Zoom guide – creating and managing meetings

Scheduling a meeting

- Go to [btc-tech.zoom.us](https://btc-tech.zoom.us), or click on the Zoom link under Remote Access on the Employee Login page and sign in to your Zoom account.
  - If you do not already have a BTC-issued Zoom account, please contact HelpDesk to request an account.

- To Schedule a Meeting
  - After signing in, click on My Account in the upper right hand corner
  - Then click on Schedule A Meeting

  - Please do not use Host A Meeting. This feature will start a meeting session immediately without any of the necessary configuration.
  - Enter a topic (meeting name)
  - Description (optional)
  - Date, time, duration
    - Zoom has recurring meeting scheduling, if needed
  - Registration – leave unchecked
  - Meeting ID – leave set to Generate Automatically
- Meeting password – leave unchecked
- Video – leave Host and Participant video set to ‘off’
- Audio – leave “Both” selected
- Meeting options – typically, leave everything as is (only “Mute participants…” is checked
- Add alternative host, if desired
- Save

- In the My Meetings page, you can add your session to your Outlook Calendar by clicking on the “Outlook Calendar (.ics)” link.
- To invite attendees, you can either invite them from your Outlook Calendar like you would any other meeting invitation done via Outlook (if you added the meeting to your calendar), or you can copy the Join URL and send it to attendees by email. You can also use the “Copy the Invitation” and paste it in an email or in a meeting invitation.
- Once you are ready to enter your meeting environment, click on Start this Meeting.

Managing a meeting
- Set up your audio
  - Click on Join Audio, and then test your speaker and microphone.
  - Next, click on Test Speaker and Microphone to test those features. From this screen, you can also select Phone Call if you will be managing the meeting with phone audio only.
You can also test and set up your audio settings by clicking on the drop-down chevron to the right of the microphone icon in the lower left hand corner of your Zoom session screen. This will also allow you to select between different microphone options (depending on your set up). Click on the microphone icon to mute and unmute your computer audio.

- If you have multiple audio components hooked up to your computer (speakers, headphones, mics, etc.) please make sure the desired sources are selected.

Set up your video (if needed)

- If you will be using a webcam, you can turn on or off your webcam by clicking on the video camera icon. You can also adjust your video settings by clicking on the drop-down chevron to the right of the video camera icon. This will also allow you to select between different webcam options (depending on your set up).

Managing participants

- Click on Manage Participants to pop up a list on the right-hand side of the screen of the people participating in your meeting
At the bottom of the Participants window you can select Mute All, Unmute All, and More to manage aspects of your attendees’ participation.

You can also mute and unmute individual participants in the Participant list by hovering over the name with your cursor and selecting Mute or Unmute.

- Chat with participants

Click on the Chat icon to open the Zoom Group Chat window, which will appear in the lower right hand side of the screen. From this screen, you can type your chat messages to everyone, or click on the drop down to the right of “To:” to select a specific participant with whom to chat.

- Screen Sharing
- To specify who can share their screen, and whether people can share at the same time, click on the drop-down chevron to the right of the Share Screen icon and select from the appropriate options, or click on Advanced Sharing Options for more options.

- Advanced Sharing Options – From this pop up screen you can specify how many participants can share simultaneously, who can share, and who can start sharing when someone else is already sharing.

- Once you have your screen sharing configured to suite your needs, click on Share Screen (either one of these options will work)

- From the screen share selection page, chose which window, screen, program, document, or application you wish to share, and then click Share.
Once you are sharing your screen, your menu bar moves to the top of your screen. From this bar, you can manage your audio, video, participants, and page sharing. You can also use Annotate.

Annotate allows you to highlight items, flag items, and write and draw on the page or document you are sharing.

- **Recording**
  - Recording should never be used when meeting with students one-on-one or in groups. It should only be used for recording lectures, trainings, or perhaps staff meetings.
  - If you want to record, click on the Record icon from the menu bar, and select Record To This Computer. Please do no record to the cloud.

Additional Resources

- Live Training Webinars
- Video Tutorials
- Zoom Knowledge Base