# Zoom Meetings Training - Reference Guide

**How to use this guide**

This should be used as a quick reference guide to scheduling and customizing your meetings and meeting settings and supplemental to one of the daily Zoom Meetings training webinars hosted by Zoom.

Zoom hosts daily free & interactive training sessions for Zoom Meetings. Get up to speed quickly by attending one of our daily 30-minutes sessions, *Getting Started with Zoom Meetings*. Then, become a power user by attending one of our weekly 60-minute deep dive sessions and learn how to get the most from all available in-meeting features.

You will find best practices and tips included throughout this guide, as well links to full support guides found on the Zoom Support site.

If you are unable to join us live, please note that we also have recordings of each of our training webinars accessible for your convenience on the same page.

## Contents

## Schedule Your Meeting

**Set the Date, Time, and Duration of your meeting.** The time zone should be the same as the meeting host. Attendees join time will vary by time zone. Duration allows for easy time-blocking on calendars and does not limit your actual event live time.

## Will you host this meeting again?

**Schedule a Recurring Meeting.** Best if you are hosting a series or set of meetings. Choose a specific daily time, a custom weekly schedule, a specific day of the month, or set to "no-fixed" time for maximum flexibility.

## Requiring Registration for a Recurring Meeting

**Customize registration enablement.** Which meetings will Registration allow your attendees to access?



- **Attendees register once and can attend any of the occurrences -** Registration allows registrants to attend all of the occurrences. All dates and times of the meetings will be listed and the registrant will be registered for all occurrences.

- **Attendees need to register for each occurrence to attend -** Registrants need to register separately for each occurrence to attend. They can only choose one date and time on the registrant page.

- **Attendees register once and can choose one or more occurrences to attend -** Registrants register once and can choose one or more occurrences to attend. They will need to select which dates and times they would like to attend and they will only be registered for those occurrences. They can choose multiple options.

## Customize Your Meeting Options

- **Schedule For** – If you have scheduling privilege for another user, you will be able to choose who you want to schedule for from the drop down. Executive Admins* will find this feature very useful!

- **Meeting Passwords** – Meetings and Webinars can require passwords for an added layer of security. Joining participants will be required to input this before joining your meeting. Passwords may be alphanumeric and are case sensitive.

- **Video** – Choose if you want the host's or the participants' webcams on or off when joining the meeting. If you choose 'off' for the host or participants, the host and participants will have the option to start their video in the meeting

- **Audio** – We prefer to select 'Both' to allow participants to use any computer devices or telephone to listen and talk on the meeting. Edit Dial-in options by clicking the edit button and offer your international attendees a local number they can call into for meeting audio.

### Meeting Options

- **Enable join before host** – Allow participants to join the meeting without you or before you join.

- **Mute participants upon entry** – This will mute all participants as they join the meeting. Participants will have the option to un-mute their microphone in the meeting.

- **Enable waiting room** – Allows the host to control when participants join the meeting by placing them in a waiting room. By default, the waiting room will take precedence  and will not allow join before host functionality, even if "join before host" is checked.

- **Only authenticated users can join** – Restrict access to the meeting so that only signed-in users can join.

- **Record the meeting automatically** – Check this if you want the meeting to be automatically recorded. Select if you want to record locally or record to the cloud.

- **Alternative Hosts** – The alternative host option allows you to schedule meetings and designate another Pro user on the same account to start the meeting or webinar if you are unable to. This user will receive an email notifying them that they've been added as an alternative host, with a link to start the meeting.

| Schedule For | Myself |
|---|---|
| Meeting Password | ☑ Require meeting password    553984 |
| Video | Host    ○ on  ◉ off |
|  | Participant    ○ on  ◉ off |
| Audio | ○ Telephone   ○ Computer Audio   ◉ Both |
|  | Dial from United States of America   Edit |
| Meeting Options | ☑ Enable join before host |
|  | ☑ Mute participants upon entry |
|  | ☑ Enable waiting room |
|  | ☐ Only authenticated users can join |
|  | ☐ Record the meeting automatically |
| Alternative Hosts | Example: john@company.com, peter@school.edu |

**Click Save to Finish.**

**Save**

## Invite Your Attendees

Once finished, you can either select a calendar option to add the scheduled meeting to your calendar or select 'Copy The Invitation' to send out the invitation to your Zoom meeting.

| Time | Dec 20, 2019 09:30 AM Central Time (US and Canada) |
|---|---|
| | Add to  **31** Google Calendar   **o** Outlook Calendar (.ics)   **Y!** Yahoo Calendar |
| Meeting ID | 912-542-733 |
| Meeting Password | × Require meeting password |
| Invite Attendees | Join URL: https://livetraining.zoom.us/j/912542733       ↻ Copy the invitation |

## Other Meeting Scheduling Options

Zoom offers multiple methods to schedule a meeting. A host has control over the options for their scheduled meetings except for settings that an administrator has locked for all users in the account or for all members of a specific group.

**Outlook Add-In** – The Zoom Scheduler Add-in allows you to easily add a Zoom meeting to any new or existing calendar event.

**Google Calendar Add-On** – The Zoom for Google Calendar Add-In allows you to you can seamlessly schedule, join, and manage meetings right from Google Calendar.

View the full guide to scheduling meetings on our support site to learn more about all scheduling options.

Executive Admins will also find downloadable PDF guides on how to use Scheduling Privilege.*

# Customize In-Meeting Features & Functionality

PERSONAL

**Profile**

**Meetings**

**Webinars**

**Recordings**

**Settings**

**Meeting**     Recording     Telephone

Before you host your meeting, review your 'Meeting Settings' by clicking on Settings located on the left menu of your Web Portal. Meeting Settings allows you to change default settings and enable, or disable, features for your meetings. These settings control the availability of many features, such as breakout rooms, recording, and chat.

**View the comprehensive guide to all available settings on our support site.**

Click on any feature below to view the respective support guide. Please note the training session each respective feature is reviewed in – you may register to join a live training session or watch a recording anytime.

| Feature | Getting Started with Zoom Meetings (30 min) | Zoom Meetings (60 min) |
| --- | --- | --- |
| Audio & Video Management | ✔ | ✔ |
| Virtual Background | | ✔ |
| Host Controls & Participant Management | ✔ | ✔ |
| Waiting Room | | ✔ |
| Polling | | ✔ |
| Screen Sharing & Annotation | ✔ | ✔ |
| Breakout Rooms | | ✔ |
| In-Meeting Chat & Private Chat | ✔ | ✔ |
| In-Meeting File Transfer | ✔ | ✔ |
| Recording (Local & Cloud) | ✔ | ✔ |

## Integrations

Integrations help connect Zoom to your existing workflow enabling more productive lead generation or automating payment and data collection processes.

Zoom app integrations support a best-of-breed technology strategy and offer flexibility in how you do business.
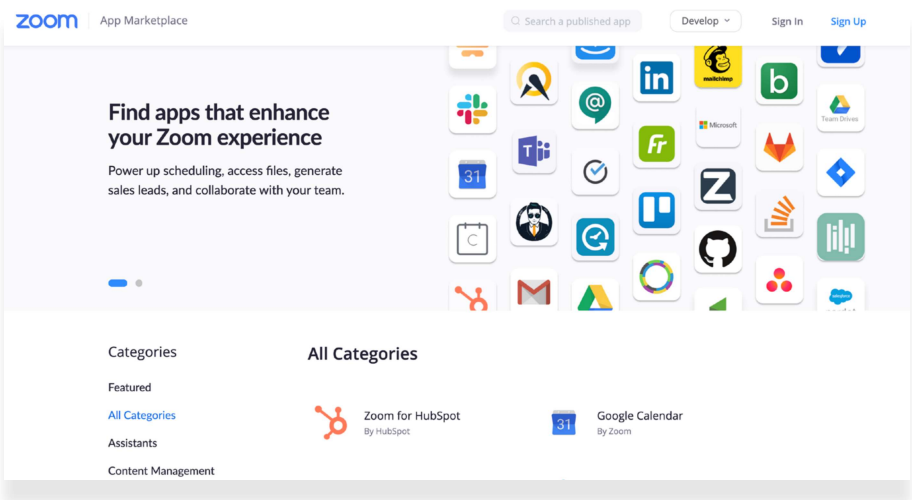


Explore the Zoom App Marketplace and check the **Works with Zoom Meetings** box to see what app integrations are available to extend your platform.

Can't find an integration in our Marketplace? You may find the integration available with Zapier – You can search all Zoom application integrations enabled by Zapier on Zapier's website.



View the full guide to getting started with integrations on our support site.

# Live Streaming Your Meeting

Zoom makes it easy to live stream your Meeting to another service. Live streaming can help you to reach a wider audience, build your community, and be an influencer.



### Facebook Live

You can stream a Zoom Webinar or Meeting live on Facebook to your Facebook timeline or a group or page that you are an admin for. This allows your participants to join via Zoom or viewers to watch and comment on Facebook Live.

View the guide to streaming to Facebook Live on our support site.

### Workplace by Facebook

You can stream a Zoom Webinar or Meeting live on Workplace by Facebook pages or groups that you are an admin for. This allows your participants to join via Zoom or viewers to watch and comment on Workplace by Facebook.

View the guide to streaming to Workplace by Facebook on our support site.

### YouTube Live

You can stream a Zoom Meeting or Webinar live on YouTube. This allows participants to join your meeting via Zoom to view and comment on it via YouTube. During the live event, there will be an approximate 20-second delay between the actual Zoom Meeting or Webinar, and the Live stream.

View the guide to streaming to YouTube Live on our support site.

### Custom Live Streaming Service



If configured by your account administrator, you can live stream a webinar to a custom platform. If you configure this before the webinar, you can begin streaming with one click after your webinar begins.

View the guide to setting up your custom live stream on our support site.