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.

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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 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.
- 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 web browser for the best functionality.
- You will not be able to join Breakout Rooms from a Chromebook or the web client. You will be able to join but not manage from the mobile app.

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

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.)
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 a new meeting** dialog:

   a. **Topic**: Name your meeting
   
   b. **Start**: Add your meeting **date** and **time**
   
   c. **Duration**: Enter your estimated meeting length
   
   d. **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.
   
   e. **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.
   
   f. **Audio**: Select **Telephone, Computer Audio, or Telephone and Computer Audio**
   
   g. **Calendar**: Select **Outlook**
   
   h. Click the **Schedule** button once you’ve made your selections.
Notes:

- You also have the option to create a **Recurring Meeting**.
- You have the option to require a password; this option is **not** recommended for class sessions.
- 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. **Record the meeting automatically**: 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.

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.

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.

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.

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 Meeting** (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](#).)
   
   Note: You can also 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. (This takes you to directly to the file location on your computer.)

12. 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: Cloud recordings will also display with sharable links. 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**, and/or **Rename Themselves**.

D. **Manage Participants**: (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**.

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

F. **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).

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

H. **End Meeting/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.
Sharing a Video During a Zoom Meeting
If you want to share the audio as well as the screen during a meeting, follow these steps:

1. Click on the green Share Screen icon at the bottom of your screen.
2. You will see a pop-up window where you Select a window of an application you want to share.
3. Click the check box in the lower left that says Share computer sound.
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.
You may also **download** the recording to your computer and then **upload** it to a platform with which you are familiar, such as Panopto or Microsoft Stream. If you need to add **captions**, you will use the download method. If you need to share it in D2L, you may do so via the **Insert Stuff > Embed Code** feature in the HTML editor.

**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 [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**.
- 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 web browser for the best functionality.
- You will not be able to join Breakout Rooms from a Chromebook or the web client. You will be able to join but not manage from the mobile app.

**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.

   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.

   Note: The host may Record the meeting. The host of the meeting is responsible for recording if needed.
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, and/or Rename Themselves**.

D. **Manage Participants**: (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**.

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

F. **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).

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

H. **End Meeting/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.
Captioning a Zoom Meeting

While synchronized, automatic transcripts are available in business, education, and enterprise accounts, editable auto-captions are not yet available for Zoom recordings with the pro version. However, captions can be created by downloading a recording and uploading it to another application with which you are familiar, such as Panopto or Microsoft Stream, that allows for editable, auto-captioning. While live closed captioning is an option in Zoom, it requires a 3rd party transcriptionist. Check out Zoom’s Getting Started with Closed Captioning guide, and contact EAS for accommodations questions.

Other Accessibility Considerations

While the user interface in Zoom is largely accessible, including keyboard and screen reader support, there are a few things to keep in mind.

- Participants with visual impairments may have difficulty with the whiteboard and screensharing features as they are visuals and not text-based. Remember to read/describe what’s happening on screen in this case. If you’re sharing documents or web pages, you may share them with the participants as files or URLs before or after the meeting via email or D2L.
- Share Zoom’s keyboard shortcuts with participants as needed.
Resources

Check out our Virtual Meetings Guide.

The following are short video guides from Zoom:

- Zoom 101: Breakout Rooms
- Zoom 101: Polling (In-meeting)
- Zoom 101: Manage Participants (In-depth)
- 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