Zoom Cloud Meetings: Leader Guide

Zoom is a cloud-based conferencing solution that provides both video conferencing and screen share capabilities. Zoom can be used for meetings among individuals or to conduct interviews for potential hires. Zoom is similar to WebEx, GoToMeeting, Adobe Connect and Blackboard Collaborate and should be familiar to you if you have used any of these products. This guide will help you conduct successful Zoom meetings from your desktop or mobile device.

To Set Up a Zoom Account:

1. Open a web browser (Safari, Chrome, Firefox or Internet Explorer) and go to
   https://tennessee.zoom.us.
   a. Select **Create or Edit Account**.
   b. **Log in** with your UTC ID and password.
   c. Complete your profile information. You can also upload a profile picture. The profile picture you have on the UTC webpage is recommended. Don't check any of the boxes at the bottom because the default options are all you will need.
   d. Select **Save Changes**.
2. You will need to download and install the Zoom software.
   a. If you try to start a meeting, it will automatically download the software.
      If you have already installed the Zoom software, skip to step #6 in the "Zoom Application" Section below.
   b. You can also go directly to this link to download the software:
      https://zoom.us/support/download
   c. If you are using an Apple or Android mobile device, you can download the Zoom app from the Apple App Store and for Android from Google Play. At either site, search for **Zoom** and look for the blue video camera icon.
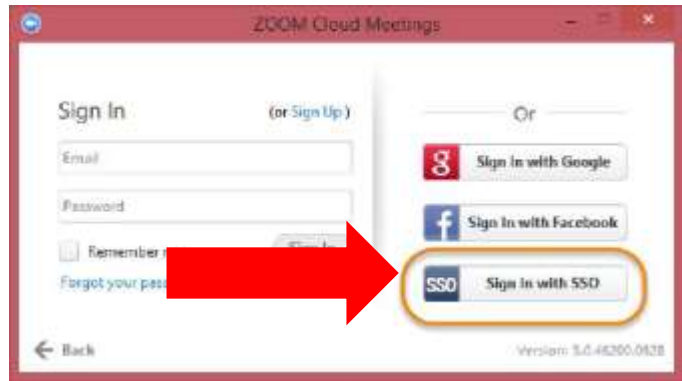   d. Go through the installation procedure on your computer or mobile device to install the software.

The Zoom Application:

1. Once you have installed the Zoom software on your computer or mobile device, click on the Zoom Icon.
2. When you launch Zoom the first time, you will be asked if you want to join or sign in. Click **Sign In.**
3. Click the **Sign in with SSO** button on the right. DO NOT enter your email and password on the left.

4. When prompted for the SSO site URL, enter https://tennessee.zoom.us and click Continue.
5. You will now see a NetID login page for UTK. Enter your UTC ID and password here (you may need to scroll up to see where to enter your credentials).
    a. We are partnering with UTK for this software, which is why you see the UTK design. Your UTC ID and password will work here.
    b. Once you have chosen this option the first time, this will be the default the next time you open and use Zoom.
6. Upon launching the application, you'll see the Zoom Home screen. This is the main set of controls for Zoom. From here there are several options.
    a. **Start with Video (or without video)**: This starts an instant meeting where you can invite others to join you or join into an existing meeting.
        1. This will be the most frequently used option.
   2. **Note:** You will need to use this option to join an H.323 videoconference system.
    b. **Schedule**: This will allow you to schedule a meeting. This option works well with your default calendar system (Outlook) and will generate an email message that you can send to your participants and will create an event on your calendar.
    c. **Join**: This will allow you to join a meeting that is already in progress by entering the Meeting ID.
    d. **Meetings**: This will give a list of upcoming meetings and links to start, edit, or delete each meeting.
    e. **Contacts**: This will give a list of available contacts and status of each (account holders only).
    f. **Chat**: This is an area to chat (instant message) with contacts who are active (account holders only).
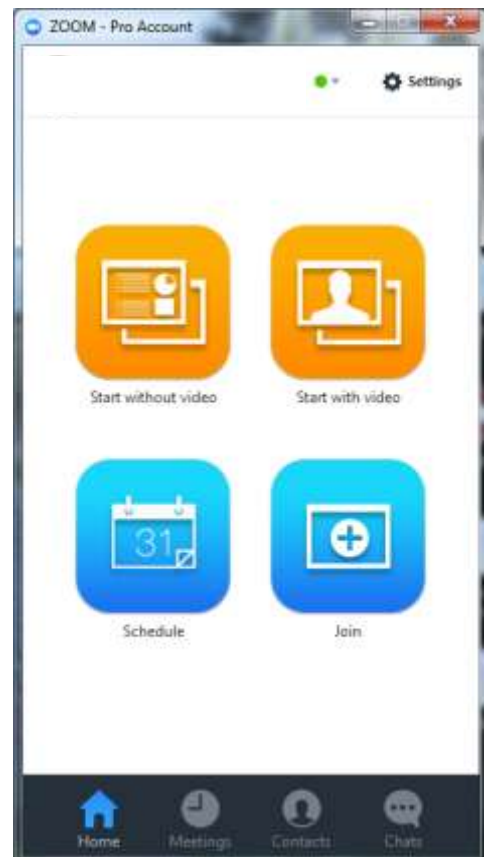
Scheduling a Meeting in Zoom:

1. To schedule a meeting with Zoom, you must first log in to your account and select the **Schedule Meeting** option on the home page.
2. A new window will open where you can set the name, date, time, and duration of the meeting, as well as many other options.
   a. **Title (or Topic)**
   b. **When:**
      Start Date, Time and Duration
      1. Is this a recurring meeting? Choose this if you want the meeting to be persistent and use the same link. Links are active for one year.
   c. **Video:**
      Who has the ability to share video?
   d. **Audio options:**
      What audio options do you want (over computer, over telephone or both)?
   e. **Meeting Options:**
      1. Require a password to join?
      2. Enable join before host. Participants will be able to join the meeting and converse before you arrive or don't arrive.
      3. Use your Personal Meeting ID (**PMI**). More on this feature below.
   f. **Calendar:**
      What is your default calendar (most likely Outlook)?
   g. When finished, click **Schedule** and Zoom will create a meeting/event in your Outlook. Zoom automatically prepares the event invitation with all the relevant information that you may send to participants via email. A sample email is provided below and will include information for connecting with the Zoom app, calling in via telephone or connecting with an H.323 system.

Zoom - Schedule a Meeting

Topic: Zoom Meeting

When
Start: Thu July 23, 2015 ▾ 11:00 AM ⏶⏷
Duration: 1 ▾ Hr 0 ▾ Min
Time Zone: (GMT-4:00)Eastern Daylight Time
☐ Recurring meeting

Video (when joining a meeting)
Host: ● On ○ Off
Participants: ● On ○ Off

Audio Options
○ Telephone Only ○ Voip Only ● Both

Meeting Options
☐ Require meeting password
☐ Enable join before host
☐ Use Personal Meeting ID ▮▮▮▮

Calendar
● Outlook
○ Google Calendar
○ Other Calendars

Schedule

Hello,

You are invited to a Zoom class session/meeting now.

Join from a PC, Mac, iPad, iPhone or Android device:

   Please click this URL to start or join. https://tennessee.zoom.us/j/4234252149
   Or, go to https://tennessee.zoom.us/join and enter meeting ID: 423 425 2149

Join from dial-in phone line:

   Dial: +1 646 568 7788 or +1 415 762 9988
   Class Session/Meeting ID: 423 425 2149
   Participant ID: Shown after joining the meeting
   International numbers available: https://tennessee.zoom.us/zoomconference

Join from a H.323/SIP room system:

   Dial: 162.255.36.11 (US East) or 162.255.37.11 (US West)
   Meeting ID: 423 425 2149

Thank you.
The UTK Course Delivery Team

Starting a Meeting:

1. There are 3 ways to start a meeting in Zoom. After launching the Zoom application and logging in:
    a. First, you can select **Start with/without Video**.
        1. This will start an instant meeting with a meeting ID (either generated by Zoom or your PMI). From here you can invite participants by selecting the **Invite** option on the bottom bar of your video screen. This will bring up another window where you can invite via email, Instant Message or Connect to a Room System. You can also select **Copy URL** to copy the URL of your meeting to send to a participant, or **Copy Invitation** which will copy the additional information for using a telephone or H.323 system.
        2. The email function will use your email client to generate a message to send via email similar to the **Schedule** function above.

3. The Instant Message function will do the same as the email function, but will instead go to current contacts you are using.

b. Second, you can go to the **Meetings** tab on your home page and select a meeting from the list if you have one scheduled. See **Scheduling a Meeting in Zoom** above.

c. Third, you can select **Join** from the Zoom Home Page to join a meeting already in session. You will need to know the Meeting ID (9-10 digits) that you want to join.

2. Once you have selected one of the above options, you will then see a new video window pop-up. Below is an image and a description of all the options. You will be prompted to **Join Audio**. Select **Join Computer Audio**.

a. **Microphone** – turn your microphone off or on
b. **Audio** – Change your audio settings between joining by phone or joining by computer
c. **Video** – turn your video off or on
d. **Settings** – Zoom settings (see below)
e. **Invite** – Invite or add participants (see Starting a Meeting 1a above)
f. **Manage Participants** – View participants and adjust individual or group settings including microphone, access rights, name displayed and participation

g. **Share Screen** – Allows you to share your screen. You will be asked to choose which monitor to share or which open application to share. When you share your screen, the main
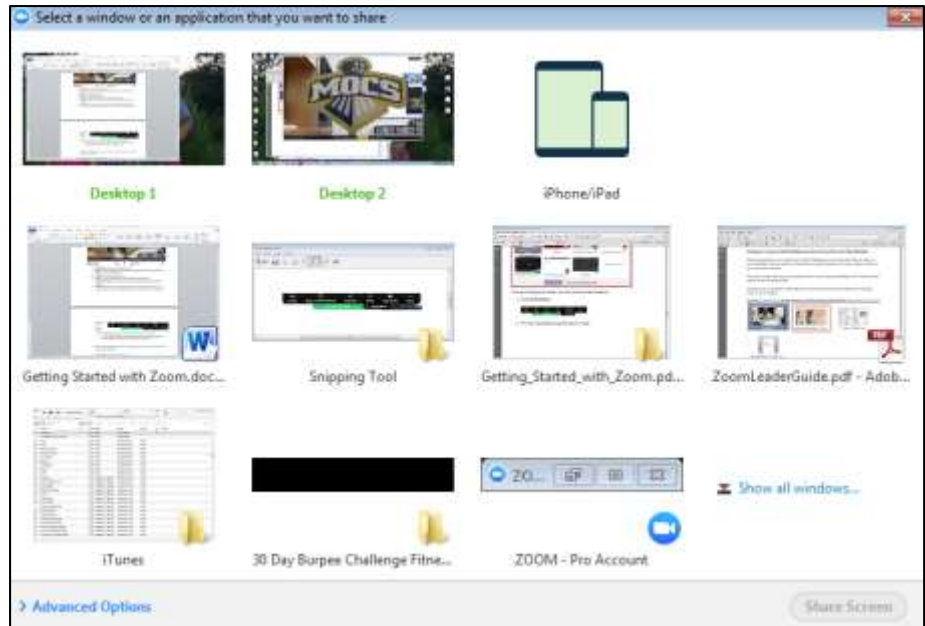
Zoom video window will minimize and be replaced with this small window at the top of your screen.

1. From here you can annotate over what you have on your screen and others in the meeting can annotate over what you are showing as well.
2. You may also control participants' screens remotely by selecting **Remote Control** and choosing the participants' name.

h. **Chat** – Chat with participants in your current meeting. You can chat with all or chat with individual users privately.
i. **Record Meeting** – Record current meeting/stop recording.
1. You can record Zoom meetings. Once you end the meeting, the system will automatically convert the video file to an .mp4 that stores locally on your hard drive.
2. **Note**: if you record the meeting, other participants will be notified that you are recording as well.
j. **Full Screen** – Move meeting window to full screen mode.
k. **End Meeting** – You can either **End Meeting for All** or **Leave Meeting.**
1. End Meeting for All will remove all participants from your meeting when you (the host) leave the meeting.
2. Leave meeting will remove you from the meeting and allow any other participants to continue to meet.
3. **Note:** If you are the meeting host, you will need to assign a new host before you leave the meeting.
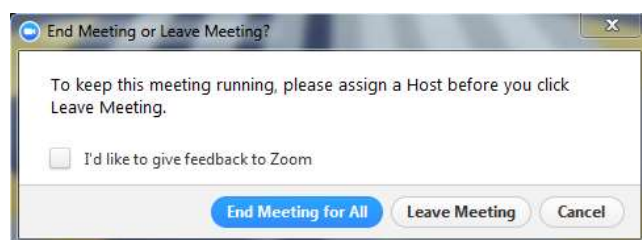
About your Personal Meeting ID (PMI):

Your Personal Meeting ID (PMI) is a meeting ID that is unique to you. By default, the system selects one for you when you create your account. We recommend that you edit that PMI to be your office phone number. That way, it will be unique to you and you won't forget it.

To edit your PMI, follow these steps:

1. Launch Zoom from your desktop.
2. Select the **Meetings** tab.
   a. You will see your PMI at the top.
   b. Select **Edit**.
   c. Select **Change your Personal Meeting ID**.
   d. Type in your office number and select **Apply**.
   e. Select **Save**.
   f. Close the window.

Below where your PMI is shown, there is a small box that says **Always use PMI for instant meetings on this computer**. Only check this if you are on your own computer or device. DO NOT check this if you log in to Zoom on a shared computer.

**Be aware that when you use your PMI for a meeting, another participant could enter in the meeting with you if you are active and they know your PMI. Therefore, if you wish to use Zoom for confidential meetings or interviews, we suggest either enforcing a password to enter the meeting or allowing the system to generate a unique meeting ID for you when you schedule a meeting.

About Audio:

While in a meeting with several participants, audio may become a challenge. Because there are so many open microphones and participants speaking you may encounter audio feedback. There are a few things you can do to prevent or minimize distracting feedback:

1. Ask participants to mute their mic until they are ready to speak and to mute their mics when they are done.
2. Encourage the use of a computer headset which changes the microphone and audio output for the participants so as not to cause feedback.

Adjusting General Settings:

Zoom settings can be accessed from two places:

1. On the Home page, to the right of your Account Name
2. On the lower bar while in a meeting (see "MOCS" image above and locate the letter d)
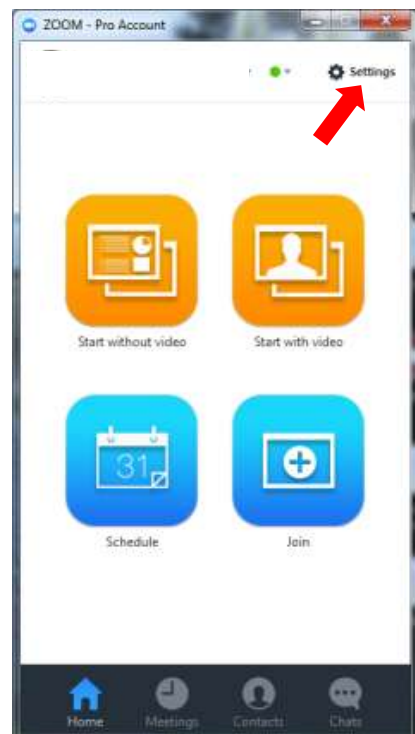
In the Settings menu, you have these options:

1. **Audio:** test, select, and adjust your speakers and microphone.
2. **Video:** test and select your video camera and see a preview of your video.
3. **General:**
   a. The default options are fine, however, in this instance it is recommended that you **uncheck** the option **Start Zoom when I start Windows**.
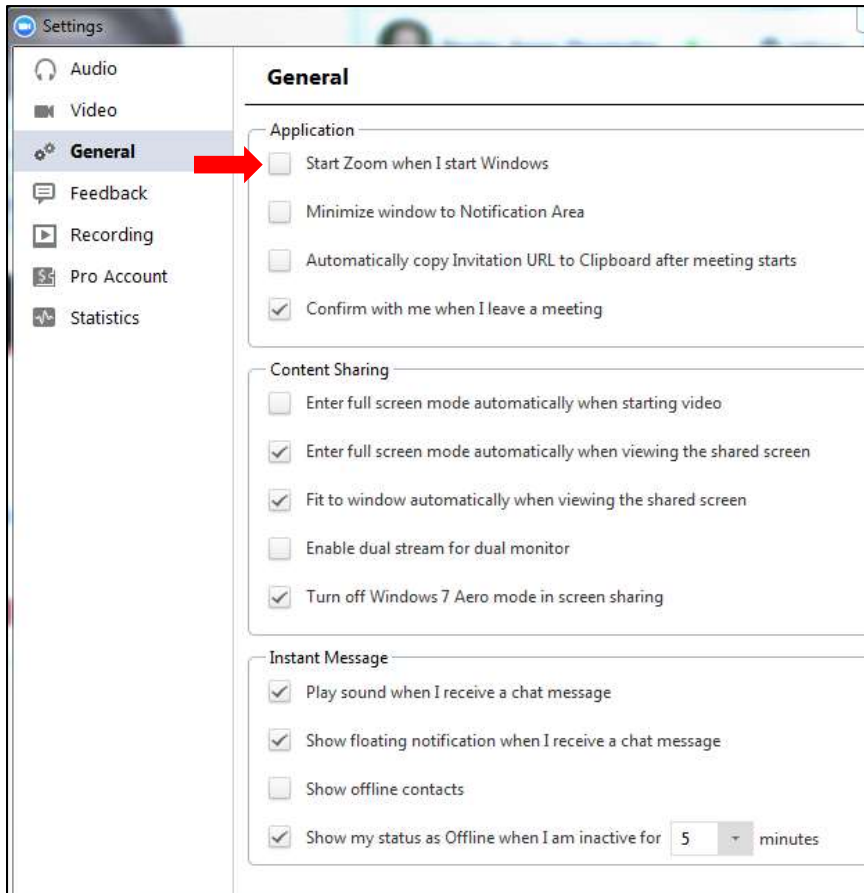
4. **Feedback:** send questions or comments directly to Zoom.
   a. **Note**: this does not go to anyone at UTC.
5. **Recording:** Here you can browse/open your stored meeting recordings. You can also select a new folder location for your meeting recordings. All meeting recordings are stored on your local device or computer.
6. **Pro Account:** Here you can upgrade your account, but there is no need to. You already have a Pro Account and there is nothing available above that.
7. **Statistics**: This shows your current statistics for overall, audio, video and screen sharing.