

Getting Started with Zoom

End-User QuickStart Guide



Before You Start:

Before you can host a meeting with Zoom, you must have the Zoom Desktop Client software installed on your computer or device. If applicable, visit <https://zoom.us/download> to download and self-install the Zoom Client for Meetings.

Setup & Configuration

Zoom Web Portal:

Visit <https://zoom.us/signin> or <http://{vanity}.zoom.us/signin> and enter your email address and password. Upon sign in you will be taken to your Profile page.

Highlights of this page are:

- Setting your profile picture (persists through the Zoom platform).
- Editing your [Personal Meeting ID/Personal Link](#)
- This is your personal dedicated virtual meeting space. You can use it at any time or schedule it for future use.

After configuring your profile, we recommend going to the Meeting Settings tab to configure your preferences based on how you would like to conduct meetings.

Zoom Desktop Client:

1. Once the Zoom Client for Meetings is installed, click the Sign In button
2. Click "Sign In with SSO" {or path designated by customer}
3. Enter {company domain} if prompted for a company domain
4. Enter in your {SSO credentials} user name and password on the login screen

You now have the Zoom client for Meetings installed. Best practice is to have Zoom start when your computer boots up.

Learn more: [Zoom Client Settings](#)

- On **Windows**, go to the Zoom client and click on your profile picture at the top right, then click Settings. Click on General and then check the box that says, "Start Zoom when I start Windows".
- On **Mac**, right-click the Zoom app in the Dock, select Options > Open at Login.

Scheduling Zoom Meetings

Zoom offers you several ways to schedule your meetings. If you're using Google calendar or Outlook, we recommend installing an applicable plug-in or extension for ease of use and efficiency when scheduling Zoom meetings. See below for additional information.

Learn more: [Scheduling with Zoom](#)

Web Portal

1. Log in to <http://zoom.us/signin> or `http://{vanity}.zoom.us/signin`
2. Click "Schedule a Meeting" in the top navigation bar
3. Input details for the meeting and click "Save"
4. You can then copy the URL or Invitation or add to your calendar with available plug in

Zoom Desktop Client

1. Click "Schedule" button on the Zoom App
2. Input details for the meeting and click "Schedule"
3. You can then copy the URL or Invitation or add to your calendar with available plug in

Outlook Add-In (Web and Desktop)

[View Full Instructions](#)

Outlook (Web)

1. Log in to the [Outlook web app \(OWA\)](#)
2. Select the **Settings** gear in the top-right corner > **Manager Add-ins**
3. Search Zoom for Outlook and click **Add**
4. Open your Outlook web calendar and select **New** to create a new calendar event.
5. Select the Zoom icon in the top toolbar and sign-in to Zoom, if prompted.
6. Select **Add Zoom Meeting**
7. Add meeting details and send.

Outlook 2013 or 2016 (Desktop App)

1. Open Outlook and select **File > Manager Add-ins**
2. Select the plus icon > **Add from the Office Store**
3. Search for Zoom for Outlook and select **GET IT NOW**
4. Open the Outlook desktop app and switch to calendar view.
5. In the **Home** tab, select **New Meeting**
6. Select **Add a Zoom Meeting**
7. Add meeting details and send

Zoom Extension for Google Calendar – [Video Tutorial & Instructions](#)

1. Download the Zoom extension for Chrome or Firefox from zoom.us/download
2. Select **Create** to create a new event in Google Calendar
3. Select **Make it a Zoom Meeting** or **more options** to expand the details.
4. Update invitation details and select **Save**

Details on additional features for scheduled meetings are available at the links below:

- [Alternative Host](#)
- [Scheduling Privilege](#)
- [Meet Now vs. Schedule Meetings](#)

In-Meeting Controls

Audio

When starting/joining a meeting, you can join the audio by phone or computer.

- Choose “Join Audio by Computer” to connect your computers mic and speakers to the Zoom Meeting. You can test your Audio sources by using the “Test Computer Audio” link when joining.
- Choose “Phone Call” and dial the number provided. Enter in the Meeting ID and make sure to input the “Participant ID”

Clicking on the Mic icon will let you mute and unmute your audio once connected

Video

Access Video settings before or during a meeting by clicking on the “Settings” icon on your Zoom Desktop Application. On the Video tab you can preview and change your camera source via the down arrow

Clicking on the Video icon will let you start and stop your video feed

Invite Participants

During a meeting, click “Invite” to send meeting information to more participants by email, Zoom chat, phone, or room system.

Manage Participants

When hosting a Zoom meeting, you have additional controls available to help manage your participants. Attendees can only view the other participants.

Share Screen

1. Click Share Screen
2. Choose to share your; desktop, specific application, whiteboard, camera feed
3. All participants in your meeting can share their screen
4. During screen sharing you and your attendees can use the Annotation tools for drawing, pointing, highlighting, etc.

Chat

1. Click “Chat” to start an in-meeting message with participants in the meeting
2. The dropdown on the chat window will allow you to message Everyone, or a specific participant

Record

As a host you can record the meeting to either the Zoom cloud or your local machine.

1. Click on the “Record” icon in the toolbar
2. Choose to record to the Cloud or Local machine
3. Recording will process once the meeting ends

Using Zoom Phone

Configure your Zoom Phone profile

1. Log in to the Zoom web portal and navigate to the **Phone** page
2. If you haven't already completed your account setup, select a country, area code, timezone, set your voicemail PIN, then click **Setup**
3. Click the Settings tab to view your Zoom Phone configurations
4. Set your Business Hours
 - During Business Hours, callers may reach you via your Zoom Phone
 - Outside of Business Hours, callers will be directed to a message, voicemail, or an additional forwarding option
5. Edit your Ring Mode and Call Handling & Forwarding
6. (Optional) Upload a Voicemail Greeting

Making a Call via your Computer

1. Log into the Zoom client
2. Click the **Phone** icon
3. Dial a number using your keyboard or the on-screen number pad. Alternatively, type a name or number above the dial pad to search through your contacts

Receiving a Call via your Computer

1. Ensure you are logged into the Zoom client
2. When you receive an incoming call, you'll see a pop-up notification with the caller's name and number
3. Click **Accept** or **Decline**. Clicking **Decline** will route the caller to your voicemail

Manage your voicemails

1. Log into the Zoom client
2. Click the **Phone** icon
3. Click the **Voicemail** tab. Your voicemail will be shown in chronological order
4. Hover over a voicemail entry and click the play icon to play the voicemail
5. Click the phone icon if you want to call that number back

Joining from a Room System

With Zoom, you can join meetings from your existing H.323/SIP room systems. You can have your H.323/SIP room system dial-in to a Zoom Meeting, or you can dial out to the room system. For more information, visit: [Getting Started with H.323/SIP Room Connector](#)

Joining from a Zoom Room

With Zoom Rooms, you can host and join meetings from your equipped conference rooms and huddle spaces.

Learn more: [Getting Started with Zoom Rooms](#)

Schedule a Zoom Room via Calendar

1. Open your {Outlook/Google} Calendar
2. Search for room resources that are available at desired time
3. Select and schedule the room

Schedule a Zoom Room via Scheduler Control

1. Select "Reserve" on Scheduler
2. Edit the topic for your reservation
3. Select your time block and select "Reserve" to book

Join a scheduled Zoom Meeting

1. Open "Meeting List" tab on the Zoom Room controller
2. Click "Start Meeting" for the correct meeting and time to start

Start an instant meeting

1. Open the "Meet Now" tab on the Zoom Room controller
2. Search for and Invite other Zoom users in your account
3. Click "Meet Now"

Join a non-scheduled meeting

1. Open the "Join" tab on the Zoom Room controller
2. Enter in meeting ID and click "join"

Share your screen in a Zoom Room

1. If you are a Zoom user, you can use the Screen Share icon on your desktop client
2. Or, click "Share Screen" on the Zoom Room controller
3. Follow instructions to either share via Airplay or share.zoom.us

Zoom Best Practices

Before the Meeting:

- Test your Audio and Video
- Make sure to choose the correct audio and video sources
- Have the content and applications that you intend to share open and prepared ahead of time
- Close applications that have pop ups

Hosting A Meeting:

- Mute your mic if others are presenting/speaking
- Use “Gallery View” for smaller 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 tools to grab and direct attention

Turn the camera on!

- Put your webcam at eye level or higher – experiment for best angles
- Make Eye Contact - Try to look at your webcam versus the screen

Below are some helpful resources from our Knowledge Base that provide a deeper dive about using Zoom:

- Watch the [Getting Started Videos](#)
- Join our [Weekly Zoom Meetings and Webinar training](#)

Technical Support

Visit support.zoom.us for additional information about Zoom features and functionality. If you require technical assistance, please call us at 888-799-9666 (option 2) or if the matter is less urgent, fill out a Support Request here: <https://support.zoom.us/hc/en-us/requests/new>