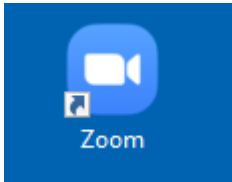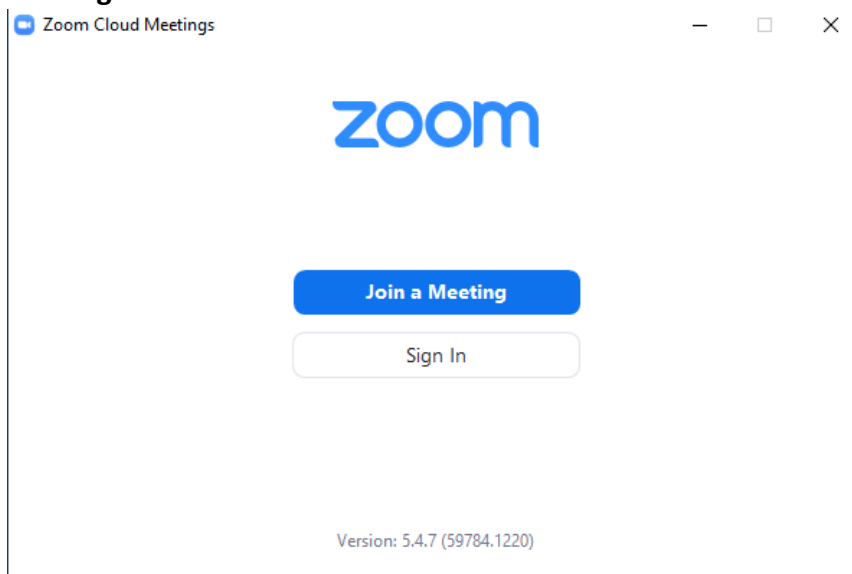# Zoom Guide

Ideal use of Zoom is achieved through use of the **Zoom desktop client** and **Zoom Outlook Plugin**.

Log into the Zoom desktop app for the first time:

- Launch the Zoom desktop client

- Click **Sign In**

- Click **Sign in with SSO**

- Enter **your company name** and click **Continue:**

- You will be prompted to sign into Okta
- Enter your credentials and click **Sign In**

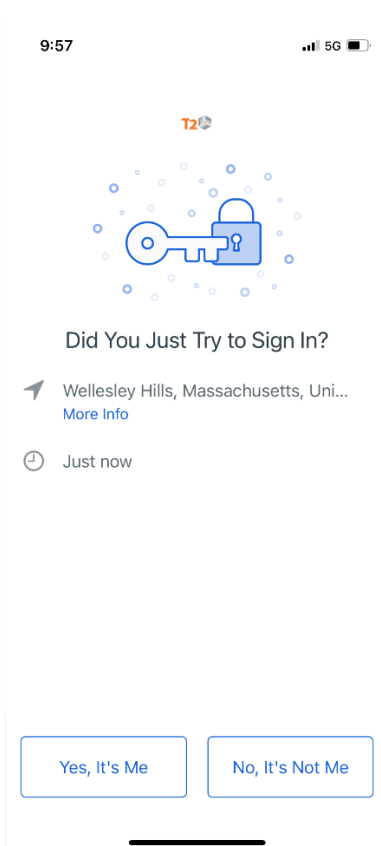Connecting to **zoom**
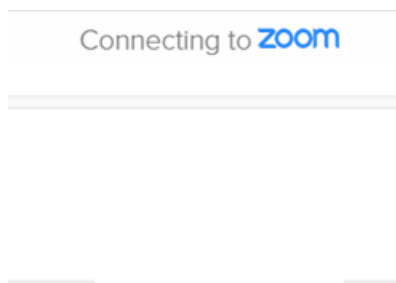
Sign In

Username

Password

••••••••••••••••

☑ Remember me
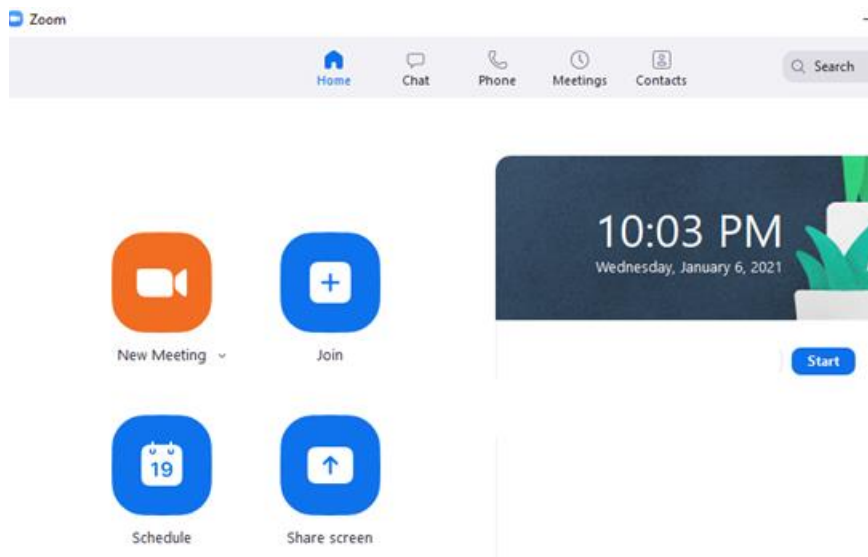
Sign In

lp signing in?

- You will then be prompted for your Okta Verify multi-factor authentication credentials:
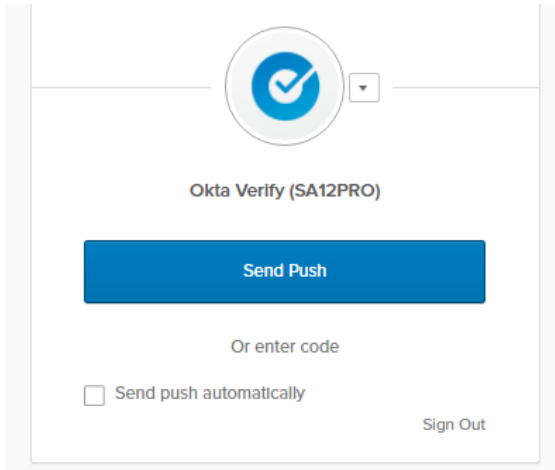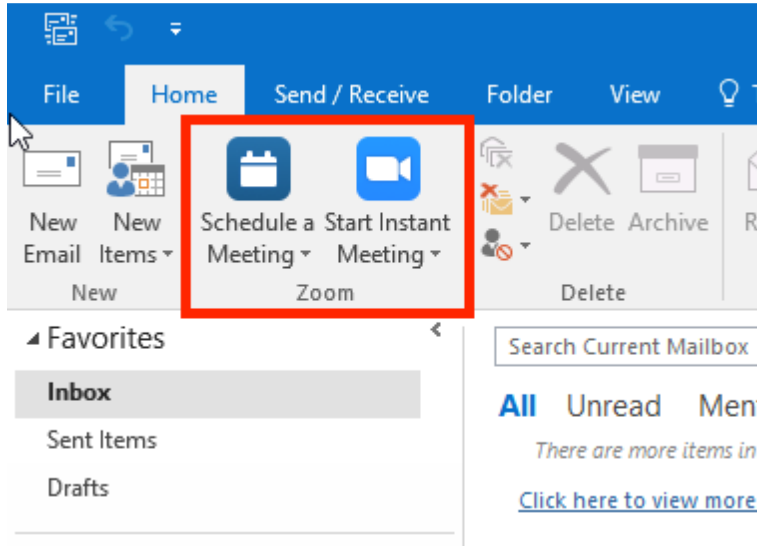

- Use your mobile device to send the MFA response:

You are now signed into Zoom successfully:

Scheduling a Meeting in Outlook

Note: Your scheduler settings are synced from the Zoom web portal. If you do not install the plugin then you must create a meeting from the Zoom desktop app.

- Click the **Schedule a Meeting** button. This brings up your calendar invite.
- The **Settings** window may appear. Select the options you'd like and click **Save.**
- A standard Outlook calendar invite opens up. Add participants to the meeting in the usual manner within Outlook.

The settings menu. *You can set passcodes, and do things like mute all participants upon entry to the meeting from this screen:*

Zoom - Schedule Meeting

portal
Change Default Settings

Meeting ID
◉ Generate Automatically

Security
☑ Passcode [　　　　　　　] ⑦
　Only users who have the invite link or passcode can join the meeting
☐ Waiting Room
　Only users admitted by the host can join the meeting
☐ Only authenticated users can join: Sign in to Zoom

Video
Host　○ On　◉ Off　　　Participants　○ On　◉ Off

Audio
○ Telephone　○ Computer Audio　◉ Telephone and Computer Audio
Dial in from United States　Edit

Advanced Options ⌃
☐ Allow participants to join anytime
☐ Mute participants upon entry
☐ Automatically record meeting
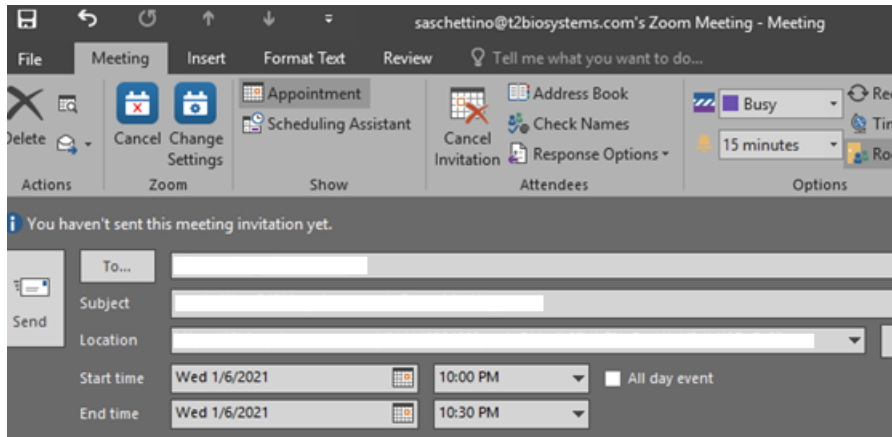☑ Include invite link in location field
☐ Insert Zoom meeting invitation above existing text

Select a language for meeting invitation:　[English ⌄]

Alternative hosts:
[Example:john@company.com;peter@school.edu]

☐ Do not show me again　　　[Save]　[Cancel]

Schedule a meeting in Outlook. The Zoom information automatically populates the calendar invite.

Making an existing event a Zoom meeting

- Open an existing calendar **event** in Outlook.
- Select schedule the meeting type of your choice.
- Select your desired settings for scheduling a meeting. See the above Scheduling a Meeting section for more details.
- Click **Save**
- The invitation will now automatically fill in the details
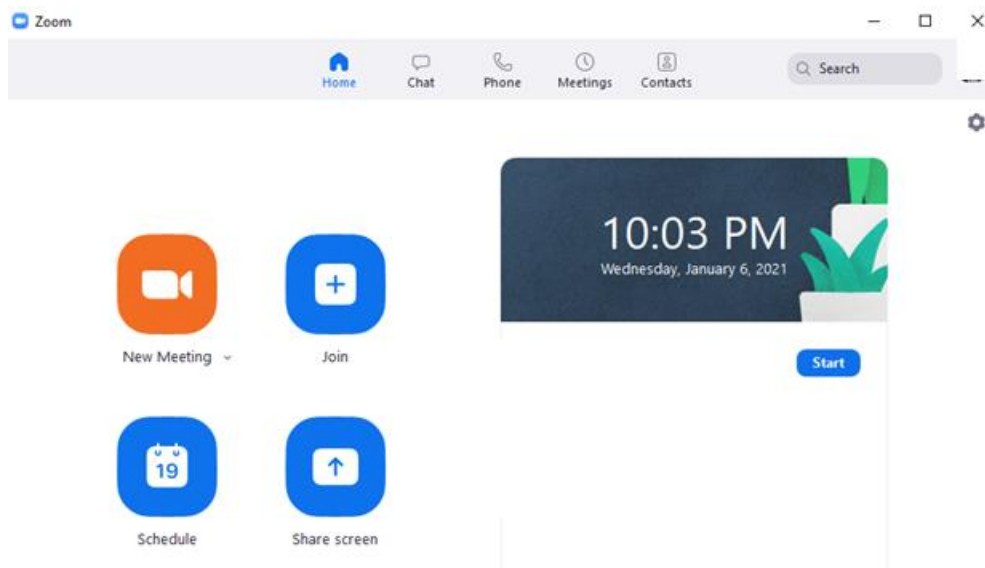- Click **Save & Close**
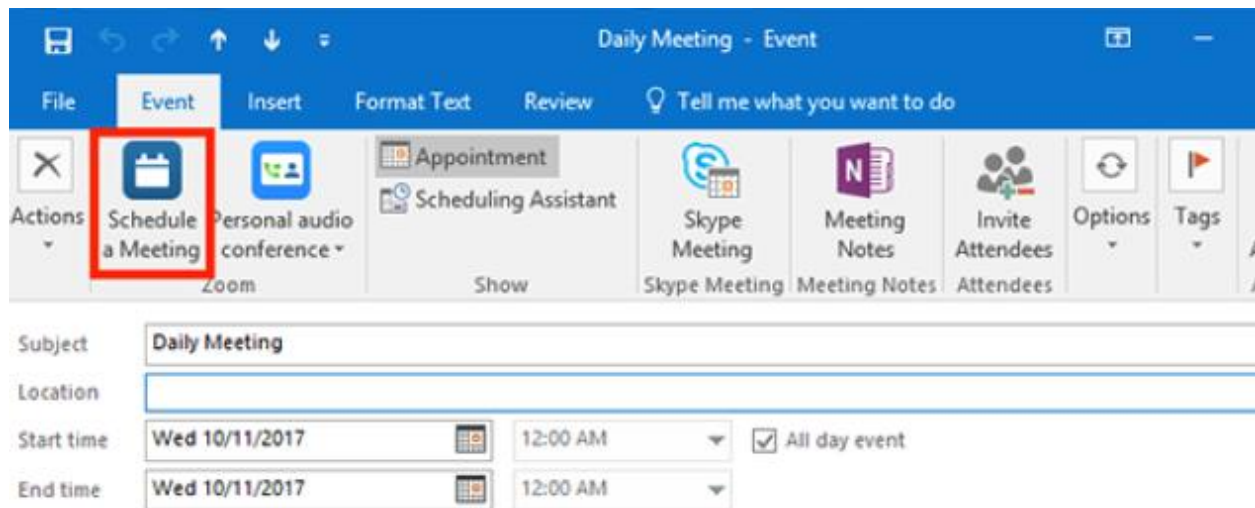
Create a Meeting from the Zoom desktop app:

- Launch the Zoom desktop client
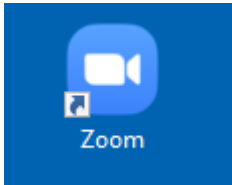
- To start a meeting instantly, click **New Meeting**
- To schedule a meeting in the future, click **Schedule**
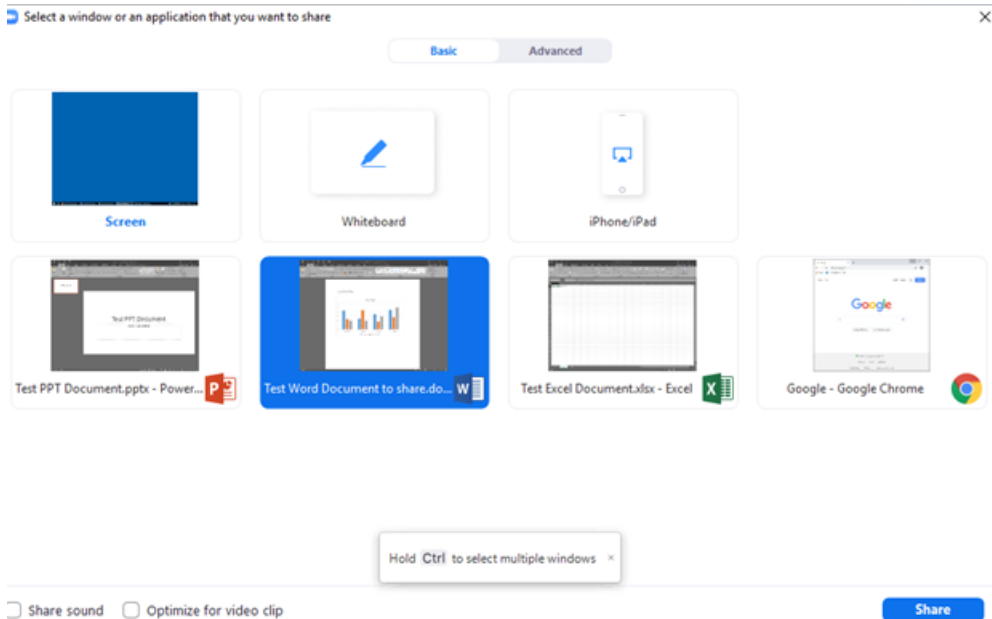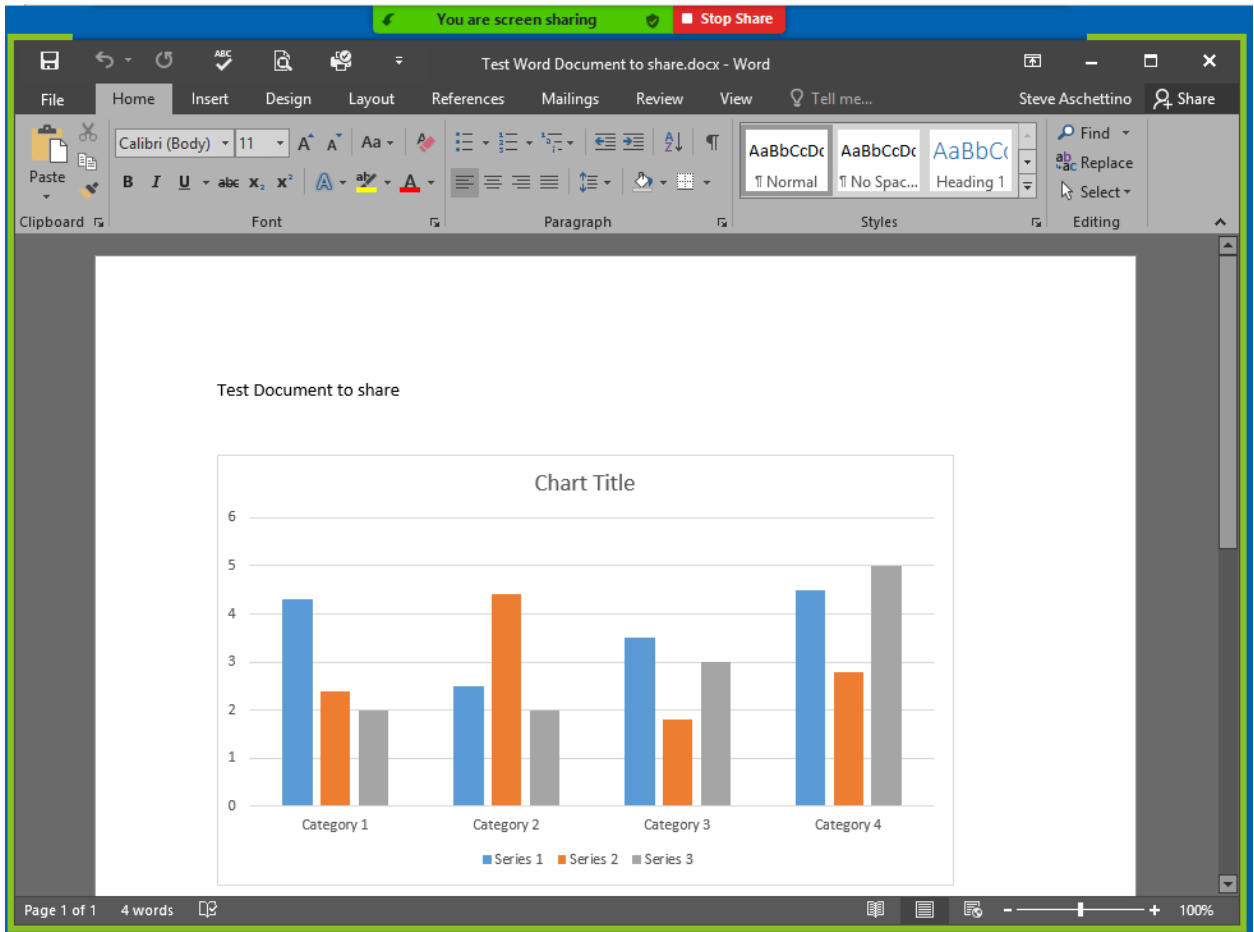
Sharing Documents

- While in the Zoom application, go to the toolbar and click the green **Share Screen** icon

- You have the option to share a specific application or window only (you probably want to do this) or the entire screen. Click **Share**
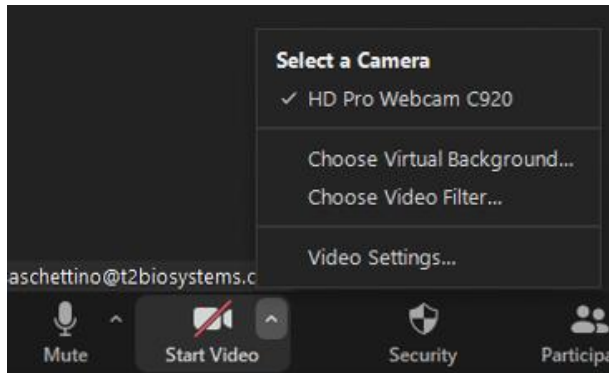
- A **green** bar will appear around the screen that is shared
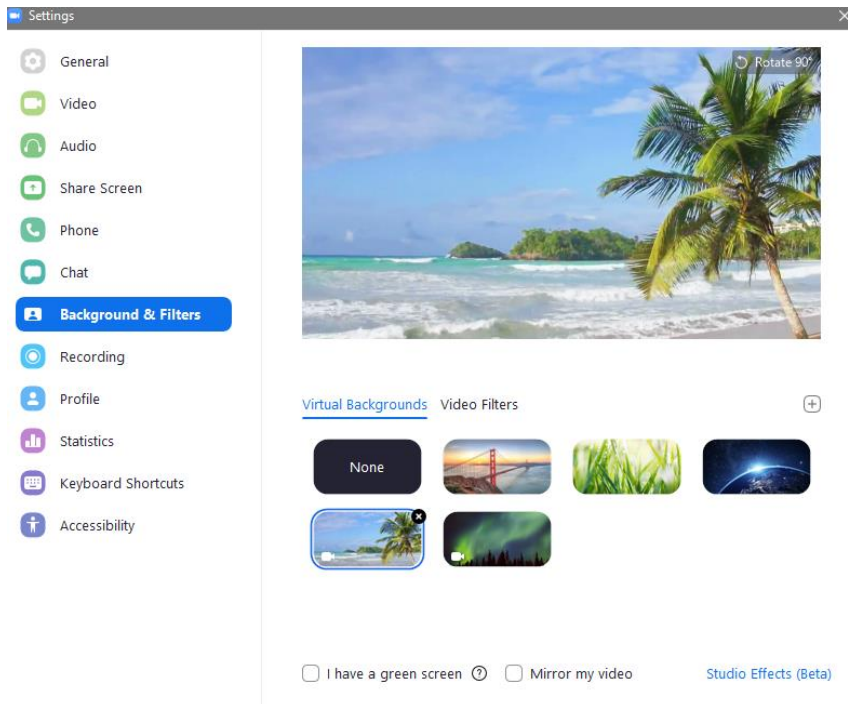- Click the **red Stop Share** to stop sharing your desktop

Changing the Zoom background image

- Click the arrow next to Start Video and click **Choose Virtual Background**

- Select from the collection of Virtual Backgrounds or upload your own

Chatting within Zoom

- Using the chat button, you can chat directly with everyone or directly to a specific person in the meeting.
- Be careful when sending chat messages. You need to select who you are chatting with from the drop-down menu, and the messages appear in the same space as seen below: