

A Note Before the Training Starts

- PLEASE MUTE YOUR MICROPHONE
- TURN OFF YOUR VIDEO
- Q & A AT THE END—BUT FEEL FREE TO ASK QUESTIONS VIA THE CHAT

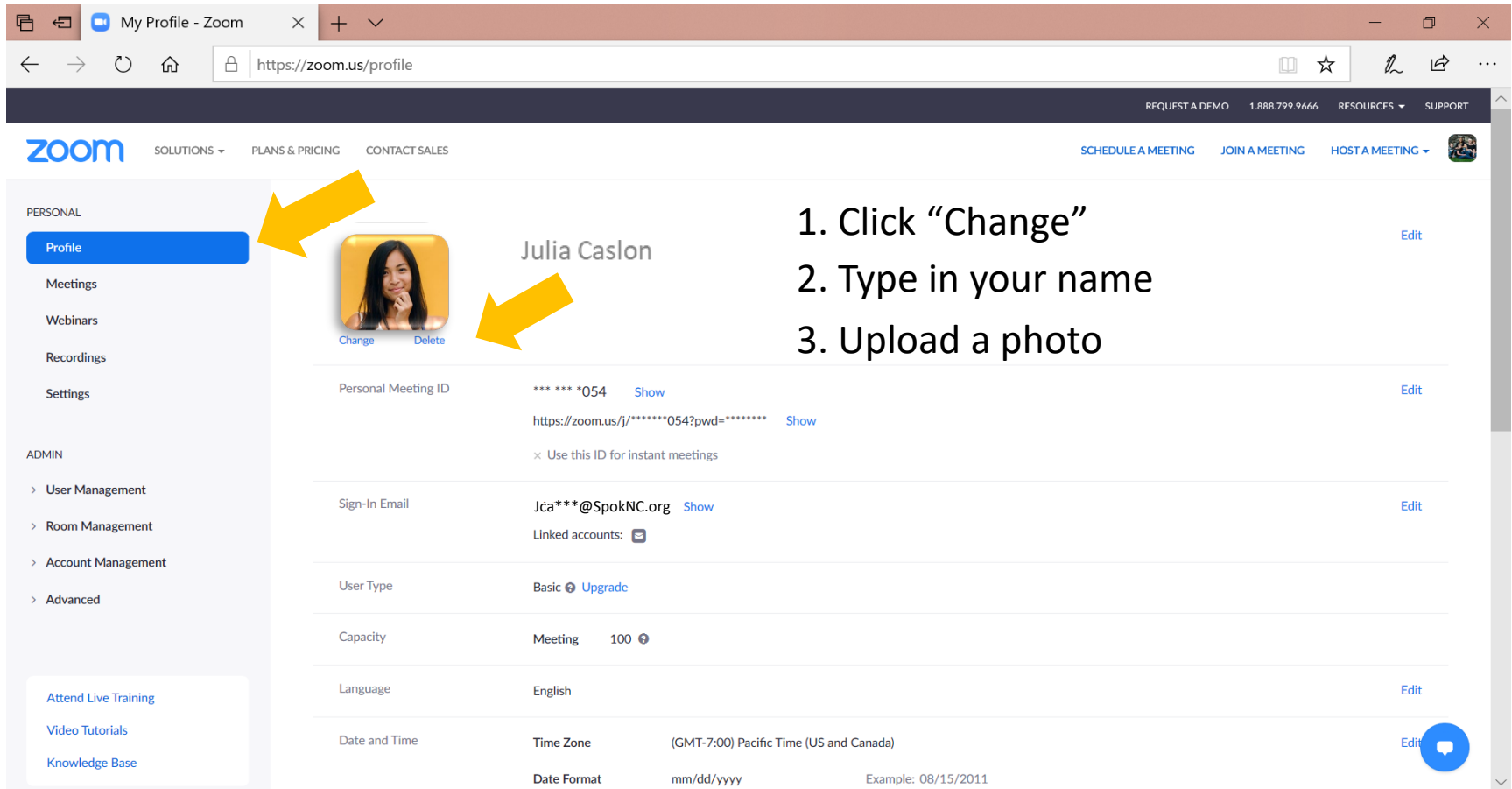
Zoom Meetings

SCHEDULING A MEETING GUIDE

OCTOBER 19, 2020

Home Page:

Set up your Zoom profile.



The screenshot shows the Zoom 'My Profile' page in a web browser. The browser tab is 'My Profile - Zoom' and the address bar shows 'https://zoom.us/profile'. The page has a dark blue header with the Zoom logo and navigation links: SOLUTIONS, PLANS & PRICING, CONTACT SALES, SCHEDULE A MEETING, JOIN A MEETING, and HOST A MEETING. A sidebar on the left contains 'PERSONAL' and 'ADMIN' sections. The 'PERSONAL' section has 'Profile' highlighted. The 'ADMIN' section has 'User Management', 'Room Management', 'Account Management', and 'Advanced'. Below the sidebar, there are links for 'Attend Live Training', 'Video Tutorials', and 'Knowledge Base'. The main content area shows the user's profile information. A yellow arrow points to the 'Profile' button in the sidebar. Another yellow arrow points to the 'Change' button below the profile picture. The profile picture is of a woman named Julia Caslon. The profile information includes: Personal Meeting ID (*** ** *054), Sign-In Email (Jca***@SpokNC.org), User Type (Basic), Capacity (Meeting, 100), Language (English), and Date and Time (Time Zone: (GMT-7:00) Pacific Time (US and Canada), Date Format: mm/dd/yyyy). There are 'Edit' buttons for each of these fields. A list of instructions is overlaid on the right side of the page.

1. Click “Change”

2. Type in your name

3. Upload a photo

How to schedule a meeting: <https://zoom.us/>

The screenshot shows the Zoom web interface for scheduling a meeting. The browser address bar displays <https://zoom.us/meeting/schedule>. The Zoom logo is in the top left, and navigation links for SOLUTIONS, PLANS & PRICING, and CONTACT SALES are visible. On the right, there are links for REQUEST A DEMO, 1.888.799.9666, RESOURCES, and SUPPORT. The left sidebar contains a 'PERSONAL' section with links to Profile, Meetings (highlighted with a yellow arrow), Webinars, Recordings, and Settings. Below this is an 'ADMIN' section with expandable links for User Management, Room Management, Account Management, and Advanced. The main content area is titled 'Schedule a Meeting' and includes the following fields and options:

- Topic:** A text input field containing 'Zoom Neighborhood Council Meeting Example'.
- Description (Optional):** A text input field containing 'Description of Meeting.['.
- When:** A date picker set to '08/17/2020', a time dropdown set to '2:00', and a PM/AM dropdown set to 'PM'.
- Duration:** A dropdown set to '1' hour and '0' minutes.
- Time Zone:** A dropdown set to '(GMT-7:00) Pacific Time (US and Canada)'.
- Recurring meeting:** An unchecked checkbox.

Numbered instructions are overlaid on the page:

1. Select "Meetings" from side bar to start scheduling your meeting
2. Name your meeting
3. Add a description if desired
4. Select date and time
5. If you have the free plan you have a 40 min. time limit.
6. Recurring meeting allows you to schedule a series of meetings at the same time.

A yellow arrow points to the 'Meetings' link in the sidebar. Another yellow arrow points to the 'Recurring meeting' checkbox. A notification bubble in the bottom right corner indicates '20 new notifications'.

Scheduling a Recurring Meeting:

☒ Recurring meeting Every month on the 17 of the month, until Feb 17, 2021, 7 occurrence(s)

Recurrence

Monthly

Repeat every

1

month

Occurs on

☒ Day 17 of the month

☐ First Sunday of the month

End date

☒ By 02/17/2021  ☐ After 7 occurrences



1. Check the “Recurring Meeting” button

2. Read through options and select the appropriate ones.

Scheduling a Meeting Continued:

Meeting ID

1. ☒ Generate Automatically ☐ Personal Meeting ID

1. Personal Meeting ID shouldn't be used for public meetings, it is better to use the automatically generated one.

Security

2. ☒ Passcode 3. ☒ Waiting Room

2. Enabling a Passcode means attendees will have to enter the passcode in order to join the meeting.

Video

4. Host ☐ on ☒ off

Participant ☐ on ☒ off

3. The Waiting Room is automatically enabled. Attendees are put into a virtual waiting room and the host must allow them into the meeting. The Waiting Room may be used to de-escalate tense discussions by placing participants there during a meeting.

4. You can decide if you want to enable or disable video for the host and all of the participants.

Scheduling a Meeting Continued:

Meeting Options

☐ Enable join before host

☒ Mute participants upon entry

☐ Record the meeting automatically on the local computer

Save

Cancel

To help cut down background noise, check the box to “mute participants upon entry”.

Participants will need to unmute themselves to speak.

After selecting all desired options, click “Save” to go to next page.

Scheduling a Meeting Continued:

The screenshot shows the Zoom web interface for managing a meeting. The browser address bar displays <https://zoom.us/meeting/86056662458>. The Zoom logo and navigation links (SOLUTIONS, PLANS & PRICING, CONTACT SALES) are at the top. The left sidebar contains links for PERSONAL (Profile, Meetings, Webinars, Recordings, Settings) and ADMIN (User Management, Room Management, Account Management, Advanced). The main content area is titled "My Meetings > Manage 'Zoom Neighborhood Council Meeting Example'". It includes a "Start this Meeting" button in the top right. The meeting details are as follows:

Topic	Zoom Neighborhood Council Meeting Example	
Description	Description of Meeting..	
Time	Aug 17, 2020 02:00 PM Pacific Time (US and Canada)	
Add to	Google Calendar Outlook Calendar (.ics) Yahoo Calendar	
Meeting ID	860 5666 2458	
Security	✓ Passcode ***** Show ✓ Waiting Room	
Invite Link	https://us02web.zoom.us/j/86056662458?pwd=eDhWSiROODBNt05NNzBkNm50b0x3UT09 Copy Invitation	
Video	Host	Off
	Participant	Off
Meeting Options	<ul style="list-style-type: none">× Enable join before host× Mute participants upon entry ?× Record the meeting automatically on the local computer	

At the bottom, there are links for "Delete this Meeting" and "Save as a Meeting Template", and buttons for "Edit this Meeting" and "Start this Meeting".

Annotations:

- A yellow arrow points to the "Add to" section, with the text: "Most likely, you won't use the calendar feature to send meeting invites."
- A yellow arrow points to the "Copy Invitation" button, with the text: "You will most often use 'Copy Invitation' to copy all of the meeting invitation information and then paste it into the body of an email."

Scheduling a Meeting Continued

Zoom Meetings - Zoom Meeting Information - 2 x

https://zoom.us/meeting/86056662458

REQUEST A DEMO 1.888.799.9666 RESOURCES SUPPORT

zoom SOLUTIONS PLANS & PRICING CONTACT SALES SCHEDULE A MEETING JOIN A MEETING HOST A MEETING

PERSONAL

- Profile
- Meetings**
- Webinars
- Recordings
- Settings

ADMIN

- > User Management
- > Room Management
- > Account Management
- > Advanced

Attend Live Training
Video Tutorials
Knowledge Base

My Meetings > Manage "Zoom Neighborhood Council Meeting Example"

Topic Zoom Neighborhood Council Meeting Example

Description Description of Meeting..

Time Aug 17, 2020 02:00 PM Pacific Time (US and Canada)

Add to [Google Calendar](#) [Outlook Calendar \(.ics\)](#) [Yahoo Calendar](#)

Meeting ID 860 5666 2458

Security ☒ Passcode ***** [Show](#) ☒ Waiting Room

Invite Link <https://us02web.zoom.us/j/86056662458?pwd=eDhWSiROODBnT05NNzBkNmNsOjB0x3UT09> [Copy Invitation](#)

Video Host Off Participant Off

Meeting Options

- ☒ Enable join before host
- ☒ Mute participants upon entry
- ☒ Record the meeting automatically on the local computer

Delete this Meeting Save as a Meeting Template

Edit this Meeting Start this Meeting

Start this Meeting

When ready you can start the meeting by selecting the "Start this meeting" button

You can save all of your meeting options as a template to use again.


Polling Feature:

The Polling feature allows you to vote or ask questions. You may save the poll as a report. Polling is only available when you sign into your account from the web portal.

Enabling polling

Account

To enable the polling feature for all members of your organization:

1. Sign in to the Zoom web portal as an administrator with the privilege to edit account settings.
2. In the navigation menu, click **Account Management** then **Account Settings**. 
3. Navigate to the **Polling** 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.

Polling
Add 'Polls' to the meeting controls. This allows the host to survey the attendees. ⓘ



Toggle the tab to enable “Polls”

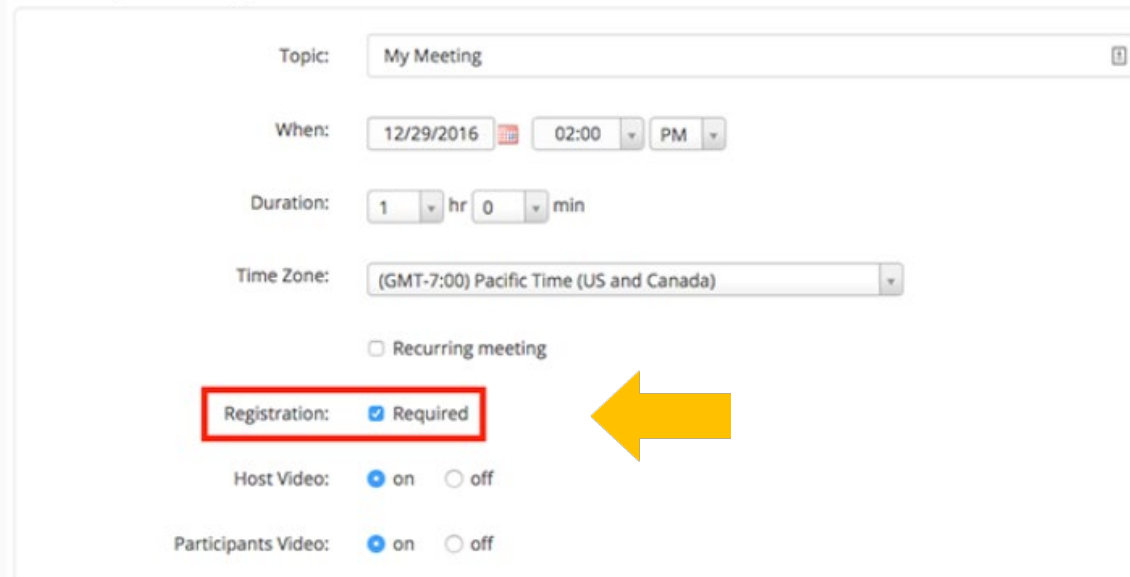
4. (Optional) If you want to make this setting mandatory for all users in your account, click the lock icon, and then click **Lock** to confirm the setting.

Creating Reports for Meeting Attendance:

Enabling registration for a meeting

1. Sign in to the Zoom web portal.
2. In the navigation menu, click **Meetings**.
3. **Schedule a New Meeting** or edit an existing meeting.
4. In the **Registration** section, make sure to select the **Required** check box.

Edit "My Meeting"



The screenshot shows the 'Edit Meeting' interface in Zoom. The 'Topic' field is 'My Meeting'. The 'When' field shows '12/29/2016' at '02:00 PM'. The 'Duration' is '1 hr 0 min'. The 'Time Zone' is '(GMT-7:00) Pacific Time (US and Canada)'. The 'Recurring meeting' checkbox is unchecked. The 'Registration' section has a red box around the 'Required' checkbox, which is checked. A yellow arrow points to this checkbox. Below 'Registration' are 'Host Video' and 'Participants Video' options, both set to 'on'.

Enable the “Registration” feature. If you want to keep attendance.

After scheduling the meeting, the **Registration** and **Branding** tabs will appear.

5. **Manage attendees:** Click **View** to see a list of people that have registered for the meeting. Clicking on the registrant name will provide addition info about that person.

Changing the Background:

Account

To enable the Virtual Background feature for all users in the account:

1. Sign in to the Zoom web portal as an administrator with permission to edit account settings.
2. In the navigation menu, click **Account Management** then **Account Settings**.
3. In the **Meeting** tab, navigate to the **Virtual Background** option (under the In Meeting (Advanced) section) and verify that the setting is enabled.

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

Virtual background

Allow users to replace their background with any selected image. Choose or upload an image in the Zoom Desktop application settings.



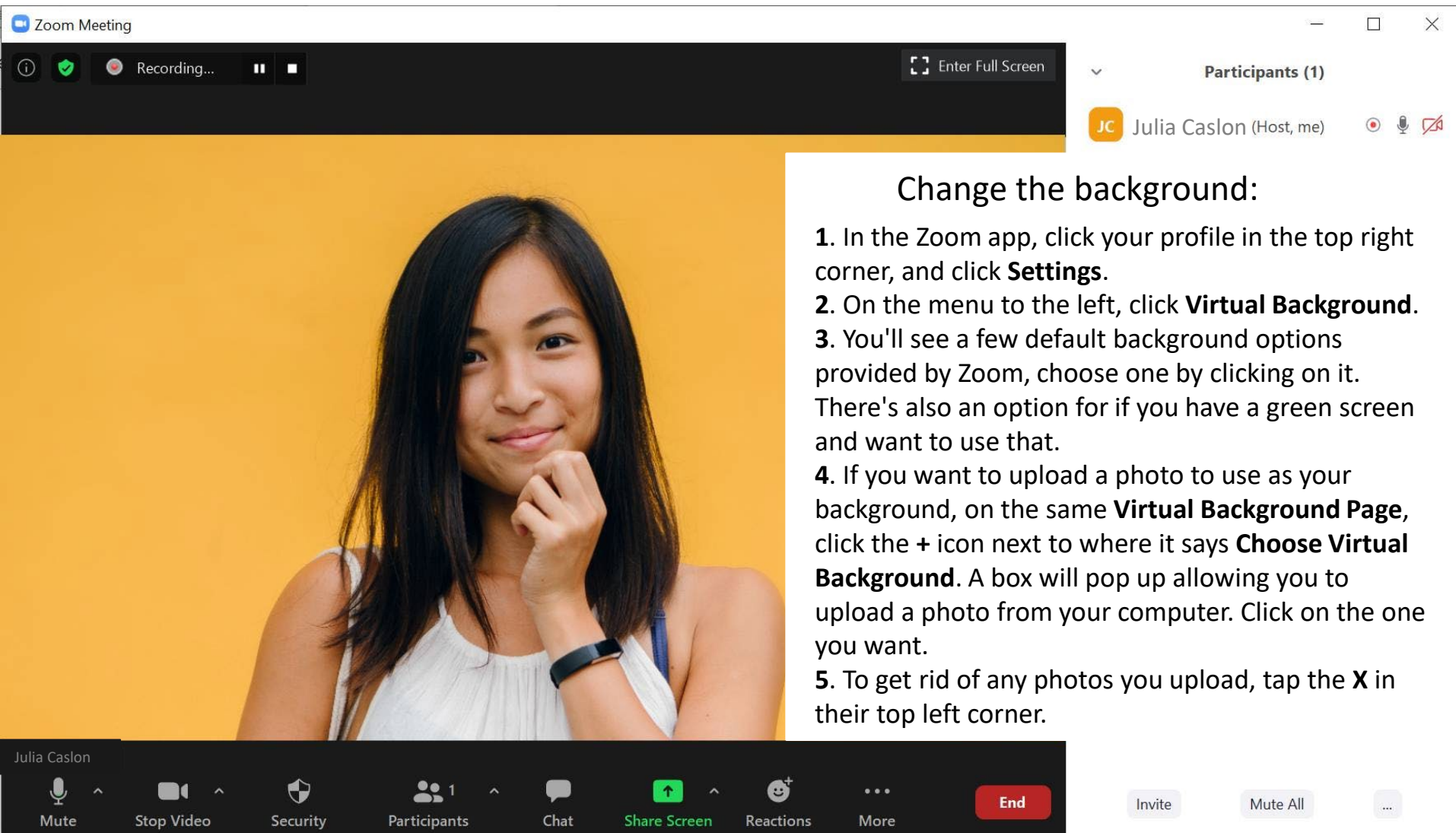
4. (Optional) If you want to make this setting mandatory for all users in your account, click the lock icon, and then click **Lock** to confirm the setting.
5. (Optional) Click **Manage virtual background** to upload default background images available for users.

Note: Users must have client/app version 5.1.1 or higher to see the background images you upload.



You can upload an image or use a Zoom image.

Meeting Controls:

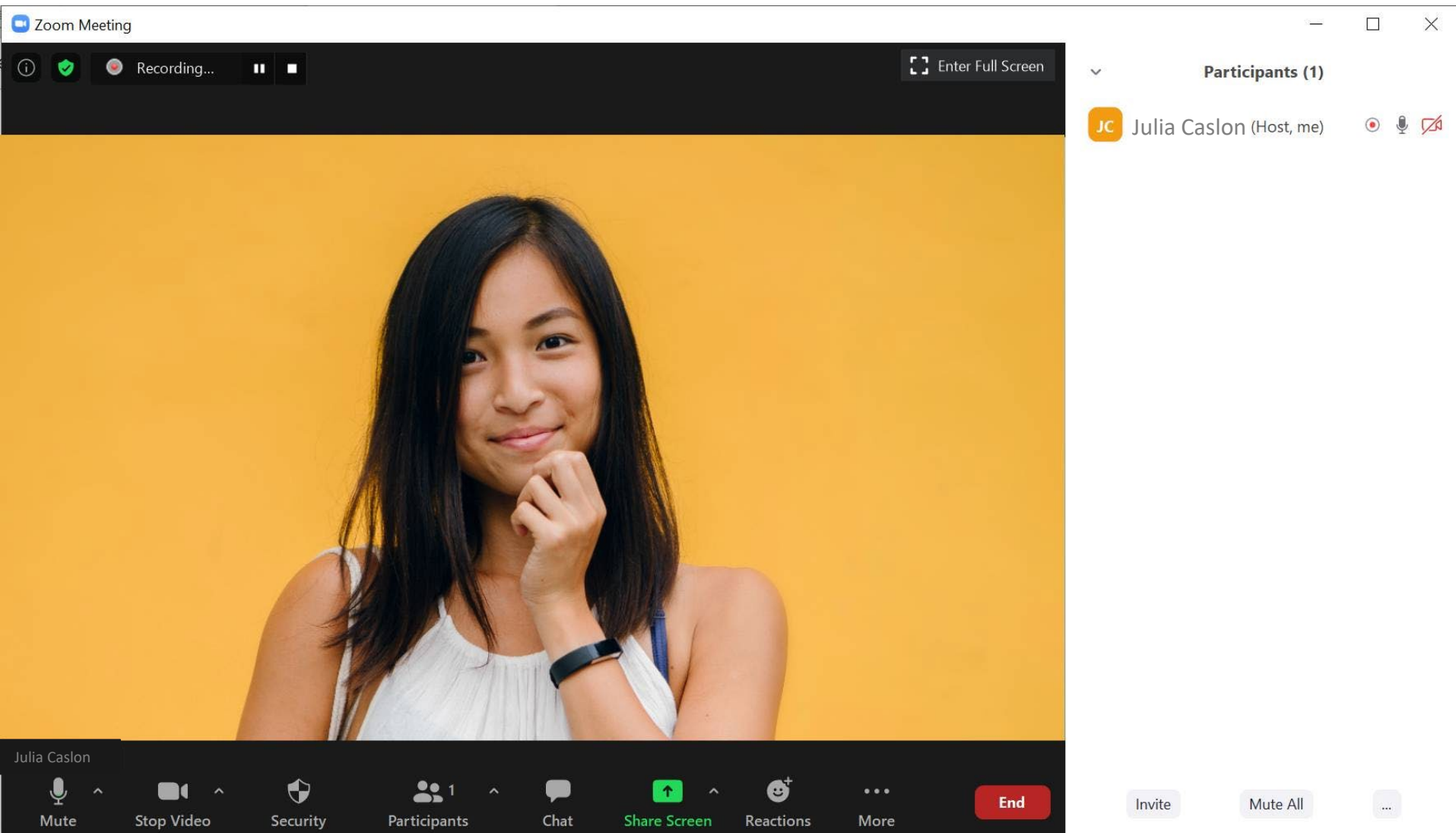


The screenshot shows a Zoom meeting window. At the top, the title bar says "Zoom Meeting". Below it, a dark bar contains icons for information, a green checkmark, a recording status "Recording...", and a full-screen button labeled "Enter Full Screen". On the right, a dropdown menu shows "Participants (1)" with a list containing "JC Julia Caslon (Host, me)". The main video area shows a woman with long dark hair, wearing a white top, against a solid yellow background. At the bottom, a dark bar contains various controls: "Mute", "Stop Video", "Security", "Participants" (with a count of 1), "Chat", "Share Screen" (with a green up arrow icon), "Reactions", "More" (three dots), a red "End" button, and buttons for "Invite", "Mute All", and a three-dot menu.

Change the background:

1. In the Zoom app, click your profile in the top right corner, and click **Settings**.
2. On the menu to the left, click **Virtual Background**.
3. You'll see a few default background options provided by Zoom, choose one by clicking on it. There's also an option for if you have a green screen and want to use that.
4. If you want to upload a photo to use as your background, on the same **Virtual Background Page**, click the + icon next to where it says **Choose Virtual Background**. A box will pop up allowing you to upload a photo from your computer. Click on the one you want.
5. To get rid of any photos you upload, tap the **X** in their top left corner.

Meeting Controls:



During the meeting, controls can be found along the bottom of the screen.

Controls during the meeting:

The screenshot shows a Zoom meeting window. The top bar includes the Zoom logo, a status bar with icons for info, security, and recording, and a full-screen button. The main area displays a video of a woman, Julia Caslon, against a yellow background. The right sidebar shows the 'Participants (1)' list with her name and status. The bottom toolbar contains icons for Mute, Stop Video, Security, Participants, Chat, Share Screen, Reactions, More, and End. Annotations with blue arrows point to the Mute and Stop Video icons, and the Participants and Chat icons, explaining their functions.

Zoom Meeting

Recording...

Enter Full Screen

Participants (1)

Julia Caslon (Host, me)

Toggle to Mute or Unmute

Toggle to start or stop video

Julia Caslon

Mute

Stop Video

Security

Participants

Chat

Share Screen

Reactions

More

End

Invite

Mute All

...

Toggle on or off to see participant list and chat side bar

Controls during the meeting:

The screenshot displays a Zoom meeting window. The top bar includes the Zoom logo, a status bar with icons for information, security, and recording, and a button to 'Enter Full Screen'. The main video area shows a woman with long dark hair against a yellow background. A context menu is open over the 'Security' icon in the bottom toolbar, listing options: 'Lock Meeting', 'Enable Waiting Room', 'Allow participants to:', 'Share Screen', 'Chat', 'Rename Themselves', and 'Unmute Themselves'. A white text box is overlaid on the video area with the text: 'The Host can change security options during the meeting'. The bottom toolbar contains icons for Mute, Stop Video, Security, Participants, Chat, Share Screen, Reactions, More, and an End button. On the right, a sidebar shows the 'Participants (1)' list with 'Julia Caslon (Host, me)' and icons for video, audio, and chat.

Zoom Meeting

Recording...

Enter Full Screen

Participants (1)

Julia Caslon (Host, me)

Lock Meeting

✓ Enable Waiting Room

Allow participants to:

Share Screen

✓ Chat

✓ Rename Themselves

✓ Unmute Themselves

The Host can change security options during the meeting

Julia Caslon

Mute

Stop Video

Security

Participants

Chat

Share Screen

Reactions

More

End

Invite

Mute All

...

Controls during the meeting:

The screenshot displays a Zoom meeting window. At the top, the title bar reads 'Zoom Meeting'. Below it, a dark bar contains icons for information, status, and recording, with the text 'Recording...' and a 'Enter Full Screen' button. On the right, a 'Participants (1)' list shows 'Julia Caslon (Host, me)' with icons for video, audio, and chat. The main video area shows a woman with long dark hair, identified as 'Julia Caslon' in the bottom left corner. A text box is overlaid on the video, stating: 'Share Screen allows the host to share an application, like the meeting agenda, from their computer'. Below this, the 'Share Screen' dialog is open, titled 'Select a window or an application that you want to share'. It has tabs for 'Basic', 'Advanced', and 'Files'. The 'Basic' tab is active, showing a grid of shareable items: 'Screen' (highlighted with a blue border), 'Whiteboard', 'iPhone/iPad', 'Launch Meeting - Zoom and 2 m...', 'Zoom PP - PowerPoint', and 'Zoom Cloud Meetings'. At the bottom of the dialog are checkboxes for 'Share computer sound' and 'Optimize Screen Sharing for Video Clip'. A blue arrow points from the 'Share Screen' button in the bottom toolbar to the 'Screen' option in the dialog. The bottom toolbar includes buttons for 'Mute', 'Stop Video', 'Security', 'Participants' (1), 'Chat', 'Share Screen' (highlighted with a green border), 'Reactions', 'More', 'End', 'Invite', 'Mute All', and a three-dot menu.

Zoom Meeting

Recording...

Enter Full Screen

Participants (1)

Julia Caslon (Host, me)

Share Screen allows the host to share an application, like the meeting agenda, from their computer

Select a window or an application that you want to share

Basic Advanced Files

Screen Whiteboard iPhone/iPad

Launch Meeting - Zoom and 2 m... Zoom PP - PowerPoint Zoom Cloud Meetings

☐ Share computer sound ☐ Optimize Screen Sharing for Video Clip

Julia Caslon

Mute Stop Video Security Participants 1 Chat Share Screen Reactions More End Invite Mute All ...

Controls during the meeting:

The screenshot displays a Zoom meeting window. At the top, the title bar reads "Zoom Meeting" with standard window controls. Below this is a dark toolbar containing icons for information, security, recording status ("Recording..."), and a full-screen button. The main area features a video feed of a woman with long dark hair, wearing a white top, against a yellow background. To the right of the video is a "Participants (1)" list showing "Julia Caslon (Host, me)" with icons for video, audio, and chat. At the bottom is a dark control bar with buttons for "Mute", "Stop Video", "Security", "Participants" (showing 1 person), "Chat", "Share Screen", "Reactions", "More", and a red "End" button. A callout box with the text "Reactions allow the user to give the presenter non-verbal feedback" points to the "Reactions" button. A secondary menu is shown above the "Reactions" button, displaying a row of reaction emojis: clapping hands, thumbs up, heart, crying face, surprised face, and confetti.

Zoom Meeting

Recording...

Enter Full Screen

Participants (1)

Julia Caslon (Host, me)

Reactions allow the user to give the presenter non-verbal feedback

Julia Caslon

Mute Stop Video Security Participants Chat Share Screen Reactions More End Invite Mute All ...

Zoom Help Center:

The screenshot shows the Zoom Help Center website in a web browser. The address bar displays <https://support.zoom.us/hc/en-us>. The page features a navigation bar with the Zoom logo, "Help Center", "SALES", "PLANS", "JOIN A MEETING", "CONTACT SUPPORT", and a "Sign in" button. A green banner contains a note about COVID-19 operations. Below this is a search bar with the placeholder text "How can we help?". The "Quickstart Guides" section includes three tiles: "Owner & Admins", "Users & Participants", and "Top 20 Resources". The "Video Tutorials" section, with a "Show All" link, displays four video thumbnails: "Live Training", "Join A Meeting", "Record a Meeting", and "Joining & Configuring Audio & Video". The Windows taskbar at the bottom shows the search bar and various application icons, with the system clock indicating 10:41 AM on 8/28/2020.

Start with the Basic Getting Started Video: <https://tinyurl.com/ZOOMtraining>

Questions:

How do I “Share” content?

- Any files, like the Agenda, need to be open before logging in to the meeting.
- Presentations from guests need to be sent to the presenter (you) before the meeting, so that you can open and share.

Are Polls used for Voting ?

- Yes. The Polling feature needs to be toggled to enable when you’re on the Account page at sign in. If you don’t toggle enable, you won’t be able to create a “poll” once the meeting has begun.

I can’t connect to audio.

- Ensure your speaker is turned on. If you see the speaker icon in the top-left corner is turned off, tap it to turn on your speaker:
- Ensure the microphone is not on mute. If you see the muted Audio icon in the meeting controls, tap it to unmute yourself:



Can I call in?

- Yes. Dial the one of numbers provided in the meeting invitation and follow the instructions:
- Enter your meeting ID followed by #.
- Enter your participant ID followed by #.
- Enter the passcode, if prompted, followed by #.