Zoom Job Aid

Using Zoom for Meetings

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Accessing Zoom

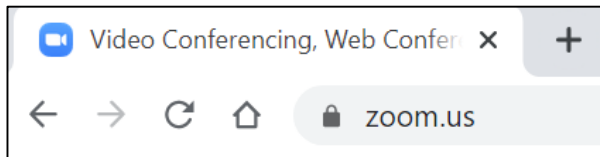To access **Zoom** computer software **(Recommended)**:

- Type "*Zoom*" in the search box and click **Enter**
- Locate the Zoom application
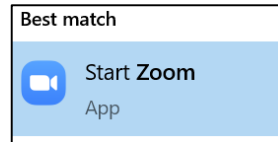
- Click **Open**

To access **Zoom** desktop client:

- Open a web browser (Chrome is recommended)
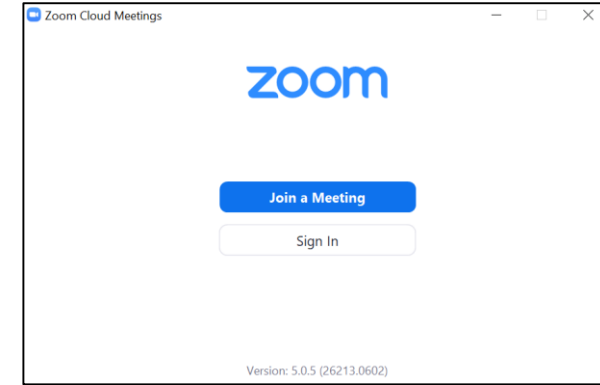- Type in "zoom.us" and press **Enter**

- This will load the Zoom webpage

The Zoom Log-in Page

When you click **Open** this will load the Zoom log-in page

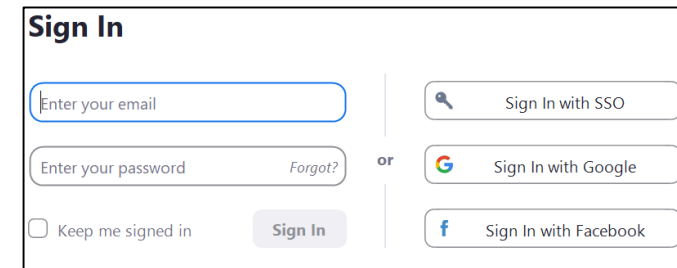From here, you can:

- **Sign In** using your log-in name and password
- **Join a Meeting** of another Zoom user

Sign In to Zoom

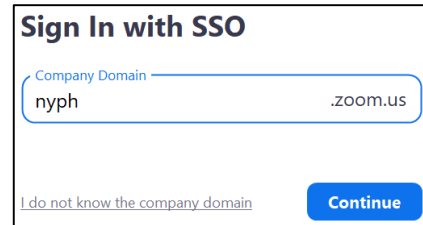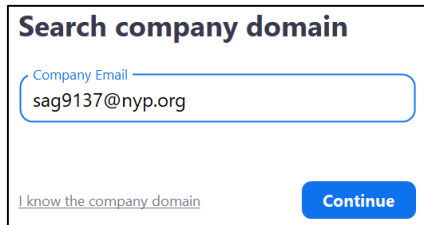Clicking Sign In (via the zoom software version) will prompt you with several choices to log-in to your Zoom account
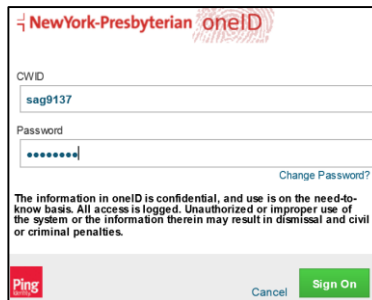

To sign in with **NYP CWID**:

- Click **Sign in with SSO**
- Enter either your NYP email address or the domain "NYPH" depending on the prompt

Using Zoom for Meetings:

Search company domain

Company Email
sag9137@nyp.org

I know the company domain   **Continue**

Sign In with SSO

Company Domain
nyph   .zoom.us

I do not know the company domain   **Continue**

Join Meeting

Enter meeting ID or personal link name

Your Name
John Doe

☑ Remember my name for future meetings

☐ Do not connect to audio

☐ Turn off my video

Join   Cancel

- This will automatically load a web browser prompting you to enter your CWID and Password

NewYork-Presbyterian oneID

CWID
sag9137

Password
•••••••   Change Password?

The information in oneID is confidential, and use is on the need-to-know basis. All access is logged. Unauthorized or improper use of the system or the information therein may result in dismissal and civil or criminal penalties.
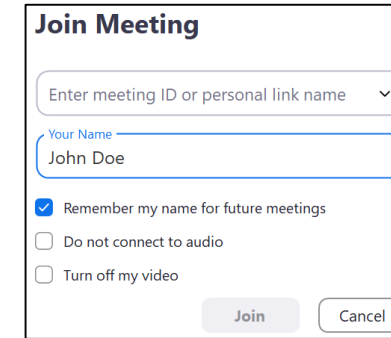
Ping   Cancel   **Sign On**

*** This is known as the Single Sign On page (SSO)*

- Enter your CWID and Password and click Sign In to load the Zoom Homepage

- Enter the Meeting ID or personal link name
  - This can be found in the Zoom Meeting email invitation you would have received

John Doe   s inviting you to a scheduled Zoom meeting.

Topic: TD Check In
Time: Jun 4, 2020 12:30 PM Eastern Time (US and Canada)

Join Zoom Meeting
https://nyph.zoom.us/j/94405529886

Meeting ID: 944 0552 9886
One tap mobile
+16465189805,,94405529886# US (New York)
+16468769923,,94405529886# US (New York)

Dial by your location
    +1 646 518 9805 US (New York)
    +1 646 876 9923 US (New York)
    833 548 0276 US Toll-free
    877 853 5247 US Toll-free
    888 788 0099 US Toll-free
Meeting ID: 944 0552 9886
Find your local number: https://nyph.zoom.us/u/adn5gpkMEp

*** Some meetings will require a Password. This string of numbers can also be found in the meeting invitation email*

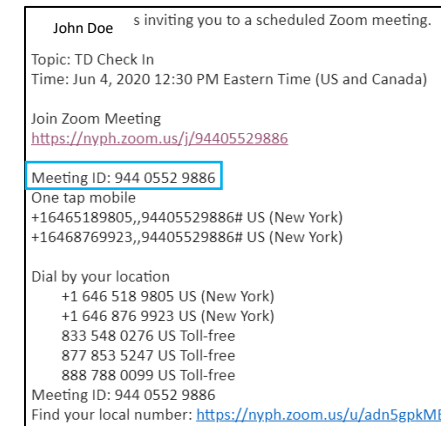## Join a Meeting

Clicking **Join a Meeting** will load a new window that enables you to join a pre-existing meeting

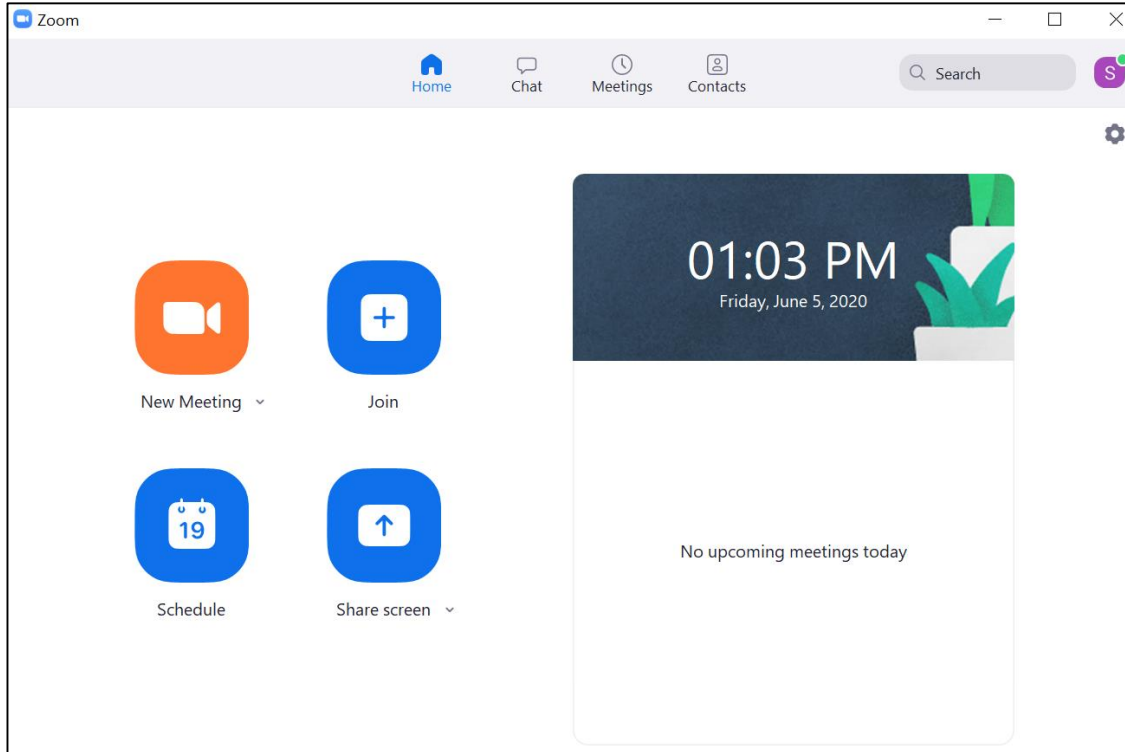*** You do not need a Zoom account to Join a Meeting*

- Enter the name you want displayed next to your webcam window when you join the meeting

- You can also select certain parameters when you join via the three check boxes below the **Your Name** section
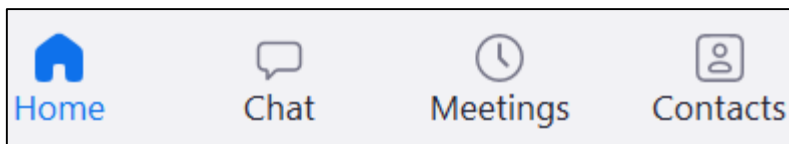
Using Zoom for Meetings:

The Zoom Home Page

Signing into Zoom will open the Zoom **Home Page**

The taskbar at the top of the screen controls access to the 4 main tabs within Zoom


The Zoom Taskbar

The main taskbar includes the following tabs:

- **Home Tab** – where you can create new meetings, join existing meetings, schedule future meetings and share your screen or other media
- **Chat Tab** – instant message with any other Zoom users in your contacts list
- **Meetings Tab** – start a meeting using your Personal Meeting ID (PMI). You can also view upcoming and recorded meetings
- **Contacts Tab** – view your contacts and channels (which are private or public groups)

You can also search within zoom by typing queries into the **Search** bar at the top right of the page
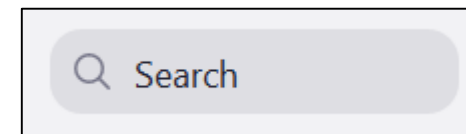
Click the **Profile Icon** to view your profile, change availability, sign out, and manipulate Settings
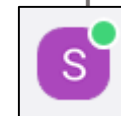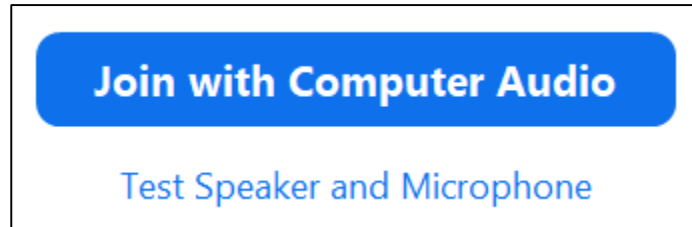
Using Zoom for Meetings:

Creating a Meeting

To create a meeting immediately, click the Meeting Icon

- This will open a Meeting Window and grant Zoom access to your camera (unless you changed this setting manually)
- The system will also prompt you to test and grant access to your microphone in a separate window
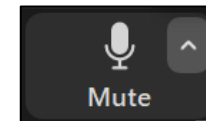

Once you've determined your audio, you will have full access to the Meeting Window

The Meeting Window

This screen is where Zoom Meetings are controlled and conducted by the meeting leader and participants. Some of these features are only available to the **Meeting Host**
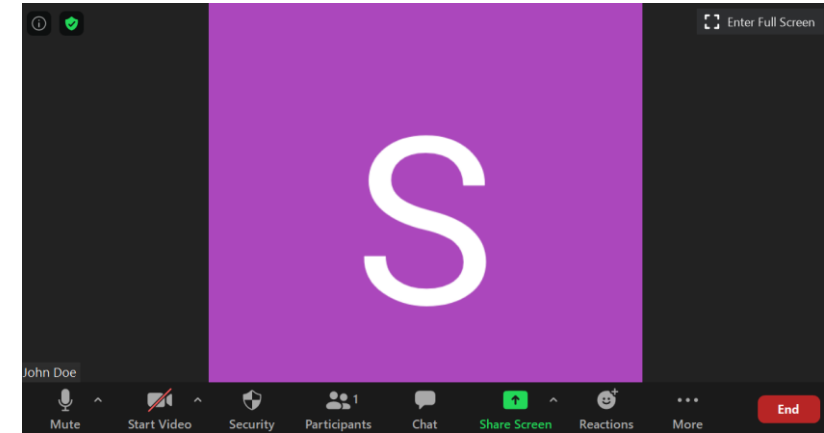
Meeting Window Settings

 Click the Microphone icon to enable and disable your audio

- Click the chevron to open the expanded menu. You can select between all available speaker/microphone options
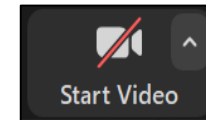
 Click the Camera icon to enable and disable your video (the red line indicates the video is disabled)

- Click the chevron to open the expanded menu. You can select available camera options, add a virtual background and view advanced video settings
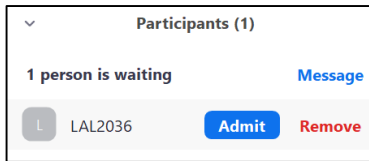
# Using Zoom for Meetings:

Security

Click the Shield icon to adjust security settings

- You can determine various participant features such as:
  - Screen sharing
  - Unmuting their own microphones
  - Renaming themselves
- You can also lock the meeting or enable a **Waiting Room** where you can screen and allow participants into the meeting
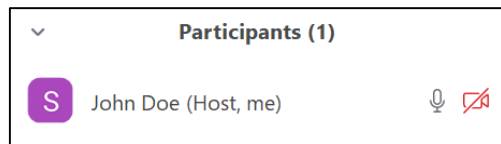
*** This feature Is only available to the **Meeting Host***

Participants (1)

1 person is waiting — Message

L LAL2036 Admit Remove
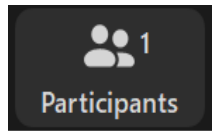
Participants 1

Click the People icon to view the current Participants to the meeting

- This will open a panel on the right side of the Meeting Window where you can view the names and settings of Participants
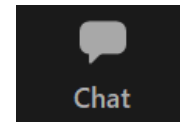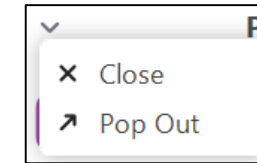
** A red icon means disabled, a grey icon means enabled

Participants (1)

S John Doe (Host, me)

- You can also Invite new Participants or Mute All Participants at the bottom

Invite   Mute All
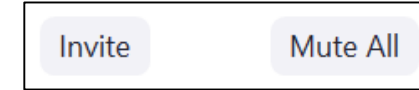
- To close the Participants panel, click the chevron at the top and click Close
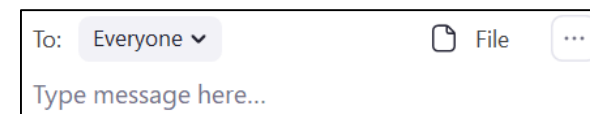
Pa
× Close
↗ Pop Out

Chat

Click the Speech Bubble icon to access the Chat

- This will open a panel on the right side of the Meeting Window where you can send and view messages between Participants
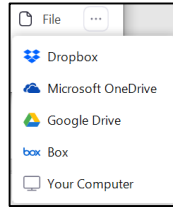
Zoom Group Chat

From Me to Everyone:
Hello Everyone!
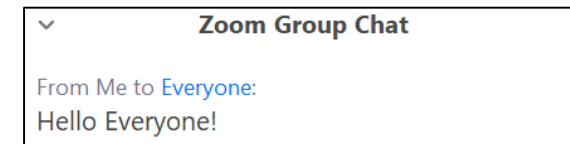
- You can message to *Everyone* or individual Participants by using the bottom panel

To: Everyone ⌄   📄 File   ⋯

Type message here...

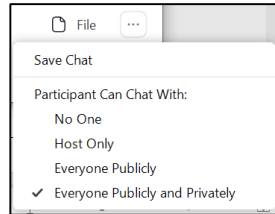# Using Zoom for Meetings:

- Click the File icon to load files from your computer into the Chat

- Click the Ellipses icon to **Save the Chat** and allow or restrict who Participants can chat with

Click the Screen icon to share your screen or other media with Participants

- This will open a new Window containing all of your shareable media
- Click "Screen" to share your full desktop
- Click the thumbnail of a specific platform (Word Doc, Web Browser etc.) and click Share to share that specific media

*** Click the "Stop Share" button to stop Sharing*

- You can share a **Whiteboard**, which can be virtually "drawn" on

- You can also request remote access to another user's Screen and Mouse
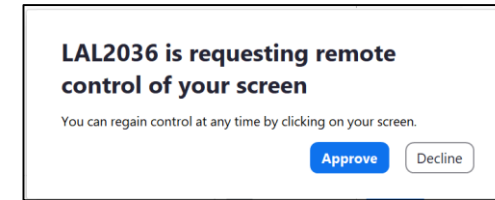
- The Meeting Host has screen sharing privileges. If you want to enable screen sharing for Participants click the chevron icon next to the **Screen Share** button
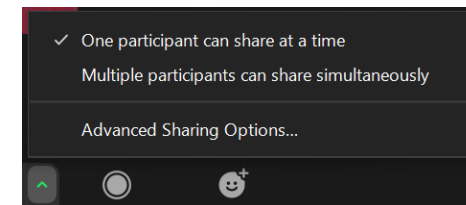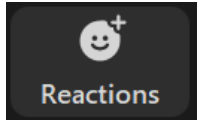
- Click **Advanced Sharing Options** to enable Participants to share screens
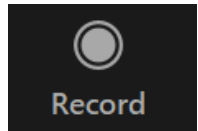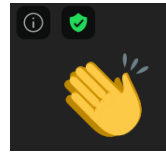
Using Zoom for Meetings:

 Click the Smiley Face icon to access Reactions

- These are temporary emojis you can send to the group during a meeting
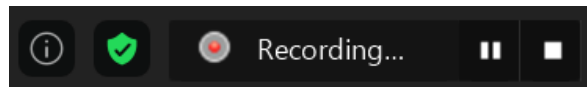

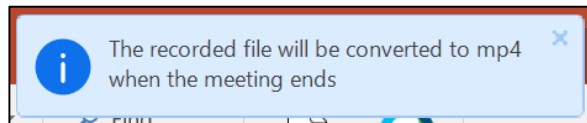- Reactions can be seen at the top left of the screen

 Click the Circle icon to Record a meeting

- You can adjust the recording by looking for the Recording bar at the top left of the screen
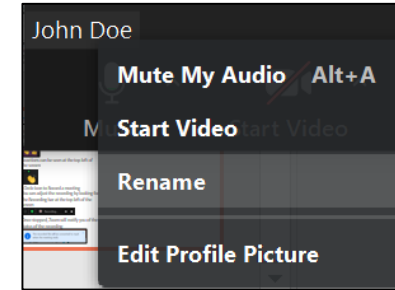

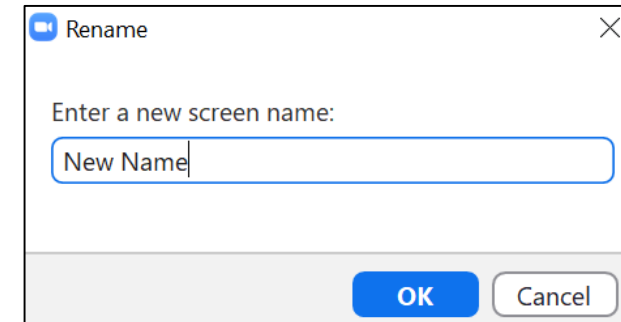- Once stopped, Zoom will notify you of the status of the recording
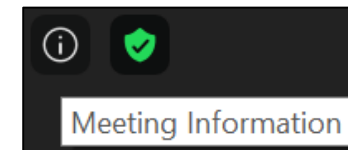

Additional Features

To **Rename** yourself, right click your current name and select Rename from the dropdown menu

- Enter a new name in the new window and click OK

To view **Meeting Information**, including the Meeting ID and Meeting Link, click the Information icon

Using Zoom for Meetings:

Additional Features

John Doe's **Zoom Meeting**

Meeting ID	785 5963 6976
Host	**John Doe** (You)
Password	9iqE5D
Numeric Password (Telephone/Room Systems)	766480
Invite Link	https://us04web.zoom.us/j/78559636976?pwd=N1ZWR0hneVAxRGJRRFB6WGhVay9BZz09
	📋 Copy Link
Participant ID	150899

To **Minimize** the Meeting Window, click the minimize icon located at the top right corner of the browser window
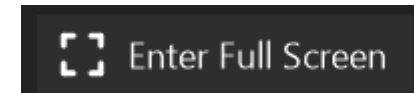

- Instead of a typical minimization, the window will collapse into a miniature version of the regular meeting window
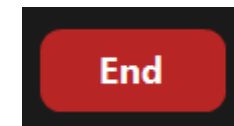

John Doe
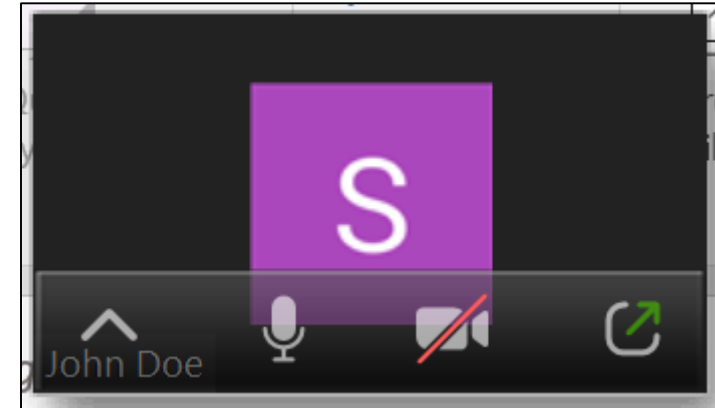
- Hover over the window and click the green arrow icon to restore the window to it's original size

To enter **Full Screen** mode, click the Full Screen icon

[ ] Enter Full Screen

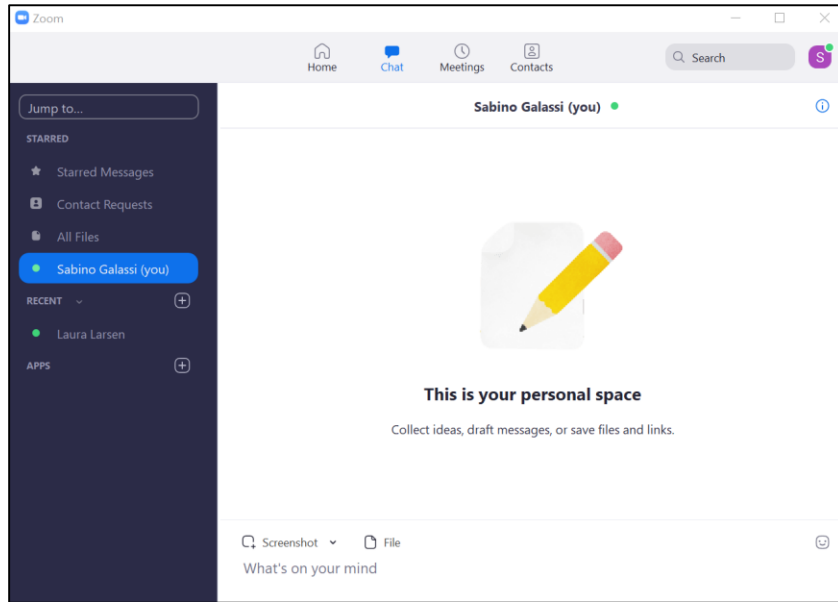- Press the ESC key or double click to exit Full Screen mode

To **End** a meeting click the End button
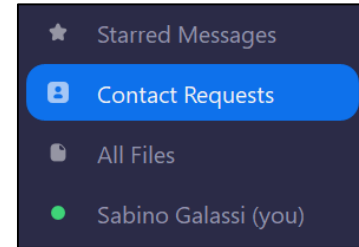
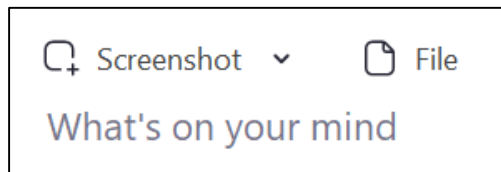**End**

Using Zoom for Meetings:

The Chat Tab

The left side taskbar of the **Chat Window** allows you to navigate the various chat features
- Use your **Personal Space** to draft messages or save files and links.
- Use the upload tool in the message window to load files take screenshots
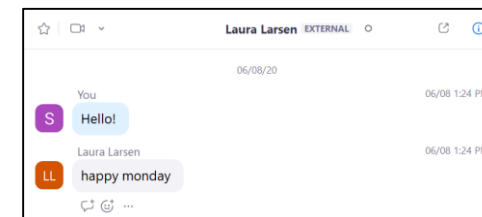

The **Contact Requests** section is used to manage all users you wish to add to your contacts

- Invitations you send and receive are stored here
- Click **Start Chat** to begin chatting with them
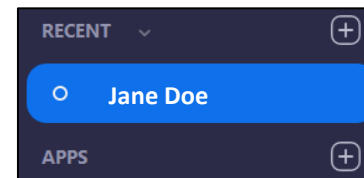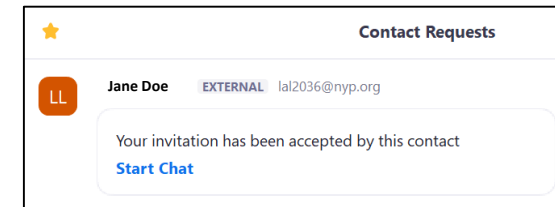
The **Recent** section houses the names of any contacts you've messaged recently
.
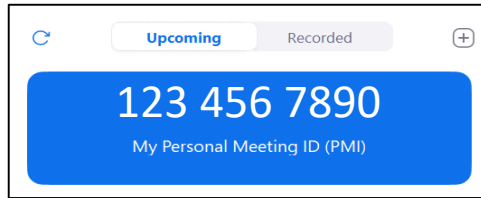- Click their name to view the chat log and start chatting

Using Zoom for Meetings:

The Meetings Tab

The **Meetings** tab contains a record of all upcoming meetings as well as any recorded meetings
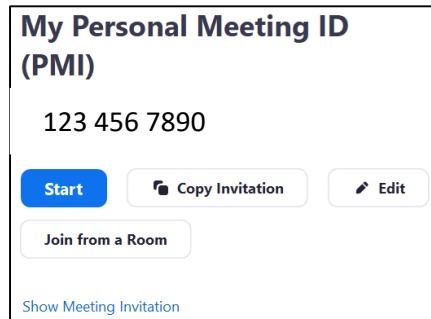

You can also find your **Personal Meeting ID (PMI)**
- The PMI is your dedicated 10 digit number assigned to an individual account. This ID becomes the users personal virtual meeting room

To start a meeting with your PMI:
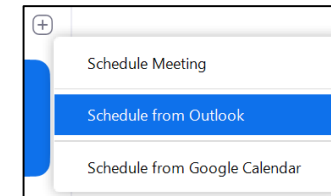- Click the **Start** icon on the right side of the meeting tab

- This will load a private meeting room using your PMI
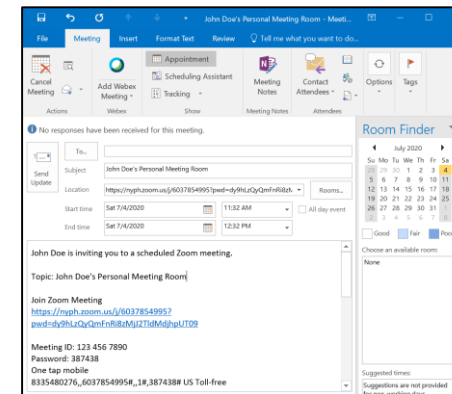
Scheduling Meetings

You can use the **Meetings** tab to schedule meetings using Zoom, Outlook or Google Calendar
To schedule a meeting via Outlook:
- Click the **Plus** symbol above your PMI

- Select the **Schedule from Outlook** option
- This will generate an Outlook calendar invitation

- This invitation will contain a your Zoom Meeting link, the Meeting ID and Password as well as call-in numbers for those on mobile devices
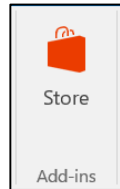
Using Zoom for Meetings:
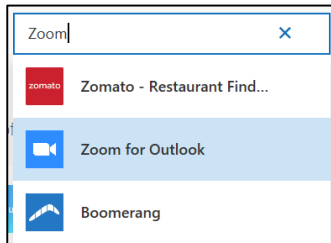
The Zoom Plug-in for Outlook

A **Zoom Plug-in** (or Add-in) can be downloaded to Outlook. This can enable Outlook users to create Zoom meeting invitations directly in Outlook.
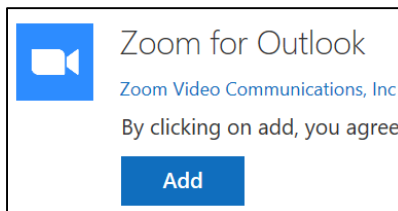
To download the Zoom Plug-in:

- Open Outlook and locate the **Add-in** group

- Click **Store** to open the Outlook Add-In store page
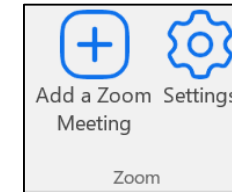- In the search bar, type in Zoom

- Click the **Zoom** option and click **Add** to download

To access the Zoom Plug-in:
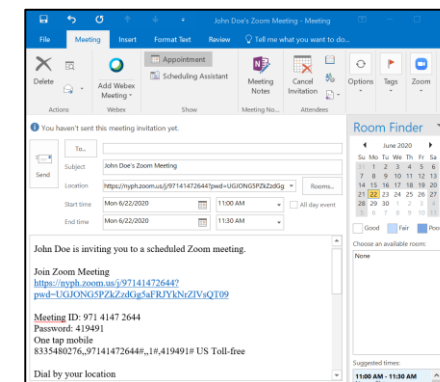
- Open an Outlook Meeting Invitation
- The Zoom group should now be available on the right side of the tab ribbon

- Click the **Add a Zoom Meeting** icon create a Zoom Meeting email invitation
  - If it's your first time using the Add-in you will be prompted to sign in via **SSO**

- Click the **Settings** icon to open a Settings Panel in the invitation and update Meeting Settings
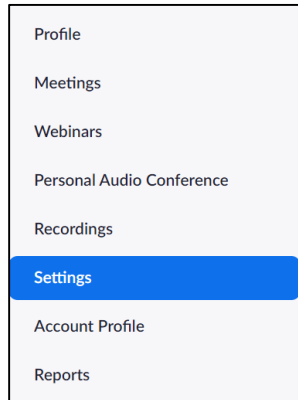
Using Zoom for Meetings:
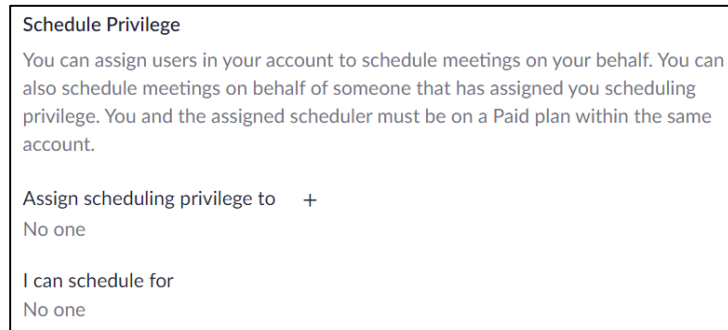
Scheduling Privileges

With a licensed account you can grant permission for other licensed accounts to schedule meetings on your behalf

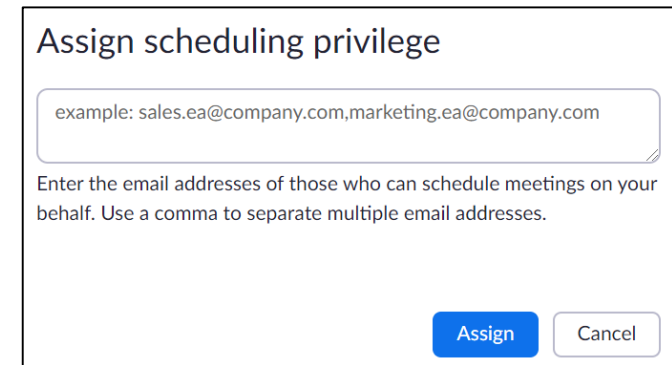To set up **Schedule Privileges**:

- Log into the Zoom Desktop Client (zoom.us)
- Click on the **Settings** icon on the left taskbar

Profile

Meetings

Webinars

Personal Audio Conference

Recordings

Settings

Account Profile

Reports

- Scroll down to the **Schedule Privileges** section

Schedule Privilege

You can assign users in your account to schedule meetings on your behalf. You can also schedule meetings on behalf of someone that has assigned you scheduling privilege. You and the assigned scheduler must be on a Paid plan within the same account.

Assign scheduling privilege to   +
No one

I can schedule for
No one

- Click the **Plus** symbol next to the "Assign scheduling privilege to" icon
- This will open a new window where you can enter the email(s) of those you wish to grant scheduling privileges to

Assign scheduling privilege

example: sales.ea@company.com,marketing.ea@company.com

Enter the email addresses of those who can schedule meetings on your behalf. Use a comma to separate multiple email addresses.

Assign   Cancel

- Click **Accept** and the email address should now appear in the "Assign scheduling privilege to" section

Assign scheduling privilege to   +

lal2036@nyp.org   ✕
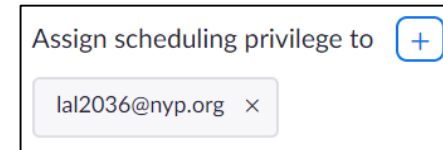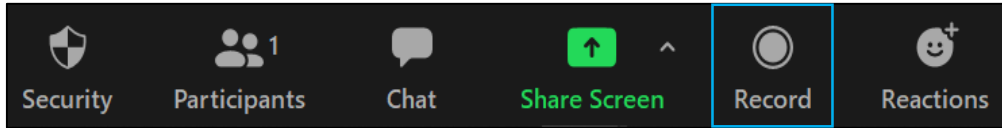
- Click the **X** icon next to the email to remove any email privileges
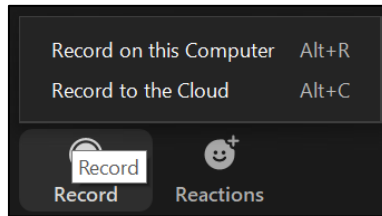
Using Zoom for Meetings:

Recording from the Meeting Window

To start a recording from the Meeting Window:
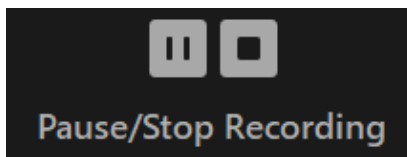
- Click the **Record** icon in the settings

- This will open a pop-up menu enabling you to choose where you'd like to record
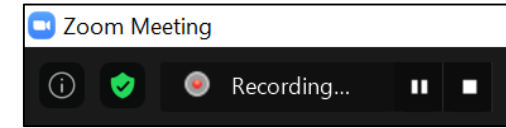

- Click either option to begin recording

To control a recording from the Meeting Window:

- Use the **Pause/Stop Recording** button to pause, stop and re-start the recording

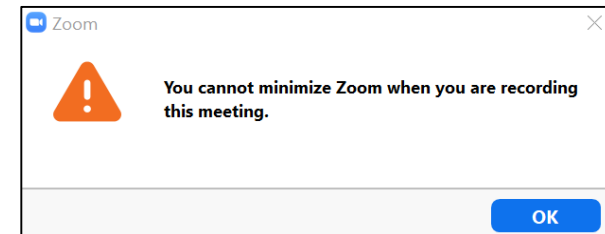****Note that stopping a recording will end the recording**

- The recording bar will appear on the top left of the screen which can also be used to pause and stop

- When paused, the recording bar will turn red

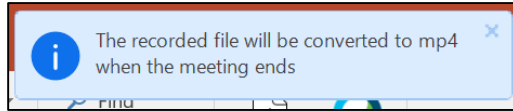***Note that the screen cannot be minimized when recording*

Using Zoom for Meetings:

To end a recording:

- Click **Stop** to end the recording
- This will trigger a notification that the recording will be converted to mp4 when the meeting ends

- Once the meeting has stopped, Zoom will begin converting the recording
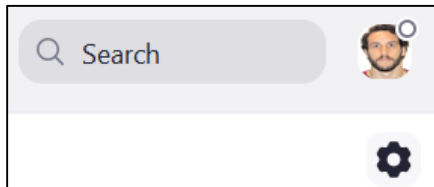

- The file explorer will open to the location of the newly created recording mp4
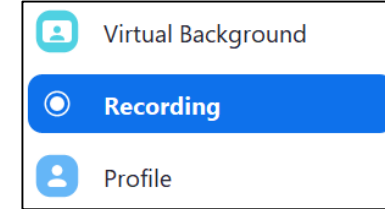
Adjusting Recording Settings
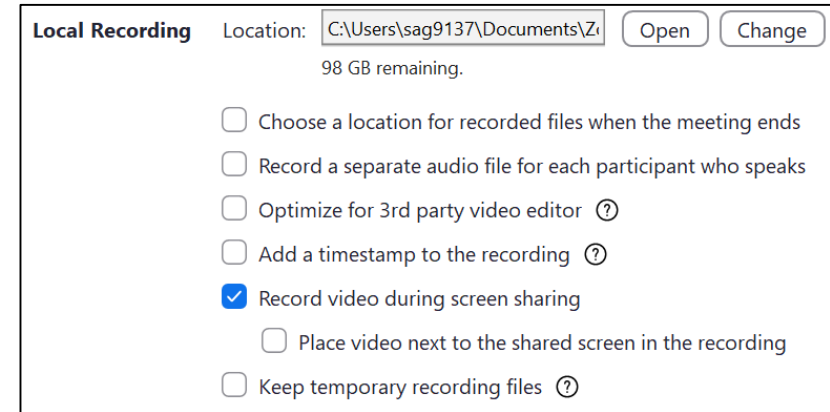
To adjust the recording settings:

- Access the **Settings** menu from the Zoom Home Page

- Click the **Recording** option from the left side taskbar

- From the menu page, you can adjust a variety of settings including:
  - Choosing the location recordings will save to
 - Recording individual audio files per participant
 - Adding timestamps

Sharing Polls

Hosts can Poll their audience via single choice and multiple choice questions directly through Zoom
To Create Polls:

- First, ensure that Polling is enabled by using the Zoom Desktop Client (Web Browser) and accessing the **Settings**

Polling

Add 'Polls' to the meeting controls. This allows the host to survey the attendees.
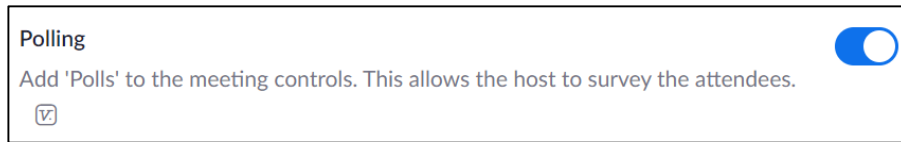
- Begin by **Scheduling a Meeting**
- Use the Desktop Client to view the meeting settings by accessing the **Manage "My Meeting"** page

Profile

My Meetings > Manage "My Meeting"

Meetings

Topic   My Meeting
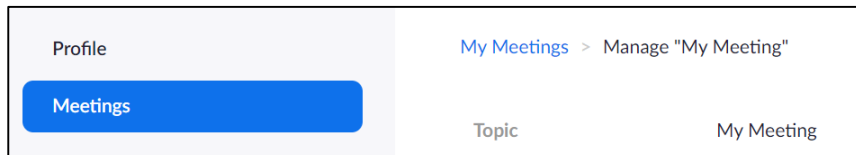
- Scroll to the bottom and click **Add** in the **Polls** section

You have not created any poll yet.   Add

- Create your **Poll** from the new window by:

- Creating a Poll Name
- Creating a Poll Question
- Choosing Single or Multiple Choice
- Creating Poll Answer(s)
  - Click **Delete** to remove the question
  - Click **Add a Question** to create a new question
- Click **Save** to save the new Poll

- The new Poll will be visible in the **Poll Settings** window and can be Edited/Deleted from here
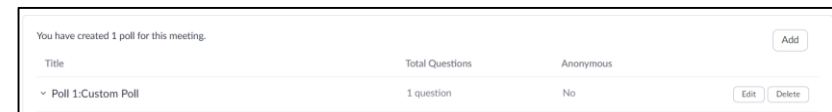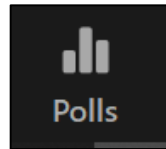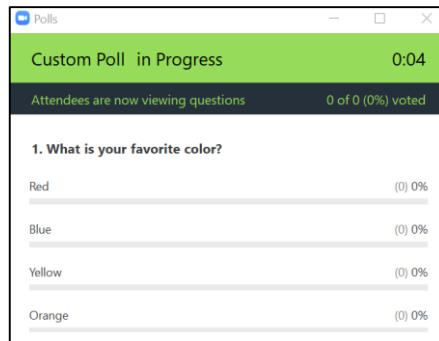
Using Zoom for Meetings: *Polling*

To Share Polls:

- Once in the Meeting, you will have access to a **Polls** icon in the bottom menu

- Click this icon to view the poll question you created
- Click the **Launch Poll** icon at the bottom to open the Poll to Participants

- Click **End Polling** to end the poll and view results
- Click **Share Results** to post results for Participants or **Re-Launch Polling** to start the poll over again

Poll Sharing Best Practices:

- A single Poll can contain as many questions as you desire.
  - If you intend to display every question at the same time you can add them all to the same Poll.
- If you want to sporadically poll your audience, you should make each question its own Poll.
  - You cannot choose individual questions within same Poll, hence the reason for making each question its own Poll.
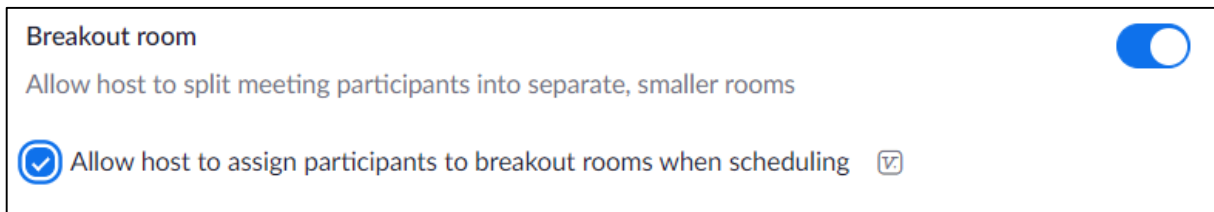
# Using Zoom for Meetings:

Breakout Rooms

As long as you're the Host, Participants in a meeting can be split into smaller virtual rooms where they can have separate group conversations and join back together later
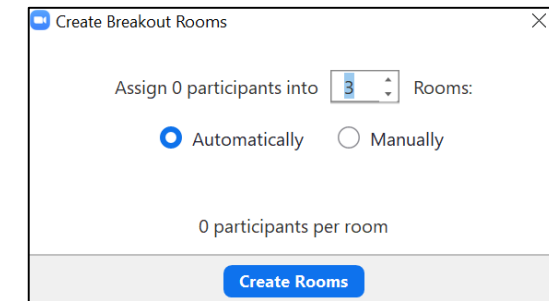
To Create a Breakout Room:
- First, ensure that **Breakout Rooms** are enabled by using the Zoom Desktop Client (Web Browser) and accessing the **Settings**

Breakout room ⬤
Allow host to split meeting participants into separate, smaller rooms

✓ Allow host to assign participants to breakout rooms when scheduling ☑

- Open a Zoom meeting by either starting a New Meeting or Scheduling a Meeting
- In either case you'll now have a new **Breakout Rooms** icon available in the bottom menu
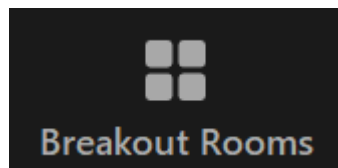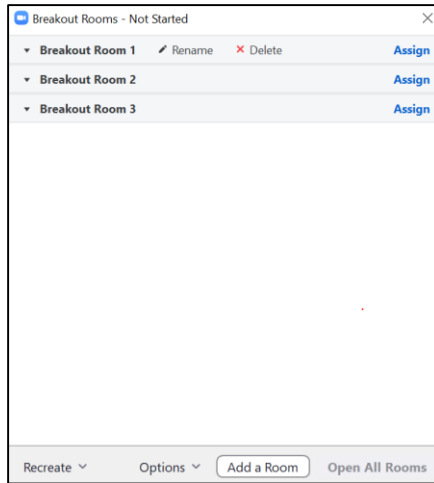
Breakout Rooms

- Click the **Breakout Rooms** icon to determine the settings for breakout rooms
  - Choose the number of rooms and whether you want the participants to be assigned automatically or randomly.

Create Breakout Rooms ✕

Assign 0 participants into 3 Rooms:

⦿ Automatically ○ Manually

0 participants per room

Create Rooms

- Click **Create Rooms** to confirm your choices
- This opens the **Breakout Rooms** window where you can:
  - View each room
  - Rename rooms
  - Delete rooms
  - Create new rooms
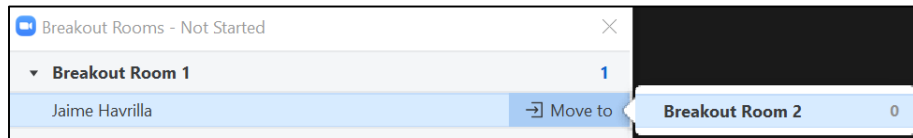 - Assign/Move Participants to rooms

Using Zoom for Meetings:

- To move a participant, hover over their name and click the **Move to** icon
- Select the new room from the side menu

- To Rename a room click the Rename icon
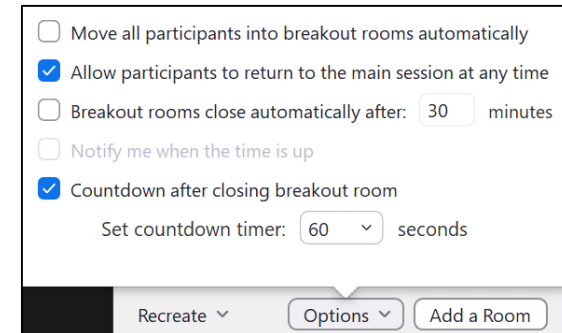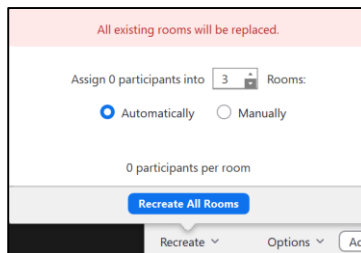- To recreate the rooms click the **Recreate** button

- Select your new parameters and click **Recreate All Rooms**
- Use the **Options** menu to select additional Participant and Breakout Room parameters such as:
  - Allowing Participants to return to the **Main Room** at any time or not
  - How long the Breakout Room(s) will be available for

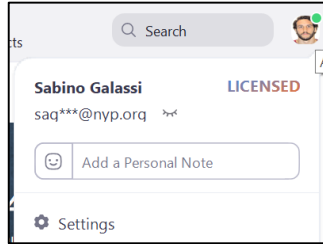- Once all Participants have been assigned click the **Open All Rooms** button to enable the Breakout Rooms
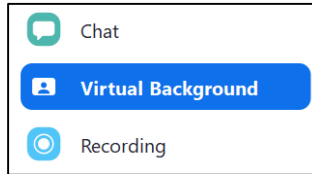
Using Zoom for Meetings:

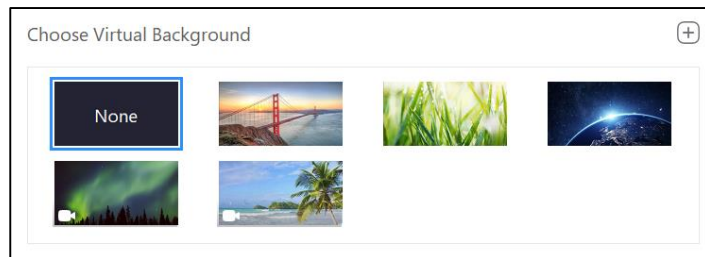## Changing the Background

To change your Background:

- Access the **Settings** menu by clicking on your Icon on the Zoom Home Page

- Click the **Settings** icon to open the Settings menu
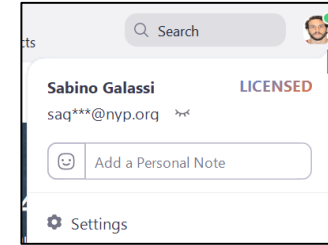- Click on the **Virtual Background** section

- You can choose a stock virtual background from the menu below, or click the **Plus** symbol to upload your own image as a background
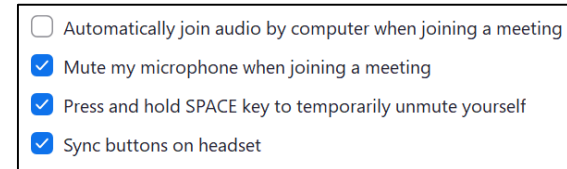

Audio and Camera Settings

To mute audio by default:

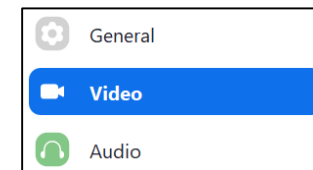- Access the **Settings** menu by clicking on your Icon on the Zoom Home Page

- Click the **Settings** icon to open the Settings menu
- Click on the **Audio** section and scroll to the bottom
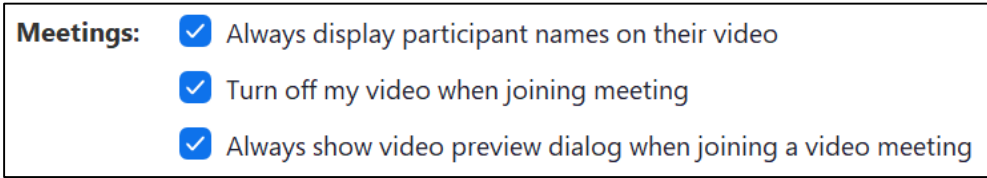- Click on the "Mute my microphone…" checkbox

To turn off video by default:

- Access the Settings menu and head to the **Video** option in the left side taskbar

Using Zoom for Meetings:

- From this menu, scroll to the Meetings section and click the "Turn off my video…" checkbox
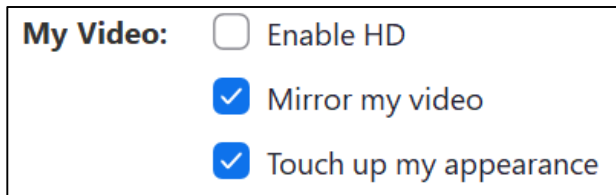

Touch Ups

Zoom has a built in camera feature than can cover minor blemishes called **Touch up my appearance**

To turn on **Touch up**:
- Head to the **Settings** tab
- Select the **Video** option from the left side taskbar
- Scroll to the **My Video** section
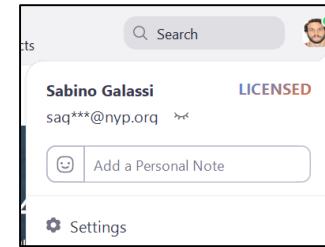- Click **Touch up my appearance**
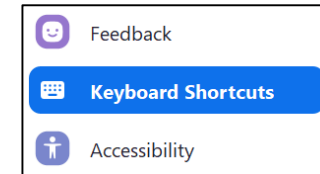

Keyboard Shortcuts

Zoom has a variety of built-in and customizable shortcuts
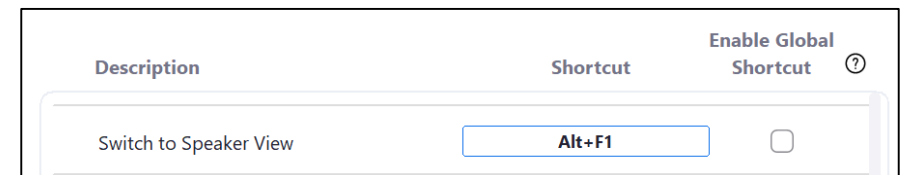To access **Keyboard Shortcuts**:
- Access the **Settings** menu by clicking on your Icon on the Zoom Home Page

- Click the **Settings** icon to open the Settings menu
- Click on the **Keyboard Shortcuts** section

- Scroll to view available shortcuts. Click on a shortcut to create custom key combinations
- Click the **Enable Global Shortcut** box to activate
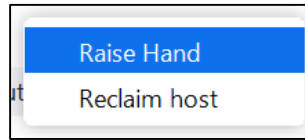
Using Zoom for Meetings:

Hand Raising

Participants in a meeting can use the **Raise Hand** button to alert the Meeting Host that they have a question

To Raise your Hand:

- As a Participant, click the ellipses icon on the bottom of the Participant window
- Click **Raise Hand** in the pop up menu

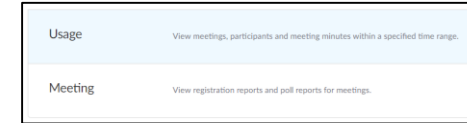- The Host will be alerted to this icon

Usage Reports

You can view and download detailed information on Participants to your sessions via the **Usage Reports** menu

Usage Report data can be extremely useful especially for attendance purposes
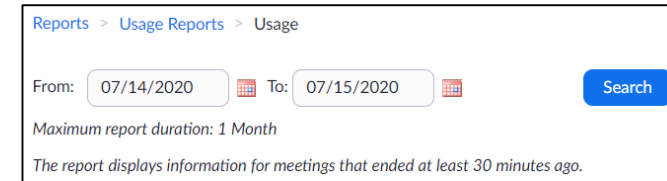
To view and download Usage Reports:

- Login to Zoom via the zoom.us Desktop Client

- Head to the **Reports** tab
- Click **Usage Reports**

- Adjust the Date Range to locate the meeting you wish to pull a report for and click **Search**

- Available meetings will be located below. Click the blue number next to **Participants** to view details

- You can view names, emails, login and logout times as well as the total duration of their presence
- Click **Export** to download as an Excel Document