ISA 2021 Virtual Conference

TIPS FOR HOSTING OR PARTICIPATING
IN A ZOOM MEETING
Source: https://biz30.timedoctor.com/how-to-use-zoom/

What Is Zoom?
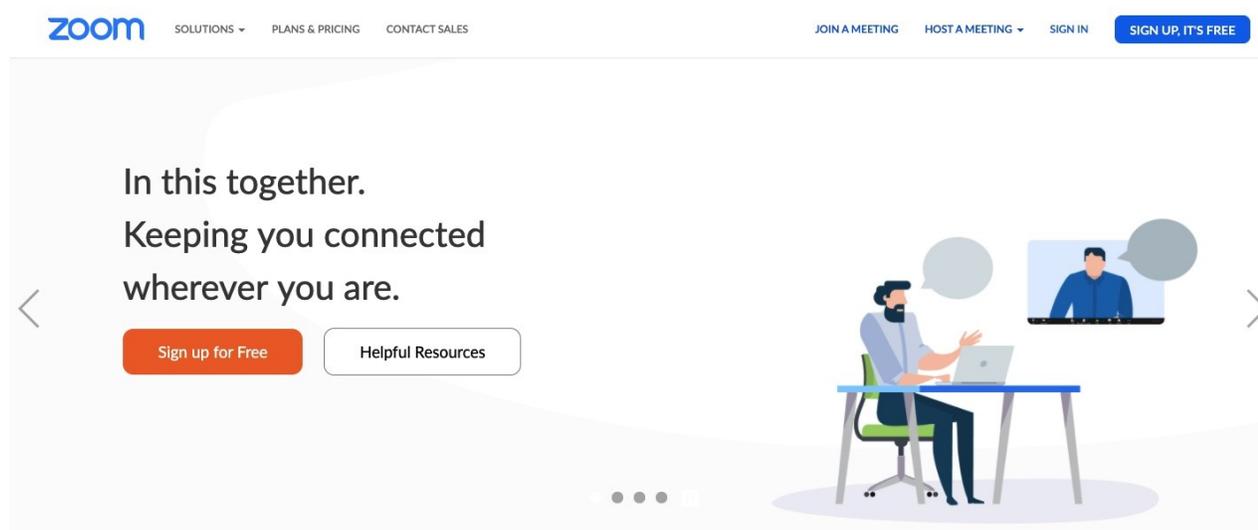
Zoom is a cloud-based video conferencing tool that lets you host virtual one-on-one or team meetings easily. With powerful audio, video and collaboration features, this remote communication tool connects remote team members with each other.

Zoom's key features include:

- HD video chat and conferencing
- Audio conferencing using VoIP (Voice over Internet Protocol)
- Instant messaging
- Virtual backgrounds for video calls
- Screen sharing and collaborative whiteboards
- Hosting video webinars

How To Use Zoom Meetings (Step-by-Step Guide)

Zoom makes it super easy for anyone to set up and conduct virtual meetings — but if you've never used the tool before, this can still be tricky.

To help you out, here's a step-by-step guide to using Zoom Meetings the right way.

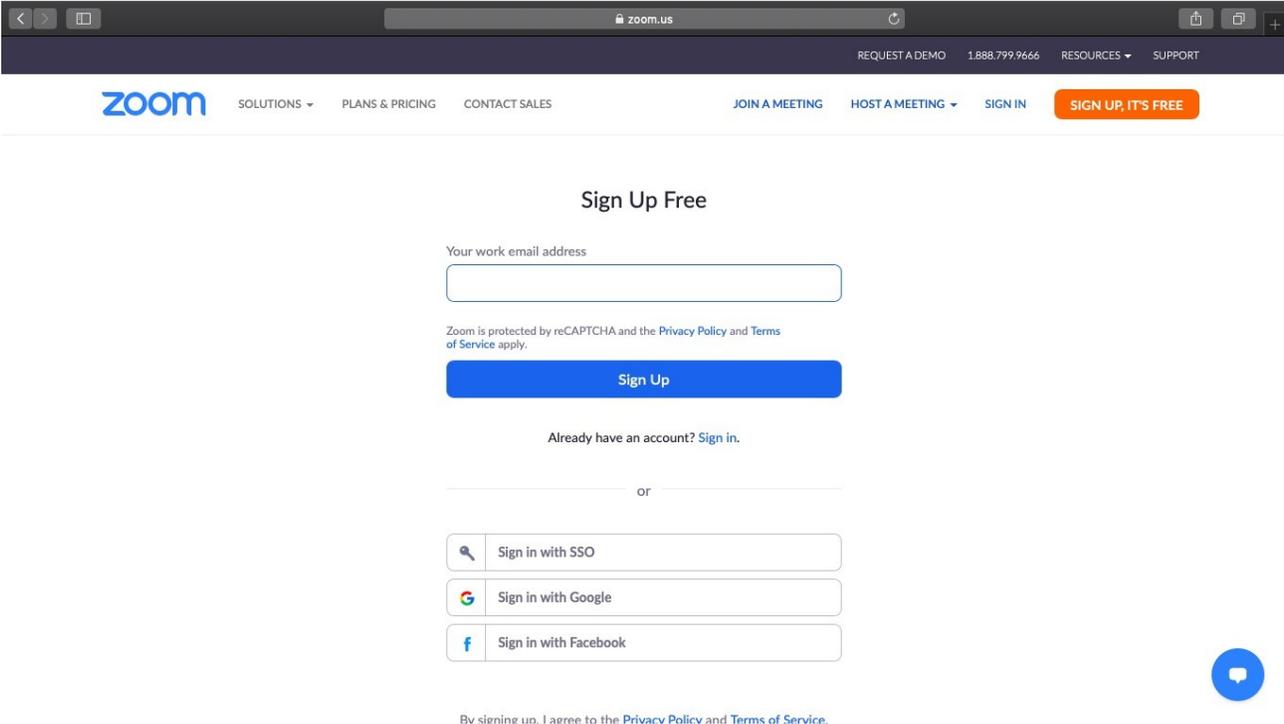We'll cover the steps for both desktop and mobile platforms on:

- How To Get Started With Zoom
- How To Set Up A Zoom Meeting
- How To Join A Zoom Meeting
- How To Schedule Meetings
- How To Record Meetings

A. How To Get Started With Zoom

1. For Desktop

Step 1: To get started with Zoom, head to [their website](#), and click on the "SIGN UP" button that's at the top-right corner of the screen.

Step 2: You have two options when it comes to creating a Zoom account.
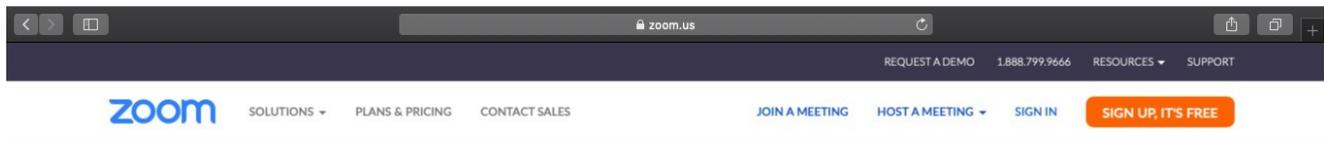
You can either:

- Create a new account using your work email address.
- Sign in using SSO (Single Sign-On) or your Google or Facebook account.

If you're using Zoom for work purposes, it's best to sign up using your work email address.

Step 3: Zoom will now send you an email with a confirmation link.

Click on that link to go to Zoom's Sign Up Assistant and sign in using your credentials.

Step 4: Download the desktop app/ Zoom client from the Zoom website for easy access.

2. For Mobile

Step 1: Download the Zoom iOS or Android app from the App Store/Play Store.

Step 2: Sign up or sign in to Zoom by following the on-screen instructions that are similar to the desktop process.

B. How To Set Up A Zoom Meeting

Here's a step-by-step guide to set up a Zoom meeting easily:

1. For Desktop

A. Starting A Zoom Meeting

Step 1: Log in to your Zoom account.
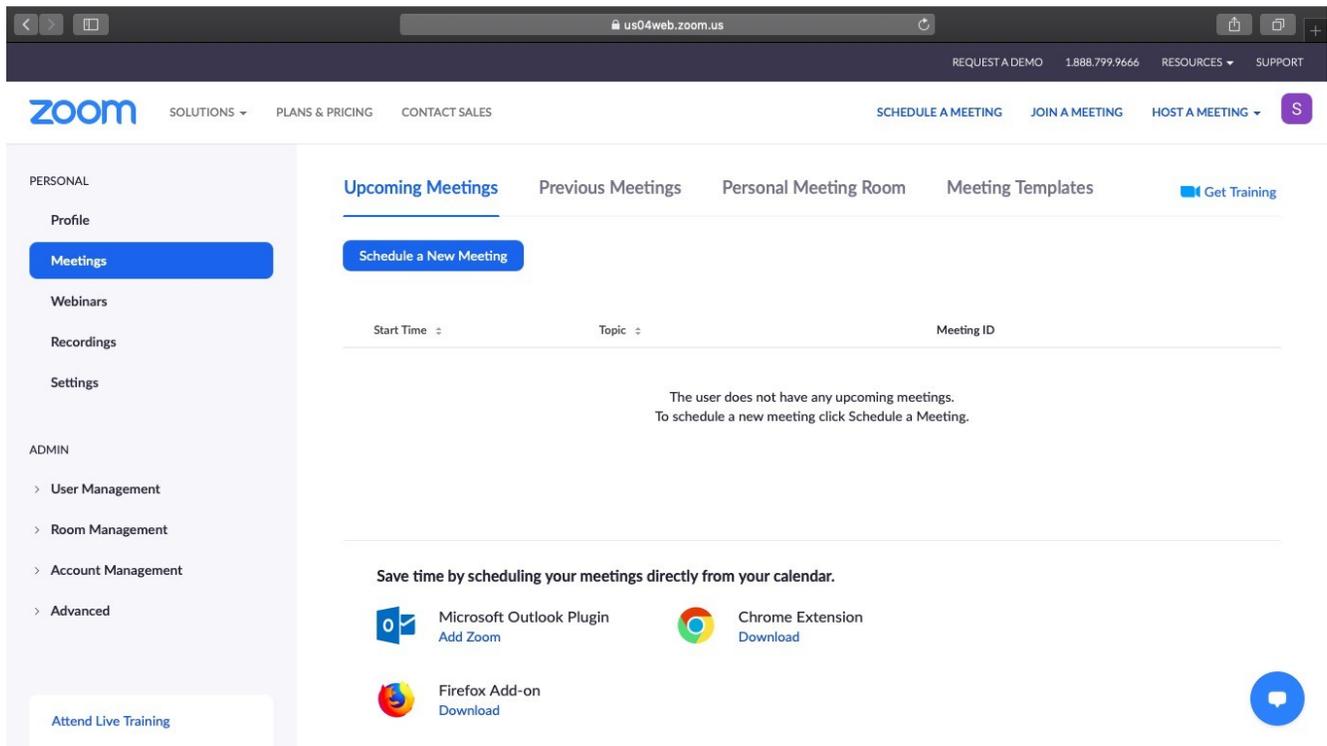
Step 2: Hover your cursor over the "HOST A MEETING" button at the top-right corner of the screen, and select one of the following options:

- With Video On
- With Video Off
- Screen Share Only

Step 3: The website will redirect you to the Zoom app and start a meeting. Here, you can edit meeting settings or copy the "Invitation URL" that you send to the attendees.
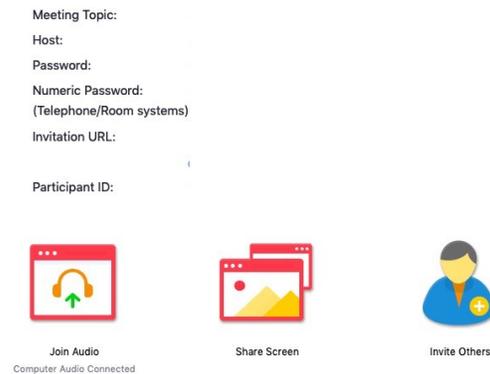
Note: You can also start a meeting quickly through the desktop app by following the instructions we listed for mobile devices later on.

B. Adding Participants

Step 1: Start a new meeting on the Zoom desktop app.
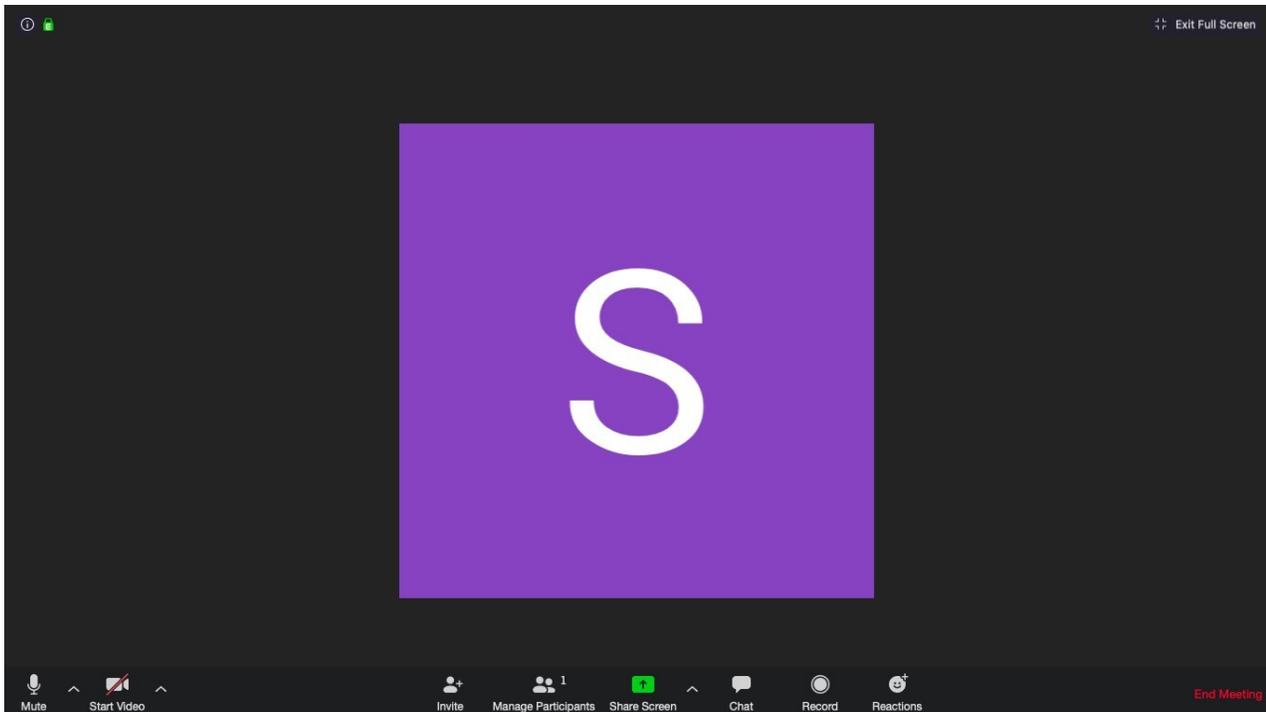
Step 2: In the new meeting screen, click on the "Invite" button in the toolbar at the bottom.
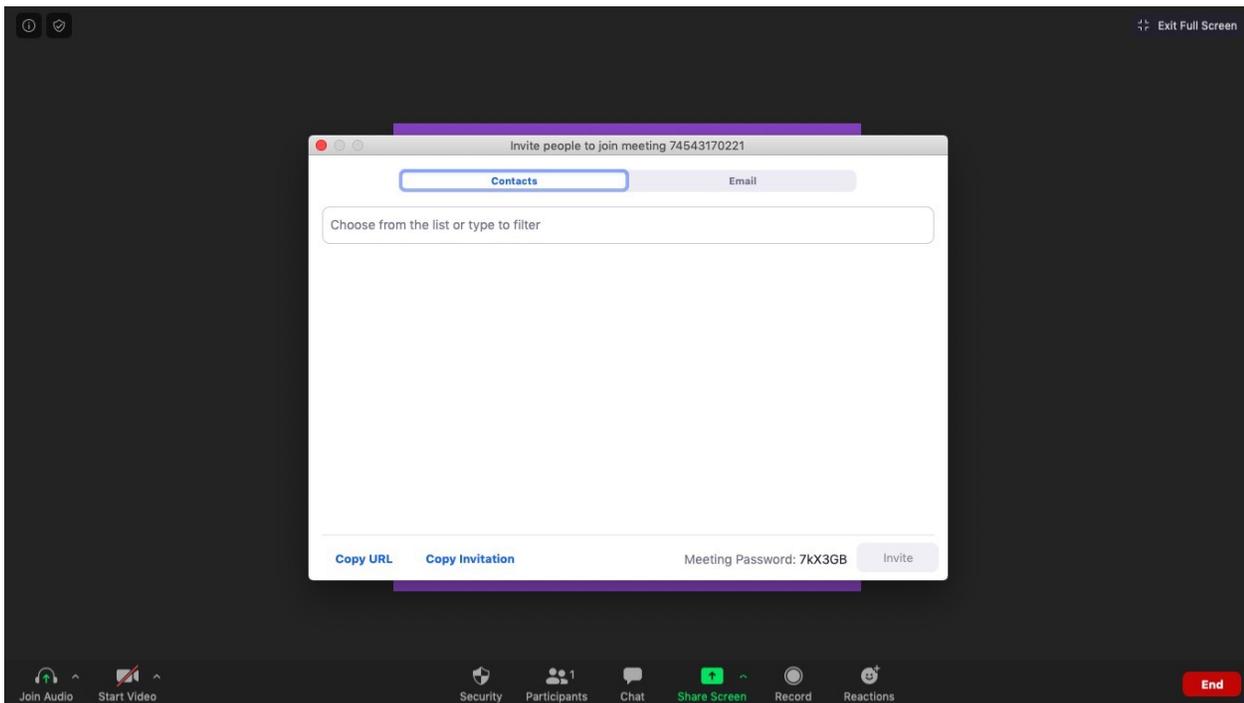
Step 3: Here, Zoom will give you the options to either Copy URL or Copy Invitation. You can send these to participants via text, email or instant messaging.
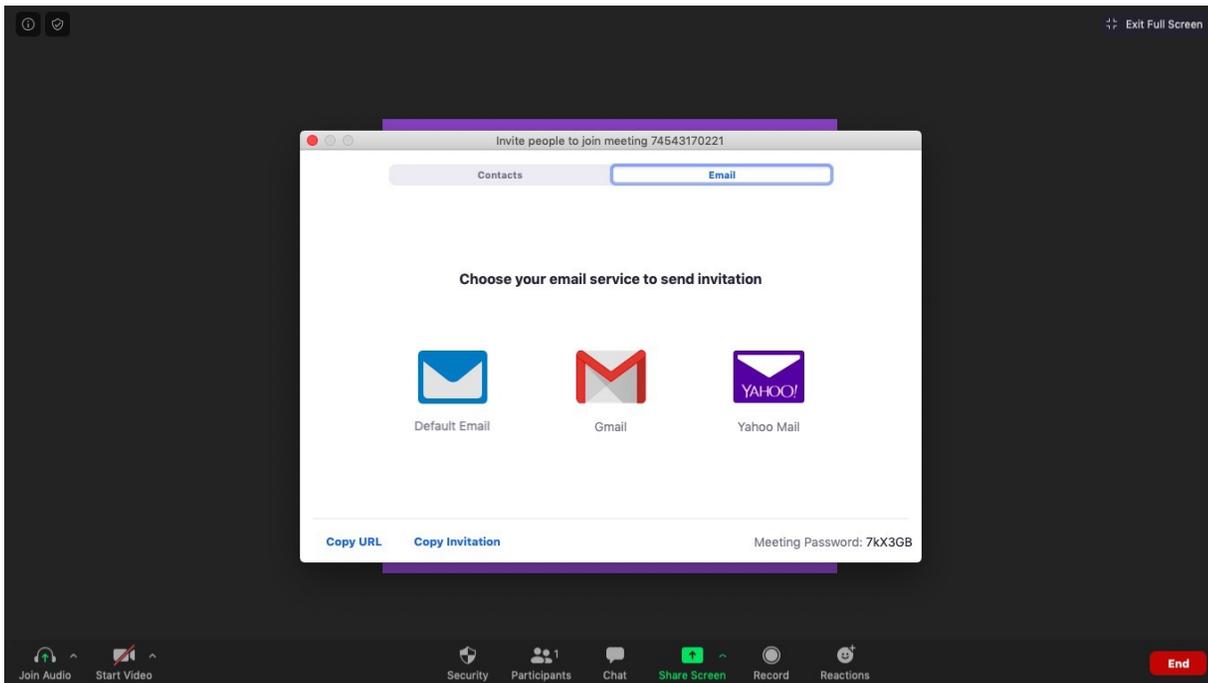
Step 4: You can also directly email the meeting details through your preferred email client via the Zoom app itself.

2. For Mobile Devices

A. Starting A Zoom Meeting

Step 1: Open the Zoom mobile app and sign in to your account.

Step 2: Tap the orange "New Meeting" icon that appears on your screen.

Step 3: Edit meeting settings according to your preferences (such as switching video off for participants, using a Personal Meeting ID, etc.).

Once you're done, tap the blue "Start A Meeting" button.

B. Adding Participants

Step 1: Once the meeting starts, tap the "Participant" icon in the toolbar at the bottom of your screen to add and manage participants.

Step 2: In the Participants window that opens up, tap on the "Invite" option at the bottom left.

Zoom will now give you the option to share your meeting details via a variety of communication platforms. These include various text, email and messaging apps on your smartphone.

C. How To Join A Zoom Meeting

Here's a step-by-step guide to join a Zoom meeting quickly:

Note: The same steps apply to both your desktop and your phone.

A. Join Using A Meeting Link

If you have a meeting link, just click on it or paste it into your web browser to join the meeting.

B. Join Using A Meeting ID

Step 1: Open the Zoom app and click on the "Join" icon.
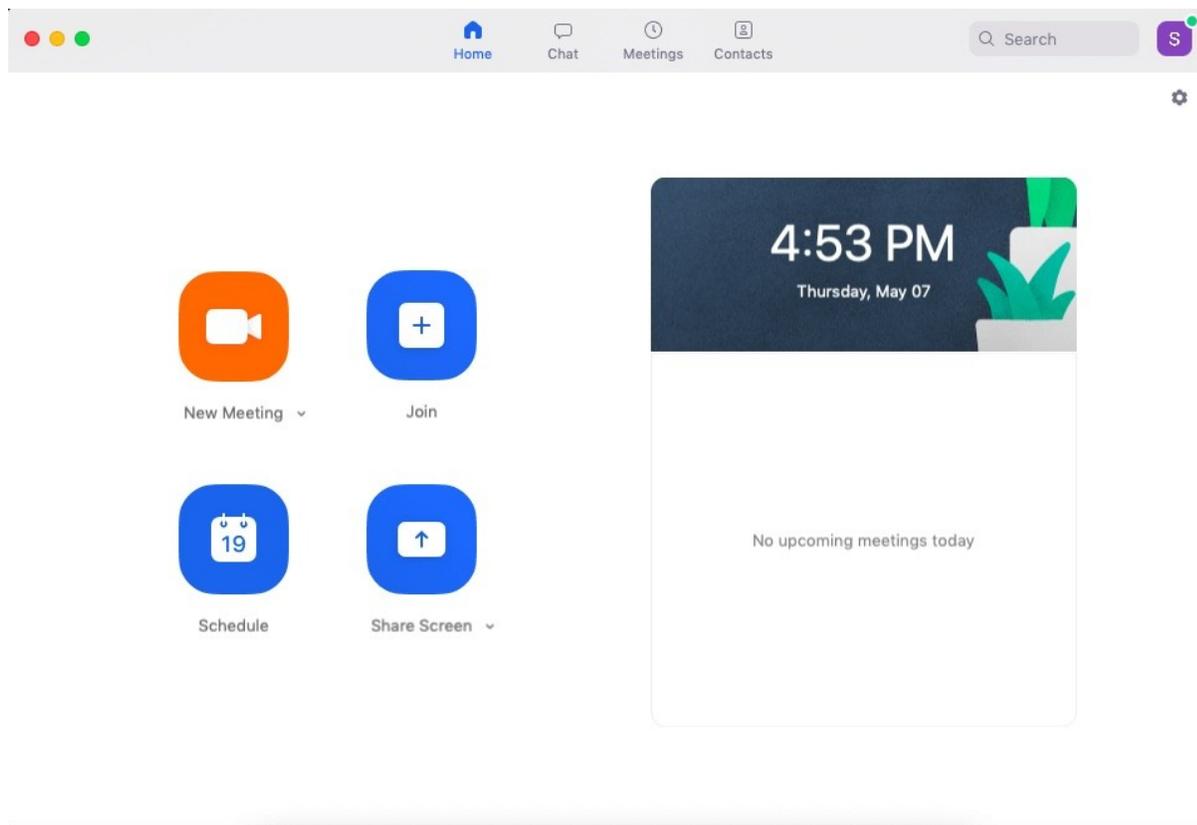
Step 2: Paste the Meeting ID in the box provided, add your display name for the meeting and click on the "Join" button.

You're now all set to [communicate with your team members](#)!

D. How To Schedule Meetings

With a busy schedule, you can easily forget about appointments or upcoming meetings.

Luckily, Zoom lets you schedule meetings in advance to avoid this!

You can schedule a meeting by setting:

- Its date and time
- Meeting ID
- Whether it requires a password to join or not
- And more!

Here's a step-by-step guide to schedule meetings in Zoom easily:

A. For Desktop

Step 1: To schedule a meeting, head to the Zoom app and click on the blue "Schedule" button (looks like a calendar icon).
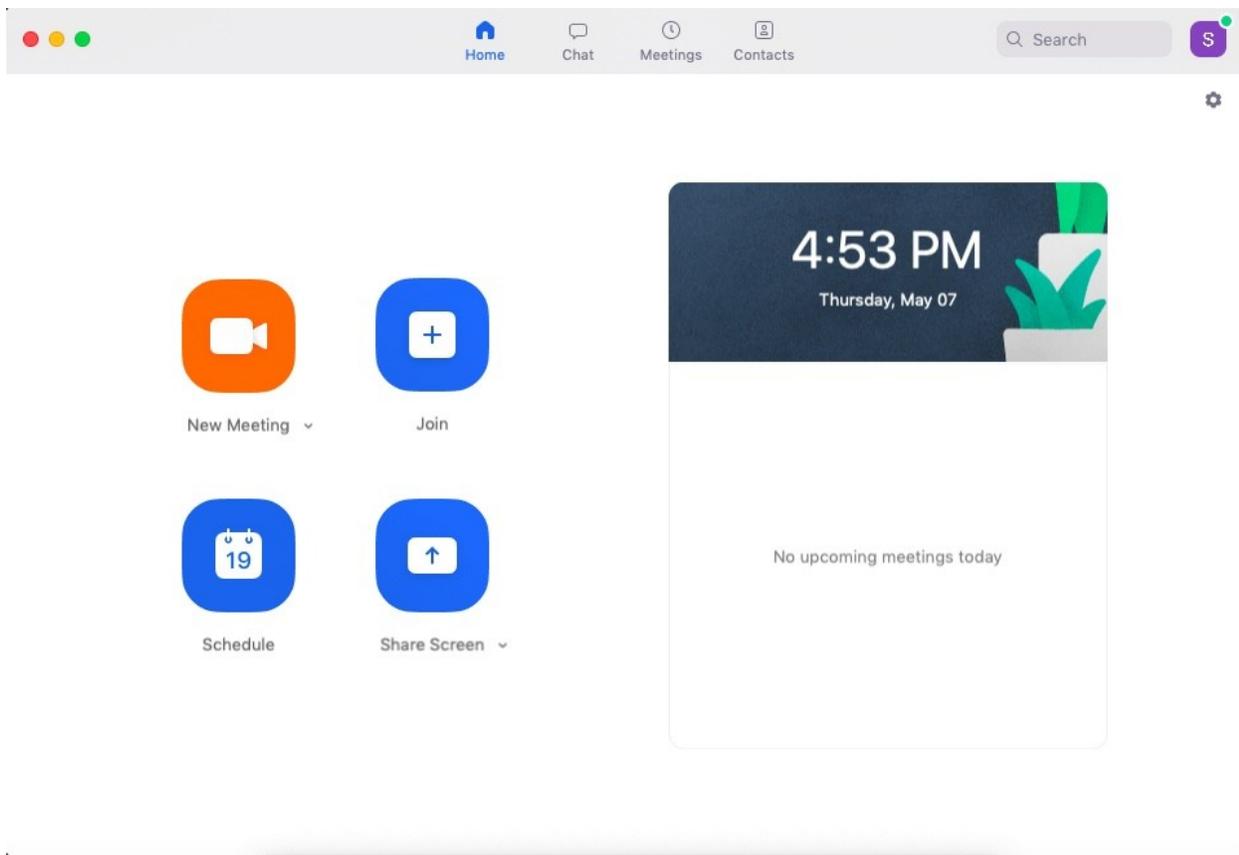
Step 2: Enter meeting details in the Schedule Meeting pop up window that appears.

You can set its date and time, privacy and access settings. You can also select your preferred calendar (between iCal, Google Calendar or others) to schedule the event in your calendar.

Schedule Meeting

Topic

Date

| 7/ 5/2020 ⌄ | 5:00 PM ⌄ | to | 7/ 5/2020 ⌄ | 5:30 PM ⌄ |

☐ Recurring meeting   Time Zone: Mumbai, Kolkata, New Delhi ⌄

Meeting ID

🔘 Generate Automatically   ◯ Personal Meeting ID 573-299-7884

Password

☑ Require meeting password   [8xXS1P]   ⑦

Video

Host   ◯ On 🔘 Off   Participants   ◯ On 🔘 Off

Audio

◯ Telephone   ◯ Computer Audio   🔘 Telephone and Computer Audio

Dial in from United States Edit

[Cancel]   [Schedule]

Quick Tip: Setting a meeting password can help avoid Zoombombing, which happens when someone who hasn't been invited to the meeting joins and disrupts it.

Step 3: Once you've adjusted preferences, click on the "Schedule" button at the bottom right of the screen.

B. For Mobile

Step 1: Open the Zoom app.

Step 2: Go to the Meet & Chat homepage and click on the "Schedule" button.

Step 3: Enter the meeting name, date and time and click "Done."

Step 4: Zoom will redirect you or open another form for adding the event to your preferred calendar. Enter details like participant names and set the notifications into your calendar event, then tap "Done."

You have now scheduled a Zoom meeting!

E. How To Record Zoom Meetings

Recording a meeting lets you easily use it as a reference to document everything that was discussed. This is especially important for remote teams who use Zoom video conferencing as their key mode of communication.

Zoom allows you to record meetings easily and save it either to your local device or the Zoom cloud. By saving it to the Zoom cloud, your team members can access it across multiple platforms easily.

Here's how to record Zoom meetings:

A. For Desktop

Step 1: Start a meeting.

Step 2: In the Zoom toolbar, click on the "Record" icon.
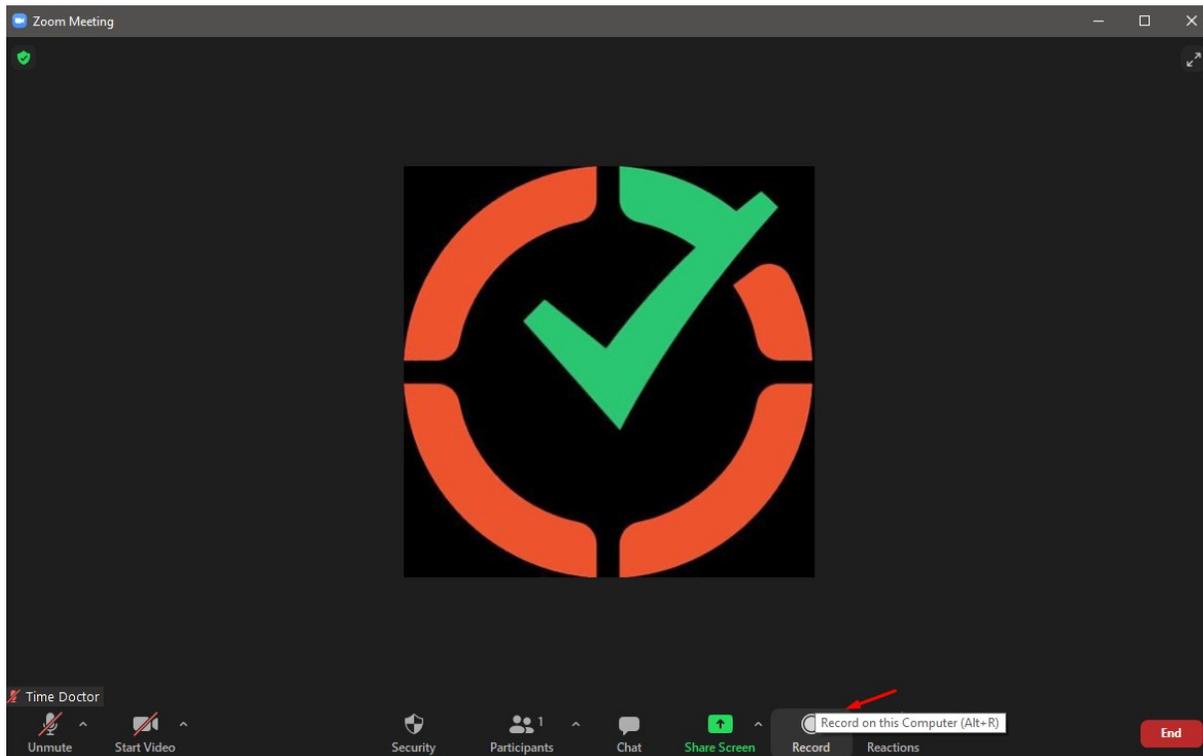
Step 3: Choose between "Record on this Computer" or "Record to the Cloud." This starts the recording.

Step 4: Click on "Pause/Stop Recording" to stop recording the meeting. Alternatively, you can also end a meeting to stop recording it.

Step 5: After you end the meeting, Zoom converts the recording to MP4 format and stores it in your preferred location. You can now easily access your recorded sessions any time you want!

B. For Mobile

On mobile devices, Zoom lets you save meeting recordings only to the Zoom Cloud. Here's how to record a

Zoom meeting from your mobile:

Step 1: During a meeting, tap on the "More" option in the toolbar.

Step 2: Select the "Record to Cloud" feature to begin recording.

Step 3: You can pause or stop the recording by clicking the "More" button.

Step 4: After the meeting, you can find your recording in "My Recordings". You can access this section by logging into your Zoom account on a web browser.

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3 Additional Features Of Zoom (and how to use them effectively)

You now know how to use Zoom Meetings.

But since there are so many features, it can still be slightly overwhelming!

Don't worry.

Here's a detailed look at three additional Zoom features and how to use them effectively.

1. Screen Sharing

Zoom lets you share your screen with other meeting participants easily.

This lets you:

- Host virtual presentations and workshops.
- Explain processes in detail.
- Review work and project documents together with your team.

To share your screen, just click on the "Share Screen" icon in the toolbar.

This lets you share:

- A specific app or window.
- A whiteboard.
- Apple iPhone / iPad screen (if your device supports this).
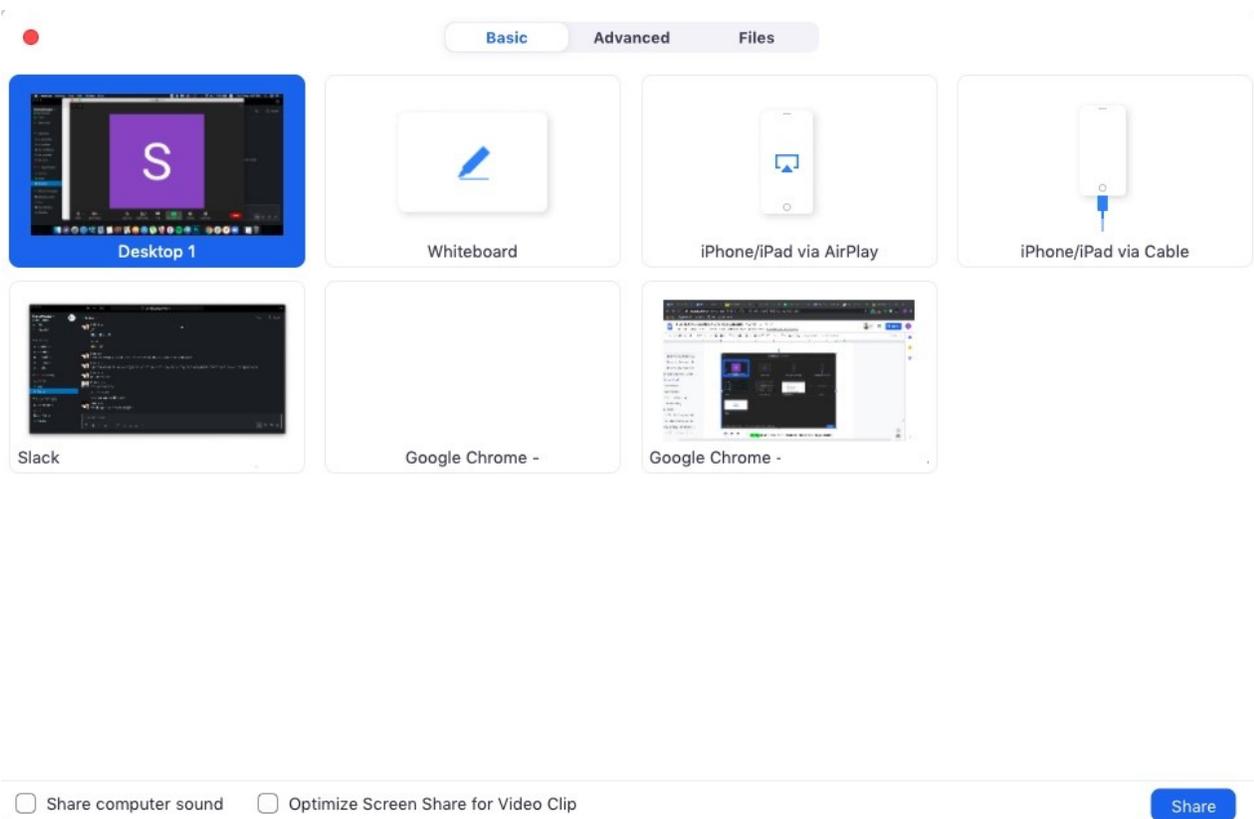
If you want more screen sharing options, click on the "Advanced" tab at the top of your screen.

Here, you can choose to share:

- A part of your screen or the entire screen.
- Only your computer's sound or your microphone's sound as well.
- Content from a second camera or content only from your screen.

2. Zoom Phone

Zoom Phone uses the Voice over Internet Protocol (VoIP) to help you make Zoom calls over the cloud. This is similar to calling from a phone number, except that the calls here are hosted over the internet.

Zoom Phone comes with plenty of additional features to make your calling experience seamless.

These include:

- Integration with CRMs like Salesforce.
- Call conferencing and delegation.
- Call recording and voice mail features.

However, Zoom Phone isn't available with the standard pricing plans. Instead, you must pay for it separately. Prices start at $10/user per month and require you to have at least one paid licensed host.

3. Zoom Rooms

Zoom Rooms are essentially virtual conference rooms where only particular members have access.

You can use these rooms for various purposes such as:

- Video conferencing
- Audio conferencing
- Screen sharing

Zoom Rooms offer various features, such as:

- One-touch sharing and conferencing.
- Use up to 12 whiteboards at a time.
- Digital signage/display around an office.

This usually requires additional hardware (multiple webcams, connectors, monitors, etc.) as well as conference room design considerations. Like Zoom Phone, Zoom Rooms aren't available in the standard pricing plans but must be purchased additionally at $49/room per month.

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3 Bonus Tips For Effective Zoom Video Conferencing

Most in-office teams might not be used to [video conferencing](#) and coping with the additional challenges it poses.

To make your experience more comfortable, here are three tips that can help team members conduct seamless Zoom meetings and calls:

Tip #1: Always Mute Your Microphone Unless Speaking

Make sure to mute your microphone when you're not speaking.

This eliminates any background noise or interference in the audio.

To mute your microphone, use the microphone button at the bottom left of the Zoom toolbar that appears in the meeting screen.

Alternatively, you can set your Zoom meeting preferences to mute your microphone at the start of every meeting automatically.

To unmute yourself, use the microphone button or hold your spacebar for as long as you're speaking. This basic rule allows group meetings or conversations to run smoothly!

For more efficient background noise elimination, use noise cancellation tools like *Krisp* to elevate your audio quality to the next level.

Tip #2: Ensure Everything Is Working Correctly Before Starting A Meeting

It's extremely common for video conferences to be delayed or get interrupted due to technical snags.

To ensure that this doesn't happen, turn on your device and check if Zoom's working correctly at least 10-15 minutes before every meeting. And if something's going wrong, alert your meeting host at the earliest (if you're the host – inform your participants of the same).

While conducting a check before every meeting may feel tiring, it's far better than being embarrassed or annoyed when something goes wrong during your Zoom meeting!