



Zoom is a program that allows users to make video chat, instant messaging, and voice calls from computers, tablets, and mobile devices. Zoom is available for computers running Microsoft Windows, Mac OS X, or Linux distributions—as well as Android, Blackberry, iOS, and Windows Phone smartphones and tablets.

**NOTE** This document provides a brief overview of how to install Zoom on a Windows computer and use its basic functions. For in-depth information on all software features as well as Mac OS X and mobile device support, please refer to Zoom's official support page at <https://support.zoom.us>

## GETTING STARTED

All UB students are only eligible for a Basic user account, while all UB faculty, and staff are automatically eligible for a Licensed user account. Both licenses have access to all the features outlined here and on the Zoom webpage, with conference length being the primary difference between license tiers; Basic users can only host meetings lasting 40 minutes or less, while Pro users do not have this limitation.

### Installing Zoom

- To sign in, simply go to <https://ubalt.zoom.us> and click on **Login**. This will take you to the familiar UB portal login screen, where you can enter your **netID and password**.
- Once you have logged in, click on **Host a Meeting**, which will prompt the desktop app to automatically download. Alternatively, you can download the app directly from <https://zoom.us/support/download>.
- For iOS devices, visit the Apple App Store and search "zoom"
- For Android, visit Google Play and search "zoom"

### Signing in

After you launch the app, you have two options:

- If you just want to join a meeting-in-progress, click on **Join a Meeting**.
  - If you select this option, you'll need a **meeting ID or Personal Link** from the host of the meeting, which you can enter into the top box, along with a screen name of your choice. Click **Join** and the meeting will start.
- If you would like to log in and start or schedule your own meeting, click on **Sign In**.
  - Because your Zoom account is linked to your UB credentials, click the **Sign In with SSO** button to continue.
  - The next screen will ask you for your company domain. Enter **ubalt** into the box.
  - This will take you to a UB portal login screen. Simply enter your **netID and password** to log in.

123-1234-1234

Your Name

Remember my name for future meetings

Don't connect to audio

Turn off my video

Join

## APPLICATION BASICS

### Home Screen

Once you have logged in, you will see the main dialog box as shown to the right. The default tab is **Home**. From here, you can:

- View what type of account you are logged in with (Pro or Basic)
- Click on **Start without video** to start a meeting sharing your desktop or a specific application
- Click on **Start with video** to start a video meeting
- Click on **Schedule** to set up a future meeting
- Click on **Join** to join a meeting that has already started

**NOTE** Click on the dropdown next to the status indicator dot to view your profile, check for updates, switch accounts, and log out.

### Meetings

Select **Meetings** to view or modify your personal meeting ID, scheduled meetings, and recorded meetings. From here, you can:

- Select **Start** to begin the pre-scheduled meeting that you have listed in your upcoming meetings
- **Edit** or update your scheduled meeting
- **Delete** will permanently delete your scheduled meeting
- **Copy** your scheduled meeting(s) invitation text and manually paste into an email, IM, SMS etc.

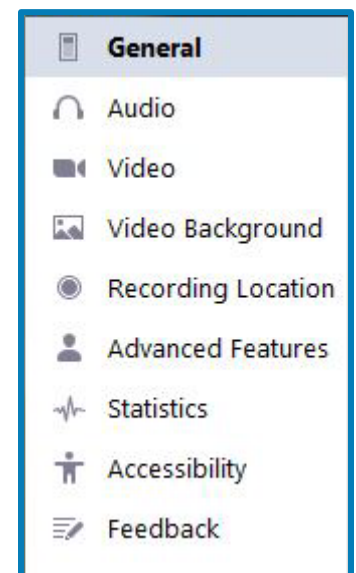
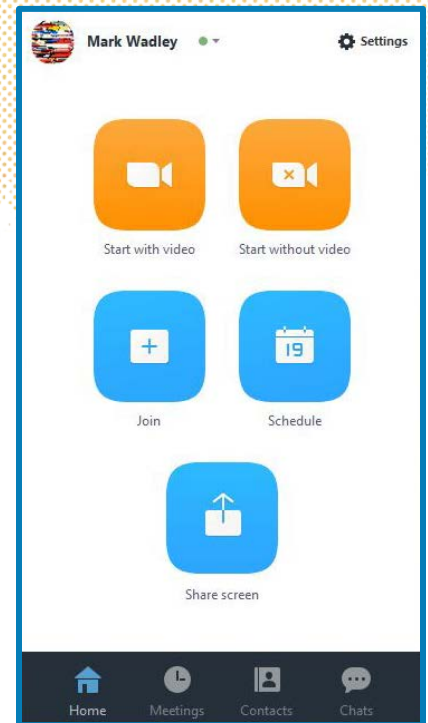
**NOTE** If you do not see your scheduled meeting, click the refresh tab in the upper right-hand corner to update/refresh the meeting list.

### Zoom Settings

You can find the Settings tab in the main dialog box or in the meeting menu bar. After clicking Settings, you will have a number of options available in the sidebar. The most important ones for you to use will be the following:

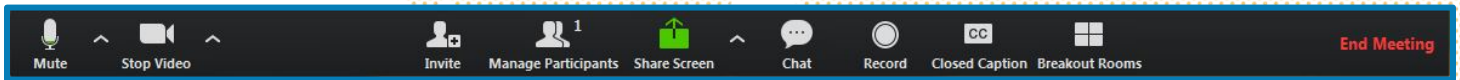
- **General:** select preferences for how you would like the application to work
- **Audio:** test, select and adjust your speakers, and microphone
- **Video:** test and select your video camera
- **Video Background:** use an image to replace the background of your video
- **Recording Location:** set the location where your recordings will be stored

**NOTE** Do not use your networked **M:\** to store your recordings! To learn how to change your recording location, see the **Recordings** section below.

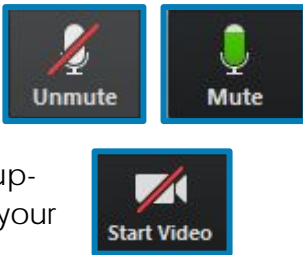


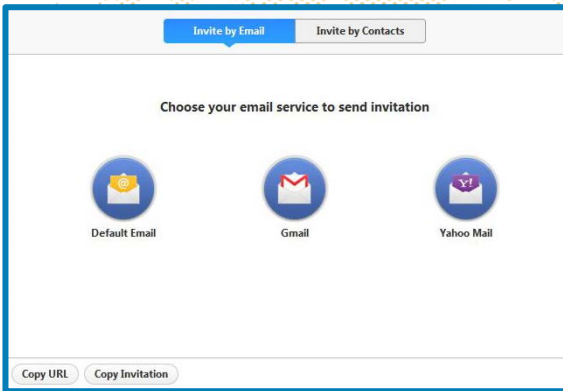
## Meeting Features

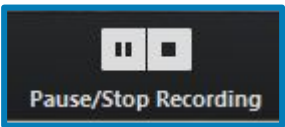
Once you have started or joined a meeting, you can perform the following actions from the menu bar located at the bottom of the meeting window (move your mouse to toggle):





- Mute Audio:** click the microphone button to mute your input audio. When your mic is active, this icon will show a green level indicator. Click the up-arrow next to the icon to change your audio input and output devices.


- Stop Video:** click the camera icon to turn off the video from your webcam. Click the up-arrow next to the icon to change your video input device.
- Invite:** clicking this icon will open a box prompting you to select an email service to send the invitation. You can certainly use these options, but we suggest clicking the **Copy URL** button in the bottom-left corner and pasting the link into an email.


- Manage Participants:** clicking this icon will display a list of active participants, allowing the host to control participant privileges, including making them a host, removing them from the meeting, allowing them to record, changing their name, putting them on hold, and muting or unmuting their audio.
- Share Screen:** clicking this icon will allow you to share your entire display or a particular application window, as well as a whiteboard display, additional cameras, or a feed from your iPhone or iPad.
- Chat:** use this feature to communicate via text with your participants, either one-on-one or as a group.
- Record:** clicking this icon will start recording the meeting, and the button will change to the **Pause/Stop Recording** icon pair (as seen to the right). Zoom will encode the recorded video to .mp4 video and .m4a audio files once you end the meeting. For more information on recording, see the section below.


- Close Caption:** This button allows you to assign captioning duties to a participant or to yourself. The participant can then transcribe the audio in real-time and it will appear onscreen as closed captions.
- Breakout Rooms:** Clicking this button will open the **Create Breakout Rooms** window, from which you can automatically or manually assign your participants to separate sessions. For more information on **Breakout Rooms**, see the section below.
- End Meeting:** This button will allow you to either end the meeting completely, or leave the meeting while allowing your participants to continue without you.
- Video Layout:** there are three video layout when in a meeting

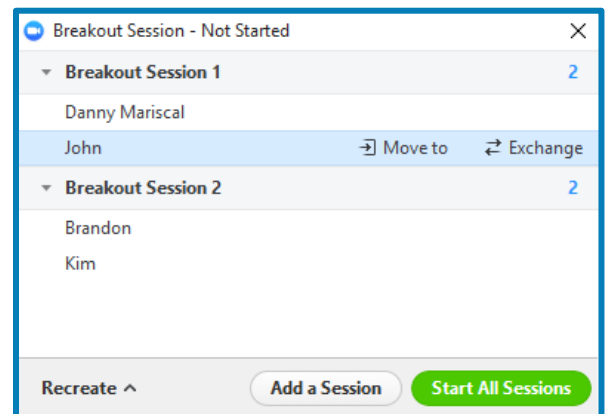
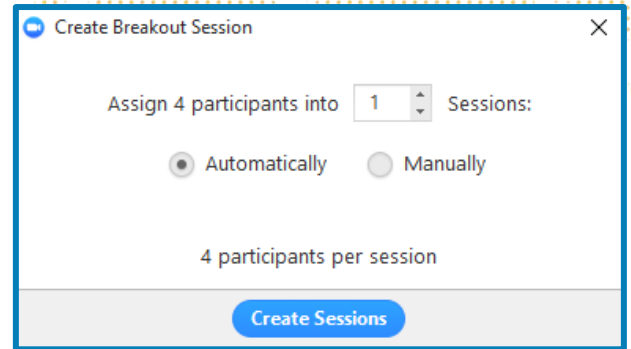
  - Full Screen: click on the icon with four arrows at the top right corner of your zoom window
  - Active Speaker: the default layout. it will switch the large video window between who is speaking.
  - Gallery View: click Gallery view in the upper right corner of your zoom window to enter.


## BREAKOUT ROOMS

The Breakout Rooms feature of Zoom will allow you to divide your meeting into up to 50 separate sessions for small group work or discussion. As a host, you can choose to manually assign participants to each group, or have Zoom do this for you automatically.

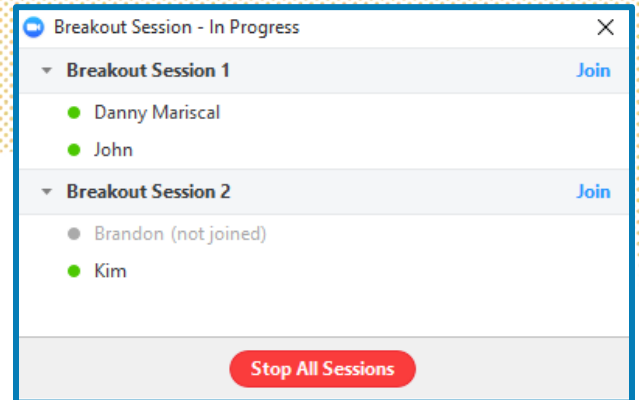
### Creating your Breakout Rooms

- To get started, click the **Breakout Rooms** button in the menu bar that appears at the bottom of the meeting window.
- This will open the **Create Breakout Session** window, which will allow you to select the number of sessions you would like to create, and how you would like to assign your participants to those sessions
  - Automatically:** Let Zoom split your participants up evenly into each of the sessions
  - Manually:** Choose which participants you would like in each sessions
- Click the **Create Sessions** button. This will create the sessions, but will not start automatically. Once the sessions are created, you can manage the session prior to starting them.
- To assign participants to your Breakout Sessions, select **Assign** next to the session you wish to assign participants to and select the checkbox next to each participant you wish to assign to that session. Repeat this for each session.
- If you selected to assign participants to sessions **Automatically**, your sessions will appear with the participants assigned evenly across your sessions. If you chose to assign participants **Manually** or wish to make changes, you can do so before starting the sessions. Participants who are not assigned to breakout sessions will remain in the main meeting when the sessions are started.
  - Move to** (participant): select a session to move the participant to
  - Exchange** (participant): select a participant in another session to swap the selected participant with
  - Delete Session:** delete the selected session
  - Recreate:** allows you to start the Breakout Session creation from scratch
  - Add a Session:** add another Breakout Session
  - Start All Sessions:** start the sessions.
- All participants will be moved to their respective sessions after confirming the prompt to join the Breakout Session. The host will be left in the main meeting until manually joining one of the sessions.



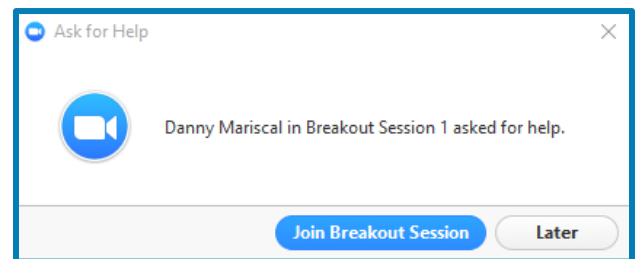
## Managing Breakout Sessions in Progress

- Once the Breakout Sessions have been started, the participants will be asked to join the Breakout Session. The host will stay in the main meeting until joining a session manually. If a participant has not joined the session yet, it will be noted by "(not joined)" next to their name.
- Join** (session): allows the host to join the breakout session selected
- Leave** (session): allows the host to leave the session and return to the main meeting (only shows when in a Breakout Session)
- Stop All Sessions:** Will stop all sessions after a 30 second countdown, shown to the host and participants, and return all participants back to the main meeting.



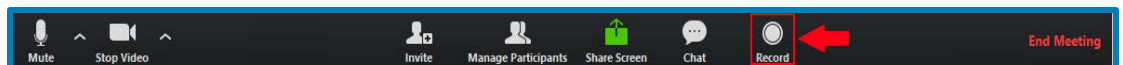
## Ask for Help

- Participants in the Breakout Sessions can request that the meeting host join their meeting by pressing the **Ask for Help** button in the menu bar.
- The meeting Host will be prompted to join the session where the request originated from. Select **Join Breakout Session** to join the session.

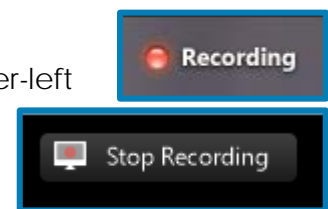


## RECORDING

### Start Recording



- While you are in a Zoom meeting, move your mouse around the screen to toggle the menu bar.
- Select **Record**
- You can also click on **Participant** to assign someone to record
- All participants in meeting will see a recording indicator in the upper-left corner of their screen
- Or If you're the host you will see this button appear in the upper left corner:



### Recording Layout

- You can record the active speaker, content sharing with active or sub video panel, gallery view or M4A audio.
- By default, only the host can record each Zoom meeting. This can be changed by having the host allow specific users to record the meeting through the **Manage Participants** panel. Each resulting recording will be in the layout of choice by the person who is recording.

- The Zoom meeting will be recorded in the current layout that the host is recording. For example, if the host is recording in **Gallery View** the recording will be in gallery view. This is independent of what the participants are viewing, so if 1 participant is watching the meeting in active speaker view and they start recording because the host granted them recording the resulting recording will be in **Active Speaker**.



**NOTE** If you move the active speaker display thumbnail to the edge of the screen or to additional monitor from the one you are presenting from the thumbnail will show up in the surrounding black bars on the recording.

### Accessing your Local Recording

- To access your saved recorded meetings, open your client menu. Then, select **Meetings** and from here select **Recorded**.
- All recorded meetings are stored locally on your local device or computer.

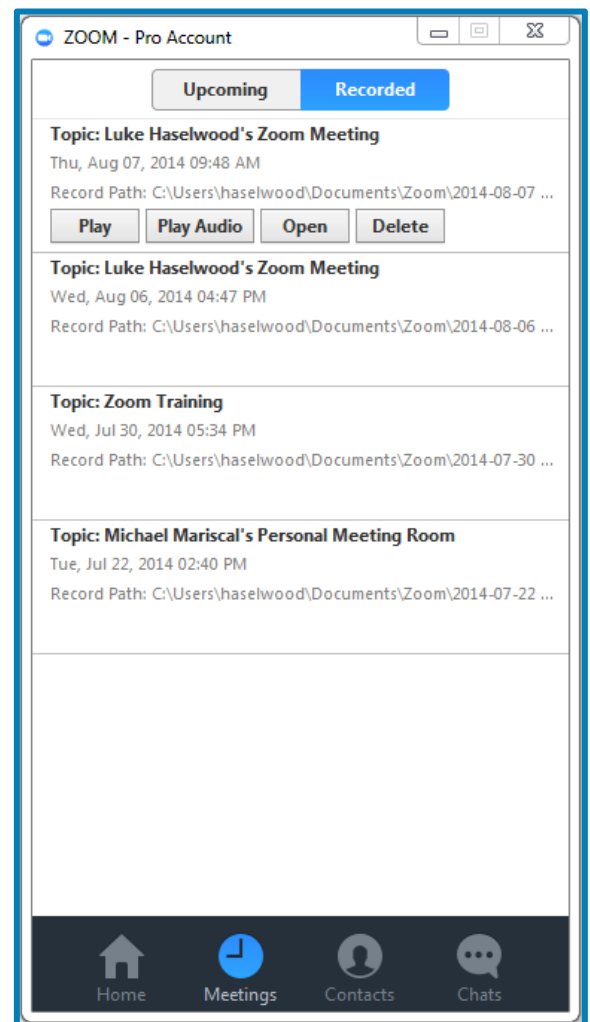
**NOTE** Your recorded meeting will be converted and added after the meeting is ended.

### Saved Recording Options

Using your mouse, toggle over your saved recording to view your options:

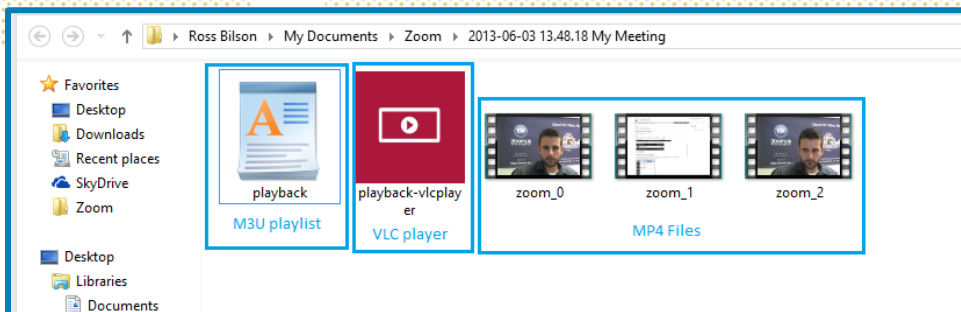
- Play Video:** Selecting "Play" from your zoom client will play the saved meeting with your default media player
- Play Audio:** Selecting "Play Audio" from your Zoom client will play the saved meeting audio with your default media player
- Open:** Selecting "Open" will allow you to view your saved file in your local device or computer's folder
- Delete:** Selecting "Delete" will erase your meeting from your zoom client only

**NOTE** After deleting your saved recorded meeting, it will still be saved to your local device or computer.



### Recording Formats

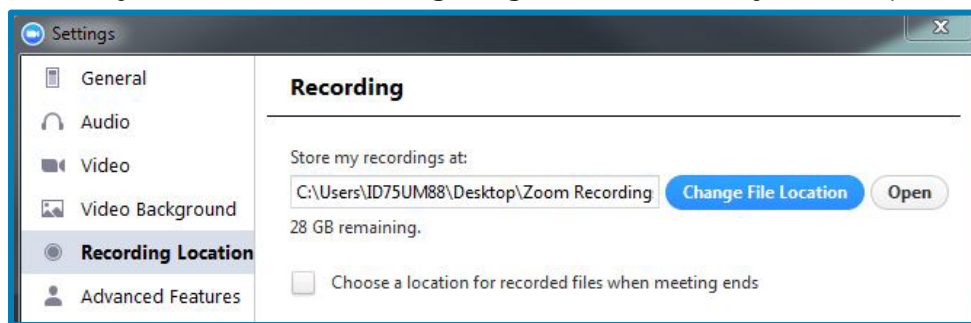
- After you have ended your meeting. Your recorded file will be converted and saved to your local device or computer.
- To access your recorded meeting folder: please select open from: **Meetings > Recorded > Open**. You will have four (4) different file to choose from:
  - **M3U playlist:** a playlist to play the individual MP4 files (Windows only)
  - **MP4 file/s:** video file or split video and screen sharing files (Windows and Mac)
  - **M4A file:** a single audio only file
  - **MP4 file:** single file for video and screen sharing
  - **Chat (txt) file:** single file for in meeting group chat



### Change Location for Recording

You can change the location of where your recorded meeting file gets stored at on your computer. Open your Zoom client and select **Settings** then select **Recording**. From here you can:

- Change where your recorded file will be stored
- Select an option to pop up a location selection each time when meeting ends



**NOTE** We recommend saving your recordings to a local drive, cloud drive, or networked storage drives. Saving to the default folder on your **M:** drive when signed in to a UB computer can result in a rapid loss of free space, as this drive has a very limited storage capacity.