HOW TO START AND RUN A ZOOM MEETING FOR THE FIRST TIME

A GUIDE FOR NEWBIES (OR "OLDIES" NEEDING A REFRESHER)



A publication of the Evolution Foundation www.facebook.com/OKevolutionfoundation

Introduction

This modern plague we are enduring has turned our existence upside down, forcing (or encouraging) us to rethink virtually everything we do. The dynamics of conducting our coalition meetings are no exception. Face-to-Face meetings are no longer the norm, and will not be for the near future, at least.

It is quite possible that this current limbo we are experiencing could last for months, even years. If community coalitions are to survive, even thrive, and continue as relevant partners in shaping community-based strategies to counteract the cascade of woes that are raining down on us, we need to change the way we communicate in our coalitions, because communication is more important now than ever before.

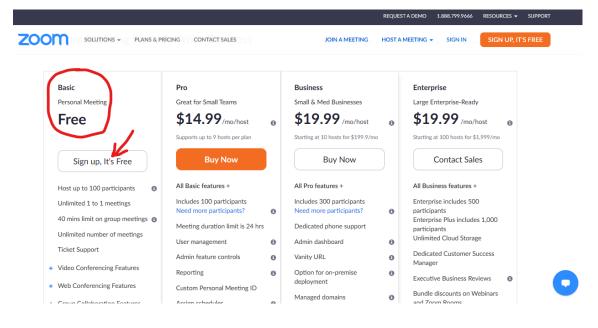
I suggest that coalition facilitators consider using a video teleconferencing platform as an alternative to face-to-face meetings. There are a number of free applications on the market today, including Cisco Webex, Monday, Google Hangouts Meet, Microsoft Teams, and Zoom Basic. I personally prefer the Zoom platform for its ease of use.

There are dozens of free live trainings, recorded trainings, webinars, YouTube videos, etc. that will cover all of the ins and outs and nuances of Zoom use, so I am not going to provide any sort of primer here. What I am going to provide is a straightforward path to scheduling your first Zoom meeting. This will take about five minutes and requires 11 steps.

Jeff Tallent, Executive Director, Evolution Foundation

Part 1: Set Up Your Account

Step 1: Go to <u>https://zoom.us/pricing</u> in your computer's browser. Click on the "Sign Up" button. It's free. Notice what you get with this free account. You can host up to 100 participants at your meetings, and you can have an unlimited number of meetings. The downside to this free account is that your meetings are limited to 40 minutes. If you are planning a coalition or committee meeting that will last longer than that, contact the Evolution Foundation and we can host your meeting for you with our Pro Account.



Step 2: Create an account and sign in. You know how to do this. Put in your email address and create a password.

						REQUEST A DEMO	1.888.799.9666	RESOURCES 🕶	SUPPORT
zoom	SOLUTIONS -	PLANS & PRICING	CONTACT SALES		JOIN A MEETING	HOST A MEETING 👻	SIGN IN	SIGN UP, IT	'S FREE
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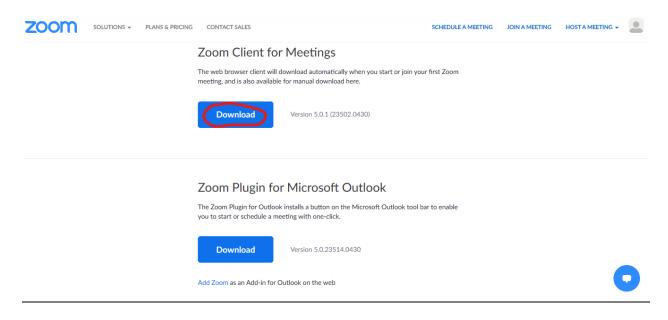
Step 3: Take a look at your home page. Obviously, yours won't have Jeff Tallent's name. It will have yours! The "Settings" link in on the far left under "Personal" can be used to establish your meeting profile preferences at a later date. Don't worry too much about those right now.

	SOLUTIONS - PL	ANS & PRICING CONTACT SALES	SCHEDULE A MEET	ING JOIN A MEETING	HOST A MEETING -
PERSONAL					
Profile			Jeff Tallent		Edit
Meetings			Account No. 116382584		
Webinars					
Recordings		Change			
Settings		Personal Meeting ID	***-***-*43* Show		Edit
			https://us02web.zoom.us/j/******431 Show		
ADMIN			\times Use this ID for instant meetings		
> User Management		Sign-In Email	jef***@aol.com Show		Edit
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		Capacity	Meeting 100 😡		

Scroll to the bottom of your home page. Find the 2nd column with the heading "Download." Right beneath the heading is the "Meetings Client" button. Click on it.

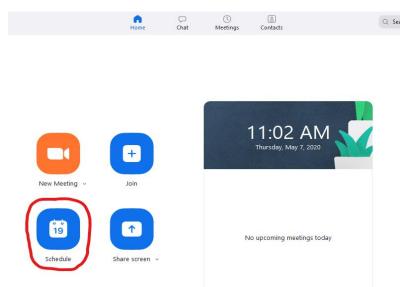
zoom	SOLUTIONS - PLANS &	PRICING CONTACT SALES		SCHEE	OULE A MEETING	JOIN A MEETING	HOST A MEETING 👻	
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	Customers Our Team	Zoom Rooms Client Browser Extension	Contact Sales Plans & Pricing	Account Support Center				
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	Press							
	Media Kit							

Step 4: Download the "Zoom Clients for Meetings." By clicking on the "Download button," Zoom will load the necessary software for running meetings on your computer. This step should also place a "Zoom" app on your desktop or wherever your apps tend to go. The app will allow you quick access to setting up future meetings. Congratulations. Now you're ready to host your first meeting.



Part 2: Start Your First Meeting

Step 5: Click to schedule your first meeting. If this screen does not appear after downloading the "Zoom Client for Meetings" then locate your Zoom app and click on it. When this screen is visible, click on the "Schedule" button.



Step 6: Schedule your meeting. Fill in the date and time for your first Zoom meeting and click the blue "Schedule" button. You will notice in the "Calendar" section of this screen shot, just above the "Schedule" button, you have three options (Outlook, Google Calendar, and Other Calendars). If you choose Outlook or Google Calendars, it will skip you to Step 8 of this tutorial. If you choose the "Other Calendar" option, you'll get a different screen which you'll see in Step 7.

Schedule Meeting

Duration: 1 hour Recurring meeting Time Zone: Central Time (US and Canada) ~ Meeting ID Generate Automatically Personal Meeting ID 649-126-1431 Password Require meeting password 134417 Video Host: On Host: On Off Participants: On Off Audio Telephone Computer Audio Dial in from United States Edit	торіс		
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Step 7: Open your default calendar. Let's assume that you chose "Other Calendars" in the step above. You should now see this screen that gives you two choices. If you choose the "Open with a default calendar" it will take you to a screen where you can tell Zoom which calendar program you are using. It will then use that calendar for the next step. On this screen you can also click "Copy to Clipboard" which simply allows you to copy and paste this information into an email without placing the event on your calendar.

🔋 Zoom - Schedule Meeting	×
Your meeting has been scheduled.	
Click the button below to copy the invitation to clipboard.	
Jeff Tallent is inviting you to a scheduled Zoom meeting.	
Topic: Jeff Tallent's Zoom Meeting Time: May 7, 2020 12:00 PM Central Time (US and Canada)	
Join Zoom Meeting https://us02web.zoom.us/j/82870861166? pwd=TnUyL2xGUTdPdzZ2ZnNzc1Y4RUkxQT09	
Meeting ID: 828 7086 1166 Password: 322415	
One tap mobile + 13462487799,,82870861166#,,1#,322415# US (Houston) + 16699009128,,82870861166#,,1#,322415# US (San Jose)	
Dial by your location +1 346 248 7799 US (Houston) +1 669 900 9128 US (San Jose)	
+ 1 253 215 8782 US (Tacoma) + 1 312 626 6799 US (Chicago)	
+1 646 558 8656 US (New York) +1 301 715 8592 US (Germantown)	
Open with default calendar (.ics) Copy to Clipboard	

Step 8: Invite your friends. Depending on your default calendar you will get a screen that looks something like this. This one is from Outlook. You will see something that says, "Required" or "Invite Someone" or something similar. This is the place you put in the email addresses of those you want to invite. You can invite up to 100 people with your basic membership.

Hint: For your first few meetings, I would suggest a limited number of invitees. This will allow you to work out any bugs with minimum embarrassment.

Your invitees do not have to have a Zoom account to participate in the meeting. However, they will need access to a computer, a smart phone, an iPad or something similar. Once you have put in all the necessary email addresses, click the "Send" button and your invitation is on its way.

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$\fbox{Cancel Meeting} \textcircled{T} Copy to My Calendar \textcircled{S} \checkmark \checkmark \swarrow \swarrow \fbox{Show As:} \fbox{Busy} \checkmark \textcircled{Reminder:} \fbox{None} \checkmark \fbox{Show As:} \r{Show As:}$								
(i) No responses have been received for this meeting.								
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Jeff Tallent is inviting you to a scheduled Zoom meeting.								
Topic: Jeff Tallent's Zoom Meeting								
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+12532158782,,85223982826#,,1#,423861# US (Tacoma)								
Dial by your location								

Step 9: Confirm your meeting is scheduled: Go to your calendar program and check to make sure the meeting is scheduled. Congratulations!

SUNDAY	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY
Apr 26	27	28	29	30	May 1	2
3	4	5	6	7 10:00am Jeff Tallent's Zoom Meeting	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30
31	Jun 1	2	3	4	5	6
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Step 10: Return to your Zoom home page. Click on the "Meetings" button and you should see your scheduled meeting listed under "Upcoming Meetings."

	PLANS & PRICING CONTACT SALES		SCHEDUL	A MEETING JOIN A MEETING	HOST A MEETING -
PERSONAL	Upcoming Meetings	Previous Meetings	Personal Meeting Room	Meeting Templates	Get Training
Profile Meetings	Schedule a New Meeting				Recently Deleted
Webinars					
Recordings	Start Time 💠	Topic ¢		Meeting ID	
Settings	Today 10:00 AM	Jeff Tallent's Zoom I	Meeting	852-2398-2826	Start Delete

Step 11: Start your meeting. On the day of the meeting, and shortly before the scheduled time, return to the home page once more. Click on the "Meetings" tab. Find your scheduled meeting in the listings and click the "Start" button. Your meeting will begin.

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PERSONAL	Upcoming Meetings	Previous Meetings	Personal Meeting Room	Meeting Templates	Get Training
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Webinars	Start Time 💠	Topic ÷		Meeting ID	
Recordings Settings	Today 10:00 AM	Jeff Tallent's Zoom	n Meeting	852-2398-2826	Start Delete

Conclusion

You're on your way, and you know enough now to schedule and start a meeting. Your next goal is to become proficient in all the features of Zoom. That sounds more daunting than it really is. The Zoom interface is user friendly. I encourage you to start a meeting and invite one good friend to do a little practice. Once on the meeting, explore all the buttons and features. You'll figure them out pretty quickly. If you want more tutorials check out the Zoom video tutorials produced by Zoom (<u>Click Here</u>). My favorite from Zoom is called "Zoom Meeting Controls" (<u>Click Here</u>). It walks you through all the basics of the Zoom interface.

If that's not enough, check out the hundreds of videos on YouTube related to Zoom (<u>Click Here</u>). Several are pretty good. Good luck. You can do this!

We have more guides for you and your coalition.

Check out our other

Newbie Manuals