# Zoom Meeting Tutorial

Hello!
If you are reading this, it is likely that you wish to use Zoom and that you need either to create or to join a meeting. Don't worry! This is a simple process, and this tutorial should cover most of the situations that you may encounter.

The very first step is to visit https://ucla.zoom.us and create an account. The site should look like this: and you can create your account by clicking on the "Login To Zoom" button in the top menu.
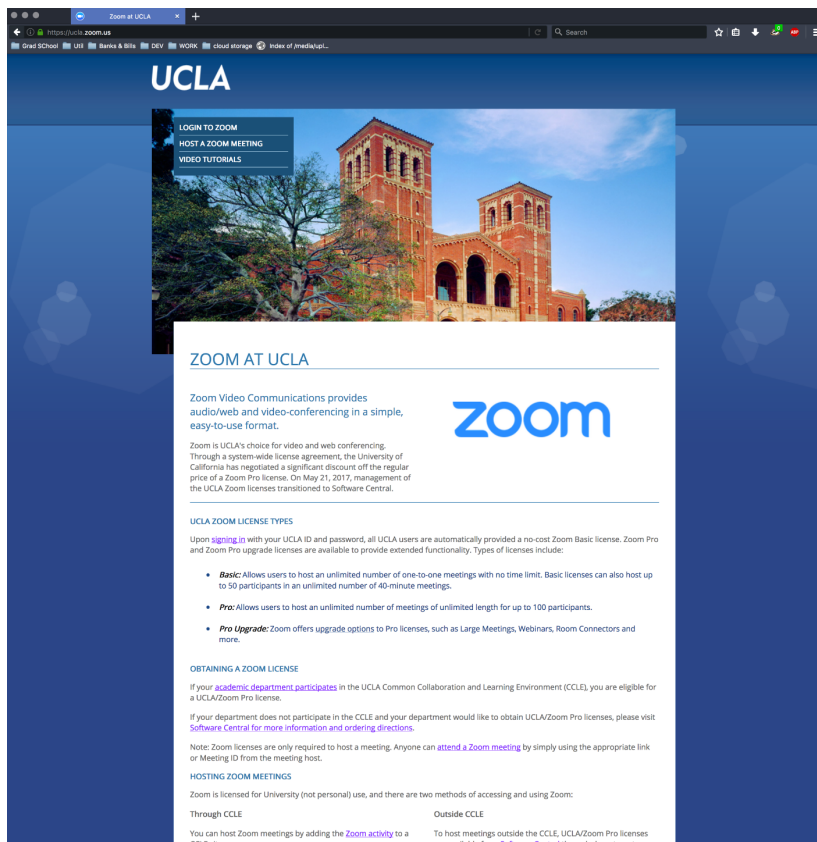
Once you have logged in, you will see a screen like this:
(Your details will be different, but the overall layout should be the same.)

CONGRATULATIONS! You have successfully created your Zoom account!

Creating a Meeting:

Creating a new meeting is easy! Click on the "Meetings" button on the left menu to see existing meetings (there should be none at this point).

Profile	Upcoming Meetings	Previous Meetings	Personal Meeting Room	🎥 Get Training

Meeting Settings

Meetings

Recordings

Webinars

Account Management

    Account Profile

    Reports

Schedule a New Meeting   Join a meeting from an H.323/SIP room system

Start Time	Topic	Meeting ID

The user does not have any upcoming meetings.
To schedule a new meeting click Schedule a Meeting.

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To get started, click on the "Schedule a New Meeting" button displayed at the top of the center area. This will launch the web based meeting scheduler. (There are other ways to schedule meetings, including an outlook plugin, but we will address those later!)

You should see something like this:

Schedule a Meeting

Topic	My Meeting
Description (Optional)	We are having a meeting!

When	10/05/2017 🗓 3:00 ▾ PM ▾
Duration	1 ▾ hr 0 ▾ min
Time Zone	(GMT-7:00) Pacific Standard Time (US and Canada) ▾
	☐ Recurring meeting
Registration	☐ Required

(there will be more of this form below)

Most of these fields are self-explanatory.
- The **Topic** field is the name of the meeting, like "Rod's Meeting" or "Weekly Staff Meeting"
- **Description** is a brief explanation of the purpose of the meeting. Ex: "a meeting to decide what to eat for lunch"

- **Times** and **dates** are straightforward, and the **time zone** should default to PST.

- If you are scheduling a recurring meeting, click the checkbox that says: "Recurring Meeting" and you will be presented with the options to set a recurrence.

This is an example of how to set recurring options for a meeting like our staff briefing, which occurs on the first Thursday of every month, rather than a set numerical date.

☑ Recurring meeting	**Every month on the First Thu, until Apr 05, 2018, 7 occurrence(s)**
Recurrence	Monthly ▼
Repeat every	1 ▼ month
Occurs on	○ Day 1 ▼ of the month
	◉ First ▼ Thursday ▼ of the month
End date	◉ By 04/05/2018 📅 ○ After 7 ▼ occurrences

The "**Registration Required**" checkbox asks if you need participants to register, and then provides you with registration options. Some reasons that you may want to force participants to register are that you need to collect names and Email addresses from participants, or that you wish to ask meeting attendees for agenda items or other questions before the meeting starts. You can specify and require questions after you create the meeting.

You can read more about how to register participants here along with how to create custom questions: https://support.zoom.us/hc/en-us/articles/211579443-Registration-for-Meetings
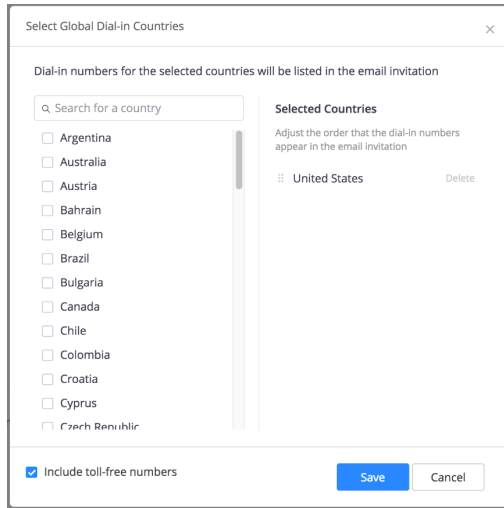
The **video** section and **audio** section allow you to set defaults for you, the host, as well as presenters. In the event that you are having an audio only meeting, you can set video to be off by default.

Video	Host	◉ on ○ off
	Participant	◉ on ○ off

*** *for international meetings*: Under the Audio setting there is an option to "dial from the United states" and an "edit" field next to it. If you need to include callers from other countries (that will be using telephones…) you can select the country there. This is NOT an exhaustive list, but it should cover many cases we encounter.
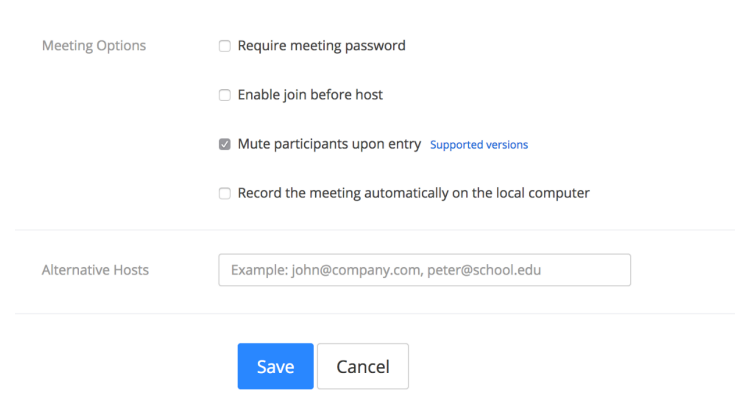
Finally, there are some more options to select, which are up to your discretion. Muting participants on entry to the meeting may cause some confusion so check this option cautiously!

Once you are happy with the settings you can click "**SAVE**" to create your meeting.

NEXT STEPS:

After creating your meeting, you will be redirected to the management screen for this meeting. You can also get to this screen by clicking "**meetings**" on the left menu and then clicking the topic of the meeting you wish to, which should be a link.

The Management screen looks like this:

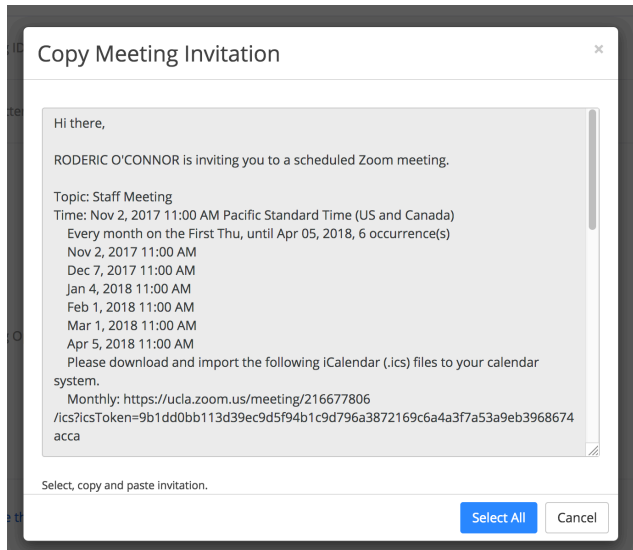|	
Topic	Staff Meeting
Description	We are having a meeting! (again)

Time	Nov 2, 2017 11:00 AM Pacific Standard Time (US and Canada)
	Every month on the First Thu, until Apr 05, 2018, 6 occurrence(s) Show all occurrences
	Add to [31 Google Calendar] [0 Outlook Calendar (.ics)] [Y Yahoo Calendar]

Meeting ID	216-677-806

Invite Attendees	People are required to register before joining this meeting.
	Registration URL: https://ucla.zoom.us/meeting/register/d996fdbb6a61bdfe34538d7d4481ef37 Copy the invitation

Video	Host	On
	Participant	On
Audio	Telephone and VoIP	
	Dial from **United States**	
Meeting Options	✕ Require meeting password	
	✕ Enable join before host	
	✔ Mute participants upon entry Supported versions	
	✕ Record the meeting automatically on the local computer	

Delete this Meeting		Edit this Meeting Start this Meeting

From here you can edit the meeting again (or in the case of a recurring meeting, you can edit either this specific instance of the meeting, or every instance of the meeting.

To invite participants, you can copy and paste the "join URL" into an email, or click "copy the invitation" to copy and paste the invite into outlook or another Email application.

*if you have required registration to participate in the meeting, this may look slightly different, but is functionally the same.

Meeting ID	216-677-806	
Invite Attendees	Join URL: https://ucla.zoom.us/j/216677806	Copy the invitation
Video	Host	On
	Participant	On

Copy Meeting Invitation

Hi there,

RODERIC O'CONNOR is inviting you to a scheduled Zoom meeting.

Topic: Staff Meeting
Time: Nov 2, 2017 11:00 AM Pacific Standard Time (US and Canada)
    Every month on the First Thu, until Apr 05, 2018, 6 occurrence(s)
    Nov 2, 2017 11:00 AM
    Dec 7, 2017 11:00 AM
    Jan 4, 2018 11:00 AM
    Feb 1, 2018 11:00 AM
    Mar 1, 2018 11:00 AM
    Apr 5, 2018 11:00 AM
    Please download and import the following iCalendar (.ics) files to your calendar
system.
    Monthly: https://ucla.zoom.us/meeting/216677806
/ics?icsToken=9b1dd0bb113d39ec9d5f94b1c9d796a3872169c6a4a3f7a53a9eb3968674
acca

Select, copy and paste invitation.

Select All   Cancel

If you click the "join URL link, you will be prompted to join the meeting right then, so watch out for that!

You can also Edit the invitation in your email program to remove extraneous information, and to add some personal flair.

You can send these meeting invites as a regular email.

*Also, you can add meetings from Outlook if you install the "Outlook" app from Zoom. Once you have done this, you can schedule meetings right from outlook!
Contact Rod (roconnor@epss.ucla.edu) for more help/instructions if you want to do this!
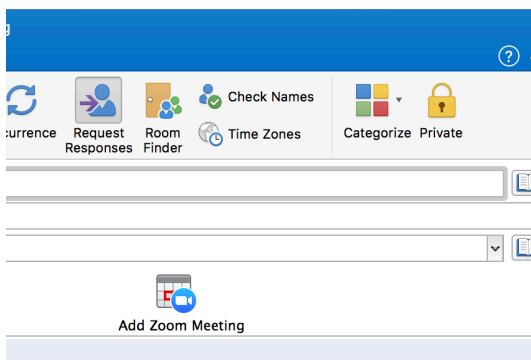
If you would like, the nice folks at Zoom have put together some very good video tutorials, which you can browse here:
https://support.zoom.us/hc/en-us/articles/206618765-Zoom-Video-Tutorials

Additionally, if you want to become a Zoom master, there is a weekly webinar training that you can register for here:
https://zoom.us/livetraining

APPENDIX A:

Using a polycom or desktop phone with Zoom meeting.

You will need to create the new meeting with a computer first. After creating the meeting, start the meeting, and a box will appear asking for you to join audio by phone or computer (Here I have focused on Phone Call):
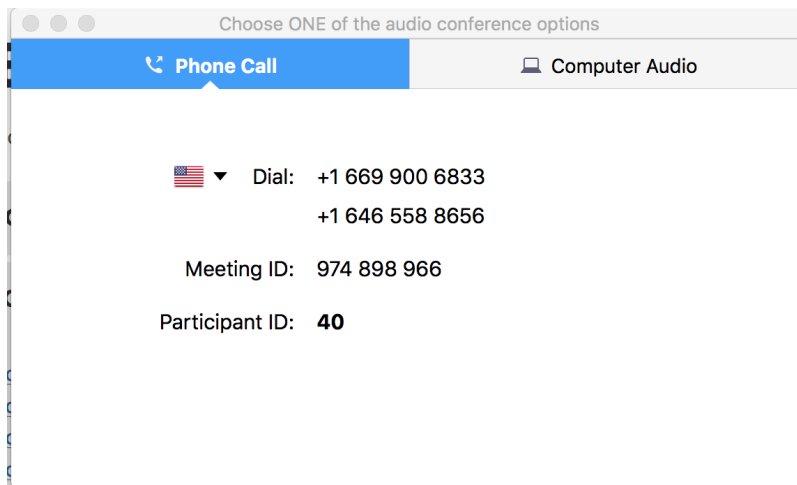
When you call this number, you will be prompted to enter the meeting ID, and a participant ID. The participant ID is not required, and telephone only Meeting attendees are likely to not have one.

If you are the presenter, and you are using telephone audio and computer video, you will need to mute or disable computer audio, and call into the conference number using a polycom, or other telephone. (If you leave computer audio on, there will be feedback issues)

NOTE: it is possible to use Zoom as a conference call service (with no video) but you will still need to set up the meeting on a computer initially. Simply set the meeting to telephone only audio, as well as disabling video for both the host and the participants. After creating the meeting, you and your participants can call into the meeting number, and the call will function as a regular conference call.

You can read zoom's version of these instructions here, along with other tutorials:
https://support.zoom.us/hc/en-us/articles/201362663-How-Do-I-Join-by-Telephone-

Our department uses a pro license so there can be up to 100 callers on the line, and there is no limit to meeting duration.