
LLC Zoom Training

— Module 1 —
Account Setup and Invitations

What is covered in this module

Account Settings

Waiting Room - Using and not using

Passcode

Audio Type

Sound on Entry

Chat

Co-host

Screen Sharing

Meeting Reactions

Participants Rename themselves

Virtual Backgrounds

Schedule a Meeting

Invitation to Meeting

Email Invitation (link) to Participants

Start a Meeting

What is Zoom

- A program that allows people at separate computers to meet together
- During the meeting or class, each person can see all of the others who are in the class and they can talk to each other.
- During the meeting, a participant can present documents, slide shows, or videos for others to view using the Share Screen feature
- One person is in charge of the class, the Host (coordinator)
- The coordinator (host) must have a Zoom Pro license and account.
 - The software of your desktop or laptop should be up to date
 - Your Zoom software should be up to date

How does it work

- The coordinator signs into their Zoom account - Zoom.us
- The coordinator schedules the meeting for the day and time needed
- Zoom generates a link to the meeting
- The coordinator copies the link and emails it to the participants
- The day of the meeting, the coordinator starts the meeting before the start time
- The participants click on the link in their email and join the meeting
- If the Waiting room is disabled (recommended), participants will enter the meeting automatically

Account Settings

- Before your first meeting, you need to setup your account
- You only need to set up your account once
- To setup your account or to make changes to your settings, sign in to your Zoom account at [Zoom.us](https://zoom.us)
- An example of your first page follows
- Click on Settings then page down to the settings you want

Page after logging in

[SOLUTIONS ▾](#)[PLANS & PRICING](#)[CONTACT SALES](#)[SCHEDULE A MEETING](#)[JOIN A MEETING](#)[HOST A MEETING ▾](#)

PERSONAL

[Profile](#)[Meetings](#)[Webinars](#)[Recordings](#)[Settings](#)

Click on
Settings



ADMIN

[> User Management](#)[> Device Management](#)[> Room Management](#)[> Account Management](#)[> Advanced](#)

When you join meetings and webinars hosted on Zoom, your profile information, including your name and profile picture, may be visible to other participants. Your name and email address will also be visible to the [account owner](#) and host when you join meetings or webinars on their account while you're signed in. The account owner and others in the meeting can share this information with apps and others.



Linda Guccione

Linda

[Edit](#)

Personal

Phone

Not set

[Add Phone Number](#)

Language

English

[Edit](#)

Time Zone

(GMT-4:00) Eastern Time (US and Canada)

[Edit](#)

Waiting Room - Not using

Security

Schedule Meeting

In Meeting (Basic)

In Meeting (Advanced)

Email Notification

Other

If you have been in a Zoom meeting, you probably got a message that the host would admit you soon.

To make it easier for the coordinator, you can let participants enter automatically so you don't have to admit them one by one. Set Waiting Room off.

Waiting Room



When participants join a meeting, place them in a waiting room and require the host to admit them individually. Enabling the waiting room automatically disables the setting for allowing participants to join before host.

If you are NOT using the Waiting Room

Make sure the following is set so phone users can enter:

If Waiting Room is enabled, phone-only users will be placed in the Waiting Room.

If Waiting Room is not enabled, phone dial-in only users will:

- ☒ Be allowed to join the meeting
- ☐ Be blocked from joining the meeting

Waiting Room - if you are using

If you prefer to use the Waiting Room, turn on Waiting Room in settings. As each participant clicks on their link, you will get a message on your screen to “Admit [participant name]”. Click on the message to allow the participant into the class.

The downside of this method is if you are using Share Screen and a late participant enters it can be difficult to admit them and you usually jump out of your place in the presentation. Also, it can get quite busy if several participants are joining at the same time. This is a good reason for setting a Co-host who can help admit participants (explained later).

Passcode

Security

Schedule Meeting

In Meeting (Basic)

In Meeting (Advanced)

Email Notification

Other

Embed passcode in invite link for one-click join



Meeting passcode will be encrypted and included in the invite link to allow participants to join with just one click without having to enter the passcode.

Audio Type

Security

[Schedule Meeting](#)

In Meeting (Basic)

In Meeting (Advanced)

Email Notification

Other

Audio Type

Determine how participants can join the audio portion of the meeting. When joining audio, you can let them choose to use their computer microphone/speaker or use a telephone. You can also limit them to just one of those audio types. If you have 3rd party audio enabled, you can require that all participants follow the instructions you provide for using non-Zoom audio.

- ☒ Telephone and Computer Audio
- ☐ Telephone
- ☐ Computer Audio

Sound on Entry

Security

Schedule Meeting

In Meeting (Basic)

In Meeting (Advanced)

Email Notification

Other

If this is left on, each time someone enters or leaves the class, a sound will chime. This can be very annoying and disruptive. To avoid that, make sure it is set to off.

Sound notification when someone joins or leaves



Chat

Security

Schedule Meeting

In Meeting (Basic)

In Meeting (Advanced)

Email Notification

Other


The Chat feature allows participants to communicate via messages to all participants or to individual participants


Chat



Allow meeting and webinar participants to send chat messages

By default, allow participants to chat with

Everyone and anyone direc...  

☒ Allow users to save chats from the meeting 

☐ Host and co-hosts  ☒ Everyone

Private chat



Allow meeting participants to send direct messages to other participants and allow webinar panelists to send direct messages to other panelists.

Co-host - Allow and Set

Security

Schedule Meeting

In Meeting (Basic)

In Meeting (Advanced)

Email Notification

Other

A Co-host can be any participant assigned that role by the host (coordinator). If you have a co-coordinator, they should be assigned as co-host. If you have a participant who is willing to help you with Zoom, they should be assigned as co-host. You are not required to have a Co-host, but it can be useful. They can help admit people for one thing.

Co-host

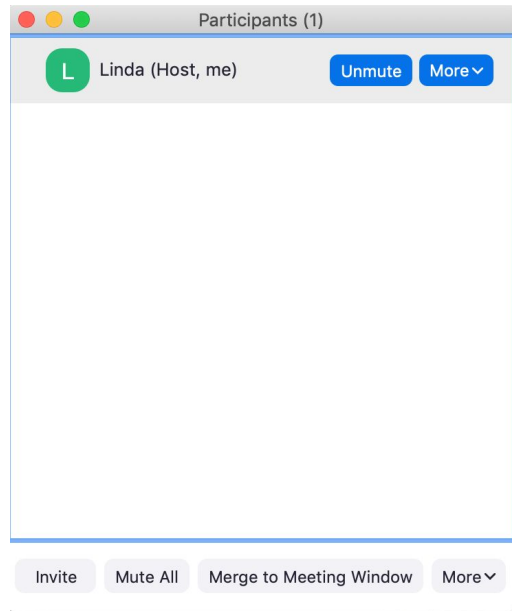
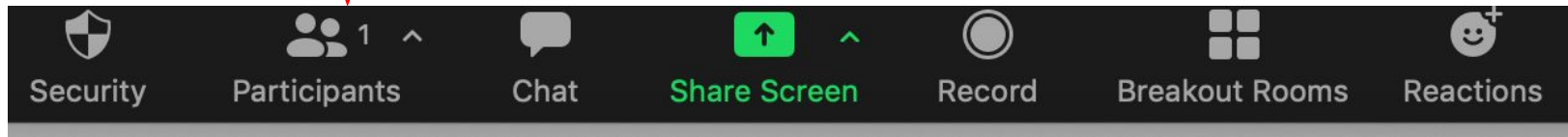


Allow the host to add co-hosts. Co-hosts have the same in-meeting controls as the host.

Set Co-host during meeting

Hover over name to get the More button

Click on Participants, go to name of participant, click More and choose **Make Co-Host**



Screen Sharing

Security

Schedule Meeting

In Meeting (Basic)

In Meeting (Advanced)

Email Notification

Other

With Zoom, a participant can share the documents, videos, or slideshows on their computer screen with the other participants. The presenting participant uses the Share screen feature.

Screen sharing



Allow host and participants to share their screen or content during meetings

Who can share?

☐ Host Only ☒ All Participants 

Who can start sharing when someone else is sharing?

☒ Host Only ☐ All Participants 

Zoom screen icons



Security



Participants



Chat



Share Screen



Record



Breakout Rooms



Reactions

Meeting reactions - Emojis

Security

Schedule Meeting

In Meeting (Basic)


In Meeting (Advanced)

Email Notification

Other

Meeting reactions



Allow meeting participants to communicate without interrupting by reaction with emojis (e.g. clap, heart, laugh). These emojis are found in the Reactions menu in the toolbar, and when selected, they display on the participant's video and in the participants list for 10 seconds. Participants can change their emoji skin tone in Settings. 

☒ All emojis 

☐ Selected emojis      

Participants rename themselves

Security

Schedule Meeting

In Meeting (Basic)

In Meeting (Advanced)


Email Notification

Other

This is the name that appears on the Zoom screen.

Allow participants to rename themselves



Allow meeting participants and webinar panelists to rename themselves. 

Virtual Backgrounds

Security

Schedule Meeting

In Meeting (Basic)

In Meeting (Advanced)

Email Notification

Other

Virtual background



Customize your background to keep your environment private from others in a meeting. This can be used with or without a green screen.



Allow use of videos as virtual backgrounds 

What we will cover next

That completes the account setup. Now we will cover:

Schedule a Meeting

Invitation to a Meeting

Email Invitation (link) to Participants

Start a Meeting

Schedule a Meeting

- Ahead of time, make an email contact list of your participants so you don't have to type the addresses one at a time.
- Go to Zoom.us and log into your account
- Schedule the meeting for the date and time needed
- You will see an invitation on-screen.
- Make a copy of the invitation
- Copy the invitation into the email you will send your participants

Schedule a Meeting

SCHEDULE A MEETING

JOIN A MEETING

HOST A MEETING ▾




At the top right of your computer screen, click on SCHEDULE A MEETING

My Meetings > Schedule a Meeting

Topic

Description (Optional)

When  ▾ ▾

Duration ▾ hr ▾ min

Time Zone

☐ Recurring meeting

DO NOT USE RECURRING MEETING

Schedule a Meeting

page 2

Registration

☐ Required

Meeting ID

☒ Generate Automatically ☐ Personal Meeting ID 909 895 1130

Security

☒ Passcode 

517118

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

☐ Require authentication to join

Video

Host ☐ on ☒ off

Participant ☐ on ☒ off

Audio


☐ Telephone ☐ Computer Audio ☒ Both

Dial from The United States [Edit](#)

Schedule a Meeting

page 3

Meeting Options

- ☒ Allow participants to join anytime
- ☐ Mute participants upon entry 
- ☐ Automatically record meeting
- ☐ Approve or block entry for users from specific countries/regions

Alternative Hosts

Enter user name or email addresses

Save

Cancel

Invitation

When you click
Save, you will get
an invitation

To make a copy of
the invitation to
send to participants,
click on Copy
Invitation

You will get another
window with the
invitation to copy

[My Meetings](#) > Manage "My Meeting"

Start this Meeting

Topic

My Meeting

Time

Sep 21, 2021 10:00 AM Eastern Time (US and Canada)

Add to

 Google Calendar

 Outlook Calendar (.ics)

 Yahoo Calendar

Meeting ID

852 0205 9836

Security

✓ Passcode

[Show](#)

× Waiting Room

× Require authentication to join

 [Copy Invitation](#)

Invite Link

<https://us02web.zoom.us/j/85202059836?pwd=U1lWbmlwTDFvYytuQ2R6aXNTMmkyUT09>

Video

Host

Off

Participant

Off

Audio

Telephone and Computer Audio

Dial from The United States

Meeting Options

× Allow participants to join anytime

× Mute participants upon entry 

× Automatically record meeting

× Approve or block entry for users from specific countries/regions

Start

Edit

Delete

Save as Template

Click on
Copy Invitation

Invitation to Send to Participants

Copy Meeting Invitation

Meeting Invitation

Linda is inviting you to a scheduled Zoom meeting.

Topic: My Meeting

Time: Sep 21, 2021 10:00 AM Eastern Time (US and Canada)

Join Zoom Meeting

[https://us02web.zoom.us/j/85202059836?](https://us02web.zoom.us/j/85202059836?pwd=U1lWbmlwTDZvYituQ2R6aXNTMmkyUT09)

[pwd=U1lWbmlwTDZvYituQ2R6aXNTMmkyUT09](https://us02web.zoom.us/j/85202059836?pwd=U1lWbmlwTDZvYituQ2R6aXNTMmkyUT09)

Meeting ID: 852 0205 9836

Passcode: 517118

One tap mobile

+13017158592,,85202059836#,,,,*517118# US (Washington DC)

+13126266799,,85202059836#,,,,*517118# US (Chicago)

Dial by your location

+1 301 715 8592 US (Washington DC)

+1 312 626 6799 US (Chicago)

+1 646 558 8656 US (New York)

+1 253 215 8782 US (Tacoma)

Click here to make copy of invitation



Copy Meeting Invitation

Cancel

Start a meeting

At Zoom.us
Login to your
account.

Click on
Meetings

You will see a
list of meetings
you have
scheduled

The screenshot displays the Zoom.us web interface. The top navigation bar includes links for 'REQUEST A DEMO', '1.888.799.5926', 'RESOURCES', and 'SUPPORT'. Below this, the 'zoom' logo is followed by 'SOLUTIONS', 'PLANS & PRICING', and 'CONTACT SALES'. On the right, there are buttons for 'SCHEDULE A MEETING', 'JOIN A MEETING', and 'HOST A MEETING', along with a user profile icon.

The left sidebar is divided into 'PERSONAL' and 'ADMIN' sections. Under 'PERSONAL', the 'Meetings' option is highlighted with a blue bar and a red arrow. Other options include 'Profile', 'Webinars', 'Recordings', and 'Settings'. The 'ADMIN' section includes 'User Management', 'Device Management', 'Room Management', 'Account Management', and 'Advanced'.

The main content area is titled 'Meetings' and features tabs for 'Upcoming', 'Previous', 'Personal Room', and 'Meeting Templates'. A filter bar shows 'Start Time' to 'End Time' with a calendar icon. A 'Schedule a Meeting' button is in the top right. The list of meetings shows two entries for 'My Meeting': one for 'Today' (10:00 AM - 11:30 AM, Meeting ID: 867 3366 0639) and another for 'Tue, Sep 21' (10:00 AM - 12:00 PM, Meeting ID: 852 0205 9836).

Start a Meeting

Put cursor on the meeting you want and the Start button will appear

zoom SOLUTIONS ▾ PLANS & PRICING CONTACT SALES SCHEDULE A MEETING JOIN A MEETING

PERSONAL

- Profile
- Meetings**
- Webinars
- Recordings
- Settings

ADMIN

- > User Management
- > Device Management
- > Room Management
- > Account Management
- > Advanced

Meetings

[Upcoming](#) [Previous](#) [Personal Room](#) [Meeting Templates](#)

Start Time to End Time

Today

10:00 AM - 11:30 AM	My Meeting Meeting ID: 867 3366 0639	Start Edit Delete
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Tue, Sep 21

10:00 AM - 12:00 PM	My Meeting Meeting ID: 852 0205 9836	
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Save time by scheduling your meetings directly from your calendar.