



zoom

User Training

Any device | Anywhere

Desktop
and Laptop



Tablet and
Mobile



Room
Systems
(Zoom Rooms
&
H.323/SIP)



Telephone
(Call-in &
Call-out)



zoom

Agenda

- Introduction
- Web Portal
 - Login
 - Profile Settings
 - Meetings Settings
- Desktop Client for Meetings
 - Meeting Settings
- Schedule and Join Meetings
 - Desktop Client
 - Web Portal
- Connecting to a Meeting
- In Session Controls
 - Host – Camera View
 - In Meeting Control Bar
 - Participant Control
 - Invite and Group Chat
 - Share Screen
 - Annotate, More and End Meeting
- Things to Remember
- Helpful Links
- Q & A

umassmed.zoom.us



Video Conferencing

Join

Connect to a meeting in progress

Host

Start a meeting

Sign in

Configure your account

Login

Sign In - Zoom X

Secure | <https://umassmed.zoom.us/signin>

 JOIN A MEETING HOST A MEETING ▾ SUPPORT FAQ SIGN IN SIGN UP, IT'S FREE

Sign In

Email address

Password

Sign In

[Forgot password?](#) Stay signed in

Or, sign in with [Google](#) or [Facebook](#)

New to Zoom? [Sign Up Free](#)

About

[Zoom Blog](#)
[Customers](#)
[Our Team](#)

Download

[Meetings Client](#)
[Zoom Rooms Client](#)
[Browser Extension](#)

Sales

1.888.799.9666
[Contact Sales](#)
[Plans & Pricing](#)

Support

[Test Zoom](#)
[Account](#)
[Support Center](#)

Language

English ▾

Notes

of 54 X 72%

Web Portal

Configure Profile

My Profile - Zoom

Secure | https://umassmed.zoom.us/profile

JOIN A MEETING HOST A MEETING SUPPORT FAQ

University of Massachusetts Medical School

Profile

- Meeting Settings
- Meetings
- Recordings
- Webinars
- Account Management
- Account Profile
- Reports

Refer-a-Friend

Attend Live Training

Video Tutorials

Knowledge Base

Emma Smith
UMass Medical School
Account No. 315533

Personal Meeting ID 302-380-3022
<https://umassmed.zoom.us/j/3023803022>
✓ Use this ID for instant meetings

Personal Link <https://umassmed.zoom.us/my/emma4594>

Sign-In Email emma_4594@hotmail.com
Linked accounts:

User Type Pro

Capacity Meeting 100

Time Zone (GMT-5:00) Eastern Time (US and Canada)

Language No option selected.

Sign-In Password *****

Host Key *****

Signed-In Device Sign Me Out From All Devices

Personal Meeting ID (PMI): Assigned to you automatically as a permanent virtual room. You can start it any time or schedule it for future use.

Personal Link: Your Personal Link is your personal URL that is associated with your Personal Meeting ID.

Web Portal

Configure Meeting Settings

My Settings - Zoom x

Secure | https://umassmed.zoom.us/profile/setting

JOIN A MEETING HOST A MEETING SUPPORT FAQ SIGN OUT

Profile

Meeting Settings

Meetings

Recordings

Webinars

Account Management

Account Profile

Reports

Refer-a-Friend

Attend Live Training

Video Tutorials

Knowledge Base

Meeting Recording Telephone

Schedule Meeting

In Meeting (Basic)

In Meeting (Advanced)

Email Notification

Other

Schedule Meeting

Features Status

Host video Start meetings with host video on Modified Reset

Participants video Start meetings with participant video on. Participants can change this during the meeting. Modified Reset

Audio Type

Determine how participants can join the audio portion of the meeting. When joining audio, you can let them choose to use their computer microphone/speaker or use a telephone. You can also limit them to just one of those audio types. If you have 3rd party audio enabled, you can require that all participants follow the instructions you provide for using non-Zoom audio.

Telephone and Computer Audio

Telephone

Computer Audio

Join before host Allow participants to join the meeting before the host arrives

Require a password for Personal Meetings if attendees can join before host If the meeting organizer selects the "Enable join before host" option for a Personal Meeting, the "Require meeting password" option is also enabled. This prevents unauthorized participants from fraudulently using the meeting ID.

Generate and require password for participants joining by phone Will generate and send new passwords for newly scheduled or edited

Web Portal

Configure Meeting Settings

My Settings - Zoom X

Secure | https://umassmed.zoom.us/profile/setting

JOIN A MEETING HOST A MEETING SUPPORT FAQ SIGN OUT

UMASS MEDICAL INFORMATION TECHNOLOGY

In Meeting (Basic)

Schedule Meeting

End-to-end encryption
Require that all meetings are encrypted using AES Locked by admin

In Meeting (Basic)

Chat
Allow meeting participants to send a message visible to all participants

In Meeting (Advanced)

Email Notification

Other

Private chat
Allow meeting participants to send a private 1:1 message to another participant.

Auto saving chats
Automatically save all in-meeting chats so that hosts do not need to manually save the text of the chat after the meeting starts.

Play sound when participants join or leave
Play sound when participants join or leave Modified Reset

Heard by host and all attendees Heard by host only

When each participant joins by telephone
 Record and play their own voice

File transfer
Hosts and participants can send files through the in-meeting chat. This option cannot be enabled if the End-to-end encryption option is enabled.

Feedback to Zoom
Add a Feedback tab to the Windows Settings or Mac Preferences dialog, and also enable users to provide feedback to Zoom at the end of the meeting Modified Reset

Display end-of-meeting experience feedback survey
Display a thumbs up/down survey at the end of each meeting. If participants respond with thumbs down, they can provide additional information about what went wrong. ?

Web Portal Configure Meeting Settings (Continued)

My Settings - Zoom

Secure | https://umassmed.zoom.us/profile/setting

JOIN A MEETING HOST A MEETING SUPPORT FAQ SIGN OUT

UMASS MEDICAL INFORMATION TECHNOLOGY

Co-host Allow the host to add co-hosts. Co-hosts have the same in-meeting controls as the host. Locked by admin

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

Allow host to put attendee on hold Allow hosts to temporarily remove an attendee from the meeting.

Always show meeting control toolbar Always show meeting controls during a meeting Modified Reset

Annotation Allow participants to use annotation tools to add information to shared screens

Whiteboard Allow participants to share a whiteboard that includes annotation tools

Remote control During screen sharing, the person who is sharing can allow others to control the shared content

Nonverbal feedback Participants in a meeting can provide nonverbal feedback and express opinions by clicking on icons in the Participants panel.

Web Portal

Configure Meeting Settings (Continued)

My Settings - Zoom

Secure | https://umassmed.zoom.us/profile/setting

JOIN A MEETING HOST A MEETING SUPPORT FAQ SIGN OUT

In Meeting (Advanced)

Schedule Meeting	Breakout room Allow host to split meeting participants into separate, smaller rooms	<input checked="" type="checkbox"/>	Modified	Reset
In Meeting (Basic)	Remote support Allow meeting host to provide 1:1 remote support to another participant	<input type="checkbox"/>	Modified	Reset
In Meeting (Advanced)	Closed caption Allow host to type closed captions or assign a person/ 3rd-party device to add closed captions	<input type="checkbox"/>	Modified	Reset
Email Notification	Far end camera control Allow another user to take control of your camera during a meeting	<input checked="" type="checkbox"/>	Locked by admin	
Other	Virtual background Allow users to replace their background with any selected image. Choose or upload an image in the Zoom Desktop application settings.	<input type="checkbox"/>	Modified	Reset
	Identify guest participants in the meeting/webinar Participants who belong to your account can see that a guest (someone who does not belong to your account) is participating in the meeting/webinar. The Participants list indicates which attendees are guests. The guests themselves do not see that they are listed as guests. 	<input type="checkbox"/>	Modified	Reset
	Auto-answer group in chat Enable users to see and add contacts to 'auto-answer group' in the contact list on chat. Any call from members of this group will be automatically answered.	<input type="checkbox"/>		
	Only show default email when sending email invites Allow users to invite participants by email only by using the default email program selected on their computer	<input type="checkbox"/>		
	Use HTML format email for Outlook plugin Use HTML formatting instead of plain text for meeting invitations scheduled with the Outlook plugin	<input type="checkbox"/>		
	Share dual camera Allow the option, during screen sharing, to share a camera that is connected	<input type="checkbox"/>		

Web Portal

Configure Meeting Settings (Continued)

My Settings - Zoom X

Secure | https://umassmed.zoom.us/profile/setting

Use HTML format email for Outlook plugin JOIN A MEETING HOST A MEETING SUPPORT FAQ District Resources SIGN OUT

Schedule Meeting

In Meeting (Basic)

In Meeting (Advanced)

Email Notification

Other

Share dual camera Allow the option, during screen sharing, to share a camera that is connected to the computer OFF

Allow users to select stereo audio in their client settings Allow users to select stereo audio during a meeting OFF

Allow users to select original sound in their client settings Allow users to select original sound during a meeting OFF

Screen sharing Allow host and participants to share their screen or content during meetings ON Modified Reset

Attention tracking Lets the host see an indicator in the participant panel if a meeting/webinar attendee does not have Zoom in focus during screen sharing. OFF

Waiting room Attendees cannot join a meeting until a host admits them individually from the waiting room. If Waiting room is enabled, the option for attendees to join the meeting before the host arrives is automatically disabled. ON Modified Reset

Show a "Join from your browser" link Allow participants to bypass the Zoom application download process, and join a meeting directly from their browser. This is a workaround for participants who are unable to download, install, or run applications. Note that the meeting experience from the browser is limited ON Modified Reset

Live on Workplace by Facebook Allow hosts to live stream their meetings to Workplace by Facebook OFF

Web Portal Configure Meeting Settings (Continued)

My Settings - Zoom

Secure | https://umassmed.zoom.us/profile/setting

Join on Workplace by Facebook

JOIN A MEETING HOST A MEETING SUPPORT FAQ SIGN OUT

Schedule Meeting

In Meeting (Basic)

In Meeting (Advanced)

Email Notification

Other

Email Notification

When attendees join meeting before host
Notify host when participants join the meeting before them

When a meeting is cancelled
Notify host and participants when the meeting is cancelled

When an alternative host is set or removed from a meeting
Notify the alternative host who is set or removed

Other

Blur snapshot on task switcher
Enable this option to hide potentially sensitive information from the snapshot of the Zoom main window.
This snapshot display as the preview screen in the iOS tasks switcher when multiple apps are open.

Invitation Email
Your meeting attendees will receive emails in language based upon their browser/profile settings.
Choose languages which your expected attendees will receive content in to edit.

Choose email in language to edit English

Send me a preview email

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

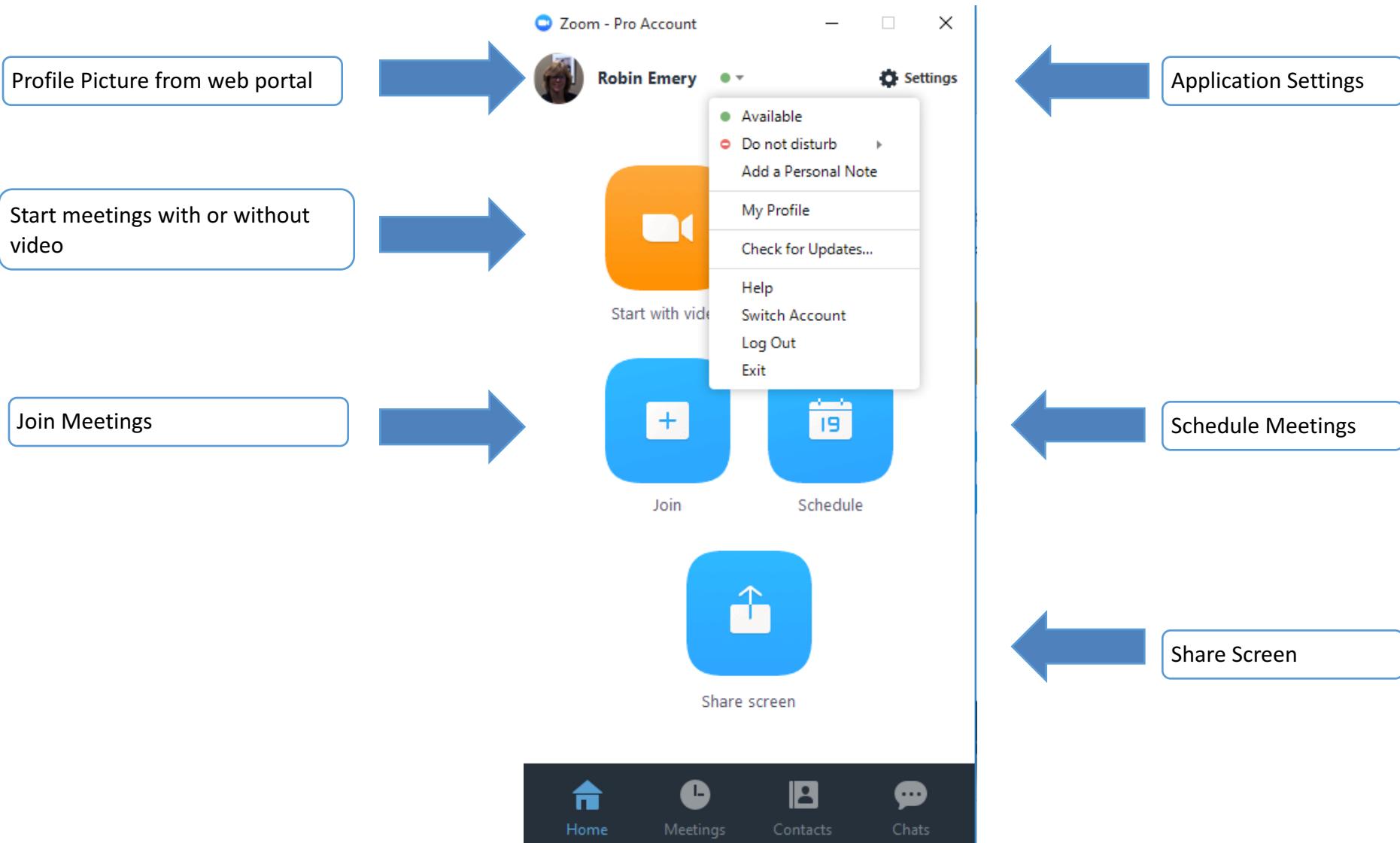
I can schedule for
No one

Integration Authentication
key: 3T-Tz4TDSIWYnx-saw83dA
Secret: iZI8COLxrgXL6oiZ4nZCdQkxYmtc84buHXQU

Regenerate

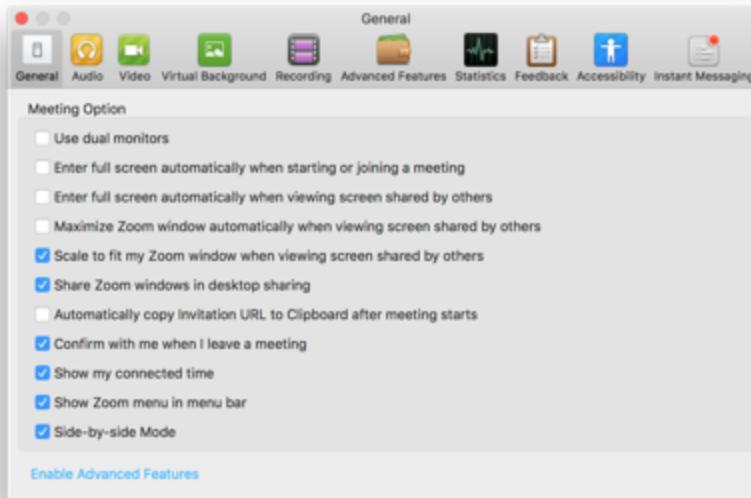
Desktop Client

➤ zoom.us/download

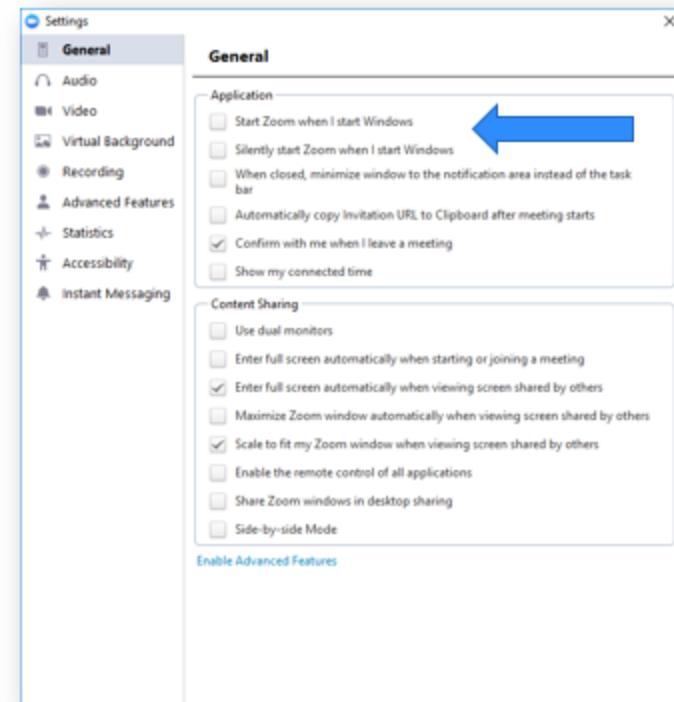


Desktop Client General Settings

Mac



Windows

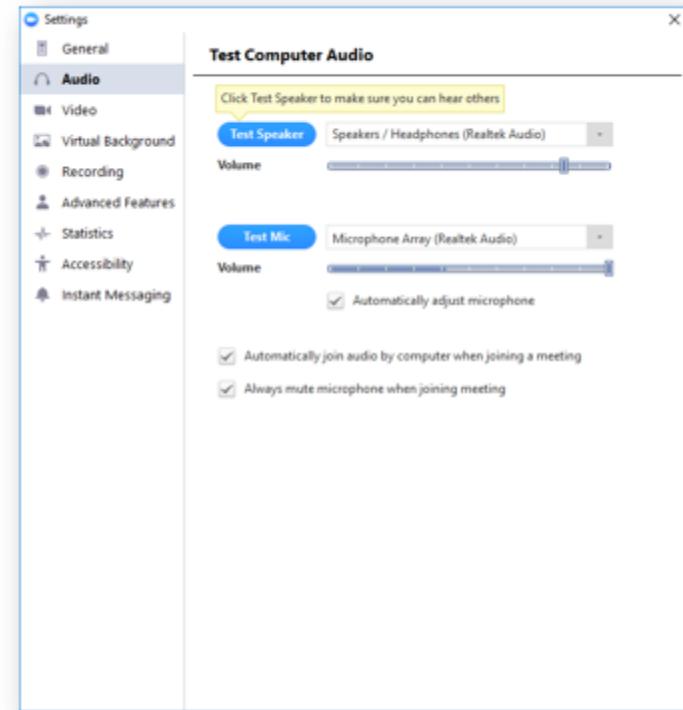


Desktop Client Audio Settings

Mac

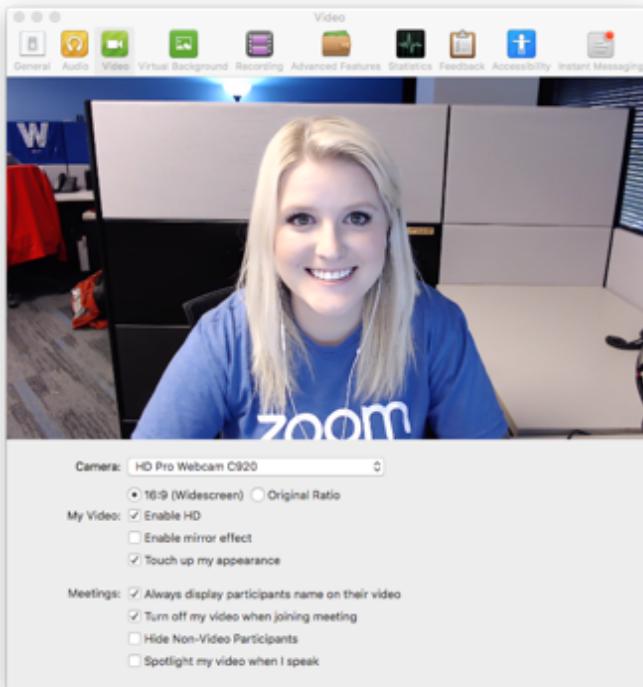


Windows

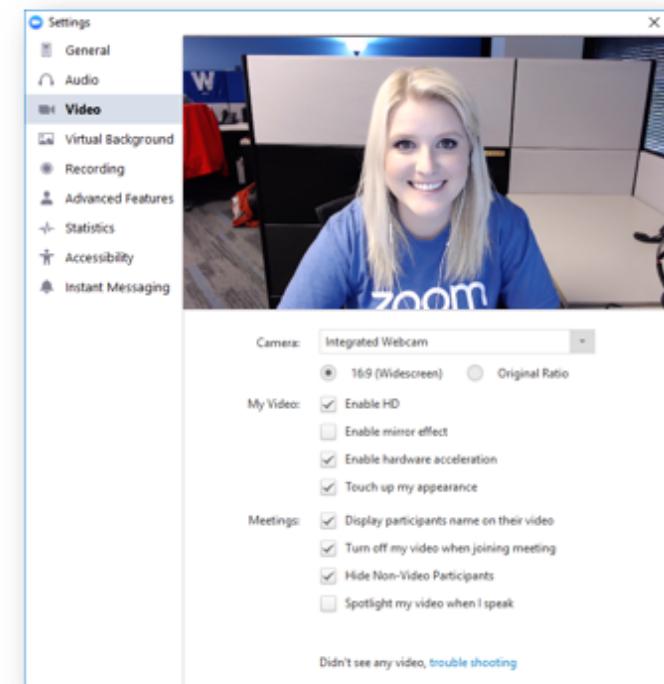


Desktop Client Video Settings

Mac



Windows

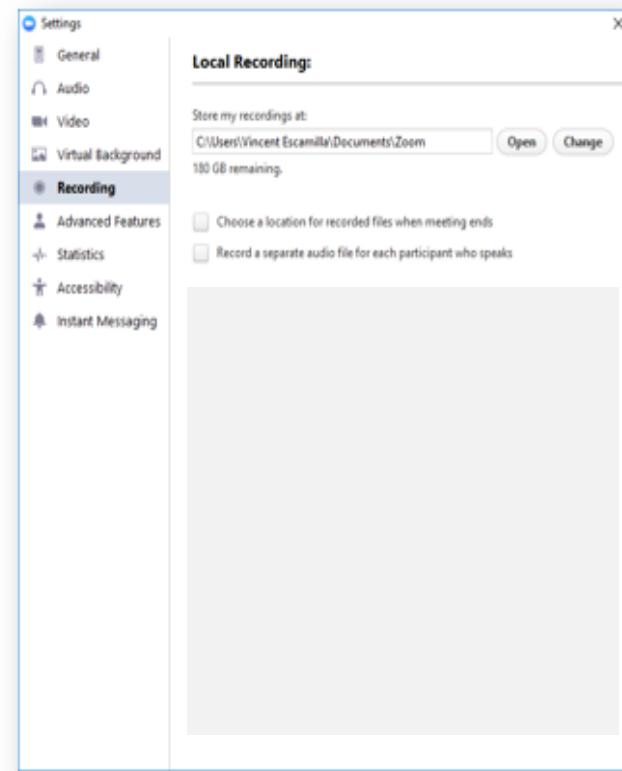


Desktop Client Recording Settings

Mac



Windows



Desktop Client

Meetings and Contact

Zoom - Pro Account

Upcoming Recorded

Personal Meeting ID (PMI)

302-380-3022

<https://umassmed.zoom.us/my/emma4594>

Always use PMI for instant meetings on this computer

Edit Schedule ▾

Recurring - Zoom

Meeting ID: 611 525 868

Home Meetings Contacts Chats

Zoom - Pro Account

Add Contact Add Group

Search

Favorites 0/0

Company Contacts 13/277

Home Meetings Contacts Chats

Scheduling with Zoom

Why Schedule a Zoom meeting

- Generate unique ID specific to that meeting
- Registration option available to control who gets ID
- Integrated with calendar for ease of scheduling

Ways to schedule with Zoom

- Web portal
- Desktop Application
- Outlook
- Mobile Application

Desktop Client

Schedule Meeting preferences

Schedule a new meeting X

Topic: Emma Smith's Zoom Meeting

When

Start:

Duration: Hr 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 302-380-3022

Advanced Options

Calendar

Outlook Google Calendar Other Calendars

Schedule

Web Portal

Schedule a meeting

[JOIN A MEETING](#)[HOST A MEETING](#) ▾[SUPPORT](#)[FAQ](#) [SIGN OUT](#)[Profile](#)[Meeting Settings](#)[Meetings](#)[Recordings](#)[Webinars](#)[Account Management](#)[Account Profile](#)[Reports](#)[Refer-a-Friend](#)[Attend Live Training](#)[Video Tutorials](#)[Knowledge Base](#)[Upcoming Meetings](#)[Previous Meetings](#)[Personal Meeting Room](#)[Get Training](#)[Schedule a New Meeting](#)[Join a meeting from an H.323/SIP room system](#)

Start Time	Topic	Meeting ID
Today 8:00 PM	Emma Smith's Zoom Meeting	206-143-638
Today 8:00 PM	Emma Smith's Zoom Meeting	302-380-3022

[Start](#) [Delete](#)
[Start](#) [Delete](#)

Save time by scheduling your meetings directly from your calendar.

[Microsoft Outlook Plugin
Download](#)[Chrome Extension
Download](#)[Firefox Add-on
Download](#)

Web Portal Select your preferences



SOLUTIONS ▾ PLANS & PRICING CONTACT SALES

- Profile
- Meeting Settings
- Meetings**
- Recordings
- Webinars
- Account Management
- Account Profile
- Reports

Refer-a-Friend
Attend Live Training
Video Tutorials
Knowledge Base

My Meetings > Schedule a Meeting

Schedule a Meeting

Topic

Description (Optional)

When

Duration hr min

Time Zone

Recurring meeting

Registration Required

Video Host on off

Participant on off

Audio Telephony Only VoIP Only Both

Meeting Options Require meeting password

Enable join before host

Mute participants upon entry Supported versions

Use Personal Meeting ID 302-380-3022

Alternative Hosts

Save **Cancel**

Web Portal

Scheduled Meeting

Profile

Meeting Settings

Meetings

Recordings

Webinars

Account Management

Account Profile

Reports

Refer-a-Friend

Attend Live Training

Video Tutorials

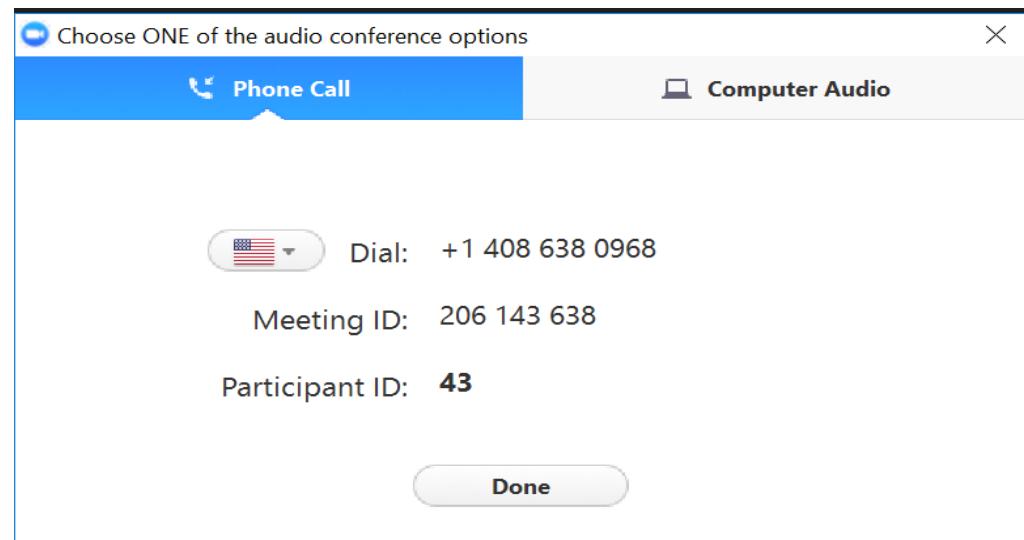
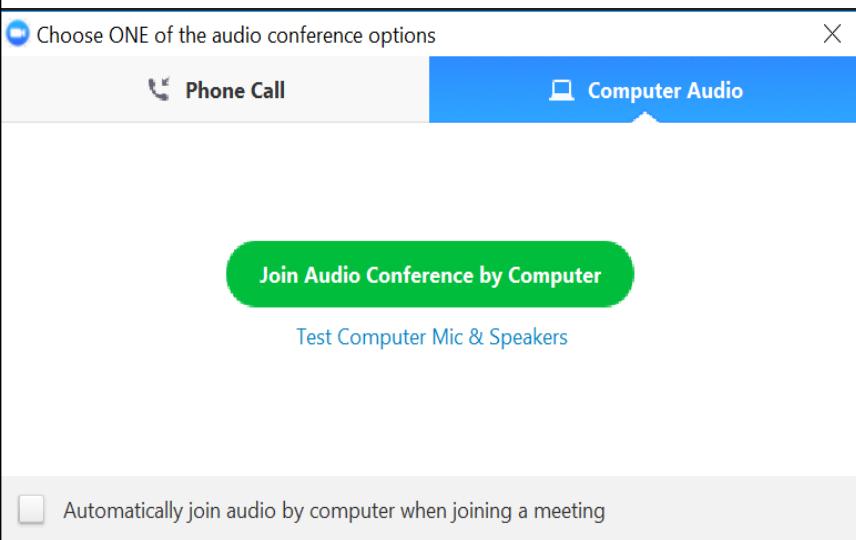
Knowledge Base

My Meetings > Manage "Zoom Meeting"

Start this Meeting

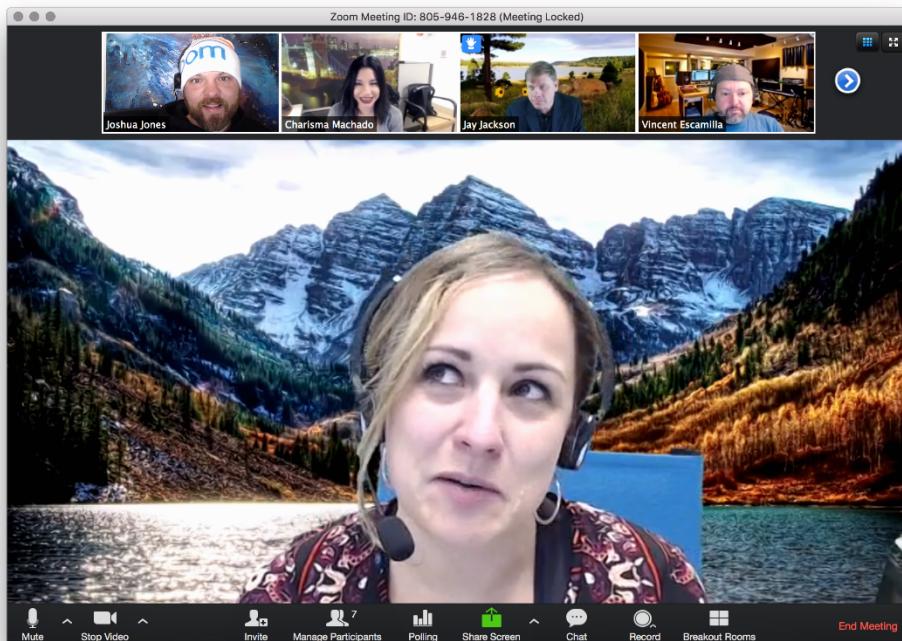
Topic	Zoom Meeting	
Description	Q&A	
Time	Aug 7, 2017 10:00 AM Eastern Time (US and Canada)	
Add to	<input type="button" value="Google Calendar"/> <input checked="" type="button" value="Outlook Calendar (.ics)"/> <input type="button" value="Yahoo Calendar"/>	
Meeting ID	302-380-3022	
Join URL:	https://umassmed.zoom.us/my/emma4594	<input type="button" value="Copy the invitation"/>
Video	Host	Off
	Participant	Off
Audio	Both	
Meeting Options	<input checked="" type="checkbox"/> Require meeting password	
	<input checked="" type="checkbox"/> Enable join before host	
	<input checked="" type="checkbox"/> Mute participants upon entry <small>Supported versions</small>	
	<input checked="" type="checkbox"/> Use Personal Meeting ID 302-380-3022	
Delete this Meeting	<input type="button" value="Edit this Meeting"/>	<input type="button" value="Start this Meeting"/>

Connecting to a Meeting

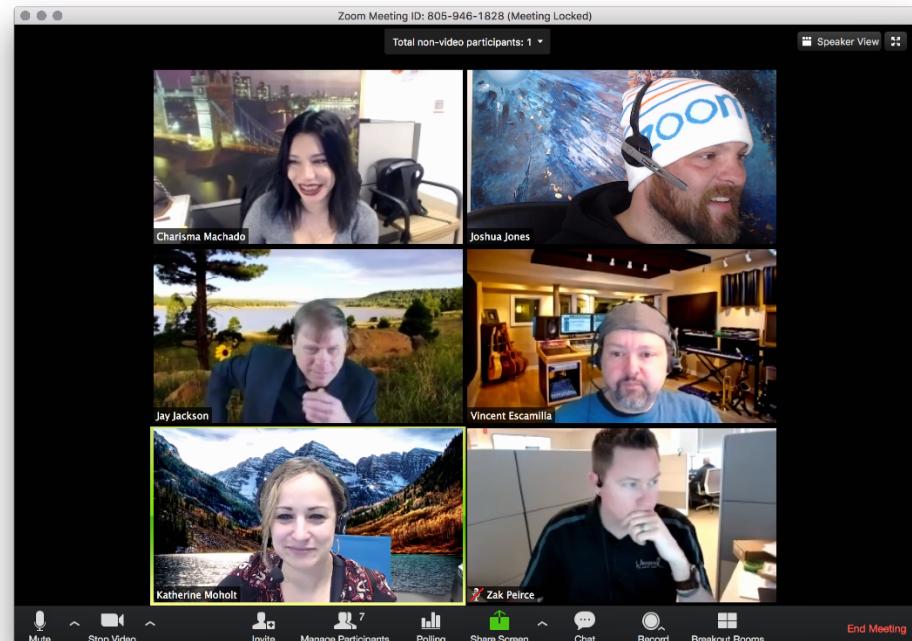


Host Controls

Camera View



Active Speaker View



Gallery View

In Meeting Controls

Meeting Interface

Zoom Meeting ID: 302-380-3022



Talking:

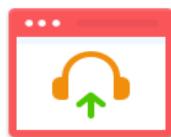
Meeting Topic: Emma Smith's Personal Meeting Room

Host: Emma Smith

Invitation URL: <https://umassmed.zoom.us/my/emma4594>

[Copy URL](#)

Participant ID: 27



Join Audio
Computer Audio Connected

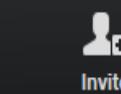


Share Screen



Invite Others

In Meeting Control Bar



Mute



Start Video



Manage Participants



Share Screen



Chat



Record



Breakout Rooms

End Meeting

In Meeting Controls

Participant Controls

Participants (2)

	Emma Smith (Host, me)		
	Robin Emery	<button>Unmute</button>	<button>More ></button>

Mute All

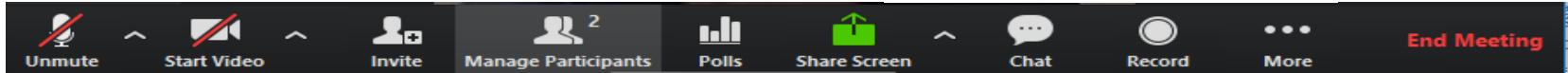
Current and new participants will be muted

Allow participants to unmute themselves

Yes No

Mute All Unmute All More ▾

✓ Mute participants on entry
✓ Put attendee in waiting room on entry
✓ Play enter/exit chime
Lock meeting



Unmute Start Video Invite Manage Participants Polls Share Screen Chat Record More End Meeting

In Meeting Controls

Invite and Group Chat

Invite people to join meeting 302-380-3022

Invite by Email **Invite by Contacts** Invite Zoom Rooms Invite a Room System

Type to filter

DW Darryl Wilson	JH jay himmelst...	MC Michael Chin	SK Samantha Ke...
SZ Sparc Zoom Account	SR Stephen Roll	AD Anindita Deb	RE Robin Emery
AY Abhi Yalamanchili	AT Academic Technology	AA Akbar Ali	AM Alexandra Morena
AD Amanda Duda	AL Ambros Lab	AD Amy Devlin	AL Amy Leary

Copy URL Copy Invitation **Invite**

Join Audio Start Video **Invite** Manage Participants Polls Share Screen Chat Record Breakout Rooms End Meeting

Zoom Group Chat

From Me to Everyone:
Hello everyone

From Robin Emery to Everyone:
hello

To: **Everyone** **More**

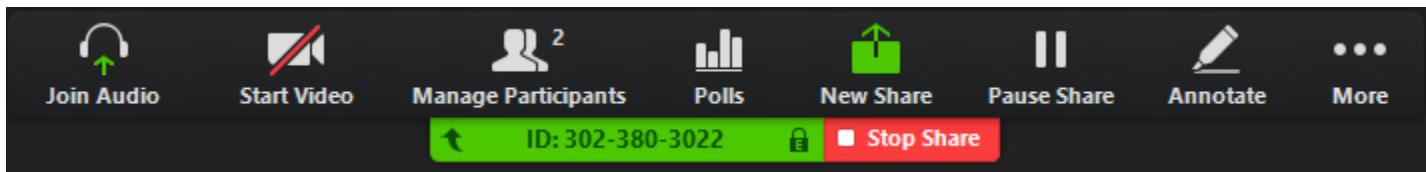
Type ere...
 Everyone
 Robin Emery

Allow attendees to chat with:
 Host only
 Everyone

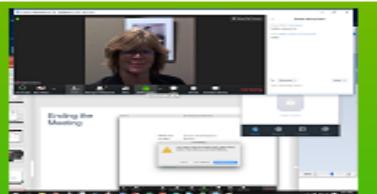
Join Audio Start Video **Invite** Manage Participants Polls Share Screen Chat Record Breakout Rooms End Meeting

In Meeting Controls

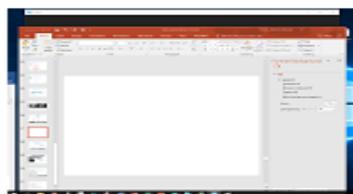
Share Screen



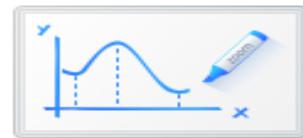
Select a window or an application that you want to share



Desktop 1



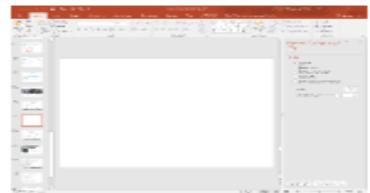
Desktop 2



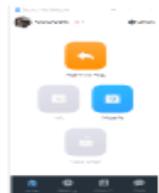
Whiteboard



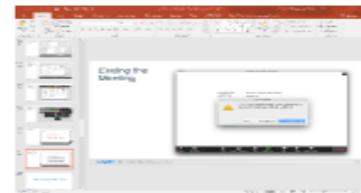
iPhone/iPad



Class presentation revise...



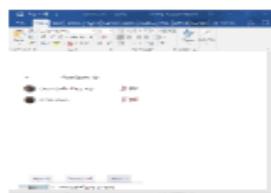
Zoom - Pro Account



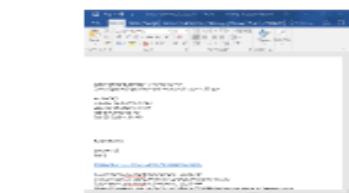
UMMS - End User Traini...



umassmed-it-logo - Paint



Document3 - Word



Zoom Training Schedule...



Post Attendee - Zoom - ...

Show all windows...

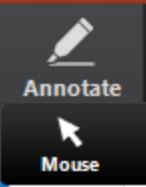
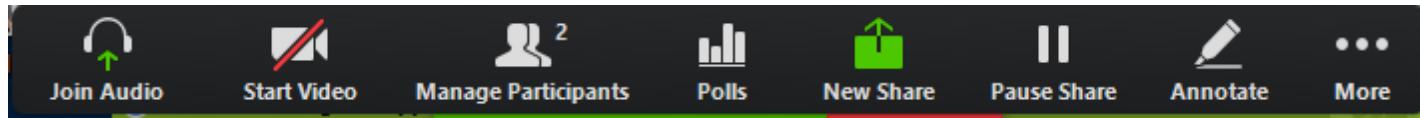
Share computer sound

Optimize for full screen video clip

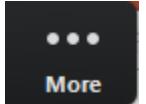
Share Screen

In Meeting Controls

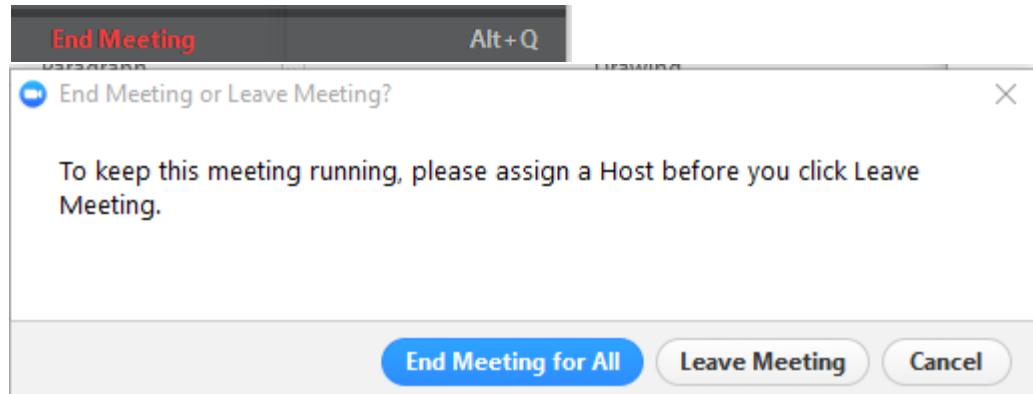
Annotate, More, End Meeting



Mouse
Select
Text
Draw
Spotlight
Eraser
Format
Undo
Redo
Clear
Save



- Chat Alt + H
- Breakout Rooms
- Invite Alt + I
- Record Alt + R
 - Size
 - Color
 - Color
- Disable participants annotation Colors
- Audio Options...
- Video Settings...
- Optimize Share for Full-screen Video Clip
- End Meeting Alt + Q



Things to Remember

Before the Meeting:

- Test your Audio and Video
- Have the content you intend to share prepared ahead of time
- Close applications that have pop ups

Hosting a Meeting:

- Mute your microphone if others are presenting/speaking
- Use Gallery View for group/team meetings
- Share your screen
 - Share specific applications to control displayed content
 - Use “New Share” to seamlessly transition between shared applications
- Use the Annotation feature to grab and direct attention

Turn the camera on:

- Position your webcam at eye level or higher – experiment for best angles
- Use the gestures and mannerisms that you would typically use in person
- Make eye contact – try to look at your webcam as often as possible

Helpful Links

UMass Web Portal

umassmed.zoom.us/signin

UMass Information Technology Web site

<http://www.umassmed.edu/it/services/Academic-Technology-and-Curriculum-Innovation/zoom/>

Zoom download site for client and plugins

umassmed.zoom.us/download

Zoom Tutorial Site

<https://support.zoom.us/hc/en-us>

Zoom Live online and recorded training Sessions

<https://support.zoom.us/hc/en-us/sections/201740096-Training>