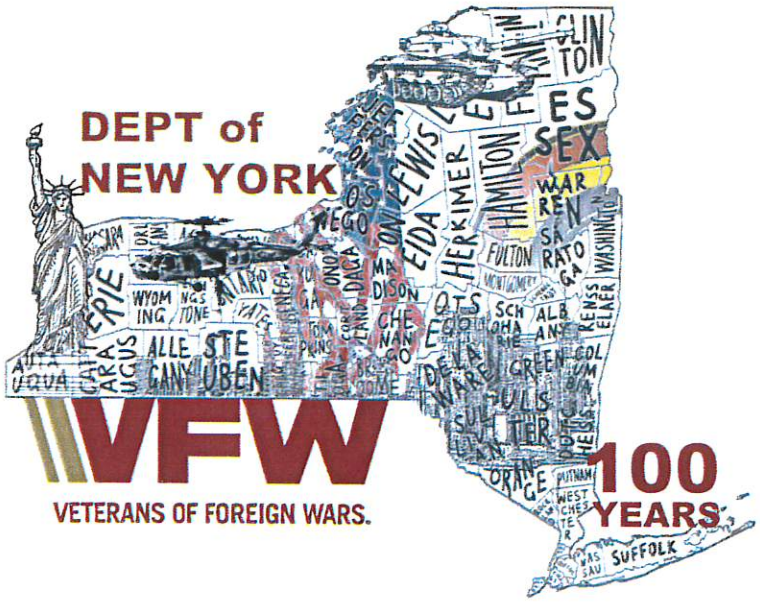
VFW
VETERANS OF FOREIGN WARS.

Guide to ZOOM and Social Media



By Dave Rogers, CMDR VFW Post 2913

DEPARTMENT OF NEW YORK

69 Sand Creek Road
Albany, New York 12205-1825

Section 1: Guide to using Zoom

Guide to using Zoom page 3
Guide to remind members page 4

a. Setting up a Zoom account page 6
b. Scheduling a meeting page 8
c. Inviting/Sharing a meeting with members page 17
d. Inviting others during a meeting page 19
e. Setting up registration of a meeting page 22
f. Joining a meeting page 26
g. Joining a meeting by smart phone or device page 28
h. Joining a meeting by phone only page 34
i. Hosting phone-only meetings page 35
j. Host and Co-Host controls in a meeting page 39
k. Recording Meetings page 40
l. Screen sharing page 46
m. Sharing slides as a virtual background page 48
n. Live Streaming a meeting page 51
o. Taking attendance page 57

Section 2: Social Media (Coming Soon)

Section 1:
Guide to Using Zoom

If there is one thing that we have learned during this time, it is that platforms like Zoom and Social Media are an important way to not only stay connected with members, but also a great way to share information and conduct business with those members that are unable to attend a meeting in person for whatever reason.

In order to help conduct a proper meeting it is best for the Commander to have a co-host (more than likely it would be your adjutant or a member who understands how to operate zoom and social media), someone who can monitor and make changes needed for the Zoom meeting while the Commander conducts the business of the meeting. Commanders will find it easier to conduct meetings when they don't have to keep checking their screens to see what is going on.

A good guide is to remind members:

It is important to remember that while we are on ZOOM, we are still conducting business for the VFW and so certain things need to be made clear to members.

1. Though we are on Zoom, we are holding an official VFW Meeting or training session and therefor all standards for the Zoom meeting are the same as if we were in person.
2. Members should be properly dressed as if in a VFW Meeting. (Each level and type of meeting can be decided by the Commander, but at a minimum the member should be in a proper shirt, and wear their service cap.)
3. While VFW meetings are not secret, when we attend a meeting uninvited guest are asked to leave, same is for Zoom, members should be in a private room, not attending the Zoom VFW meeting in their living room with their whole family sitting around talking.
4. Members should be sitting up, and not lying in bed. If outside be sure to be in an area that is not next to a main street or lots of noise as cars driving by and kids playing can cause people to not be able to hear what is going on.
5. All members should be on mute unless they want to comment or have to give a report. Having everyone unmuted often makes a lot of noise and people are unable to hear what is being said.
6. If a member needs to talk to someone in their house or take a phone call, the same rules apply as in a meeting, excuse yourself from the meeting by posting a message in the chat and step away. This is especially important if you are unmuted so that your talking does not interrupt the meeting.
7. If a member needs to speak or has a comment they should post in the chat, or if the Post, County, District or Dept has someone monitoring should raise their hand. It is harder to monitor for larger meetings so posting in the chat is best. Allowing the monitor to see the message and let the commander know that someone needs to talk. Then the monitor can take the person off chat and allow them to speak. For those calling in on a cell phone this can be a problem as the monitor cannot see your face. If a person calling in on the phone is giving permission to speak simply *6 to unmute. If you want to speak *9 lets you raise your hand, so the monitor knows you need to talk.

Section 1:a

Setting up a Zoom Account

Setting up a Zoom Account

Overview

This quick start guide walks you through getting started with your new Zoom account, including essential steps like scheduling your first meeting, downloading the Zoom client, and updating your Zoom profile. Whether you just signed up for your own Zoom account or you have been invited to an existing account, read this quick start guide for a summary of your next steps and click the embedded links to learn more.

This article covers:

- Signing up and activating your Zoom account
- Signing into your Zoom account on the web
- Updating your profile
- Scheduling your first meeting
- Downloading the Zoom client
- Starting a test meeting
- Starting your first meeting as the host
- Inviting others to join your meeting
- Joining another user's meeting

Signing up and activating your Zoom account

Joining an existing account

If you are being invited to an existing account, you will receive an email from Zoom (no-reply@zoom.us). Once you receive this email, click **Activate Your Zoom Account.**

Creating your own account

To sign up for your own free account, visit zoom.us/signup and enter your email address. You will receive an email from Zoom (no-reply@zoom.us). In this email, click **Activate Account.**

Signing into your Zoom account on the web

You can login to your Zoom account on the web at any time, at zoom.us/signin. Once you're logged in, use the panel on the left side to navigate the Zoom web portal. You can update your profile, schedule a meeting, edit your settings, and more.

Updating your profile

You can update your profile by adding a profile picture, set your time zone, update your password and more. To access your Zoom profile, sign into the Zoom web portal and click **Profile**.

Section 1:b
Scheduling a Zoom Meeting

Scheduling a Zoom Meeting

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.

- Schedule from the Zoom desktop client or mobile app
- Schedule from the Zoom web portal
- Schedule for someone else - PDF Guides for Executive Assistants (Outlook, Google)

For instructions on scheduling using our plugins and extensions, see:

- Scheduling from the Outlook add-in
- Scheduling from the Outlook plugin
- Scheduling from the Chrome Google Calendar extension
- Scheduling from the Firefox Google Calendar extension
- Scheduling using the G Suite Google Calendar add-in

Note: The asterisk (*) means your admin can restrict access to the setting/options, or the setting has additional prerequisites. These settings may not be visible. Click the relevant embedded links for more information.

By Windows/Mac

1. Open your Zoom client and sign in to Zoom.
2. Click on the **Schedule** icon.
   This will open the scheduler window.
3. Select your meeting settings. Note that some of these options might not be available if they were disabled and locked to the off position at the account or group level.

- **Topic**: Enter a topic or name for your meeting.
  - **Start**: Select a date and time for your meeting. You can start your meeting at any time before the scheduled time. You can also manually enter any time. For example, you can enter **15** in the minutes field to schedule a time in a 15-minute increment.
  - **Time Zone**: By default, Zoom will use your computer's time zone. Click the drop-down menu to select a different time zone.
  - **Recurring meeting**: Choose if you would like a recurring meeting (the meeting ID will remain the same for each session).
- **Meeting ID**
  - **Generate Automatically**: Generate a random unique meeting ID.
  - **Personal Meeting ID***: Use your Personal Meeting ID.
- **Security**
  - **Passcode**: Enter a meeting passcode. Joining participants will be required to input this before joining your scheduled meeting.
    Note: The meeting passcode must meet complexity requirements set by your admin.
  - **Waiting Room**: Enable Waiting Room for the meeting.
- **Video**
  - **Host**: Choose if you would like the host's video on or off when joining the meeting. Even if you choose off, the host will have the option to start their video.
  - **Participants**: Choose if you would like the participants' videos on or off when joining the meeting. Even if you choose off, the participants will have the option to start their video.
- **Audio***: Allow users to call in using **Telephone** only, **Computer Audio** only, **Both**, or **3rd Party Audio** (if enabled for your account).
- **Calendar**: Select a calendar service to add the meeting to and send out invites to participants.
  - **Outlook**: Open the Outlook desktop app and create an event for the meeting.
    Note: You will see **Outlook** when using the Windows client.
  - **iCal**: Open iCal and create an event for the meeting.
    Note: You will see **iCal** when using a macOS.
  - **Google Calendar**: Open Google Calendar in your default browser and create an event for the meeting.
  - **Other Calendars**: Open a new window, where the meeting text can be copied pasted into the user's preferred communication method. You can also down an ICS file which can be opened in most email applications.

- **Advanced Options**: Click on the arrow to view additional meeting options.

    - **Enable join before host**: Allow participants to join the meeting without you or before you join. The meeting will end after 40-minutes for Basic (free) users if 3 or more people join the meeting.
    - **Mute participants on entry**: If join before host is not enabled, this will mute participants as they join the meeting. Participants can unmute themselves after joining the meeting.
      Note: To mute all participants currently in a meeting, see the options to manage participants.
    - **Only authenticated users can join**: Restrict access to the meeting so that only signed-in using can join.
    - **Automatically record meeting**: Select if you want to record locally (to your computer) or to the cloud.
    - **Enable additional data center regions for this meeting***
    - **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 menu.
    - **Show in Public Event List**: Add the meeting to a public calendar associated with your vanity URL.
    - **Alternative hosts**: Enter the email address of another Zoom user who is Licensed, on your account to allow them to start the meeting in your absence.
    - **Interpretation** (only supported in Windows and macOS clients)*:
      Enable language interpretation for the meeting.

4. Click **Save** to finish and open the selected calendar service to add the meeting.
   Note:
    - If you are scheduling a recurring meeting, you will need to set the recurrence in your calendar service.
    - Choosing **Other Calendars** will allow you to copy and paste the scheduled meeting information such as date, time, and meeting URL.

For the Web

1. Sign into the Zoom web portal.
2. Click Meetings, and click **Schedule A New Meeting**.
3. Select the meeting options. Note that some of these options might not be available if they were disabled and locked to the off position at the account or group level.

- **Topic**: Enter a topic or name for your meeting.
- **Description**: Enter in an optional meeting description.
- **Use a template**: Apply a meeting template.
- **When**: Select a date and time for your meeting. You can manually enter any time and press enter to select it. For example, you can enter **15** in the minutes field to schedule a time in a 15-minute increment.
- **Duration**: Choose the approximate duration of the meeting. This is only for scheduling purposes. The meeting will not end after this length of time.
- **Time Zone**: By default, Zoom will use the time zone set in your profile. Click the drop-down menu to select a different time zone.
- **Recurring meeting**: Check if you would like a recurring meeting(the meeting ID will remain the same for each session). This will open up additional recurrence options.
    - **Recurrence**: Select how often you need the meeting to recur: **Daily**, **Weekly**, **Monthly**, or **No Fixed Time**. It can recur up to 50 times. If you need more than 50 recurrences, use the **No Fixed Time** option.
    - The other recurrence options will depend on how often the meeting recurs. You can configure the meeting to end after a set amount of occurrences or have the recurring meeting end on a specific date.
- **Registration**: Check this option if your meeting will require registration. Instead of a join link for your participants, you will be provided a registration link. If registration is required and the meeting is reoccurring, choose one of these options:
    - **Attendees register once and can attend any of the occurrences**: Registrants can attend all of the occurrences. All dates and times of the meeting 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.
- **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.
- **Meeting ID**
    - **Generate Automatically**: Generate a random unique meeting ID.
    - **Personal Meeting ID***: Use your Personal Meeting ID.
- **Security**

    - **Passcode**: Enter a meeting passcode. Joining participants will be required to input this before joining your scheduled meeting.
      Note: The meeting passcode must meet complexity requirements set by your admin.
    - **Waiting Room**: Enable Waiting Room for the meeting.
- **Video**
    - **Host**: Choose if you would like the host's video on or off when joining the meeting. Even if you choose off, the host will have the option to start their video.
    - **Participants**: Choose if you would like the participants' videos on or off when joining the meeting. Even if you choose off, the participants will have the option to start their video.
- **Audio***: Allow users to call in using **Telephone** only, **Computer Audio** only, **Both**, or **3rd Party Audio** (if enabled for your account).

    - **Dial in From**: If **Telephone** or **Telephone and Computer Audio** is enabled for this meeting, click **Edit** to select the dial-in countries that you would like included in the invitation. By default, this includes your **Global Dial-In Countries** listed in your meeting settings.
- **Meeting options**
    - **Enable join before host**: Allow participants to join the meeting without you or before you join. The meeting will end after 40-minutes for Basic (free) users if 3 or more people join the meeting.
    - **Mute participants on entry**: If join before host is not enabled, mute participants as they join the meeting. Participants can unmute themselves after joining the meeting.
      Note: To mute all participants currently in a meeting, see the options to manage participants.
    - **Only authenticated users can join**: Restrict access to the meeting so that only signed-in using can join.
    - **Breakout Room pre-assign***: Pre-assign participants to breakout rooms.
    - **Automatically record meeting**: Select if you want to record locally (to your computer) or to the cloud.
    - **Enable additional data center regions for this meeting***
- **Alternative hosts**: Enter the email address of another Zoom user who is Licensed, on your account to allow them to start the meeting in your absence.
- **Interpretation** (only supported in Windows and macOS clients)*: Enable language interpretation for the meeting.

4. Click **Save** to finish.

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.

Copy the Invitation will open up a window where you can copy the full invitation to send out via email.

Note: Using the Outlook Calendar option, will also launch the .ics in iCal if Outlook is not the default email program in macOS.

By Andriod/Iphone

1. Sign into the Zoom mobile app.
2. Tap **Schedule.**
3. Select the meeting options. Some of these options might not be available if they were disabled and locked to the off position at the account or group level.

- **Topic**: Enter a topic or name for your meeting.
- **Date**, **From**, **To**: Select a date and time for your meeting.
- **Time Zone**: By default, Zoom will use your device's time zone setting. To change the time zone, click this field.
- **Repeat**: Choose if you would like a recurring meeting (the same meeting ID for all occurrences).
- **Use Personal Meeting ID (PMI):** Check this if you want to use your Personal Meeting ID. If not selected, a random unique meeting ID will be generated.
- **Security**

  - **Require Meeting Passcode**: Participant must enter the meeting's passcode you set up to enter the scheduled meeting.
  - **Passcode**: Enter a passcode that participants will be required to input before joining your scheduled meeting.
    Enable Waiting Room: Send participants to the Waiting Room before you admit them into the scheduled meeting.
- **Meeting Options**
  - **Host Video On**: Turn the host's video on or off when joining the meeting. Even if you choose off, the host will have the option to start their video.
  - **Participant video On**: Turn the participants' videos on or off when joining the meeting. Even if you choose off, the participants will have the option to start their video.
  - **Audio option**
    - **Pick your audio connection**: Allow users to call in using **Device audio** only, **Telephone** only, **Telephone and Device Audio**, or **3rd Party Audio** (if enabled for your account).
    - **Select dial-in country***: Select dial-in numbers to display in the meeting invite. Tap and drag each country to re-arrange the order.
- **Advanced Options**
  - **Enable Waiting Room**: Allow the host to control when participants join the meeting by placing them in a Waiting Room.
  - **Allow Join Before Host**: Allow participants to join your meeting before you. The meeting will end after 40-minutes for Basic (free) users if 3 or more people join the meeting.
  - **Automatically Record Meeting**: Automatically record the meeting.
  - **Record location**: Select if you want to recorded locally (to your computer) or to the cloud (zoom.us/recording).
  - **Additional Data Center Regions***

    - **Alternative hosts**: Select users in the same organization to allow them to start the meeting in your absence.
  - **Add to Calendar**: Add the meeting to your default calendar app.
4. Tap **Save** to finish scheduling.

Notes:

- A non-recurring meeting ID will expire **30 days** after the meeting is scheduled for. You can restart the same meeting ID as many times as you would like, within the 30-day period.
- A recurring meeting ID will expire **365 days** after the meeting is started on the last occurrence. You can re-use the meeting ID for future occurrences.
- Scheduled meetings can be started at any time before the scheduled time. The links will not expire or become invalid unless it is past the 30-day period for a non-recurring meeting, has not been used for over 365 days for a recurring meeting, or has been deleted from your Zoom account. An instant meeting link will expire as soon as the meeting is over.

Section 1:c
Inviting/Sharing a meeting with Members

Inviting/Sharing a meeting with Members

There are several ways to invite participants to a scheduled or instant meeting.

Note: You can also invite by phone (requires the audio conferencing plan) or invite a room system (requires Cloud Room Connector add-on).

This article covers:

- Inviting others during a meeting
    - Email
    - Contacts
    - URL or invitation text
- Inviting others to a scheduled meeting
    - Desktop client
    - Web portal

Prerequisites

- Zoom Desktop Client

Section 1:d

Inviting others during a meeting

Inviting others during a meeting

1. Sign into the Zoom Desktop Client.
2. Start or join a meeting.
3. Click **Participants** in the meeting controls.
4. Click **Invite** at the bottom of the participants panel.
5. Choose from the following invite options:

Email

1. Click the **Email** tab.
2. Select an email provider:

    - **Default Email**: Invite others by using your default email application for your computer.
    - **Gmail** or **Yahoo Mail** : Invite others by using the Gmail or Yahoo website. You will be prompted to sign into your account.
    - **Note**: A new email will be composed automatically with the meeting information in the email body.
3. Add recipients to the email and send it.

Contacts

1. Click the **Contacts** tab.
2. Select their name from the window, or search for a contact.
3. Click on the individual you would like to invite. You can select multiple contacts. Once you do this, their name(s) will be highlighted in blue and they will appear in the list at the top of the window.
4. Click **Invite** in the lower right corner.

URL or invitation text

Click **Copy Invite Link** or **Copy Invitation** if you want to send your instant meeting information elsewhere.

- **Copy Invite Link**: Copy the meeting join link.
- **Copy Invitation**: Copy the full invitation text.
- Paste the URL or invitation using **Ctrl** + **V** on Windows, or **Cmd** + **V** on a Mac. You can also right-click and click **Paste**.

Inviting others to a scheduled meeting

You can also schedule a meeting and invite others before starting the meeting.

Desktop client

1. Sign into the Zoom Desktop Client.

2. Schedule a meeting.
3. Click **Meetings**.
4. Select the meeting that you want to invite others to. Click **Copy Invitation**.
   The meeting invitation will be copied, and you can paste that information into an email or anywhere else you would like to send it out.

Web portal

1. Sign into the Zoom web portal.
2. In the navigation menu, click **Meetings**.
3. Click the topic of the meeting.
4. Next to **Time,** there are options for adding to your calendar.
   - If you click on **Google Calendar** or **Yahoo Calendar**, it will create a calendar event automatically in the specific email service you choose.
   - If you click on **Outlook Calendar**, this will generate a .ics file that you import to your Outlook calendar.

5. You can also manually copy the meeting information by clicking **Copy Invitation**.

   - If you select **Copy Invitation**, another window will open with the meeting invitation text.
   - Click **Copy Meeting Invitation**.
   - You can copy the invitation and send it out through email or elsewhere.

Section 1:e

Setting up Registration of a Meeting

Setting up Registration of a Meeting

Scheduling a meeting that requires registration will allow participants register with their e-mail, name, other questions, and custom questions. You can also generate meeting registration reports if you want to download a list of people that registered.

Note: Participants joining meetings with registration must use the Zoom desktop client or mobile app. They will not be able to join using the web client.

This article covers:

- Enabling registration for a meeting
- Customizing registration options
- Customizing branding

Prerequisites

- Host user type must be Licensed
- The meeting you are enabling registration for cannot use your PMI

Enabling registration for a meeting

1. Sign into the Zoom web portal.
2. In the navigation menu, click **Meetings**.
3. Schedule a New Meeting or edit an existing meeting.
4. In the **Registration** section, make sure to select the **Required** check box.
   After scheduling the meeting, the **Registration** and **Branding** tabs will appear.
5. **Manage attendees**: Click **View** to see a list of people that have registered for the meeting. Clicking on the registrant name will provide addition info about that person.

Customizing registration options

After you schedule the meeting, you can customize registration options:

1. Click the **Registration** tab.
2. In the **Registration Options** section, click **Edit**.
3. Customize these options:

Registration

- **Automatic Approval**: Anyone who signs up will receive information on how to join.
- **Manual Approval**: Anyone who signs up will need to be approved by the host on the meeting management page.
- **Send an email to host when someone registers**: Check this option if you want to receive an email when someone registers for your webinar. Attendees will receive an email when you approve their registration.

- **Close registration after event date**: Check this option if you want to prevent anyone from registering after the webinar date and projected end time. Attendees can still register on the event date and once the webinar starts, as long as it is before the projected end time of the webinar. For example, if you schedule a webinar for 9AM with a duration of 2 hours, the registration will close at 11AM.
  Note: If you enable this setting and make your webinar available on-demand, people can use the original registration link to register for the on-demand webinar recording.
- **Allow attendees to join from multiple devices**: Check this option to allow webinar attendees to be able to join from multiple devices, such as computers and phones.
- **Show social share buttons on the registration page**: Provides buttons to share the registration page to Facebook, Twitter, LinkedIn, or email.

Questions

You can customize the question fields that appear in your registration page.

1. Click the **Questions** tab.
2. Check the Field(s) you would like to include on your registration page.
3. (Optional) Check the **Required** box if you want to make that field required.
4. Click **Save All.**

Note:

- Name and email address are always required.
- Some fields like **Country/Region** and **State/Province** will appear as dropdown menus for attendees.

Custom questions tab

1. Click the **Custom Questions** tab to add questions to your registration page.
2. Click **New Question** to add a question.
3. Choose the type of question: **Short answer** or **Single answer**.
4. Check whether the question is required.
5. Enter the question.
6. For single answer questions, enter the answer options.
7. Click **Create**. Repeat the above steps to create more custom questions.
8. Click **Save All** to save your customized registration.

Customizing branding

After you schedule the meeting, click the **Branding** tab to customize branding options for your registration page:

- **Banner**: Click **Upload** to add an image that appears at the top of your registration page.
- **Logo**: Click **Upload** to add an image that appears to the right of meeting topic on your registration page. The logo also appears in the email invitation.

- (Optional) Click **Add Description** to add alt text to the image. The description isn't visually displayed on the screen but helps people with visual impairments to access and understand the image.

Section 1:f

Joining a Meeting

Joining a Meeting

Before joining a Zoom meeting on a computer or mobile device, you can download the Zoom app from our Download Center. Otherwise, you will be prompted to download and install Zoom when you click a join link.

You can also join a test meeting to familiarize yourself with Zoom.

Prerequisites

- Each meeting has a unique 9, 10, or 11-digit number called a meeting ID that will be required to join a Zoom meeting
- If you are joining via telephone, you will need the teleconferencing number provided in the invite.
  - Open the Zoom desktop client.
  - Join a meeting using one of these methods:
    - Click **Join a Meeting** if you want to join without signing in.
    - Sign in to Zoom then click **Join.**

  - Enter the meeting ID number and your display name.
    - If you're signed in, change your name if you don't want your default name to appear.
    - If you're not signed in, enter a display name.

  - Select if you would like to connect audio and/or video and click **Join**.

Section 1:g

Joining a meeting by smart phone or device

Joining a meeting by smart phone or device

Zoom Video Communications

Overview

You can join a Zoom meeting by means of teleconferencing/audio conferencing (using a traditional phone). This is useful when:

- you do not have a microphone or speaker on your PC/Mac,
- you do not have a smartphone (iOS or Android) while on the road, or
- you cannot connect to a network for video and VoIP (computer audio)

Zoom has toll numbers available for many countries that are included with all plans. For audio plan subscribers, Zoom also has toll-free and additional toll numbers available. The dial-in numbers available are dependent on the host's audio subscription and settings.
If the meeting invite does not provide a local number for your country, there is a more extensive list of Zoom International Dial-in Numbers. If a number is not listed or has asterisks (***) in place of some of the numbers, it means that number is not available on the account that you're currently logged into.

If you have a Zoom Phone license, you can dial in to a meeting using Zoom Phone without incurring usage charges.

Joining a meeting by phone

1. After joining a Zoom meeting, you will be prompted to join the audio automatically. If this prompt does not appear or you close out of it, click **Join Audio** in the meeting controls.
2. Click **Phone Call**.
3. **Note**: If you are subscribed to the call out add-on, you can join the meeting by having Zoom dial your phone number.
4. Follow the instructions for dialing in:
   - Select the country you're calling from in the flag drop-down menu.
   - Call one of the numbers provided.
   - Enter your meeting ID followed by #.
   - Enter your participant ID followed by #.
   - Enter the passcode, if prompted, followed by #.

If you joined computer audio automatically, you can leave the computer audio and join by phone:

1. Click the arrow next to **Mute/Unmute**.
2. Click **Leave Computer Audio**.
3. Click **Phone Call** and follow the prompt to dial in.

Linux

1. After joining a Zoom meeting, you will be prompted to join the audio automatically. If this prompt does not appear or you close out of it, click **Join Audio** in the meeting controls.
2. Click **Phone Call**.
3. Follow the instructions for dialing in:
   - Select the country you're calling from in the flag drop-down menu.
   - Call one of the numbers provided.
   - Enter your meeting ID followed by #.
   - Enter your participant ID followed by #.
   - Enter the passcode, if prompted, followed by #.

If you joined computer audio automatically, you can leave the computer audio and join by phone:

1. Click the arrow next to **Mute/Unmute**.
2. Click **Leave Computer Audio**.
3. Click **Phone Call** and follow the prompt to dial in.

Web

1. After joining a Zoom meeting in your web browser, you will be prompted to join the audio automatically. If this prompt does not appear or you close out of it, click **Join Audio** in the meeting controls.
2. Follow the instructions for dialing in:
   - Select the country you're calling from in the drop-down menu.
   - Dial one of the numbers provided.
   - Enter your meeting ID, followed by #.
   - Enter your participant ID, followed by #.
   - Enter the passcode, if prompted, followed by #.

Learn more about the Zoom web client.

iPhone

1. After joining a Zoom meeting, you will be prompted to join the audio automatically. If this prompt does not appear or you close it, tap **Join Audio** in the meeting controls.
2. Tap **Dial In**.
3. Tap the arrow at the top to select the country you're calling from.
4. Tap the number you want to call.
5. Tap **Dial**.
6. Tap **Call**.
7. To return to the Zoom app, swipe up on the home bar (iPhone X) or press the home button (iPhone 8 or older), then tap the Zoom icon.
8. When you leave the meeting, you will have the option to **Leave Meeting** or **Leave Meeting with Telephone Connected**, to stay dialed into the meeting after leaving from the Zoom app.

If you joined device audio automatically, you can leave the computer audio and join by phone:

1. Tap **More**.
2. Tap **Disconnect Audio**.
3. Tap **Join Audio** and follow the instructions above.

iPad

1. After joining a Zoom meeting, you will be prompted to join the audio automatically. If this prompt does not appear or you close it, tap **Join Audio** in the meeting controls.
2. Tap **Dial In**.
3. Tap the arrow at the top to select the country you're calling from, if not selected by default.
4. Follow the instructions for dialing in:
    - Dial one of the numbers provided.
    - Enter your meeting ID, followed by #.
    - Enter your participant ID, followed by #.
    - Enter the passcode, if prompted, followed by #.
    - Tap **Close** after dialing in.

If you joined device audio automatically, you can leave the computer audio and join by phone:

1. Tap **More**.
2. Tap **Disconnect Audio**.
3. Tap **Join Audio** and follow the instructions above.

Android

1. After joining a Zoom meeting, you will be prompted to join the audio automatically. If this prompt does not appear or you close it, tap **Join Audio** in the meeting controls.
2. Tap **Dial In**.
3. Tap the arrow at the top to select the country you're calling from, if not selected by default.
4. Tap the phone icon next to the number you want to call.
5. Tap **Call**.
6. If prompted, allow Zoom to make and manage phone calls.

7. Return to your home screen and open Zoom again.
8. When you leave the meeting, you will have the option to **Leave Meeting** or **Leave Meeting with Telephone Connected**, to stay dialed into the meeting after leaving from the Zoom app.

Note: If you're on an Android device that can't make calls, follow the instructions for dialing in:

- Dial one of the numbers provided.
- Enter your meeting ID, followed by #.
- Enter your participant ID, followed by #.
- Enter the passcode, if prompted, followed by #.
- Tap **Back** after dialing in.

If you joined computer audio automatically, you can leave the computer audio and join by phone:

1. Tap **More**.
2. Tap **Disconnect Audio**.
3. Tap **Join Audio** and follow the instructions above.

Section 1:h

Joining a meeting by phone only

Joining a meeting by phone only

1. Dial an in-country number. If you dial a toll number, your carrier rates will apply. You can find the numbers on your meeting invitation or view a full list of international dial-in numbers.
2. You will be prompted to enter the meeting ID - the nine (9), ten (10), or eleven (11) digit ID provided to you by the host, followed by #.
3. If the meeting has not already started and join before host is not enabled, you will be prompted to enter the host key to start the meeting, or to press # to wait if you are participant.
4. You will be prompted to enter your unique participant ID. This only applies if you have joined on the computer or mobile device or are a panelist in a webinar. Press # to skip.
5. You may be prompted to enter the meeting passcode, followed by #. This passcode will be included in the meeting invite provided by the host.

If you join by computer or mobile device later, you can enter the Participant ID to bind your phone and device session together and show your video when you speak on the phone. To enter your participant ID once you are in the meeting, enter **#Participant ID#** on your phone.

Phone controls for participants

The following commands can be entered via DTMF tones using your phone's dial pad while in a Zoom meeting:

- *6 - Toggle mute/unmute
- *9 - Raise hand

Entering the meeting password using your dial pad

If the meeting requires a password, a phone-specific numeric password will be generated. You can find this password in the invitation listed below the dial-in numbers and meeting ID.

Section 1:i

Hosting phone-only meetings

Hosting phone-only meetings

You can join and start any Zoom meeting from your telephone and control the meeting with DTMF tones. To be recognized as the host, you will need to enter your host key, which you can find on your user profile

Note: If you enable join before host and join only from your telephone, you will not be recognized as the host and will not have host controls. If you need to host meetings from your phone with full host controls, do not enable join before host.

Learn more about scheduling or editing a scheduled meeting:

- Schedule a Meeting
- Update a Scheduled Meeting
- Enable for your Personal Meeting ID (PMI)

You can also consider using Personal Audio Conference.

Considerations for joining by phone as the host

- If you have scheduled the meeting from a basic account, the meeting will timeout after forty-minutes with a thirty-minute warning notification, if two or more participants join or you do not bind your phone and computer/mobile device session with the participant ID.
- If you would like the meeting to last for unlimited duration, the meeting will need to be scheduled by a **Licensed** user, on a **Pro** or above account.
- The number of phones that can connect to a Zoom meeting or webinar is determined by account type and add-on assigned to the user account.
    - Licensed User: 100 Dial In Users
    - Licensed + Large Meeting 200: 200 Dial In Users
    - Licensed + Large Meeting 300: 300 Dial In Users
    - Licensed + Large Meeting 500: 500 Dial In Users
    - Licensed + Large Meeting 1000: 1000 Dial In Users
    - Licensed + Webinar 100: 100 Dial In Users
    - Licensed + Webinar 500: 500 Dial In Users
    - Licensed + Webinar 1000: 1000 Dial In Users
    - Licensed + Webinar 3000 and above: 1984 Dial In Users

Phone controls for meeting host

If you have entered the Host Key to start the meeting, you will have host controls available to you by entering DTMF tones on your dial pad. To hear all available commands, enter ** on your phone.

- *4 - End the meeting for all participants
- *5 - Lock or Unlock the meeting
- *6 - Mute or unmute yourself
- *7 - Start or Stop Recording

  Note: all participants in the meeting will be notified when recording is stopped or started.
- *# - Hear the number of participants in the meeting
- 99 - Mute or unmute all participants

Section 1:j
Host and co-host controls in a meeting

Host and co-host controls in a meeting

Host controls allow you as the host to control various aspects of a Zoom meeting, such as managing the participants.

The co-host feature allows the host to share hosting privileges with another user, allowing the co-host to manage the administrative side of the meeting, such as managing participants or starting/stopping the recording. The host must assign a co-host. There is no limitation on the number of co-hosts you can have in a meeting or webinar.

Co-hosts do not have access to the following controls as they are only available as host controls in a meeting:

- Start closed captioning and assign someone or a third-party to provide closed captioning
- Start live streaming
- End meeting for all participants
- Make another participant a co-host
- Start breakout rooms or move participants from one breakout room to another
- Start waiting room (co-hosts can place participants in waiting room or admit/remove participants from the waiting room)

Co-hosts also cannot start a meeting. If a host needs someone else to be able to start the meeting, they can assign an alternative host.

Prerequisites

- Host permission in the meeting, or co-host permission (set by the host)
- Zoom desktop client for Mac, PC, Chrome OS or Linux
- Zoom mobile app for iOS or Android

Section 1:k

Recording a Meeting

Local recording

Local recording is available to free and paid subscribers. Local recording allows participants to record meeting video and audio locally to a computer. The recorded files can be uploaded to a file storage service like Dropbox, Google Drive, or a streaming service like YouTube or Vimeo.

Note: Local recording is not supported on iOS and Android. See cloud recording for paid accounts if you are using a mobile device.

This article covers:

- Enabling local Recording
  - Account
  - Group
  - User
- Starting a local recording
- Stopping or pausing a local recording
- Assigning recording privileges to a participant
- Changing local recording settings
- Recording multiple audio files

Prerequisites

- Zoom Basic (Free) account or above
- Zoom Desktop Client for Windows, macOS, or Linux, version 2.0 or higher

Enabling local recording

Account

1. Sign into the Zoom web portal as an administrator with the privilege to edit account settings.
2. Click **Account Settings**.
3. In the **Recording** tab, navigate to the **Local Recording** option and verify that the setting is enabled.
   If the setting is disabled, click the toggle to enable it. If a verification dialog displays, choose **Turn On** to verify the change.
4. (Optional) If you want to make this setting mandatory for all users in your account, click the lock icon, and then click **Lock** to confirm the setting.

Group

1. Sign into the Zoom web portal as an administrator with the privilege to edit user groups.
2. Click **Group Management**.
3. Click the name of the group, then click the **Settings** tab.
4. In the **Recording** tab, navigate to the **Local Recording** option on the **Recording** tab and verify that the setting is enabled.

If the setting is disabled, click the toggle to enable it. If a verification dialog displays, choose **Turn On** to verify the change.

Note: If the option is grayed out, it has been locked at the account level, and needs to be changed at that level.

5. (Optional) If you want to make this setting mandatory for all users in this group, click the lock icon, and then click **Lock** to confirm the setting.

User

1. Sign into the Zoom web portal and click **My Meeting Settings** (if you are an account administrator) or **Meeting Settings** (if you are an account member).
2. In the **Recording** tab, navigate to the **Local Recording** option and verify that the setting is enabled.
   If the setting is disabled, click the toggle to enable it. If a verification dialog displays, choose **Turn On** to verify the change.

   Note: If the option is grayed out, it has been locked at either the group or account level, and you will need to contact your Zoom administrator.

Starting a local recording

The host must record the meeting or grant the ability to record to a participant.

1. Start a Zoom meeting as the host.
2. Click the option to **Record**.
3. If there is a menu, select **Record on this Computer**.
   Hosts will see the following recording indicator in the top-left corner while recording is active.

   Participants will see the following indicator in the top-left corner while the recording is active.

4. Click **Participants** to see which participants are currently recording.

   Note: Dial-in participants will hear a message informing them that the meeting is now being recorded unless disabled by the host.
5. After the meeting has ended, Zoom will convert the recording so you can access the files.
6. Once the conversion process is complete, the folder containing the recording files will open.
   Note: By default, the audio/video file (MP4) will be named **Zoom_0.mp4**. The audio only file (M4A) is named **audio_only.m4a**.

Note:

- If the meeting unexpectedly shuts down or if the conversion process is interrupted, the recording files could become corrupted and non-recoverable. Restarting or shutting down your computer, putting the hard disk to sleep, or closing your laptop will interrupt the conversion process.

- If the conversion process is not successful after the meeting has ended, you can try to convert the files again by navigating to the recording location and double clicking the recording files.
- You can record the meeting in different layouts including active speaker, gallery view, and shared screen. Learn more about recording layouts.

Stopping or pausing a local recording

During a Zoom recording, a participant can **Stop** or **Pause** the recording. If a participant stops the recording and starts it again, a **new** video file will be created for the next recording segment. If a participant pauses the recording and starts it again, Zoom will record to the same video file for the recording segment.

1. After a recording has been started, click Pause or Stop Recording at the bottom.

   The recording can also be stopped or paused by clicking the indicator in the top left corner.

2. When a recording is paused, the following indicator will be displayed in the meeting.

3. To resume the recording, click **Resume Recording** at the bottom

   The recording can also be resumed by clicking the indicator in the top left corner.

4. After you stop the recording, you can access the local recording files on your computer.

Assigning recording privileges to a participant

1. In a Zoom Meeting click on **Manage Participants**.
2. In the Participants menu navigate to the participant who will be granted recording privileges. Click **More** next to their name.

3. Select the option to **Allow Record**.

   The participant will receive the following notification:

4. When a participant is recording, the participant menu will display a recording icon next to the participant's name.

5. To disable the participant's ability to record, click **More** next to the name, then click **Forbid Record**.

   The participant will receive the following notification:

Changing local recording settings

To change local recording settings in the Zoom client:

1. Open the Zoom client and click **Settings**.
2. Click the **Recording** tab.
   This will open your recording options that you can change using the client.

   Note: Setting the default location to a cloud syncing folder (such as Dropbox, Google Drive, or One Drive), an external drive, or network storage device may cause issues with saving and converting the local recording. Zoom strongly recommends keeping the default location on a local drive for recordings.

Recording multiple audio files

When recording locally, the host can record all participants' audio streams as separate audio files, one file for each participant. To enable this option:

1. Open the Zoom client and click **Settings**.
2. Click the **Recording** tab.
3. Enable **Record a separate audio file for each participant**.
4. Record and save the meeting to your computer.
5. Once the meeting is over and the recording has processed, open the recording folder.
6. Within the folder, open **Audio Record**.
7. Once in the **Audio Record** folder, each participant's audio track will be listed as its own file in with the file name ending in the participant's name.

Section 1:1

Screen Sharing

Screen Sharing

Overview

While in a meeting, you can share the following content:

- Entire desktop or phone screen
- A specific application
- A portion of your screen
- Whiteboard
- Device audio
- Content from a second camera
- iPhone/iPad screen

Note:

- The host can disable participants' ability to share their screen.
- For Free/Basic accounts, screen sharing is set to **Only Host** by default.
- In a webinar, only the host, co-hosts, and panelists can share their screen.
- If you're using the desktop client, you can show Zoom windows during screen share.

Prerequisites

- Zoom desktop client
- Zoom mobile app
- Client version 5.0 or higher is required for joining a meeting after May 30, 2020.

Section 1:m

Sharing slides as a Virtual Background

Sharing slides as a Virtual Background

Overview

While you can share PowerPoint presentations or share Keynote presentations in meetings, you can also share your presentation as a Virtual Background for an immersive sharing experience. Sharing your slides as a Virtual Background allows your participants to view your video imposed directly on the screen share. It also allows you to manage your presentation directly from within the Zoom meeting controls.

Note: Sound, transitions, or animations embedded in slides are not supported.

If the presenter records the meeting locally, the recording will also have the video embedded on top of the slides. If the host or another participant records the meeting locally, they must be on at least **5.2.0** or higher for the video to be embedded on the slides. If they are on any version older than **5.2.0** or record to the cloud, the recording will record the slides and video as a normal screen share recording.

This feature is currently in beta, available to all customers. If you do not want your account to use this feature, please contact Zoom support to request that this feature be disabled.

This article covers:

- Sharing a presentation as your background
- Managing slides and video
    - Changing slides
    - Changing video size and position
    - Remove your video from slides

Prerequisites

Presenter requirements

- Zoom Desktop Client for Windows, version **5.2.0 (42619.0804)** or higher
- Zoom Desktop Client for macOS, version **5.2.0 (42634.0805)** or higher
- Make sure your computer meets the system requirements for Virtual Background
- PowerPoint installed locally
- Keynote installed locally (macOS only)

Viewer requirements

- Zoom Desktop Client
    - Windows: **5.2.0 (42619.0804)** or higher
    - macOS: **5.2.0 (42634.0805)** or higher
    - Linux: **5.2.0 (440215.0803)** or higher
- Zoom Mobile App
    - Android: **5.2.0 (42588.0803)** or higher

- iOS: **5.2.0** or higher

Note: If a participant is on a version lower than what is stated above or joining from the Web client, a Zoom Room, or 3rd party endpoint, they will view the slides as a normal screen share, and the presenter's video will not be imposed over the slides.

Sharing a presentation as your background

1. Click the **Share Screen** button located in your meeting controls.
2. Click **Advanced**.
3. Click **Slides as Virtual Background**.
4. Browse, and select the PowerPoint presentation file.
5. Click **Open**.

Once the presentation has been imported, the slides will be shown as your virtual background. If your video is on, by default it will be imposed over the slides.

Managing slides and video

Once the share has started, you can manage your video and slides from the meeting controls.

Changing slides

To navigate through your slides, use the **next** and **previous** buttons in the meeting controls.

Changing video size and position

To reposition or change the size of your video:

1. Click, the **...** in the presentation menu.
2. Click **Resize My Video**.
3. Click and hold one of the 4 corners of the image and drag your mouse to resize the image.
4. Click and hold the center of your image, then drag your mouse to reposition the image on the slide.

Remove your video from slides

If you want to stop imposing your video on top of the slides and have it sent as a separate video feed:

1. Click, the **...** in the presentation menu.
2. Click **Split Video from Slides**.
3. Your participants will now view your slides as a normal screen share and your video feed will be sent as a separate feed. You can still navigate slides in the meeting controls.
4. To re-impose your video on the slides, click **Merge Video and Slides**.

Section 1:n

Streaming a meeting or webinar on Facebook Live

Streaming a meeting or webinar on Facebook Live

Overview

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.

Note:

- Zoom does not support the new Facebook Live Producer. If you see a notification to try to the new Live Producer, click **Dismiss**.
- Facebook changed their API as of April 2018 and now prevents some users from live streaming to groups. If you are unable to live stream your webinar to Facebook, you can configure the Facebook Live stream as a custom service.

This article covers:

- Enabling Facebook Live streaming for meetings
  - For your account
  - For a group
  - For your own meetings
- Enabling Facebook Live Streaming for webinars
- Live stream to Facebook
  - Direct streaming from a meeting or webinar
  - Streaming a meeting or webinar to a Facebook via custom live streaming
- Tips for live streaming on Facebook
  - Processing time
  - Audio echo
- Checking Facebook permissions
  - Check permissions for a page
  - Change permissions for a group

Prerequisites

Streaming for meetings

- Pro, Business, Education, or Enterprise account
- The Host is Licensed
- Zoom Client version **4.4.53582** or higher on PC or a Mac
- Live stream is enabled on Facebook

Streaming for webinars

- Pro, Business, Education, or Enterprise account
- Host has Webinar add-on
- Zoom Client version **4.0** or higher on PC or a Mac

- Live Stream is enabled on Facebook

Enabling Facebook Live streaming for meetings

Account

To enable all members of your organization to live stream meetings on Facebook:

1. Sign into the Zoom web portal as an administrator with the privilege to edit account settings.
2. Click **Account Management** > **Account Settings**.
3. Toggle the **Allow live streaming the meetings** under **In Meeting (Advanced)** and enable **Facebook.**
4. (Optional) If you want to make this setting mandatory for all users in your account, click the lock icon, and then click **Lock** to confirm the setting.

Group

To enable all members of a specific group to live stream meetings on Facebook:

1. Sign into the Zoom web portal as an administrator with the privilege to edit groups.
2. Click **User Management** > **Group Management**.
3. Click the name of the group, then click the **Settings** tab.
4. Toggle the **Allow live streaming the meetings** under **In Meeting (Advanced)**, and enable **Facebook.**

   Note: If the option is grayed out, it has been locked at the Account level and needs to be changed at that level.
5. (Optional) If you want to make this setting mandatory for all users in this group, click the lock icon and then click **Lock** to confirm the setting.

User

To enable live stream the meetings that you host on Facebook:

1. Sign into the Zoom web portal.
2. Click **Account Management** > **Account Settings** (if you are an account administrator) or **Settings** (if you are an account member).
3. Toggle the **Allow live streaming the meetings** under **In Meeting (Advanced)**, and enable **Facebook.**

   Note: If the option is grayed out, it has been locked at either the Group or Account level, and you will need to contact your Zoom administrator to make changes.

Enable Facebook Live streaming for webinars

1. As an owner or account admin, sign into the Zoom web portal.
2. Click **Account Management**, then **Webinar Settings**.

3. Click **Edit** to the right of **In Webinar Settings**.
4. Enable **Allow hosts to live stream to webinars**, and then enable **Facebook**.
5. Click **Save Changes**.

Initiating a live stream to Facebook

Direct streaming from a meeting or webinar

1. Start your webinar or meeting.
2. In the meeting/webinar controls, click **More**.
3. Click **Live on Facebook**.
4. Your default browser will open, and you will be prompted to log into Facebook if you aren't already logged in.
5. Sign into Facebook.
6. Choose where on Facebook you would like to Go Live.
7. Click **Next**.
   Note:
   - If you are not able to start the live stream, clear your browser's cache and cookies, then try again.
   - Zoom does not support the new Facebook Live Producer. If you see a notification to try to the new Live Producer, click **Dismiss**.
8. When you are ready to start the broadcast on Facebook, click **Go Live**.

9. Wait for the notification from the Zoom client that your Webinar is Live on Facebook, then begin your Webinar.
10. Streaming stops when you end the webinar or meeting or click the **Stop Streaming** icon on the Zoom client.

Streaming to Facebook via custom live streaming

1. Enable Custom Live Streaming for your Meeting or Webinar.
2. In Facebook, click **Live Video** on the page, group, event, or your timeline where you would like to go live.
3. Click **Connect**.
   Note: If you are not able to start the live stream, clear your browser's cache and cookies, then try again.
4. Click **Schedule**.
5. Select the date and time of your webinar.
6. Click **Schedule**.
7. On the Go Live announcement, click **Edit Your Details**.
8. In another browser tab, sign into Zoom and navigate to your meeting or webinar.
9. Copy and paste the Stream Key. Stream URL, and Live Streaming page URL in your Custom Meeting or Webinar Live Stream Setup.
10. Click **Save**.
11. Start your Zoom meeting or webinar when you are ready to begin the event.
12. **More** in the Meeting Controls.

13. Click **Live on Custom Live Streaming Service**

Tips for live streaming on Facebook

Processing time

There is a processing time of approximately 20 seconds for Facebook Live, so participants watching on Facebook will see the same content approximately 20 seconds after participants watching on Zoom.

Audio echo

If you have the Facebook window open on your computer, you will hear your audio play back to you approximately 20 seconds delayed. If you need to keep the Facebook window open to view and reply to comments, click the speaker icon at the bottom right of the live stream on the Facebook page to mute the video.

Checking Facebook permissions

You can stream to your Facebook Timeline or to a Facebook Group or Page, if you have appropriate permissions.

To check your permissions for a Facebook page

You must be an admin or an editor to stream to a Facebook page. If you are a moderator, analyst or advertiser, this page will show up under your Facebook pages, but you will not be able to Live Stream.

1. Sign in your Facebook account.
2. Click the arrow at the top right and choose the page you would like to stream to.

   If the page is not listed, click **Manage Pages** and then click the name of the page.
3. Click **Settings**.

4. Click **Page Roles** on the left.

5. Under **Existing Page Roles**, it will list anyone who is assigned a role for this page and their role. Only admins and editors can stream to a page.

To check your permissions for a Facebook group

You must have admin permissions for a group to stream. If you have moderator or member permissions, you will not be able to live stream to this Facebook Group.

1. Log in to your Facebook Account.
2. Click **Groups** on the left side.

3. Under **Groups You Manage**, click the gear next to the group you would like to stream to and click **Edit Group Settings**.

   Note: If the group appears under **Your Groups**, not Groups You Manage, you are a member of this group and will not be able to live stream.
4. Click **Members** on the left.

5. Under **Admins and Moderators**, click **...** next to your name.

   - If you are a moderator for the group, you will have the option **Remove as Moderator**. You will not be able to live stream.
   - If you are an admin for the group, you will have the options **Change to Moderator** and **Remove as Admin**. You will be able to live stream.

Section 1:o

Taking Attendance in a Zoom Meeting

Taking Attendance in a Zoom Meeting

While many Posts, Counties, Districts, and Dept will do an active call out for those present it is possible to miss people. Asking people to register is a good way to get an accurate account of who attends and also who stays.

1. Log in to Zoom on the web.

2. Click Reports and then choose Usage.

3. Check that the date range at the top includes the session for which you want to take attendance. Then click on the Participants link for the session.

1. Check that the date range includes the date of the session for which you want to take attendance. If not, adjust the date range and click **Search**.
2. Then click the **Participants** link for the session.

4. Review the report. Check the Export with meeting data checkbox.

1. Notice that the same student joined the meeting twice. This happens when a student leaves the meeting and re-joins it. You won't be able to tell if they left the meeting because of technical difficulties, but you can see how long they were in the meeting under Duration.
2. Click **Export with meeting data.**

4.1. Click Show Unique users to see a collapsed list of each unique attendee and their total duration.

5. Click Export.

6. An Excel file will download to your computer. Open the Excel file.