also gather information from meeting attendees about themselves before they join the call. For example, you might want to require that attendees provide their name, company affiliation, or industry.

To collect this information, first you need to require Registration, an option found in the My Meetings tab of the Zoom web app. Then, you can set up a form that attendees must fill out before they can join the meeting.

For the registration form, Zoom provides standard fields, such as name and company affiliation, that you add using checkboxes. To add new questions or fields, jump over to the tab called Custom Questions.

Requirements: To require attendee information, the host must have a Pro account. Additionally, the meeting cannot be your Personal Meeting ID.

8. Let someone else schedule your meetings

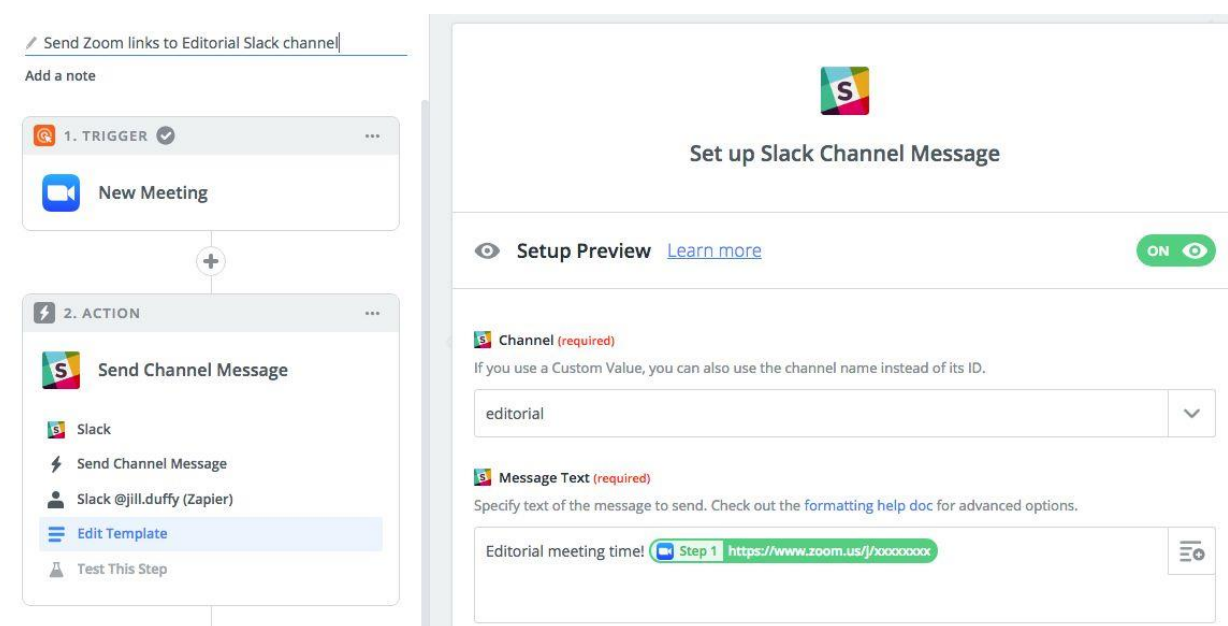
People who work with an assistant will love this option in Zoom that gives scheduling privileges to someone else. Whoever manages your calendar can now schedule Zoom calls for you.

To set up the scheduling assistant privilege, log into Zoom, open **Meeting Settings**, and look under Other. You'll see a plus sign next to Assign Scheduling Privilege. Add your scheduling assistants by typing their email addresses and finish by clicking **Assign**.

After you add your scheduling assistants, they must log out of Zoom and log back in for the feature to take effect. From this point on, assistants can create meetings for others by using the Schedule tool. Look for Advanced Options or Meeting Options (depending on which version of Zoom you use), and follow the prompts to create a new meeting.

Requirements: The primary Zoom account holder and everyone who receives scheduling privileges must all have Pro or Corp licenses. And for webinars, both account holder and scheduler must have webinar licenses.

9. Automatically post Zoom meeting links in Slack



The image shows a Zapier automation workflow. On the left, a 'Send Zoom links to Editorial Slack channel' Zap is visible. It has two steps: 1. TRIGGER: 'New Meeting' and 2. ACTION: 'Send Channel Message'. The 'Send Channel Message' step is expanded to show configuration for Slack. On the right, the 'Set up Slack Channel Message' configuration window is shown. It includes a 'Setup Preview' toggle (ON), a 'Channel (required)' dropdown set to 'editorial', and a 'Message Text (required)' field containing the text 'Editorial meeting time!' followed by a Zoom link 'https://www.zoom.us/j/xxxxxxx'.

Here's a tip to reduce the amount of work needed for team meetings. Set up an automation (also called a Zap) so that any time a new team meeting in Zoom kicks off, the Zoom link gets posted to the appropriate channel in Slack automatically. For further information [use this Zap](#)

Requirements: To set up integrations between Zoom and Zapier, you need a paid Zoom account. Free account holders don't have access to the Zoom API.

There are many other examples of **Zoom Integrations** [HERE](#) such as; add Zoom meetings to Google Calendar; add Zoom webinar registrants to MailChimp as a subscribers, and use Eventbrite attendees to create Zoom webinar registrants.

10. Learn a few essential keyboard shortcuts

If you use Zoom more than once a week, there are a couple of keyboard shortcuts worth learning to save you oodles of time.

- *I is for invite.* Press Cmd+I (macOS) or Alt+I (Windows) to jump to the Invite window, where you can grab the link to the meeting or send invitations to others via email.
- *M is for mute.* Press Cmd+Ctrl+M (macOS) or Alt+M (Windows) when you are the meeting host and want to mute everyone else on the line.
- *S is for share.* Press Cmd+Shift+S (macOS) or Alt+Shift+S (Windows) to share your screen.