Overview

Zoom provides video conferencing, simple online meetings, and group messaging in one easy-to-use platform. It offers outstanding video, audio, and wireless screen-sharing across multiple platforms, which includes Windows, Mac, iPhone/iPad and Android. Zoom offers a free plan with some restrictions (available to anyone), however, Zoom began removing the 40-minute meeting limit that normally applies to the free (basic) account for schools in March. School users can use this form to receive the free removal of the 40-minute time limit if you don't already have a Pro (paid) account.
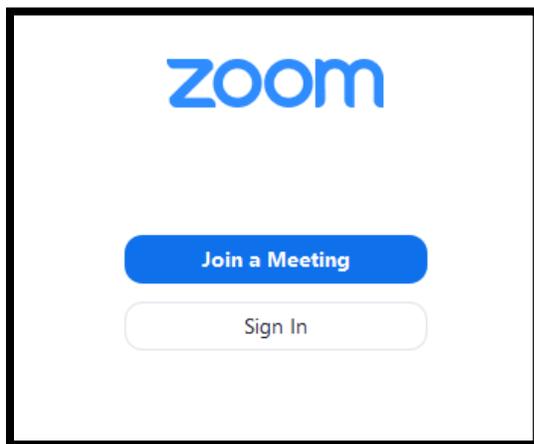
Prerequisites

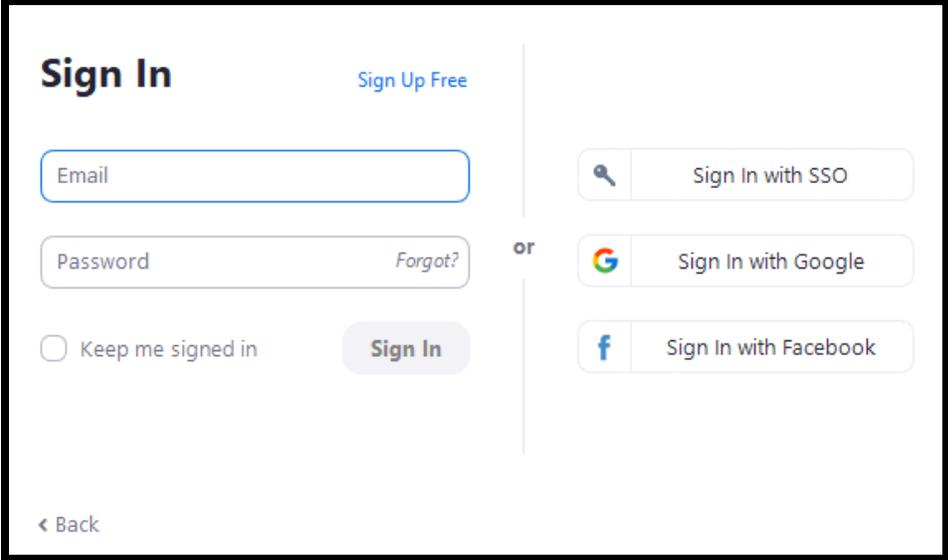- Install the Zoom desktop client (Windows or Mac)

This article covers:

- Sign in and Join

- Home

- Meetings

- In-Meeting Controls

- SAIS Tips and Recommendations

- More Resources

Sign in and Join

After launching Zoom, you can click **Join a Meeting** to join a meeting without signing in. But if you want to start or schedule your own meeting, click **Sign In**.
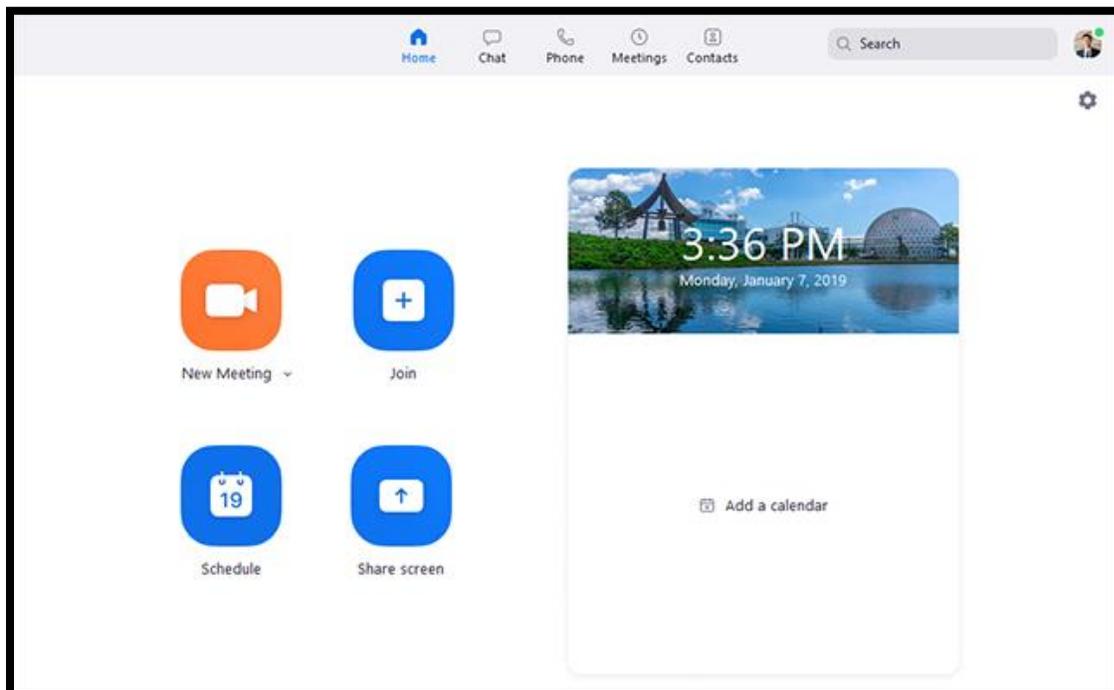
To sign in, use your Zoom, Google, or Facebook account. If you don't have an account, click **Sign Up Free**. If you have a Zoom account but cannot remember your password, click **Forgot**.


Home
After signing in, you will see the **Home** tab, where you can click these options:

- **New Meeting**: Start an instant meeting. Click the downwards arrow to enable video or use your personal meeting ID (PMI) for instant meetings.

- **Join**: Join a meeting that is in progress.

- **Schedule**: [Set up a future meeting](#).

- **Share Screen**: [Share your screen in a Zoom Room](#) by entering in the sharing key or meeting ID.

- **Upcoming meeting:** Displays the next meeting for the current day.
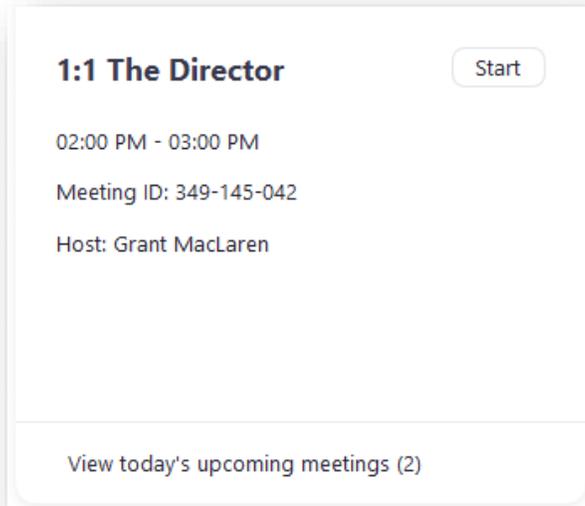
Meetings
Select the **Meetings** tab and click **Upcoming** to view, start, edit, and delete scheduled meetings.
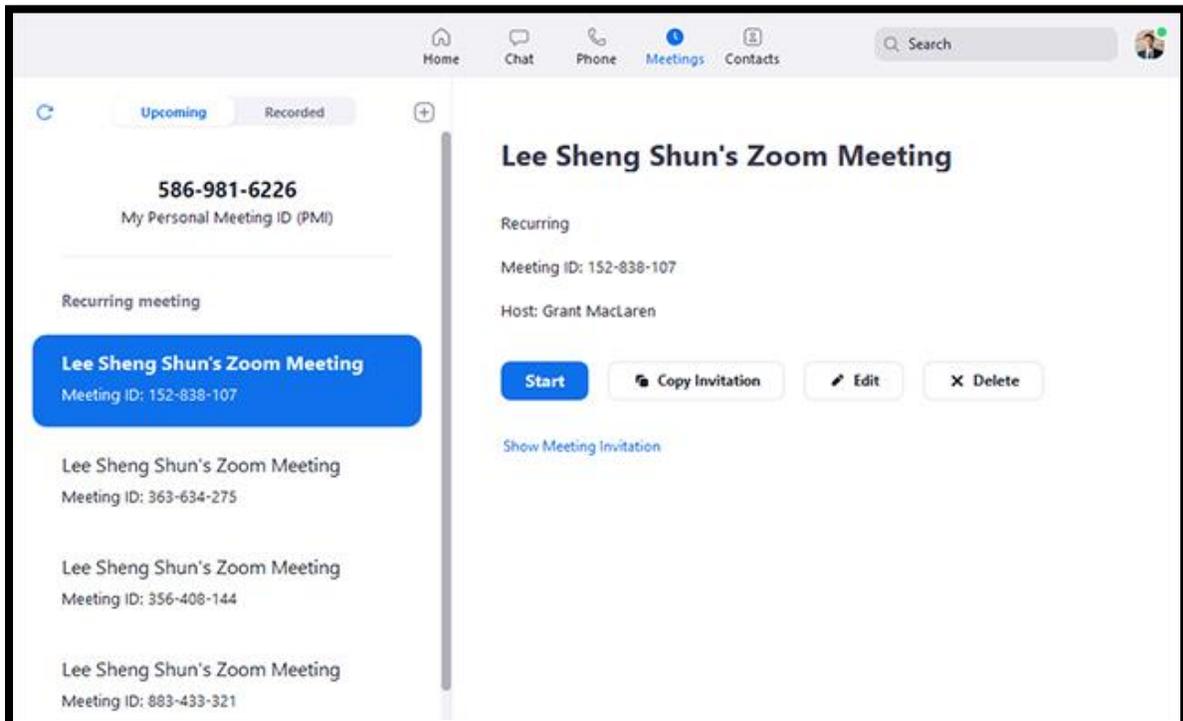
You can click the following options after selecting a scheduled meeting in the left-side panel:

- Add icon ⊕: Schedule a new meeting.

- Refresh icon ↻: Refresh the meeting list if you don't see your scheduled meeting.

- **Start**: Start the scheduled meeting that you have selected in your upcoming meetings.

- **Copy Invitation**: Copy the scheduled meeting's invitation text, allowing you to manually paste into an email, instant messenger etc. Click **Show Meeting Invitation** if you want to view the invitation you're copying.

- **Edit**: Edit the meeting options for your scheduled meeting.

- **Delete**: Permanently delete your scheduled meeting.

## In-Meeting Controls

Once you have started or joined a meeting, you can access the meeting controls located at the bottom of the meeting window (move your mouse in the Zoom window to display meeting controls).

Learn more about meeting controls for hosts, co-hosts, and attendees. You can also join a test meeting to familiarize yourself with meeting controls before joining a scheduled meeting.

SAIS Tips and Recommendations

➢ **Screen Sharing:** If you plan to share a presentation (e.g., Google Slides or PowerPoint Presentation), use the green "**Share Screen**" button to do so. You'll have the option to share your entire screen (e.g., "Screen 1") or just a specific program (Microsoft PowerPoint, or your favorite browser). If you only need to share your presentation, we recommend opting to share just the specific program (e.g., PowerPoint) or your browser rather than the entire screen. By doing so, any pop-ups from new email or Slack, etc., won't be seen by your audience.

➢ **Good Audio:** It's critical for presenters to have a good microphone to ensure the audience will hear you well. A typical laptop will have a basic microphone, usually located behind one or two small holes on either side of the built-in webcam. If you direct your voice toward that area, your audience should hear you well. However, these are typically unidirectional microphones which don't work well when you turn your head to look at something else while continuing to talk. For this reason, a headset is ideal. You might be able to use the earbuds that came with your smartphone (give them a try!). But a headset that connects via a USB connection is best. Two good quality options include: Plantronics C3210 headset (mono); Plantronics C3220 headset (stereo). Your local big box store will usually have low cost USB headsets too that are decent. For a good webcam, consider this Logitech webcam with built-in microphone.

➢ **Test your Audio!** It is super important that you check your speaker and microphone settings before starting a meeting. To do so, open the Zoom program and click the small cog-wheel that displays near the top. Then visit the "Audio" section and use the 'Test Speaker' and 'Test Mic' to ensure all is well. Note: the option for "Automatically adjust volume" for the microphone is often problematic on some brands/models of laptops. Consider un-checking it.
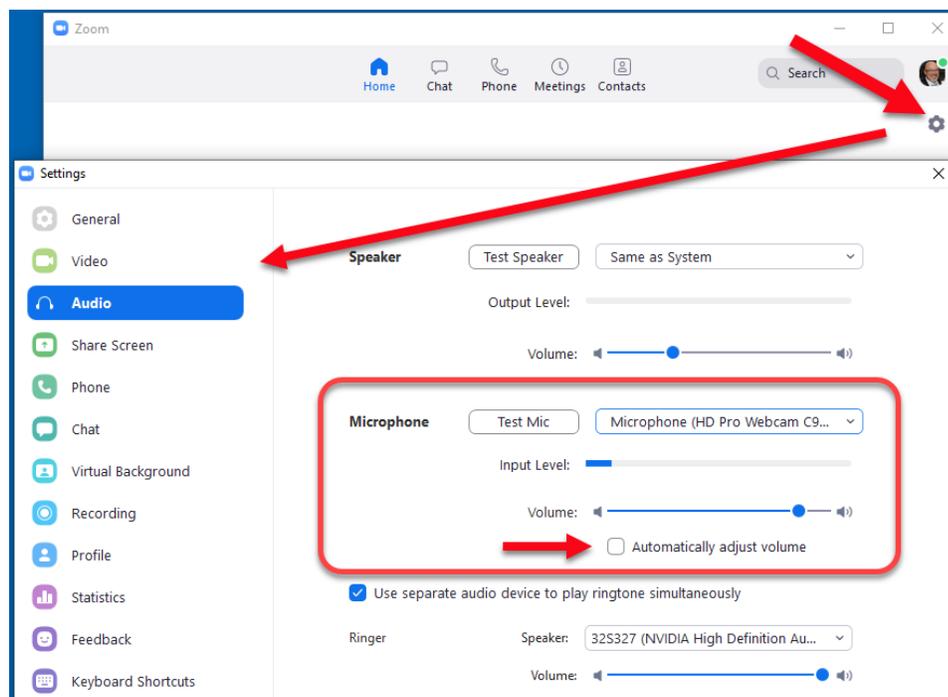
➢ **Breakout Rooms:** After getting comfortable with Zoom, you might opt to explore the feature called breakout rooms. This feature allows you to assign people into separate (semi-private) meeting rooms where they can talk among themselves. They can return to the main room at any time, and/or you can close all breakout rooms at any time. Learn more.

➢ **Share Multiple Screens Simultaneously:** Another advanced feature that might be of interest is the ability to have two people share their screens simultaneously. Your participants can choose which shared-screen to view at any time, and/or if they have two or more monitors, it's possible to see both shared screens simultaneously. Learn more.

More Resources

- Watch the Getting Started Videos

- Join Zoom's Weekly Zoom Meetings and Webinar training

- Join a test meeting (don't worry, no one else will be there!)

Settings and Profile Options

Click your profile picture for these options:

- Add a personal note.

- **Settings**: Access settings you can change in the client.

- Change your status to **Available**, **Away**, or **Do Not Disturb**.

- **My Profile**: Open the Zoom web portal to edit your profile.

- **Help**: Open the Zoom Help Center.

- **Check for Updates**: Check if Zoom is up to date.

- **About Zoom**: View the current version.

- **Switch to Portrait View**: Switch the Zoom window to portrait view if you prefer a narrower window.

- **Sign out**

- **Upgrade to Pro** (if you are on a free account)