Host and Participate in a Zoom Meeting

CMU has a Pro Zoom account. Zoom offers **voice and video conferencing**. It is often used for **meetings** and **webinars**. It may be used for **virtual office hours**, **tutoring**, and **group projects**. When appropriate, it may also be used for **live class sessions**. Features include document and desktop sharing. Recordings of meetings are available as cloud recordings or downloadable MP4 files.

This guide will walk you through the steps to **host** a meeting and **participate** in a meeting. Guidance is also provided for captioning and teaching resources.

Note: Beginning **November 1, 2021**, Zoom requires all users to update their Zoom applications to ensure they are **no more than nine months behind the current version**, at any given time.

**Contents**

- Host and Participate in a Zoom Meeting ................................................................. 1
- Host a Zoom Meeting .............................................................................................. 2
  - Host Tutorial Videos ............................................................................................. 3
  - Zoom Settings ........................................................................................................ 3
  - Scheduling a Zoom Meeting ................................................................................ 4
  - Starting and Recording a Zoom Meeting ............................................................ 8
  - Sharing a Recorded Meeting ................................................................................ 15
- Participate in a Zoom Meeting ................................................................................ 16
  - Participant Tutorial Videos from Zoom ............................................................... 17
Host a Zoom Meeting

You will need to **create** an account if you plan to **host** a meeting. Check out our [Zoom Account Set Up guide](#). If you only need to **participate** in a meeting, you do not need to create an account. If you just need to participate, you may skip to the steps outlined in the [Participate in a Zoom Meeting](#) section of this guide.

Notes:

- Check out [Zoom System Requirements](#).
- If you need to use **keyboard shortcuts**, they are available.
- If you can’t use the desktop version or just prefer the app experience, there is a [Zoom mobile app](#) available.
- If you are using a **Chromebook**, please refer to [How to Use Zoom on a Chromebook](#) and [Getting Started on Chrome OS](#). Cloud recording may not be available on a device using the Chrome OS. While you can still host a Zoom session on this device, you may have to [set another user as a co-host](#) or [allow others to record](#).
- You will should be able to join Breakout Rooms from a Chromebook but not on the web client. You will be able to join but not manage from the mobile app.
- If you are unable to install Zoom on any device, you may join a meeting via a web browser. The [Zoom web client](#) offers limited functionality. Use the Chrome, Firefox, or Edge (Chromium) web browser for the best functionality.

As the host, you may access Zoom via:

- MAVzone > Applications > Zoom
- Zoom desktop application (once installed)
- Zoom mobile app (check out [Zoom’s mobile app guide](#))
- D2L > Content > (Module) > Existing Activities > External Learning Tools > Zoom (option only available for faculty)

Use this part of the guide to **schedule** and **host** a Zoom meeting. The screenshots are based on the Zoom **desktop application**. If you wish to use the D2L Zoom integration, please refer to the [Host and Participate in a Zoom Meeting with D2L guide](#).
Host Tutorial Videos

From Zoom:

- [Scheduling a Meeting](#)
- [Recording a Zoom Meeting](#)
- [Meeting Controls](#)
- [Sharing Your Screen](#)

From CMU:

[Recording Group Presentation with Zoom](#) (Note: This video does not mention the required password/waiting room when setting up a meeting.)

Zoom Settings

1. Once you have a Zoom account and have the desktop application (program) installed, launch Zoom from your computer. (Note: If you cannot find the program on your computer, you can download it again from [https://zoom.us/download#client_4meeting](https://zoom.us/download#client_4meeting).)
2. After launching Zoom, click on the **Settings** (gear icon) menu on the top right of the launch window.
3. Go to Video settings. Then, check the box by Spotlight my video when I speak. (If you don’t see this option right away, you may need to scroll down a bit.)

4. You can also go to the Recording settings and choose a preferred Local Recording location (such as Desktop) to save recordings. Recordings may also be available in Cloud Recording. Close the window when you are finished adjusting the settings.

Scheduling a Zoom Meeting

1. From the main menu, select Schedule.
2. In the **Schedule meeting** dialog:

   a. **Topic**: Name your meeting.
   b. **Start**: Add your meeting **date** and **time**.
   c. **Duration**: Enter your estimated meeting length.
   d. **Recurring meeting**: Check this box to schedule recurring meetings. (Note: Zoom limits users to 50 recurring meetings for one scheduling set up. If you need additional meetings, you will need to set up an additional recurring meeting.)
e. **Time Zone**: Double check you are in the correct time zone.
f. **Meeting ID**: Select from **Generate Automatically** or use your **Personal Meeting ID**.
g. **Security**: Check if you wish to include a Passcode or **Waiting Room** (recommended). You also have the option for **Only authenticated users can join**: Sign in to Zoom.
h. **Video – Host**: Choose if you would like your video on or off when joining the meeting. Even if you choose off, you will have the option to start your video after joining the meeting.
i. **Video – Participants**: Choose if you would like the participants’ video on or off when joining the meeting. Even if you choose off, participants will have the option to start their videos after joining the meeting.
j. **Audio**: Select **Telephone, Computer Audio, or Telephone and Computer Audio**.
k. **Calendar**: Select **Outlook**.
l. Click the **Save** button once you’ve made your selections.

**Notes**:
- Expanding the **Advanced Options** allows you to select additional options:
  
  - **A. Enable join before host**: Typically leave this option unchecked so that you are the first in the meeting.
  - **B. Mute participants on entry**: This is a good option to check, especially for meetings with multiple participants.
  - **C. Automatically record meeting**: This may be a good option to check if you’re hosting a class session(s) and need to share the recording with the class or need to caption the meeting afterward.
  - **D. Alternative hosts**: Enter email if applicable. You may enter the email address of another Zoom user with a Pro license on our CMU account to allow them to start the meeting in your absence.
- **Interpretation**: If your meeting will have an interpreter, checkmark **Enable language interpretation**. (For more information, please contact Distance Education.)
3. A window will pop up with the meeting details. Depending on how you need to share the details with meeting participants, you may copy the entire instructions (Copy to Clipboard button) or just copy the meeting topic, time, and link and paste the details for your participants in an email, D2L, etc.

Notes:

- You may add the meeting to your Outlook Calendar as well with the Microsoft Outlook desktop plugin.
- If you need to copy the meeting invitation again, you may do so by clicking on the 3-dot menu by the scheduled meeting and selecting the Copy Invitation option from the dropdown menu.

When sharing your meeting link, it may be helpful to include some quick tutorial links for your participants, such as:

Before Joining:

- Watch this quick tutorial on how to join a meeting
- Watch this quick tutorial on joining and configuring audio and video
- Watch this quick tutorial on meeting controls
- Test Joining a Zoom Meeting
Starting and Recording a Zoom Meeting

On the scheduled day and time, the host will start the Zoom meeting from the Zoom application main menu.

Recording note: While you will not typically record any personal meetings, some meetings, such as interviews or group projects, need to be recorded. This may discourage inappropriate behavior during meetings. Recording is also key for captioning to be provided later as needed. Be sure to inform participants they are being recorded. Zoom also automatically informs participants they are being recorded when recording begins. The application announces “Recording in progress” aloud, and “Recording stopped” aloud when recording stops. Each participant receives a visual prompt where they may either consent to stay in the meeting or leave when this prompt appears. After the meeting, the host may generate a report listing participants who provided consent.

1. Click on the **Start** button beside your scheduled meeting.
2. Click the **Join with Computer Audio** button.

Note: If you’ve not previously tested your set up, please click the **Test speaker and microphone** link first.

3. If your video is not on yet, click the Start Video button in the meeting toolbar.

4. Before starting to record, be sure your participants know recording will be taking place. Zoom will also inform them.

5. If you wish to record in **Gallery View**:  
a. Once all participants join and you’re ready to begin the meeting/presentation, switch to **Gallery View**.

b. In **Gallery View**, you should all have your cameras on and you will see participants equally on the screen. 3-4 participants will be shown in a quadrant view. Depending on your device, you may be able to see up to a 5x5 (25 participant view) or a 7x7 (49 participant view).

6. Once you’re in **Gallery View** and ready to record, click the **Record** option.

7. You’ll be prompted to select **Record on this Computer** (Alt + R) or **Record to the Cloud** (Alt + C).
   Note: If you’re recording to the cloud, you’ll receive a brief message indicating you are connecting to the cloud server.

8. Once you’ve started recording, you’ll notice a **Recording** notice at the top left of your screen.

Note: If you need help, refer to Zoom’s YouTube tutorial video **Recording a Zoom Meeting**. You may **Pause Recording** during the meeting if needed.

9. Once your meeting/presentation is complete, click **Stop Recording**.

Note: If you selected the option to record to your computer, Zoom will probably provide a prompt: **The recorded file will be converted to mp4 when the meeting ends.**
If you selected the cloud recording option, you’ll receive a prompt asking **Do you want to stop cloud recording?** If Yes, you will receive an email notification when the cloud recording is ready. Click the **Yes** button if you’re ready to end the recording.

10. After you stop the recording, also click **End** (followed by **End Meeting for All**).

11. Your recording will process and be saved in your preferred recording location. (Refer to Step 4 of **Zoom Settings**.)

12. You can access your Zoom recordings from the **Meetings** area of the Zoom application by going to the **Recorded** section, selecting the **applicable meeting**, and clicking the **Open** button.

13. This takes you to your Zoom **Recordings**. You may **Download** the recording or **Copy shareable link**.
14. By default, your recording will be saved as an MP4 file titled “zoom_0”. (There will also be an “audio_only” file and a “playback” file, but you won’t use these.)

Notes:

- If you recorded to your computer, by default, your recording will be saved as an MP4 file titled “zoom_0”. (There will also be an “audio_only” file and a “playback” file, but you won’t use these.)

- If you recorded to the cloud, you will receive an email from Zoom <no-reply@zoom.us> indicating that your cloud recording is now available. The email will include 2 links, 1 for the host only, and 1 to share the recording with viewers.
- Be sure to abide by any applicable privacy (such as FERPA) expectations before sharing videos.

Using the Zoom Meeting Toolbar

A. **Mute/Unmute**: Mute or unmute your mic. Clicking the menu options will also allow you to Select a Microphone, Select a Speaker, Test Speaker & Microphone, Switch to Phone Audio, Leave Computer Audio, and Audio Settings.

B. **Start/Stop Video**: Start or stop your webcam/camera. Clicking the menu options will also allow you to Select a Camera, Video Settings, and Choose Virtual Background.

C. **Security**: (Only available to the meeting host) Click the icon to select Lock a Meeting, Enable Waiting Room, Allow Participants to: Share Screen, Chat, Rename Themselves, and/or Unmute Themselves.
D. **Participants**: (Participant management options only available to the meeting host) Click the icon to see your participant list, mute/unmute participants, start/stop video of participants, and/or invite other participants. Clicking on the 3-dot menu at the bottom right corner of the Participants pane will allow you to access additional options, such as Mute Participants on Entry, Allow Participants to Unmute Themselves, Allow Participants to Rename Themselves, Play Enter/Exit Tone, Enable Waiting Room, and Lock Meeting. The Participants area also displays non-verbal feedback options, such as yes, go slower, etc. which are available in Reactions.

E. **Polls**: You can create a poll during a meeting or start a prepared poll.

F. **Chat**: Click on the icon to access the Chat pane. Chats may be directed to Everyone, host or an individual participant.

G. **Share Screen**: (Available to meeting host and participants, if the host allows) Click on the icon to select your window or application you wish to share from the Basic options, including a Whiteboard option. This screen also allows you to check the option to Share computer sound and Optimize Screen Sharing for Video Clip. The Advanced options allow you to share Portion of Screen, Music or Computer Sound Only, or Content from 2nd Camera. Clicking on the menu options (instead of the icon) will allow you to select: One participant can share at a time, Multiple participants can share simultaneously, and Advanced Sharing Options (How many participants can share at the same time, Who can share, and Who can start sharing when someone else is sharing).

H. **Record**: Click on the icon to choose where you wish to record: your device or the cloud.
I. **Live Transcript**: This option allows participants to view live captioning/transcript during the meeting. For more information, please review our [Zoom Accessibility guide](#).

J. **Breakout Rooms**: You can create Breakout Rooms during a meeting or use prepared rooms. You may assign participants automatically or manually.

K. **Reactions**: You may use non-verbal reactions such as clap, thumbs up, heart, joy, open mouth, or tada. You also have the option to respond Yes, No, Slower, or Faster. Hosts and co-hosts, as well as participants, now have the option to Raise Hand, too. (Note: The 3-dot option allows for additional reactions/emojis and allows the participant to change the skin tone.)

L. **End/Leave Meeting**: Click to End or Leave meeting if you are the host (you may also assign another host if you leave). Click to Leave meeting if you are a participant.

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**Sharing Your Screen, Audio, or Video During a Zoom Meeting**

Once you are in your Zoom meeting, you can share your computer screen and audio.

1. Click on the **Share screen** icon in the tool bar that pops up at the bottom of the meeting when you hover over with your cursor.
2. You will see a pop-up window where you **Select a window of an application you want to share**. This will show the different screens you have open and you can select the one you want to share. The shared screen will highlight in blue. Note: you may want to close any personal or sensitive screens prior to starting the meeting to make sure you don’t accidentally share sensitive information.
3. To enable computer audio in addition to sharing the screen, check the **Share Computer Sound** box in the lower left corner of the share screen pop-up window. You also have the option to select **Optimize Screen Sharing for Video Clip** and that is advised as well.
4. After you select the window/application you wish to share, click the **Share** button.
5. Now when you are in screenshare mode it will play **all computer sounds** to the participants.
Sharing a Recorded Meeting

Please note once again: Be sure to abide by any applicable privacy (such as FERPA) expectations before sharing videos.

You will be able to share a link to the recorded meeting.

Due to security updates, a password is added by default. If you, or your students, wish to disable the password for all cloud recordings, follow these steps:

1. Go to the Zoom app in MAVzone
2. Click Recordings then Settings
3. In the settings you will see that Require password to access shared cloud recordings is turned on by default, click it to be off.

If you need to enable captions for your recording, please review our Zoom Accessibility guide.

You may also download the recording to your computer and then upload it to a platform with which you are familiar, such as Panopto. You may use this option for captioning if you prefer Panopto over Zoom’s captioning. If you need to share it in D2L, you may do so via the Insert Stuff > Embed Code feature in the HTML editor.
Panopto Meeting Recordings
Since Zoom and Panopto have an integration, Zoom cloud recordings will also be added to a Meeting Recordings folder in your My Folder in Panopto.

You have the option to share the Panopto version by adjusting the Share settings and then adding the Panopto video link within D2L, email, etc. You may add captions by using the import auto captions option in the Edit > Captions area. These auto-captions are editable for accuracy. Check out our Panopto captioning guide for detailed directions.

Participate in a Zoom Meeting
Use these steps to join and participate in a Zoom meeting.

Notes:

- Check out Zoom System Requirements.
- If you need to use keyboard shortcuts, they are available.
- If you can’t use the desktop version or just prefer the app experience, there is a Zoom mobile app available.
- If you are using a Chromebook, please refer to How to Use Zoom on a Chromebook and Getting Started on Chrome OS. Cloud recording may not be available on a device using the Chrome OS. While you can still host a Zoom session on this device, you may have to set another user as a co-host or allow others to record.
- You will should be able to join Breakout Rooms from a Chromebook but not on the web client. You will be able to join but not manage from the mobile app.
- If you are unable to install Zoom on any device, you may join a meeting via a web browser. The Zoom web client offers limited functionality. Use the Chrome, Firefox, or Edge (Chromium) web browser for the best functionality.
Participant Tutorial Videos from Zoom

- Join a Meeting
- Meeting Controls
- Sharing Your Screen

Joining a Zoom Meeting

1. Follow the link shared by your instructor or host on the day and time of your Zoom meeting.

2. If you have never joined a Zoom meeting before, you might need to download and run the Zoom client application. Select download & run Zoom. Once downloaded, run the Zoom_launcher.exe (application) file.

3. If you have previously downloaded and run Zoom, your web browser will request your permission to open zoom meetings. Click the Open Zoom Meetings (or Open Zoom) button.
4. Once you connect to the meeting, click the **Join Audio Conference by Computer button** to be able to speak and hear others. You can also select to remember your audio joining preference by selecting the box **Automatically join audio by computer when joining a meeting.**

![Zoom Meeting Participant Interface](image)

Note: If you do not have a microphone, you can choose to join via **Phone Call**.

5. Once you have joined the audio conference, you may **Start Video** if you wish to share your webcam.

![Zoom Meeting Interface](image)

Note: The host may **Record** the meeting. The host of the meeting is responsible for recording if needed. The application announces “Recording in progress” aloud, and “Recording stopped” aloud when recording stops. You will be prompted to consent to recording (**Got It**) or leave the meeting (**Leave meeting**).
Using the Zoom Meeting Toolbar

A. **Mute/Unmute**: Mute or unmute your mic. Clicking the menu options will also allow you to **Select a Microphone**, **Select a Speaker**, **Test Speaker & Microphone**, **Switch to Phone Audio**, **Leave Computer Audio**, and **Audio Settings**. (Your host may have disabled some features or require you to mute.)

B. **Start/Stop Video**: Start or stop your webcam/camera. Clicking the menu options will also allow you to **Select a Camera**, **Video Settings**, and **Choose Virtual Background**.

C. **Security**: (Only available to the meeting host) Click the icon to select **Lock a Meeting**, **Enable Waiting Room**, **Allow Participants to**: **Share Screen**, **Chat**, **Rename Themselves**, and/or **Unmute Themselves**.

D. **Participants**: Click the icon to see the **participant list**.

E. **Polls**: Your instructor may start a poll during a meeting.

F. **Chat**: Click on the icon to access the **Chat pane**. Chats may be directed to **Everyone**, **host** or an **individual participant**.

G. **Share Screen**: (Available to meeting host and participants, if the host allows) Click on the icon to select your window or application you wish to share from the **Basic** options, including a **Whiteboard** option. This screen also allows you to check the option to **Share computer sound** and **Optimize Screen Sharing for Video Clip**. The **Advanced** options allow you to share **Portion of Screen**, **Music or Computer Sound Only**, or **Content from 2nd Camera**. Clicking on the menu options (instead of the icon) will allow you to select: **One participant can share at a time**, **Multiple participants can share simultaneously**, and **Advanced Sharing Options** (How many participants can share at the same time, Who can share, and Who can start sharing when someone else is sharing).

H. **Record**: Click on the icon to choose where you wish to record: your **device** or the **cloud**.

I. **Live Transcript**: This option allows participants to view live captioning/transcript during the meeting. For more information, please review our **Zoom Accessibility guide**.

J. **Breakout Rooms**: Your instructor may enable breakout rooms during a meeting.
K. **Reactions**: You may use non-verbal reactions such as clap, thumbs up, heart, joy, open mouth, or tada. You also have the option to respond Yes, No, Slower, or Faster. Hosts and co-hosts, as well as participants, now have the option to Raise Hand, too. (Note: The 3-dot option allows for additional reactions/emojis and allows the participant to change the skin tone.)

L. **Leave Meeting**: Click to Leave meeting.

**Captioning a Zoom Meeting & Other Accessibility Considerations**

Check out our [Zoom Accessibility guide](#) to learn more about live transcription, captions for recordings, keyboard shortcuts, and more.

**Resources**

Check out our [Virtual Meetings Guide](#).

The following are short video guides from Zoom:

- [Zoom 101: Breakout Rooms](#)
- [Zoom 101: Polling (In-meeting)](#)
- [How to use Breakout Rooms](#)
- [Screen Share & Annotation for EDU](#)
- [How to use Waiting Rooms to Manage Office Hours & Drop-In Visitor Times](#)

The following are web guides from Zoom:

- [Testing Computer or Device Audio](#)
- [How Do I Test My Video?](#)
- [Scheduling Meetings](#)
- [How Do I Invite Others to Join a Meeting?](#)
- [Roles in a meeting](#)
- [Waiting Room](#)
- [Host and Co-Host Controls in a Meeting](#)
• Managing Participants in a Meeting
• Sharing Your Screen
• Sharing Multiple Screens Simultaneously
• Sharing a Whiteboard
• Using Annotation Tools on a Shared Screen or Whiteboard
• In-Meeting File Transfer
• Getting Started with Breakout Rooms
• Managing Breakout Rooms
• Participating in Breakout Rooms
• Polling for Meetings
• Controlling and Disabling In-Meeting Chat
• Saving In-Meeting Chat
• Local Recording