

**USING**  
**zoom**

## Contents

What Is Zoom?	2
First Steps	3
Becoming A User	4
Scheduling A Meeting	5
Inviting Participants To A Meeting	11
Connecting From A Computer	14
Connecting From A Room System	19
Recording A Meeting	24
Appendix	25

## What is Zoom?

Zoom is a cloud-based video conferencing product that, in its simplest form, allows users to connect from computers for mobile devices. In some ways, it is similar to Skype, which many people are familiar with. The primary differences, though are:

- Skype is limited in the number of connections it can support
- Skype can only connect computers and mobile devices
- Zoom acts as a bridge for all the connections

While Skype can only handle a few video connections in one call, the basic free Zoom package allows up to one hundred participants in a meeting. The paid packages increase this to a maximum of five hundred participants.

Skype is also limited in that it can only connect computers and mobile devices—smart phones and tablets. While the basic Zoom package only connects computers and mobile devices, there is an add-on that allows computers, mobile devices, and room-based (hardware codec) video conferencing systems to take part in the same call. Room-based systems, until recently, could only communicate with other room-based systems, but Zoom and their competitor, BlueJeans, have allowed interconnectivity between all types of conferencing systems.

When you make a Skype call, you call directly to the other user, and the call is connected through the internet. With Zoom, all the participants connect through Zoom. Calling is similar to making a phone conference call through a bridging service. All the phone participants call in to the same number, and then they enter a meeting code. The phone bridge connects all the participants in that meeting together. Zoom works in a similar way. All the participants have a meeting code that they either enter directly, if calling from a room-based system, or it is embedded in a link that the computer and mobile users click on to connect.

In addition to basic conferencing between computer, mobile devices, and room-based systems, Zoom offers some other options. In addition to the “large meeting” option mentioned above, you can also use Zoom for webinars. In a normal conference, the participants can hear all the other participants and speak back to them. In a webinar, the communication is one-way. A presenter delivers a presentation to an audience on their computers and mobile devices, or in conference rooms with a codec-based video conferencing system. The audience can hear and see the presentation, but do not have the ability to talk back. For feedback, there is a “chat” feature, or the webinar organizers can set up an e-mail address that the audience can contact with questions or comments. In webinar mode, Zoom can handle up to 10,000 audience members. This feature is best used for announcements or training.

## First Steps

To use Zoom as a meeting participant, you just need to be invited to the meeting by the meeting organizer. If you going to connect from a computer or mobile device, you will be sent a link to click on. This will download the Zoom application and install it on your device. You do not need admin rights for the app to be loaded on a University computer. Once the application is installed, it will open and you will be connected to the meeting. The link contains a nine-digit number that identifies the specific meeting that you are taking part in.

The download and installation of the application only happens the first time you join a Zoom meeting with a specific device—computer or mobile device. Any future meetings will just open the application and connect to the meeting.

As with all computer-based conferencing solutions, for best results you need a camera and suitable audio devices. Most laptops now have a built-in cameras, microphone and speakers. If you are using a desktop computer, though, you will need to use an external camera and microphone. Most webcams have a built-in microphone, but you will get the best audio results on both laptops and desktops if you use headphones with a microphone, like the set shown below:



## Becoming A User

If you are planning on setting up your own meetings, you need to be a user. The Zoom account “Owner” or one of the account “Admins” can set up users as either an “Admin” or “Pro” user. Either status allows you to create meetings in Zoom.

When you are added as a user, you will receive an e-mail indicating that an account has been created for you. The e-mail contains a link that you click on to verify your e-mail address. When you click on the link, you are asked to confirm your name and create a password. The password is tied to the e-mail address that was entered by the Owner or Admin when they added you to the Zoom service.

The e-mail that is sent to you also contains a link to the Zoom Support Page, which has a vast amount of information on using Zoom.

## Scheduling A Meeting

To schedule a meeting, you first need to log into the Zoom website. The URL for the website is <https://zoom.us>. Since you will probably be using this link fairly often, you should probably bookmark it.

The Zoom home page has a “Sign In” link in the upper right corner of the page:

Zoom Video Communications was Named a 2018 Gartner Peer Insights Customers' Choice for Meeting Solutions!\*

Read the Report

Source: Gartner Peer Insights (January 31, 2018)

Figure 1. Gartner Peer Insights "Voice of the Customer" Meeting Solutions Overall Ratings

Gartner Peer Insights "Voice of the Customer" Meeting Solutions Overall Ratings As of January 31, 2018

Eligible Vendors	Gartner Peer Insights Customer's Choice	Gartner Magic Quadrant Position	Number of Reviews	Overall Customer Rating
Zoom Video Communications	Customer's Choice	Leader	n=406	4.59
Highfive Technologies			n=30	4.58
Lifesize			n=50	4.49
LogMeIn	Customer's Choice	Challenger	n=163	4.36
TeamViewer			n=42	4.33
BlueJeans Network	Customer's Choice	Visionary	n=67	4.32
Google	Customer's Choice	Challenger	n=131	4.27
GoTo	Customer's Choice	Leader	n=388	4.21
Microsoft		Leader	n=293	4.18
Adobe		Challenger	n=72	4.14

4.22 Mean overall rating for eligible vendors in this specific market

Source: Gartner Peer Insights (January 31, 2018)

Clicking on the link will take you to the sign in page, where you will enter your e-mail address and the password you created when you were added as user:

The image is a screenshot of a web browser (Safari) displaying the Zoom Sign In page. The browser's address bar shows 'zoom.us'. The page has a dark blue header with the Zoom logo and navigation links: SOLUTIONS, PLANS & PRICING, CONTACT SALES, JOIN A MEETING, HOST A MEETING, SIGN IN, and a blue button labeled 'SIGN UP, IT'S FREE'. The main content area is white and features a 'Sign In' heading. Below the heading are two input fields: 'Email address' and 'Password'. A blue 'Sign In' button is positioned below these fields. To the left of the button is a link for 'Forgot password?' and to the right is a checkbox labeled 'Stay signed in'. Below these options is a link that says 'Or, sign in with Google or Facebook'. At the bottom of the main content area, there is a link for 'New to Zoom? Sign Up Free'. The footer is dark blue and contains links for 'About' (Zoom Blog, Customers), 'Download' (Meetings Client, Zoom Rooms Client), 'Sales' (1.888.799.9666, Contact Sales), 'Support' (Test Zoom Account), and a 'Language' dropdown menu set to 'English'.

zoom

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

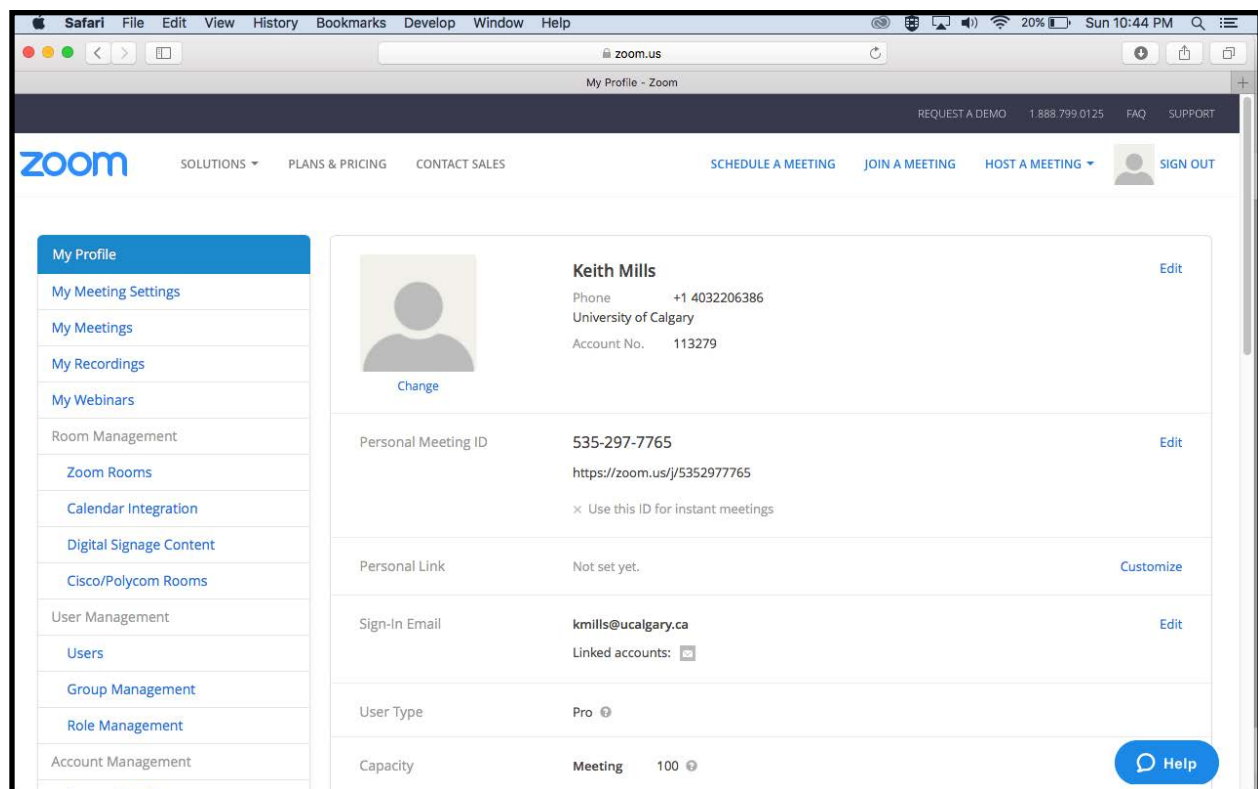
Download  
Meetings Client  
Zoom Rooms Client

Sales  
1.888.799.9666  
Contact Sales

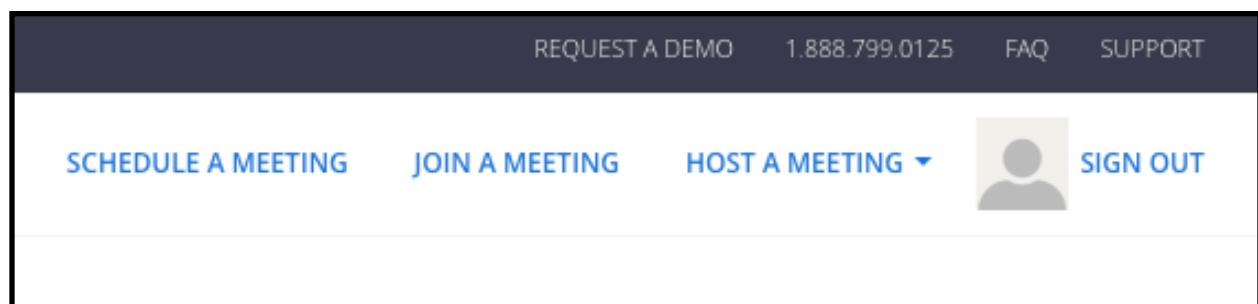
Support  
Test Zoom  
Account

Language  
English

Logging in will take you to your Zoom page, which contains information about your account status:



In the upper right hand corner, you will see some options for joining or creating meetings:



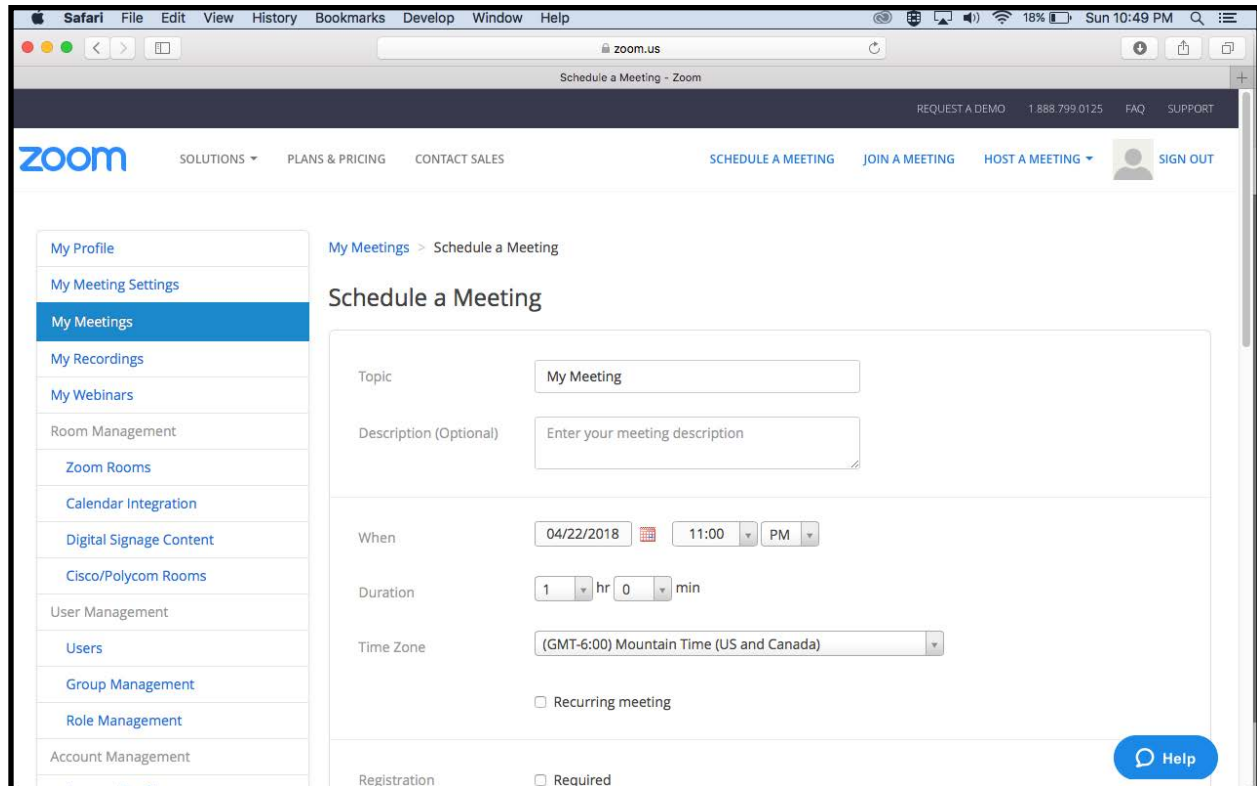
“Host A Meeting” will immediately start a meeting that you can invite people into.

“Join A Meeting” will let you enter into a meeting that has already been created. To join, you will need to know the nine-digit meeting number.



“Schedule A Meeting” will let you create a meeting that will take place at some time in the future. It is basically the same idea as creating a meeting invitation in your Outlook Calendar.

When you click on the “Schedule A Meeting” link, you get the following page:



The important fields are:

**Topic**—Pick a name that means something to the participants.

**Description**—This is optional, but lets you add a comment about what the meeting will be about.

**When**—This is where you select the date and time for the meeting. It is a good idea to choose a start time that is slightly earlier than the actual start time of the event. This allows participants to join the meeting and test their connections beforehand.

**Duration**—Pick a duration that is a bit longer than you think you will need.

**Recurring meeting**—This is like the recurring meeting option in the Outlook Calendar. If you have a meeting that will repeat on a regular basis, check the box and you will be given options of how often the meeting will repeat and at what interval.

As you scroll down the form, more settings appear (the full form is shown in the appendix of this document):

The screenshot shows the Zoom 'Schedule a Meeting' settings page. The left sidebar contains a navigation menu with options like Account Profile, Account Settings, Billing, Recording Management, IM Management, Dashboard, Reports, Scheduling Tracking Fields, Webinar Settings, and Advanced. The main content area is titled 'Schedule a Meeting - Zoom' and includes a 'SIGN OUT' button. The settings are organized into sections: Registration (with a 'Required' checkbox), Video (with 'Host' and 'Participant' radio buttons set to 'off'), Audio (with 'Telephone', 'Computer Audio', and 'Both' radio buttons, where 'Both' is selected), and Meeting Options (with checkboxes for 'Require meeting password', 'Enable join before host', 'Mute participants upon entry', 'Use Personal Meeting ID 535-297-7765', and 'Enable waiting room'). A 'Help' button is located at the bottom right.

The next settings are:

**Registrations**—We generally don't require people to pre-register for meetings, but this might be something that you want or need to do in specific circumstances.

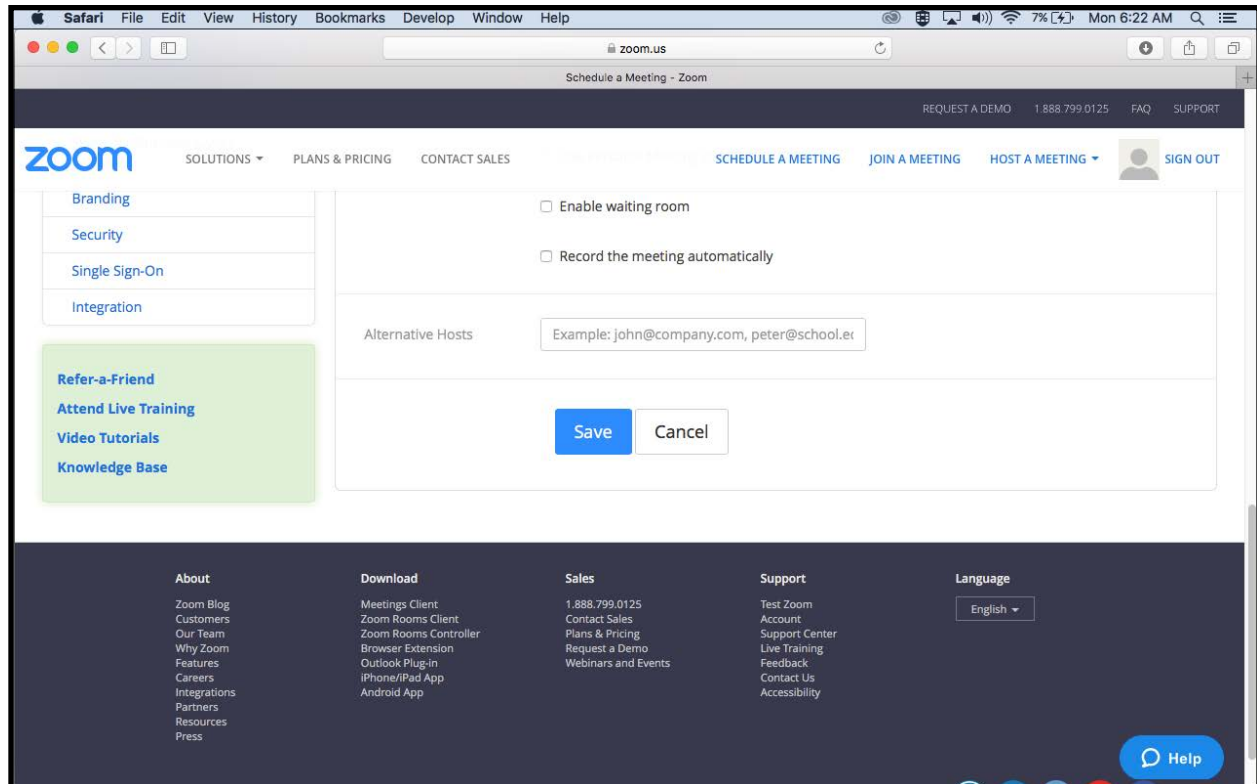
**Video**—The default setting for both the Host and the Participants is "off," but you may want to set this to "on." If you leave it at "off," all parties to the call will be connected with their cameras off, but they can be turned on after the connection has been made. If you set it to "on," the participants' cameras will be on as soon as they connect.

**Audio**—The default setting is "Both," which allows participants to connect to the audio stream through the computer, or by telephone. Connecting by telephone usually involves a long distance call into the Zoom service, but it may occasionally be necessary on important calls where a participant is unable to connect by computer.

**Meeting Options**—The only option that we normally use is the "Enable join before host." This allows people to join the meeting before the host connects. If you leave this box unchecked, the host must be connected before anybody else can join the session.

People often like to log in a bit early to make sure that they're connected properly, so giving them the option of connecting before the host does allows them to check their connection.

Scrolling down a bit more shows the end of the form:



The screenshot shows the Zoom 'Schedule a Meeting' form in a Safari browser window. The browser's address bar shows 'zoom.us'. The page title is 'Schedule a Meeting - Zoom'. The top navigation bar includes links for 'REQUEST A DEMO', '1.888.799.0125', 'FAQ', and 'SUPPORT'. The main navigation bar includes links for 'SOLUTIONS', 'PLANS & PRICING', 'CONTACT SALES', 'SCHEDULE A MEETING', 'JOIN A MEETING', 'HOST A MEETING', and 'SIGN OUT'. The left sidebar contains links for 'Branding', 'Security', 'Single Sign-On', 'Integration', 'Refer-a-Friend', 'Attend Live Training', 'Video Tutorials', and 'Knowledge Base'. The main form area includes checkboxes for 'Enable waiting room' and 'Record the meeting automatically'. Below these is a text input field for 'Alternative Hosts' with the placeholder text 'Example: john@company.com, peter@school.e'. At the bottom of the form are 'Save' and 'Cancel' buttons. The footer contains links for 'About', 'Download', 'Sales', 'Support', and 'Language'.

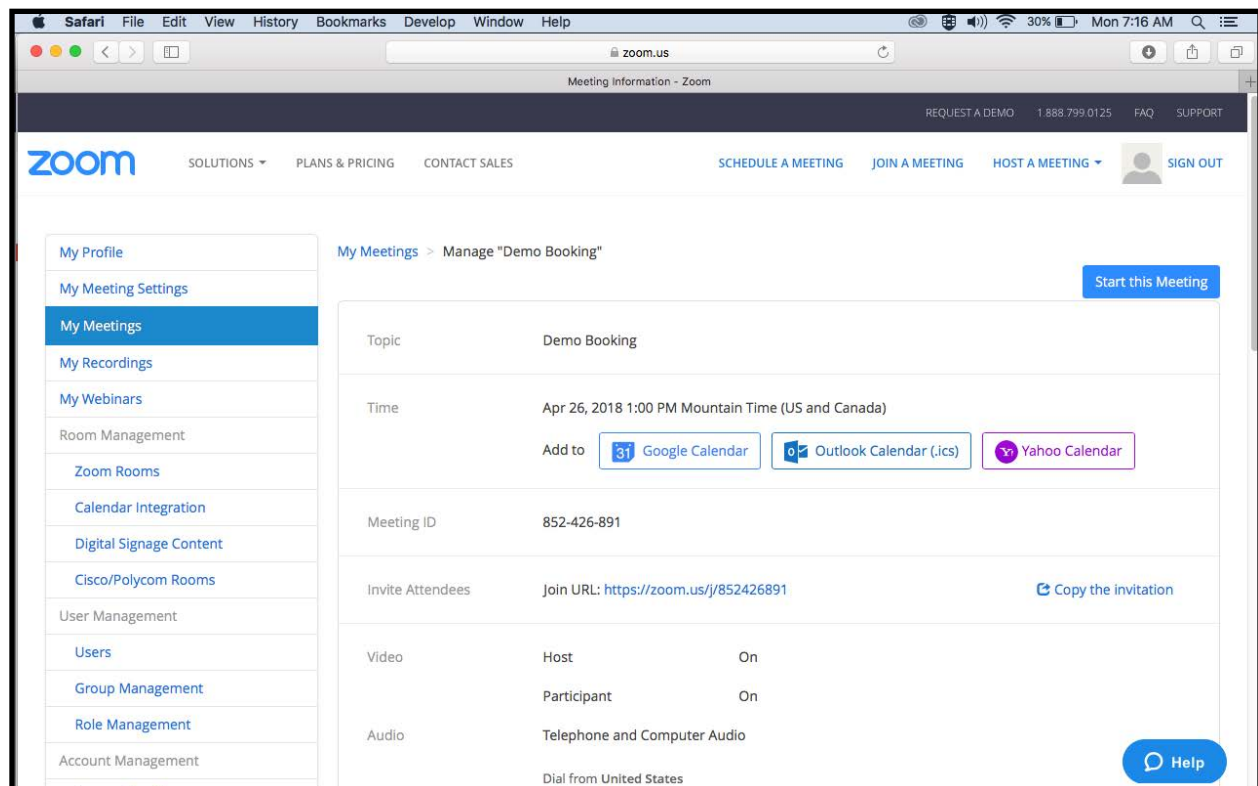
The last option, “Record the meeting automatically,” is not a feature to which we are currently subscribed. If we were, meetings would be recorded “in the cloud,” and could be viewed and downloaded after the meeting ends. You can do a local recording on any computers that are connected to the call, however.

Once all the information is entered into the form, click on the “Save” button. Saving the document will bring up a new page that you can use to invite the participants to the meeting.

## Inviting Participants To A Meeting

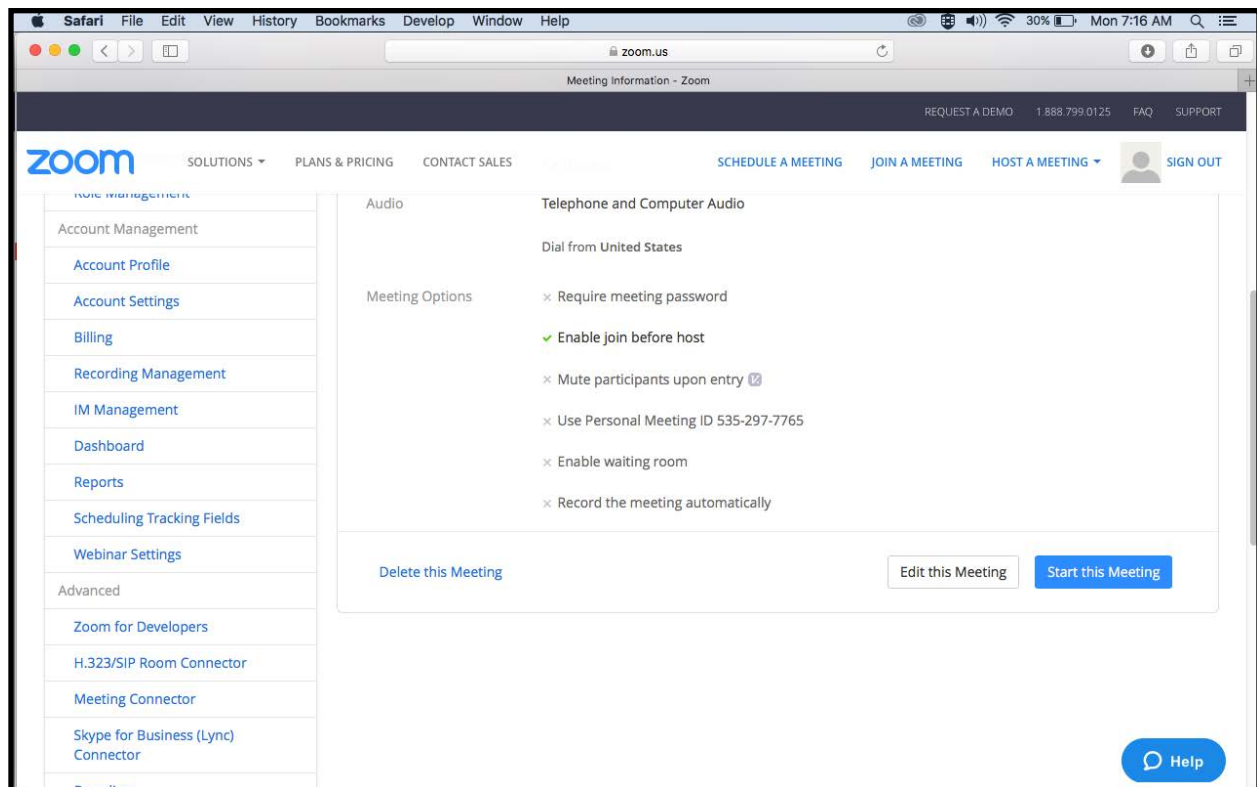
After you save the details of your meeting, you will see another page that summarizes the details of the meeting. Like the previous form, it takes up more than one screen on your computer. The full form is also shown in the appendix.

The top of the form has the basic meeting information—meeting name, date, time. It also has links that allow you to add the meeting to your calendar:



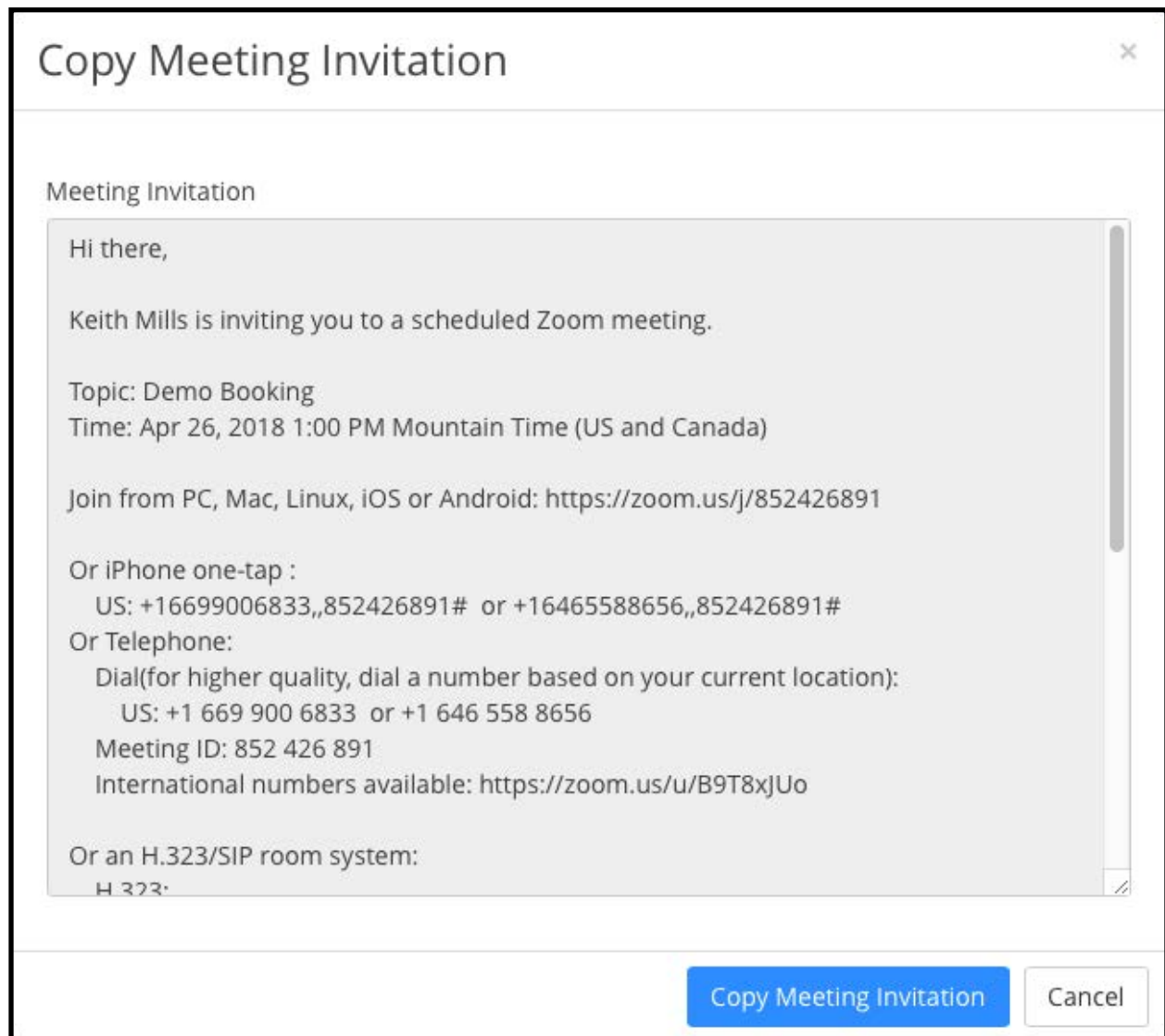
If you click on one of the calendar buttons, it will add the meeting to your calendar. At that point, you can go to your calendar and click on the meeting to open up the calendar entry. You can then add the e-mail addresses of the participants and send a meeting invitation to them. The body of the invitation will contain all the details on how to connect to the meeting. There will be a link that computer and mobile device users can click on to join, as well as phone in numbers and information on how to connect from a room-based (hardware codec) video conferencing system.

Scrolling down to the second screen of this page just gives the remaining details of the meeting, as well as a links to delete or edit the meeting details, or start the meeting.



You'll notice that there is a "Help" link in the bottom right corner of the screen. You can click this link at any time to open a chat window with the Zoom help desk.

Going back to the first screen, you will also see a link that says “Copy the invitation.” If you click on this link, it will open a window with the connecting instructions:

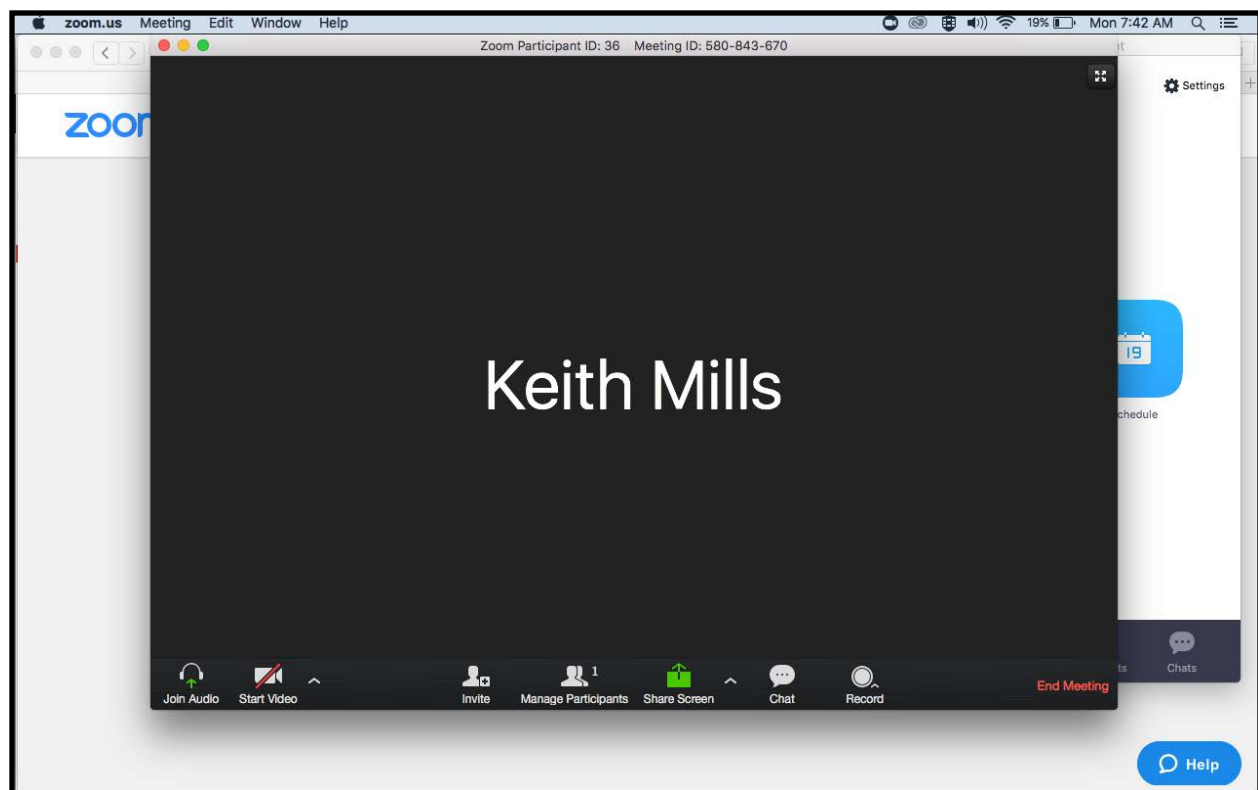


If you click the “Copy Meeting Invitation” button, you can then paste the information into an e-mail that you send to the participants. You can also edit it in the e-mail to eliminate unnecessary information. For example, if nobody will be phoning in, you can delete the calling information. There are also several IP addresses for people connecting from room-based systems, based on geographical area. You can delete the information for other locations and just give the IP address for your area.

## Connecting From A Computer

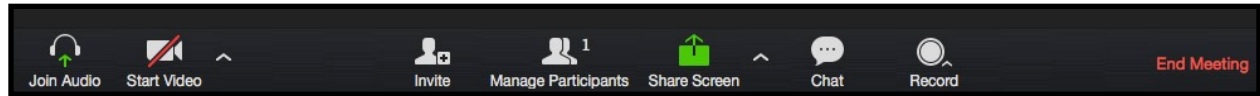
As mentioned earlier on the “First Steps” page, connecting from a computer or mobile device is as simple as clicking on a link. The meeting invitation will have a link that contains the meeting ID number, so clicking on the link will connect you to the correct meeting.

On a computer, the Zoom application will download and install itself if Zoom has never been used on that computer before. If Zoom has been used before, the application will open and connect you to the meeting. The Zoom screen will look like:



In this example, video is turned off. Other participants will see the user's name in a small window to let them know who is connected. If video was turned on, they would see the participant's camera image with a name at the bottom of the screen. In the upper right corner of the window is a small button that will make the window go to full screen. Meeting controls are across the bottom of the window. In this case, we are looking at the host's window. The other participants will see something similar, but will not have all the same controls.

The control strip across the bottom looks like:



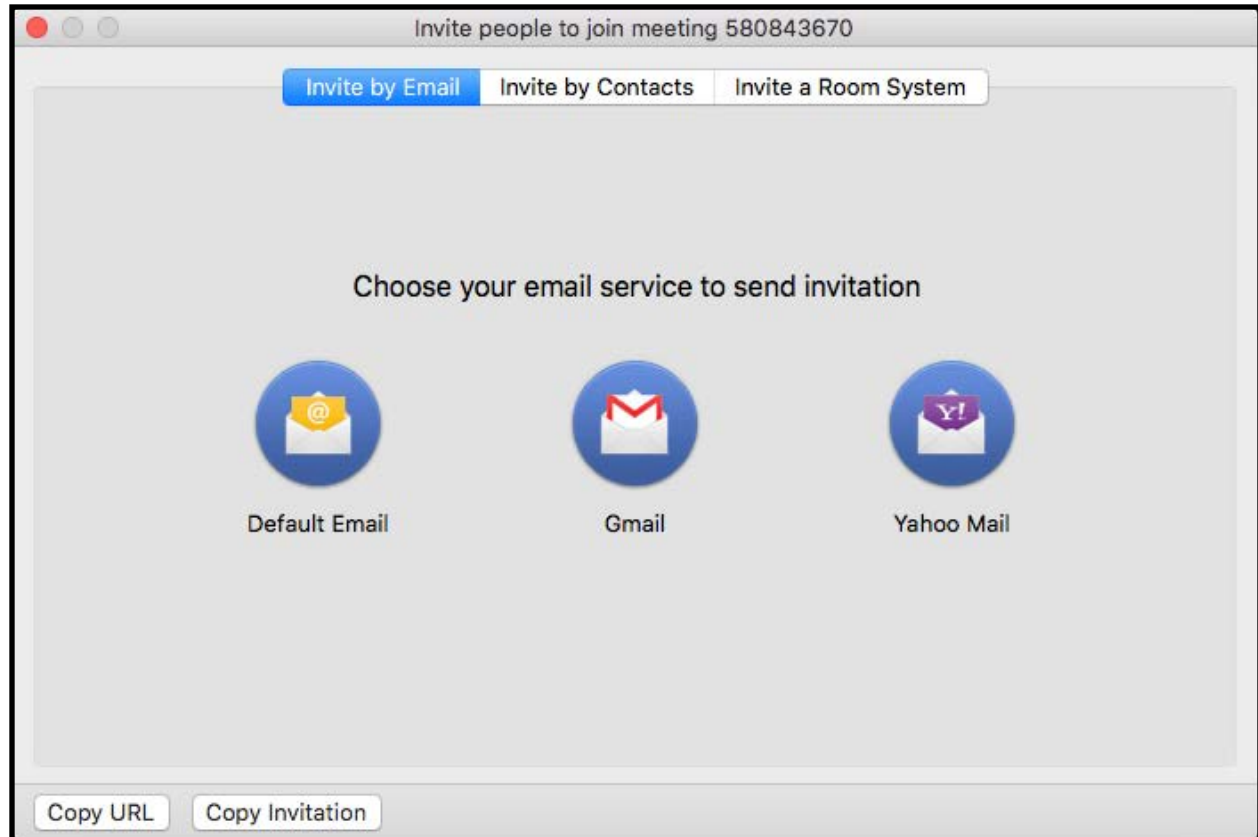
On the left are the audio and video buttons. Clicking on the headphone icon lets you choose between telephone audio and computer audio. When the meeting first connects, you will see a pop-up window that lets you select your audio source, but this button on the control strip lets you change your selection later on. Clicking on the “Start Video” icon starts and stops the webcam. There is a small “up arrow” next to the camera icon that lets you choose your camera, if you have more than one (eg. built-in laptop webcam or USB webcam plugged into the laptop), and lets you adjust your video settings.

At the far right is a button to end the meeting. If you are a participant, you will be asked to confirm that you want to leave. If you are the host, you have the choice of leaving the meeting, or ending the meeting for everybody. If you are just leaving the meeting yourself, you will be asked to designate another participant as host.

In the middle set of buttons is a “Manage Participants” button. Clicking there will give you a list of all the meeting participants and their roles in the meeting. This is where you can designate another participant as the host if you are leaving the meeting but wish to have the meeting continue without you.



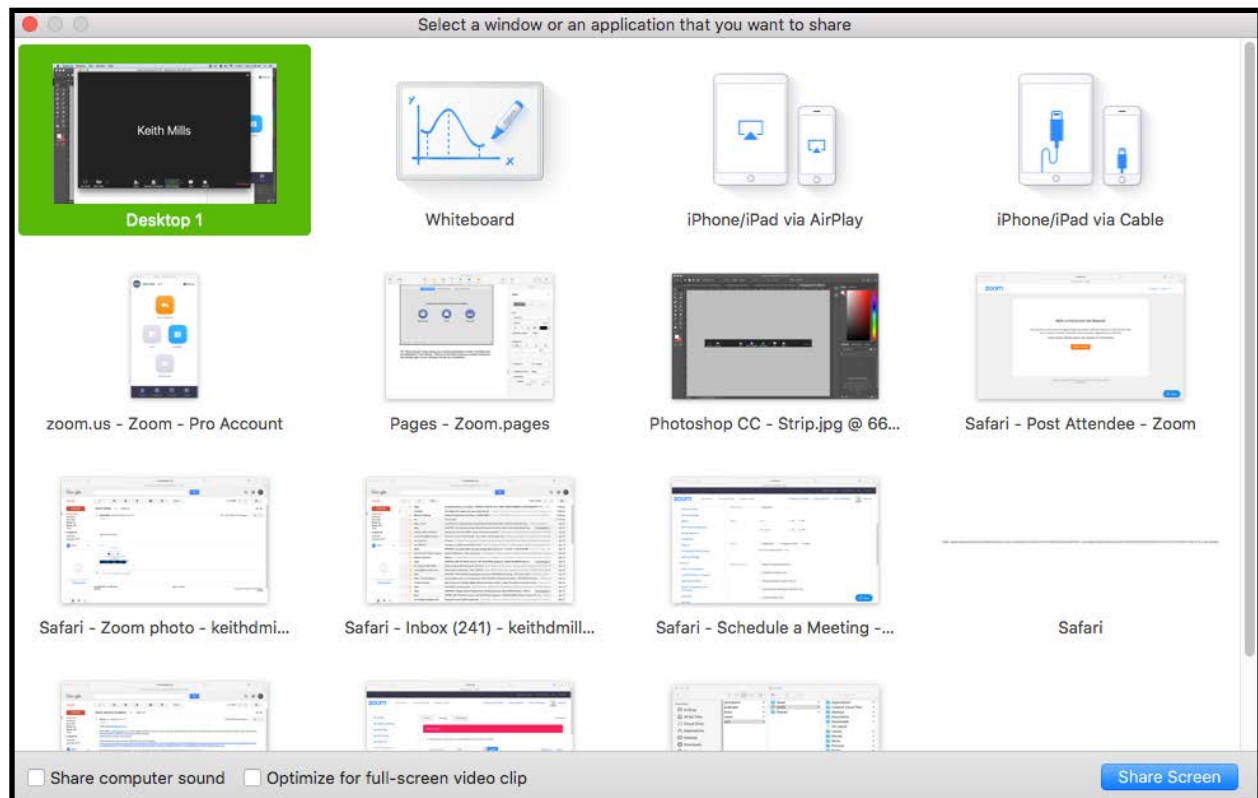
As a host, you can invite other people to the meeting by clicking on the “Invite” button. The window that appears allows you to e-mail an invitation with the contact information, or call out to a room system.



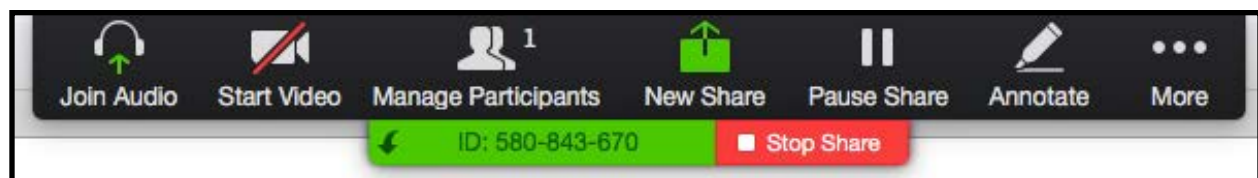
The “Record” button at the right of the centre controls allows you to record the meeting onto the computer. It is saved as an .mp4 file in the Movie or Videos folder of the computer. When the meeting ends, you will see a message indicating that the video clip is being processed. Do not shut down the computer until the message goes away, indicating that the video clip has been completely processed and saved.

The “Chat” button opens up a chat window that lets you send messages to either all the participants in the meeting or to specific participants.

The “Share Screen” button allows you to share presentations or other information with the participants in the meeting. Clicking on the button brings up a window showing all the windows open on your computer, as well as a whiteboard. You can also share content from a mobile device that is connected to the computer:



Simply select the window that you wish to share and click on the “Share Screen” button in the lower right corner of the window. This will put the selected window into your Zoom window as well as sharing it with all the other participants. A new control strip will appear at the top of your window when you are presenting content:



It contains the usual controls that are normally at the bottom of the window, but it adds a couple of new features. You and the other participants can annotate over the shared content, you can pause the sharing, or you can end the sharing. The “More” option at the end basically just gives access to the options from the main control strip at the

bottom of the screen that aren't shown here—invite participants, audio/video controls, etc.

There is a small “Up Arrow” icon next to the “Share Screen” button on the control strip:



This gives you access to advanced sharing options. For example, you can restrict sharing to the host, or allow any participant to share content. Or you can allow more than one person to share content at the same time.

## Connecting From A Room System

Connecting from a room-based video conferencing system is a bit more complicated than a typical call between rooms. Normally, you would just call the IP address of the other room and the call will connect either automatically, or when the person at the other end accepts the call. With Zoom, you call into Zoom, and then have to enter the specific ID number of the meeting you wish to join.

When you receive the meeting invitation, you will be given an IP address to call. There are Zoom IP addresses in several countries and the complete list is:

**162.255.37.11 (US West)**  
**162.255.36.11 (US East)**  
**221.122.88.195 (China)**  
**115.114.131.7 (India)**  
**213.19.144.110 (EMEA)**  
**202.177.207.158 (Australia)**  
**209.9.211.110 (Hong Kong)**  
**64.211.144.160 (Brazil)**  
**69.174.57.160 (Canada)**

You start by calling the IP address for the closest country to your location. Some of the campus video conferencing systems have a Zoom number in their directory. The Canada IP address is a recent development, so some systems have the US West IP in the directory. This will not make any difference to your call.

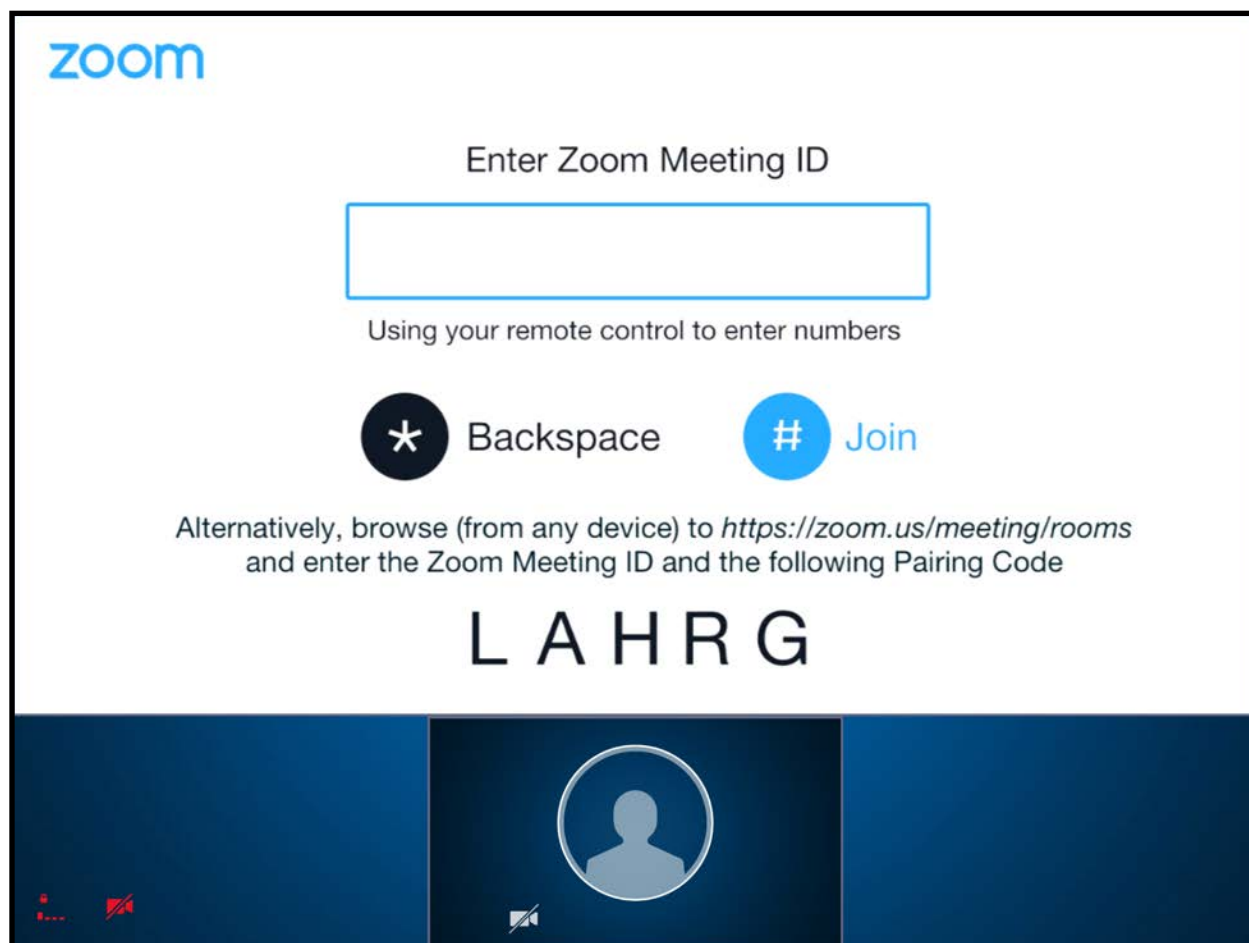
To manually call from a Polycom system, start by pressing the “Call” button on the remote:



Then enter the IP address of the Zoom location you are using, using the number keypad on the remote:



The Zoom location will answer and you will see the following screen:



A recorded voice will tell you to enter the meeting ID number—the nine-digit number from the meeting invitation—and then press the “pound key” (#) to join the meeting.

Normally, if you are doing a multi-point call (more than two participants), one room system can dial out to both of the other systems, so one site can handle all the connections. With Zoom, all sites have to dial in to Zoom separately, so this is a bit more complicated than usual. However, multi-point calls from a codec are usually limited to four sites (Polycom) or six sites (Sony). With Zoom, any number of room systems can call into a single meeting, as long as the account is set up for it. The current U of C account can handle up to five room systems, with up to one hundred computer/mobile device connections, in a single call. If demand warrants, we can increase the number of room system connections, at an additional cost.



To enter the meeting number on a Polycom video conferencing system, you first need to press the “pound key”:



This puts the remote into a different mode where the number keypad is used to enter information on screen instead of entering IP addresses. Once you’ve pressed the pound key, enter the nine-digit meeting number and press pound again. This will connect you into the meeting. If you are the first person in, the voice will tell you. As other people enter the meeting, they will appear on screen.



## Recording A Meeting

As mentioned earlier, you can record meetings onto a computer that is connected into a call. Simply click on the “Record” button on the controls at the bottom of the screen. You cannot record a meeting if you are connecting via a room system.

When the meeting ends, you will get a message saying that file is being processed. It will be saved on your computer as an .mp4 file in the “Videos” or “Movies” folder.

Zoom offers a cloud recording option that the University of Calgary is not currently using. If there is sufficient demand, it is something that could be added to the account in the future.

## Appendix

The scheduling form:

[My Meetings](#) > Schedule a Meeting

### Schedule a Meeting

Topic

My Meeting

Description (Optional)

Enter your meeting description

When

04/23/2018 7:00 AM

Duration

1 hr 0 min

Time Zone

(GMT-6:00) Mountain Time (US and Canada)

☐ Recurring meeting

Registration

☐ Required

Video

Host ☐ on ☒ off

Participant ☐ on ☒ off

Audio

☐ Telephone ☐ Computer Audio ☒ Both

Dial from United States [Edit](#)

Meeting Options

☐ Require meeting password

☐ Enable join before host

☐ Mute participants upon entry ⓘ

☐ Use Personal Meeting ID 535-297-7765

☐ Enable waiting room

☐ Record the meeting automatically

Alternative Hosts

Example: john@company.com, peter@school.e






Save

Cancel

## The Invitation screen:

[My Meetings](#) > Manage "Demo Booking"

Start this Meeting

Topic	Demo Booking	
Time	Apr 26, 2018 1:00 PM Mountain Time (US and Canada)	
Add to	<div> Google Calendar</div> <div> Outlook Calendar (.ics)</div> <div> Yahoo Calendar</div>	
Meeting ID	852-426-891	
Invite Attendees	Join URL: <a href="https://zoom.us/j/852426891">https://zoom.us/j/852426891</a>	 Copy the invitation
Video	Host	On
	Participant	On
Audio	Telephone and Computer Audio	
	Dial from United States	
Meeting Options	<div><input type="checkbox"/> Require meeting password</div> <div><input checked="" type="checkbox"/> Enable join before host</div> <div><input type="checkbox"/> Mute participants upon entry </div> <div><input type="checkbox"/> Use Personal Meeting ID 535-297-7765</div> <div><input type="checkbox"/> Enable waiting room</div> <div><input type="checkbox"/> Record the meeting automatically</div>	
Delete this Meeting		<div>Edit this Meeting</div> <div>Start this Meeting</div>