

Zoom Video Conferencing Quick Start Guide

This guide provides basic instructions to schedule and run a video conference meeting. You can find more detailed instructions starting after the Quick Start guide. You may also control-click on the highlighted words in the quick start guide to be taken directly to the section which provides greater detail on that topic.

1. **Schedule the meeting** (from your computer; provided the prerequisites are installed on your computer):
 - From your Outlook calendar screen, under the *Home* tab (top of screen), within the *Zoom* group, choose “Schedule a Meeting.”
 - On the Zoom launch window, type in the credentials below (make sure the “*Keep me logged in*” checkbox is **NOT** checked) and then click *Sign In*.
 - Email: thergert.zoom@vision-forward.org
 - Password: Vfazoom1
 - In the Zoom – Schedule a Meeting window, select your desired options and click *continue*.
 - The next screen is a traditional *Outlook* meeting invite window. Address the invitation with attendees, edit the subject if desired, leave the location with the web link already populated, adjust the date/time fields as needed, edit the meeting notes if desired, and click *Send*.

2. **Running the meeting from the 2 North conference room:**
 - Gather the wireless keyboard, mouse, remote and USB table microphones and bring them to the conference table. If the mouse does not work, check the power switch on the bottom of the mouse.
 - Press the *Watch TV* button on the remote to turn on both the screen and the sound system. If the computer does not display on the TV, turn the computer on, located under the table. When the nature scene and time display, hit the escape key and login as *presenter*, with password of *staff*.
 - Click the *Zoom Meeting Software* icon on the desktop, opening the Zoom home screen. If it is not signed in, click the *Sign In* link and use the following credentials:
 - Email: thergert.zoom@vision-forward.org
 - Password: Vfazoom1
 - In the Zoom window, choose *Meetings* and find your meeting in the drop list.
 - Choose *Start*.
 - Click *Join Audio Conference by Computer* button to enter the meeting.

3. **Managing the Meeting:**
 - While in a meeting, you will see live video of the other attendees. To adjust how attendees are displayed on the screen, click on *Enter Full Screen*, *Gallery View* or *Speaker View* (located at the top right of your window).
 - You now have access to the following meeting functions: mute, stop video, invite, manage participants, share screen, chat, record and end meeting.

4. **Attending a meeting:**
 - The email you receive will contain links to join the meeting from your computer, from your iPhone or mobile device, or by telephone. If you accept the meeting

into your Outlook calendar, you will need to return to your calendar at the meeting time to find the links to join the meeting within the notes section.

- **If you join by computer**, you will want to make sure you have functional web cams and microphones before joining the meeting.
- **If you join by a mobile device**, you will be prompted to download the *Zoom* app and join as guest the first time you attempt to join a Zoom meeting.

5. **[Transferring a recorded meeting:](#)**

- After your meeting, you may complete the [instructions in our detailed manual](#) or contact Troy to have the recorded meeting put in your home documents folder.

6. **[Wrapping up a meeting:](#)**

- After you have exited your meeting by using the *End Meeting* button in the Zoom window, please shut down the computer.
- Also press the *Power* button once on the remote to turn off the screen and sound system.
- Return all items to the side table.

Zoom Video Conferencing

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Prerequisites

The *Zoom Client for Meetings* must be installed on **your** computer before you can host, attend and/or manage meetings.

Zoom's Microsoft Outlook Plugin must be installed on **your** computer before you can schedule a meeting directly from Outlook Calendar.

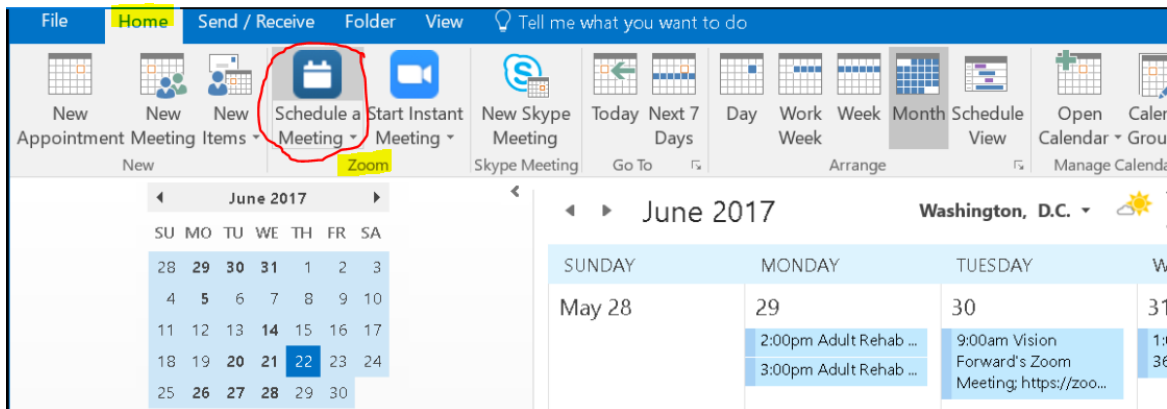
To install these, the following two utilities must be run from the *Share\general\it\zoom* folder:

1. Go to *Share\general\it\zoom* folder.
2. Double click on **ZoomOutlookPluginSetup.msi** and then click on **Run**. After this is installed, you must restart Outlook for the Zoom options to be available.
3. Return to *Share\general\it\zoom* folder.
4. Double click on **ZoomInstaller.exe** and then click on **Run**. This will install the *Zoom* icon on your desktop (where you manage meetings).

Note that these prerequisites are necessary on your *own personal* computers but **not** on the "2 North" Conference Room computer.

Scheduling a Meeting (from Outlook on your computer)

1. Open your *Outlook Calendar*.
2. Under the *Home* tab, within the *Zoom* group, choose “*Schedule a Meeting*.”

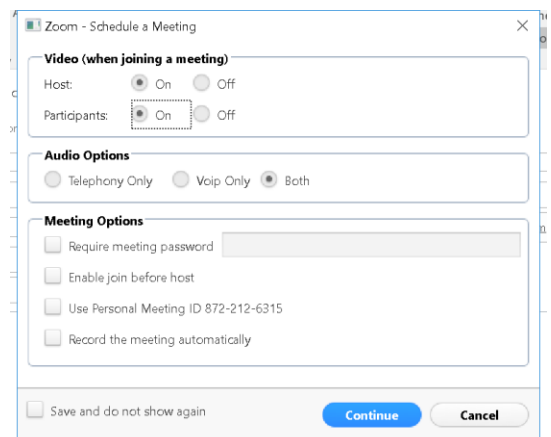


3. You will see the *Zoom launch* page. Click *Sign In*.
4. You will be asked to login with the credentials below (make sure the “*Keep me logged in*” checkbox is **NOT** checked):

Email: thergert.zoom@vision-forward.org
Password: Vfazoom1

5. A *Zoom – Schedule a Meeting* window will open with options for you to customize. Please use the following configuration.

- Video (When joining a meeting)
 - Host - **on**
 - Participants – **on**
- Audio Options
 - **Both**
- Meeting Options (Choose the options that best fit your meeting needs.)
 - Require meeting password
(*participants required to enter a password to join the meeting*)
 - Enable join before host
(*participants can start meeting before the host joins*)
 - Use Personal Meeting ID (*Uses same meeting ID for every meeting you create*)
 - Record the Meeting automatically (*recording will begin once the meeting begins. Host may start/stop recording at any time*)



7. Click **Continue**.
8. The next screen is a traditional *Outlook* meeting invite window. Address the invitation with attendees and edit the subject if desired, leave the location with the web link already populated, adjust the date/time fields as needed, edit the meeting notes if desired, and click **Send**.

Hosting a Scheduled Meeting Room***

Complete these steps in the “2 North” Conference Room

1. Using the remote on the table, press the “**Watch TV**” button, which will turn on both the screen and the sound system.
2. If the computer does not display on the TV, turn the computer on, located under the table. Lift the table cloth; hit the escape key and login using the following credentials:

Username: presenter

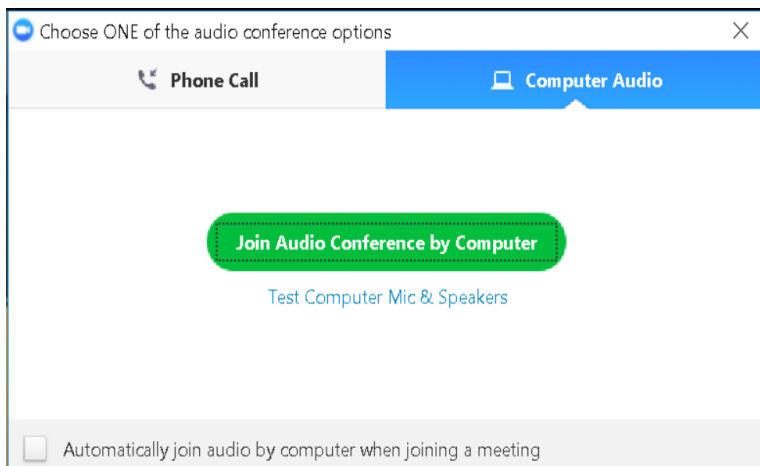
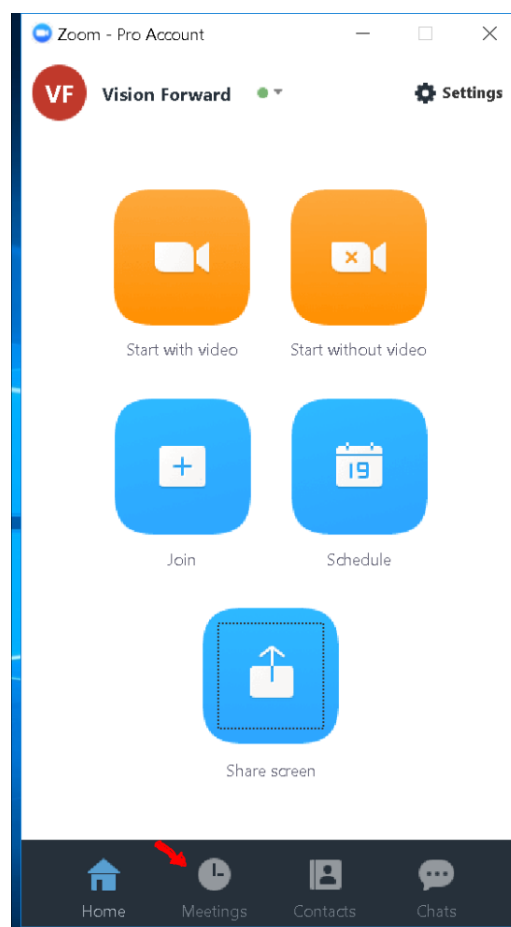
Password: staff

3. Feel free to move the wireless keyboard and mouse to the conference table.
4. Click the **Zoom Meeting Software** icon on the desktop, opening the *Zoom Desktop App* to the *Zoom* home screen. This computer *should* automatically be signed in with the appropriate account and password. However, if it is not, click the **Sign In** link and use the following credentials:

Email: thergert.zoom@vision-forward.org

Password: Vfazoom1

5. In the *Zoom* window, choose **Meetings** find your meeting in the drop list.

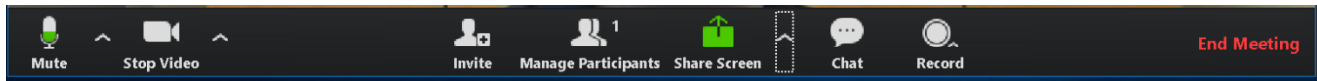


6. Choose **Start**, then click “Join Audio Conference by Computer” button to enter the meeting.

Managing the Meeting

While in a meeting, you will see live video of the other attendees. If you want this view to expand into “full screen mode,” click on *Enter Full Screen*, which you will see in the top right corner of your video feed. You may also click on the “Gallery View” or Speaker View”, located at the top right of your window, to change how the participants are displayed.

Additionally, at the bottom of the screen will be a toolbar looking like this:



Toolbar Functions:

- **Mute** – will mute your microphone (your video feed will still show!)
- **Stop Video** – will stop your video (your microphone will still transmit your audio!)
- **Invite** – allows you to invite more people via email right then *during* the meeting
- **Manage Participants** – Allows the host to manage attendees’ access to/participation in the meeting
- **Share Screen** – Allows other attendees to see a mirror feed of *your* computer screen (i.e. If you wanted to show a video, slide show, etc.); a pop up will ask if you want to share a specific window, your whole computer, your audio, etc.
- **Chat** – Opens a text chat window visible to all meeting attendees
- **Record** – Records the meeting in two formats – video/audio and just audio
- **End Meeting** – Will ask you if you want to end the meeting (i.e. For everyone) or leave the meeting (ie. Others can stay in the meeting/continue)

Wrap Up

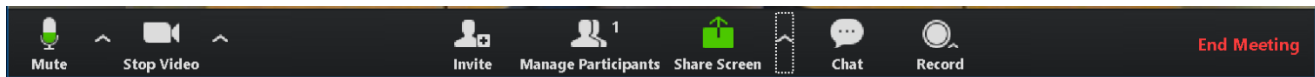
1. After you have exited your meeting by using the **End Meeting** button in the *Zoom* window, please shut down the computer.
2. Please also use the remote to turn off the screen and sound system by pressing the *Power* button once.
3. Return all items to the side table.

Attending a Meeting

Notes

- The email you receive will contain links to join the meeting from your computer, from your iPhone or mobile device, or by telephone. If you accept the meeting into your *Outlook* calendar, you will need to return to your calendar at the meeting time to find the links to join the meeting within the notes section.
 - If you join by computer, you will want to make sure you have functional web cams and microphones before joining the meeting. Screen reader users may benefit from the *Zoom* keyboard shortcuts document, which is located in: *Share\general\it\zoom*.
 - If you join by a mobile device, you will be prompted to download the *Zoom* app the first time you attempt to join a *Zoom* meeting. You do not need to create an account; rather, you can choose “*Join as Guest*.”
1. Click on the link under the “Join from PC, Mac, Linux, iOS or Android:” section from either your Outlook Calendar meeting event, smart phone calendar event, or the original invitation email.
 2. Type in the name you would like displayed to all attendees.
 3. Click the “Join Audio Conference by Computer” button to join the meeting.
 4. While in a meeting, you will see live video of the other attendees. If you want this view to expand into “full screen mode,” click on *Enter Full Screen*, which you will see in the top right corner of your video feed.

Additionally, at the bottom of the screen will be a toolbar looking like this:



Toolbar Functions:

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- **Share Screen** – Allows other attendees to see a mirror feed of *your* computer screen (i.e. If you wanted to show a video, slide show, etc.); a pop up will ask if you want to share a specific window, your whole computer, your audio, etc.
- **Chat** – Opens a text chat window visible to all meeting attendees
- **Record** – Records the meeting in two formats – video/audio and just audio
- **End Meeting** – Will ask you if you want to end the meeting (ie. For everyone) or leave the meeting (ie. Others can stay in the meeting/continue)

Host Provided Information for Meeting Attendees

Here is some general information you should provide to meeting attendees you invite:

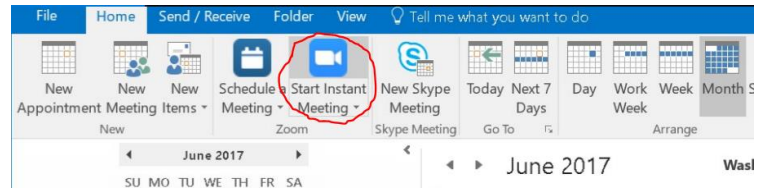
1. The email that they receive will contain links to join the meeting from their computer, from their iPhone or mobile device, or by telephone. Those who accept the meeting into their *Outlook* calendars will need to return to their calendar at the meeting time to find the links to join the meeting.
2. Those who join by computer will want to make sure they have functional web cams and microphones before joining the meeting. Screen reader users may benefit from the *Zoom* keyboard shortcuts document, which is located in: *Share\general\it\zoom* (this can be sent to them ahead of time).
3. Those who join by a mobile device will be prompted ahead of time to download the *Zoom* app the first time they attempt to join a *Zoom* meeting. They do not need to create an account; rather, they can choose “*Join as Guest.*”

Hosting an Instant Meeting

Instant Meetings would typically be hosted or started from your office computer rather than the conference room. Besides scheduling a Zoom meeting, there are also two ways you may start an instant Zoom meeting.

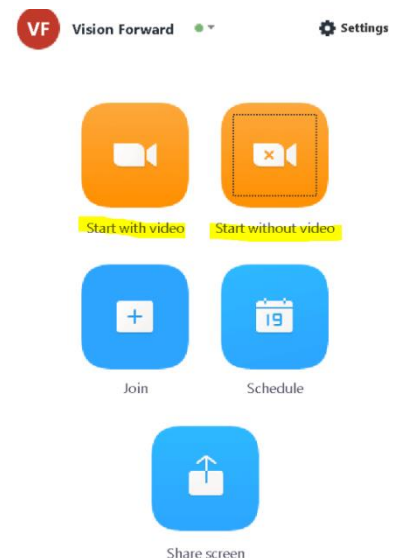
From Outlook

1. Open your *Outlook Calendar*.
2. Under the *Home* tab, within the *Zoom* group, choose “*Start an Instant Meeting*”
3. You will see the *Zoom launch* page. Click *Sign In*.
4. You will be asked to login with the credentials below (make sure the “*Keep me logged in*” checkbox is **NOT** checked):
Email: thergert.zoom@vision-forward.org
Password: Vfazoom1
5. Click “Join Audio Conference by Computer” button to start the meeting.
6. Use the toolbar, located at the bottom of the screen, to choose the “Invite” button.
7. The Zoom invite window will open. There are multiple ways to invite participants, please use one of the following three.
 - a. “Default Email” – this will open your default email client, Outlook, and allow you to invite participants with a standard email message.
 - b. “Copy URL” – This will copy the meeting URL, to your clipboard, allowing you to paste it into a standard email, which you would create via Outlook.
 - c. “Copy Invitation” – This copies the invitation text, to your clipboard, allowing you to paste it in your program of choice.



From the Zoom Meeting Client

1. Click the **Zoom Meeting Software** icon on the desktop, opening the *Zoom Desktop App* to the *Zoom* home screen. This computer should automatically be signed in with the appropriate account and password. However, if it is not, click the **Sign In** link and use the following credentials:
Email: thergert.zoom@vision-forward.org
Password: Vfazoom1
2. Click either “Start With Video” or “Start Without Video” to create a meeting.
3. Click “Join Audio Conference by Computer” to start meeting.
4. Use the bottom toolbar to choose the “Invite” button.
5. The Zoom invite window will open. There are many ways to invite participants; please use one of these three:
 - a. “Default Email” – will open your default email client, Outlook, and allow you to invite participants with a standard email message.
 - b. “Copy URL” – will copy the meeting URL to your clipboard, allowing you to paste it into an email you would create via Outlook.
 - c. “Copy Invitation” – copies the invitation text to your clipboard, allowing you to paste it in your program of choice.



Transferring a Recorded Meeting

Once you end your meeting, and you chose to record it, Zoom will automatically save the meeting displaying a progress window. Once the process is complete, you must transfer the folder from the 2 North Conference Room to the Share drive. Please feel free to contact IT if you would prefer to have them do it.

1. Click on the “Zoom Recorded Meetings” icon located on the desktop.
2. Each meeting recorded is named by the date and time the meeting occurred. Find your meeting and cut the folder. (Right click the meeting folder and click “cut”
3. Return to the computer desktop and click on the “Transfer Zoom Recordings” icon on the desktop.
4. Paste your meeting recording into this folder.
5. Monitor the progress and insure the transfer is complete before following the “Wrap Up” section of this document.
6. Return to your office computer and browse to Share\General\Zoom Recorded Meetings and find your meeting.
7. Right click the meeting and choose cut.
8. Paste the meeting into your user folder.