



# Zoom

## Schedule and Host Staff Meetings

This guide covers how to schedule Zoom meetings, send meeting invitations, and host meetings; from the perspective of a supervisor conducting staff meetings. If you’ve not yet logged in to your Zoom account, begin with the *Activating Your Zoom Account Quick Start Guide*. Using Zoom on your computer or laptop is strongly recommended, however, the instructions for using the Zoom Cloud Meetings app on a mobile device are also included.

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**Note:** If you are accessing Zoom from a remote location, be sure to run it off the browser on your local computer or mobile device for the actual meeting. **Do not remote in to your CMHA-CEI desktop and then use the browser on your remote session.**

### Webcam, Speakers or Headphones, and a Microphone

To use Zoom on a computer, you must have an internet connection, be able to access your CMCHA-CEI email account, and have a computer or laptop with a working webcam (for video), speakers or a set of headphones, and a microphone. A separate set of headphones, preferably with a built-in microphone are helpful for better sound. If you do not have this equipment, you will need to use a mobile device. Instructions for using Zoom on a mobile devices start on page 8.

## Zoom Accounts

Most staff members have a “Basic” Zoom account, which limits the meetings they initiate to 40 minutes when there are more than three people in attendance. Basic Zoom accounts have *no* time limit when only two people are in a meeting, such as during one-on-one staff meetings, or telehealth sessions. Some staff members have a “Licensed” or Host account. Meetings hosted using these accounts allow up to 100 attendees with no time limit. The IS Department is working with Programs to determine which staff members will receive a Licensed Zoom Account.

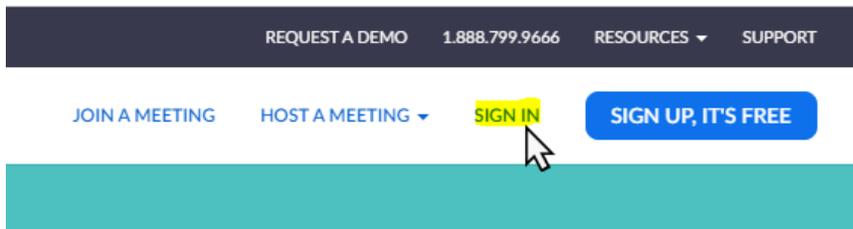
## Zoom Meetings from a Computer or Laptop

### Schedule a Zoom Meeting – Computer / Laptop

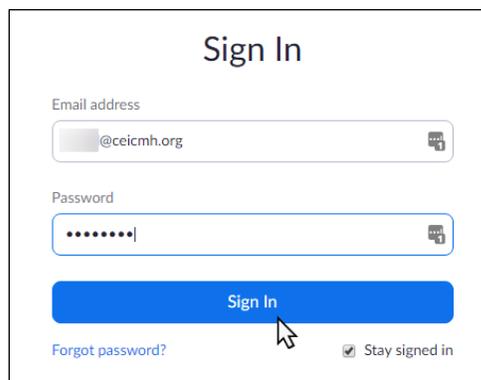
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#### 1. Sign in to Your Zoom Account

On your computer, open **Chrome** and go to the URL <https://www.zoom.us>. (See *Note* above regarding using your local web browser.) Click the “**Sign In**” link at the top right of the page.

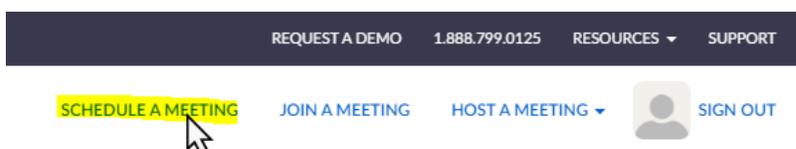


Enter your Zoom credentials, and click the “**Sign In**” button. **Remember that your Zoom password should not be the same as your CMHA-CEI password.**

A screenshot of the Zoom 'Sign In' form. The form has a white background and a dark blue header with the text 'Sign In'. Below the header, there are two input fields: 'Email address' and 'Password'. The 'Email address' field contains '@ceicmh.org'. The 'Password' field contains a series of dots. Below the input fields is a blue 'Sign In' button. At the bottom left of the form, there is a link for 'Forgot password?'. At the bottom right, there is a checkbox labeled 'Stay signed in' which is checked. A mouse cursor is pointing at the 'Sign In' button.

#### 2. Create a Scheduled Meeting

- a. After logging in, at the top right side of your Zoom Profile page, click on “**SCHEDULE A MEETING.**”



- b. Complete information in the following fields:
- i. **Topic** – A brief description of the meeting’s purpose.
  - ii. **When** – The date and start time of the meeting. You may schedule meetings for the same day or any day in the future.
- c. **Duration** – The expected length of the meeting. If your meeting is one-on-one, or you are scheduling with a “Licensed” or “Host” account, it is recommended to set the duration a little longer than actually expected to allow for meeting overages. If you have the “Licensed” Zoom account, you will see an orange text box below “duration,” informing you of the time limit for meetings with three or more people.

The screenshot shows the Zoom 'Schedule a Meeting' page. The 'Topic' field contains 'Wednesday Staff Meeting'. The 'When' field is set to '03/18/2020' at '9:00 AM'. The 'Duration' is set to '0 hr 45 min'. An orange warning box below the duration field states: 'Your Zoom Basic plan has a 40-minute time limit on meetings with 3 or more participants. Upgrade now to enjoy unlimited group meetings. Contact Info Services Department. Do not show this message again.' A callout box points to this warning with the text: 'If this box does NOT appear, you have a "Licensed" account and these limits do not apply.' The 'Meeting ID' field has 'Generate Automatically' selected, but a callout box points to the 'Personal Meeting ID 810-311-1823' with the text: 'You may choose to use the same Meeting ID for all meetings.' Other fields include 'Meeting Password' (Require meeting password), 'Video' (Host on, Participant on), 'Audio' (Both selected), and 'Meeting Options' (Enable join before host checked).

The rest of the options are set by default and should not need to be changed. However, you may choose to use the Personal Meeting ID for all meetings. This may help attendees because they won’t have to look for the invitation each time there’s a meeting. They would just need to know the Meeting ID and could log on the Zoom and join.

- iv. **Alternative Hosts** – If you are scheduling this meeting on behalf of another staff member who is expected to be the host, please enter their email in the alternative hosts field.

Alternative Hosts

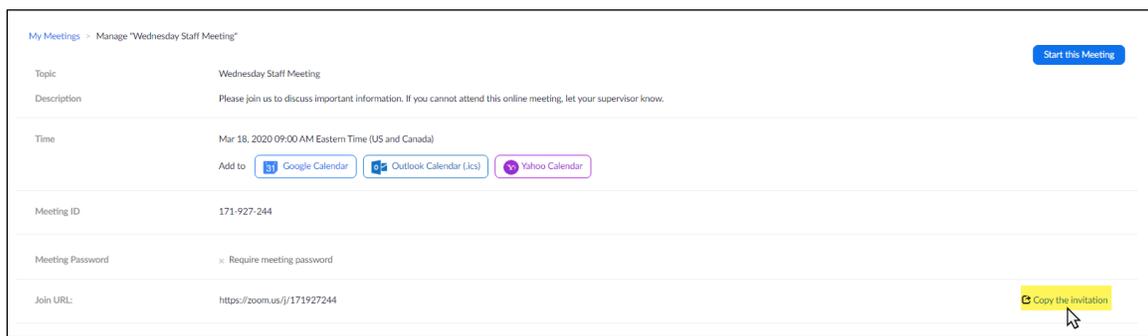
Example: mary@company.com, peter@school.edu

- c. After entering the topic, date, time, duration of your meeting, as well as an alternative hosts (if applicable), scroll to the bottom of the page and click “**Save**”.

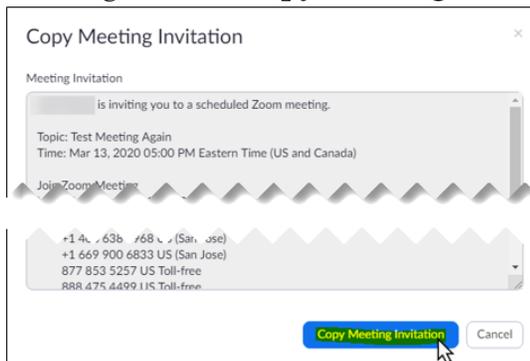
After saving, you will be taken to the manage meeting screen, from here you will be able to either “**Start this Meeting**” to launch it immediately, or “**Copy the invitation**” to email attendees. *Note:* You will not need to manually start the meeting, it will automatically start at the set date and time once the creator, or other designated host joins.

## Invite Attendees to the meeting – Computer / Laptop

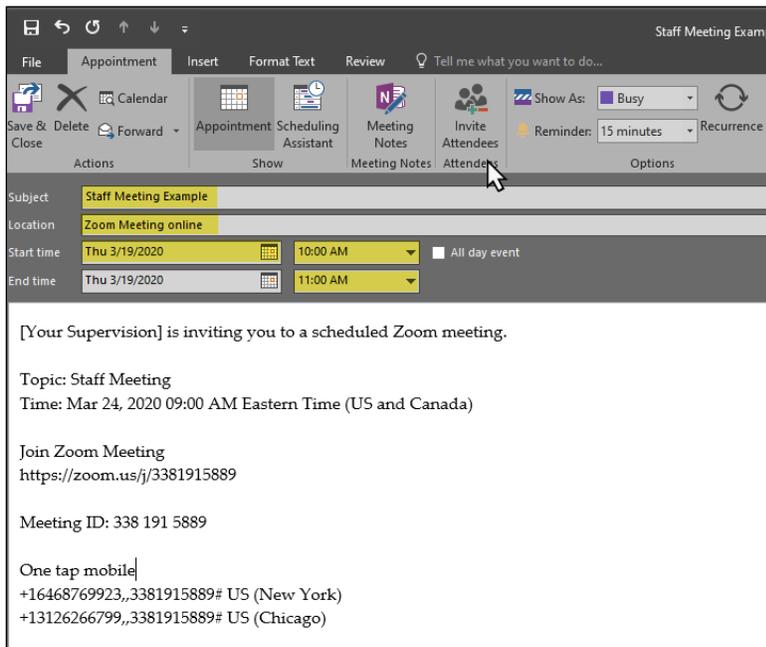
1. Click on “**Copy the invitation,**” on the right hand side of the Zoom meeting page.



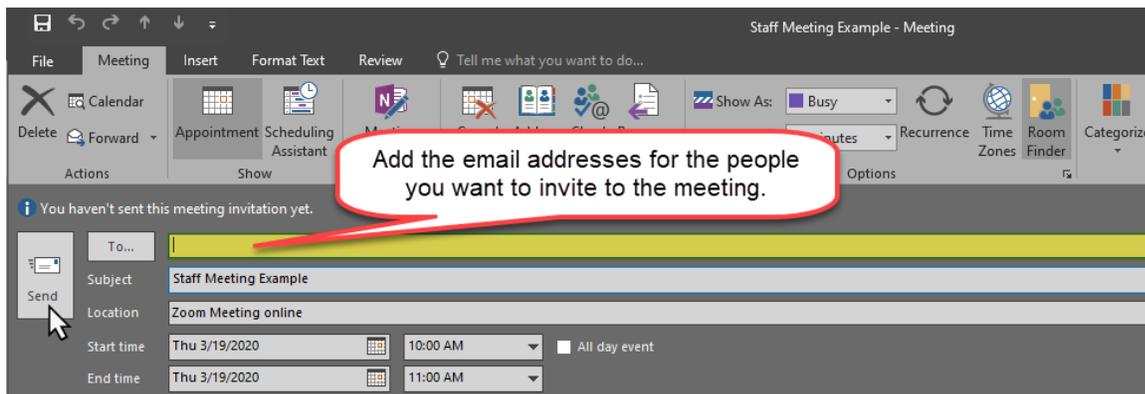
2. This opens a pop-up window with all the information others will need to join the Zoom meeting. Click “**Copy Meeting Information**” to copy the information to your clipboard.



3. It is strongly recommended that Zoom staff meetings be sent to employees as an Outlook calendar entry. To do so, open your CMHA-CEI *Outlook* > *Calendar* and create a new *Appointment*. Complete the Subject, Location, Start Time and End Time for the appointment (same as the Zoom meeting). In the **body** of the Appointment, **right click** and select **paste**. The contents of the Zoom Meeting Invitation will be pasted into the body of the Calendar Appointment.



4. Click “**Invite Attendees,**” and add the intended recipients, as well as any alternative hosts you have defined, in the “**To:**” field. Be sure the *Subject* informs recipients about the Zoom meeting and purpose. Click “**Send.**”



*Note:* This guide is specifically for staff meetings so you do not need to send these from the generic ZoomInvite@ceicmh.org email.

## Host the Meeting – Computer / Laptop

1. **Start the Meeting** – As the meeting host, plan to launch the meeting 10-15 minutes before the scheduled start time. This allows you to test your webcam and audio features, as well as be able to greet attendees when they join the meeting.
  - a. **Login to your Zoom account.** Locate the meeting in the **Upcoming Meetings** list. Click “**Start**” on the right hand side of the screen.



Once you are running Zoom, you will be prompted to **“Join with Computer Audio.”** Do NOT use the Phone Call option.

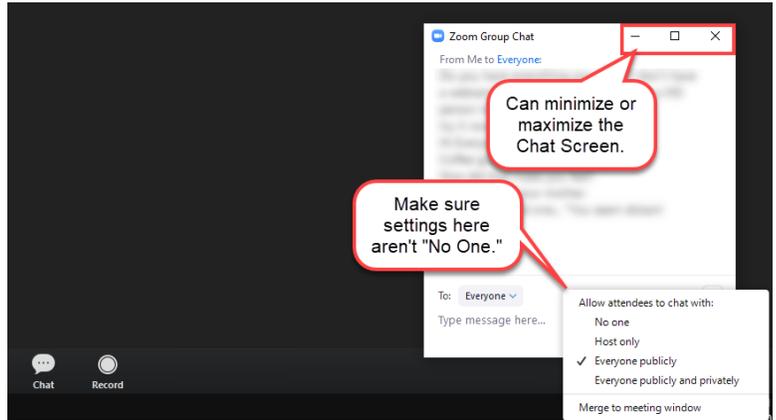
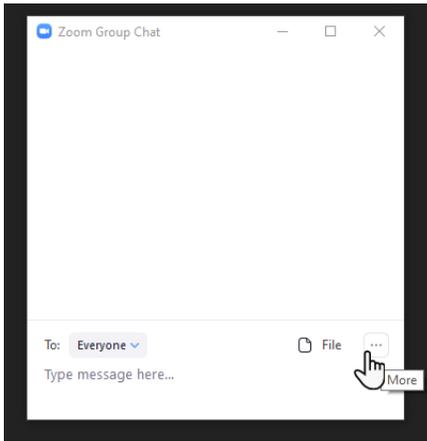
- b. **Test Audio/Video** – Audio and speaker controls are on the bottom left of the Zoom screen. You may test your speaker and microphone following the instructions as they appear on the screen.



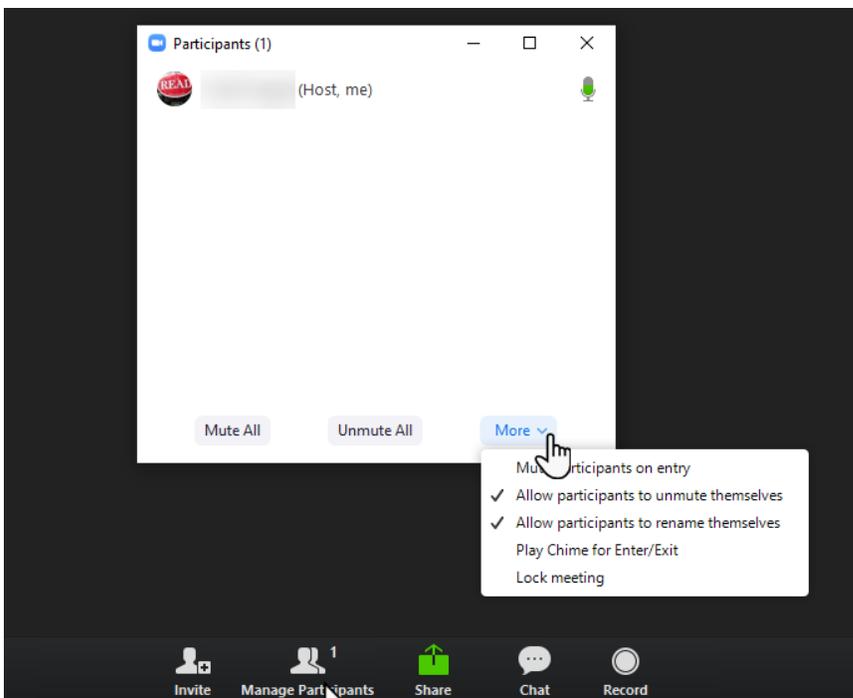
- c. **Manage Audio/Video, e.g. Mute, volume etc.** – You may start/stop video and/or Mute/UnMute audio following the instructions as they appear on the screen.
- d. **Share** – Click on **“Share”** to show your screen with all of the meeting participants.
- e. **Chat** – Chat is a way to enable attendees to participate even when they do not have a microphone. The Chat function can be access by clicking the icon on the bottom of the screen. For larger meetings, it is advisable to deputize someone to monitor the chat on behalf of the host.



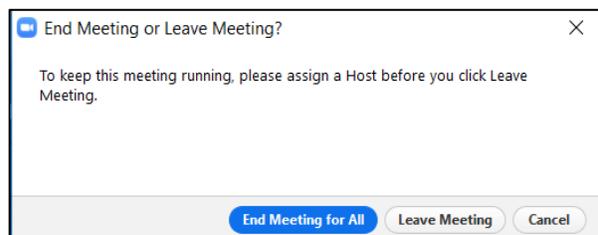
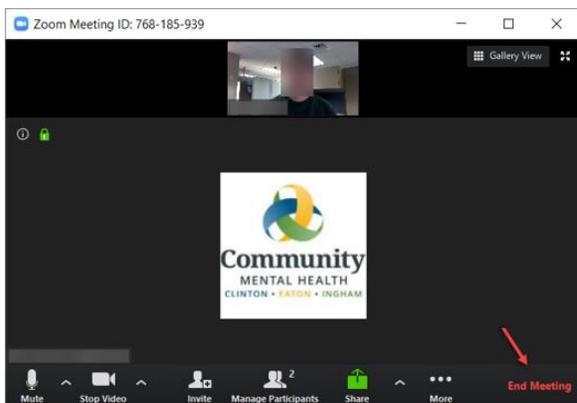
**Chat Settings** – The Host does need to set the chat permissions for the meeting. Click the three ellipses on the bottom right of the Chat window to access the permissions dropdown menu shown below.



- f. **Participants** – Click the “**Manage Participants**” button in the Zoom Host Controls on the bottom of the screen to see who has joined the meeting. From this pop-up window, you can see your attendees names and explore options by hovering over “**More...**”



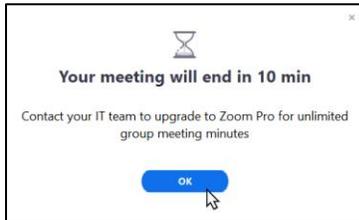
- g. **End the Meeting** – When the meeting is over, click “**End Meeting**” at the bottom right hand of the screen, Then “**End Meeting for All.**”



## Time Limit for Basic Accounts

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If you are hosting a meeting using a Basic Zoom account and there are three or more participants in the meeting, you will receive a 10- minute warning message. Click “OK.” If you need to continue your meeting, follow the instructions to schedule and start another meeting. Be sure to send an invitation, or at least let your meeting attendees know the meeting ID so they can join.



## Zoom Meetings from a Mobile Device

If using a computer or laptop for your Zoom meeting is not an option, follow are instructions for scheduling and hosting a Zoom meeting via a mobile device.

### Install the Zoom App on Your Mobile Device

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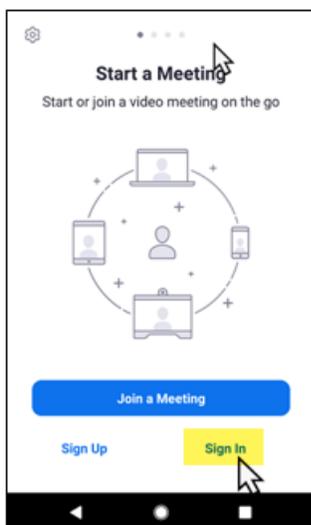
Before using Zoom on a mobile device for the first time, you must download and install the app:

1. Go to the Play Store (Android) or App Store (Apple) and search for: ZOOM Cloud Meetings.
2. Install the application.

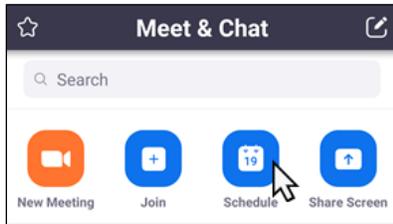
### Schedule a Zoom Staff Meeting - Mobile Device, Zoom Cloud Meetings app

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1. On your mobile device, open the Zoom app.  Tap “Sign In” and sign in with your credentials. Remember that your Zoom password should not be the same as your CMHA-CEI password.



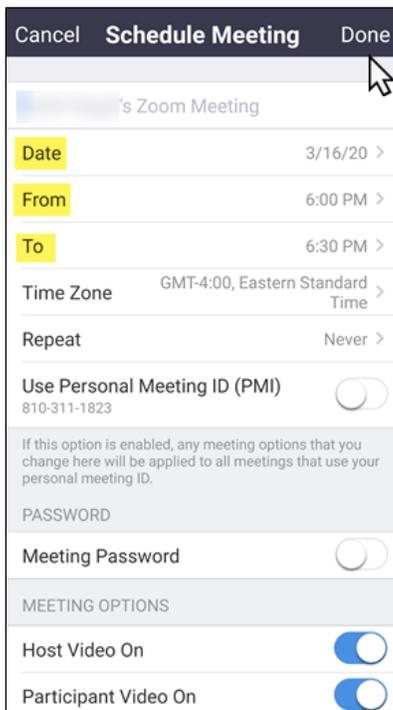
2. **Schedule** – Once you’ve installed and signed in to the app, the Meet & Chat Screen will open automatically the next time you open the app. Tap **“Schedule.”**



- a. Complete information in the following fields:

- i. **Title of Meeting**
- ii. **Date, From, and To** – Enter the date and start time of the meeting.

The rest of the options are set by default and should not need to be changed. You may wish to use the Personal Meeting ID so all of your meetings have the same ID number.

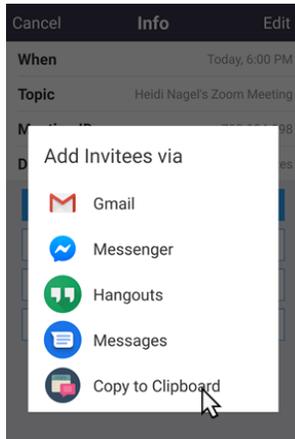


- b. Tap **“Done”** in the top right hand corner. You will be taken to the manage meeting summary. From here you will be able to manually start the meeting, invite attendees, or edit any previously configured settings for the meeting.

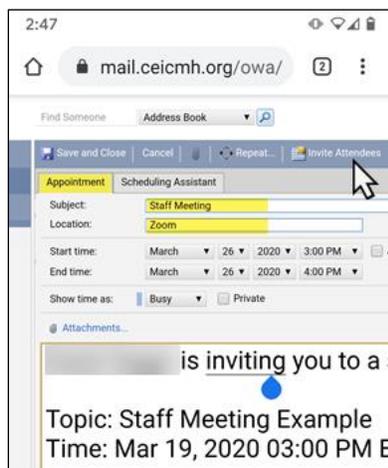
## Invite Attendees from the Zoom App

1. After scheduling the meeting, tap **“Invite Attendees,”** to receive the prompt below. Tap **“Copy to Clipboard.”**

*Note:* You may not want to allow Zoom to access your calendar as this is likely to be your personal calendar. Be certain that you are sending staff meeting invites from your work email.



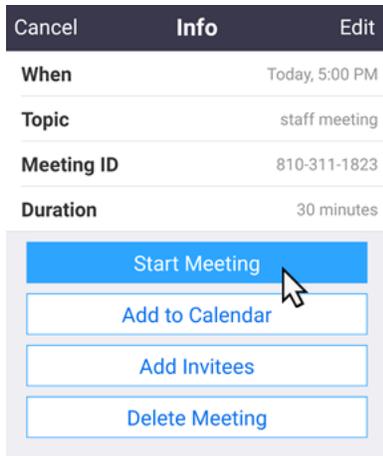
2. Open **Outlook (web access) > Calendar** and create a **New Appointment**. Complete the Subject, Location, Start Time, and End Time.
3. Tap **“Invite Attendees.”** Add the intended recipients, as well as an alternative host, in the **“To:”** field.



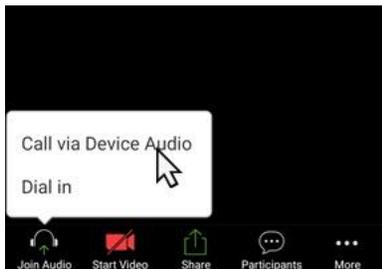
4. In the **body** of the email, use your device feature to **paste from the clipboard**. The contents of the invitation will be pasted into the body of the email. Add any additional information you would like. Tap **“Send.”**

## Host a Zoom Meeting – Mobile Device, Zoom Cloud Meetings app

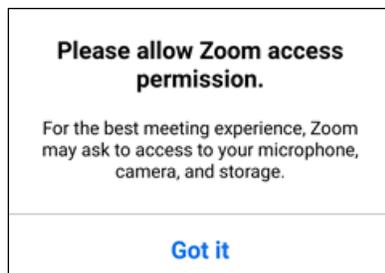
1. **Start the meeting** – In the Zoom app, you will get an Info screen when there's a meeting scheduled. From here tap **"Start Meeting."**



2. Zoom will open the meeting home screen. Hold your finger where you see **"Join Audio"** on the bottom left of your screen. Then tap on **"Call via Device Audio."**



3. **Audio/Video** – Remember it is necessary to allow Zoom permissions to access your phone, microphone, and storage.

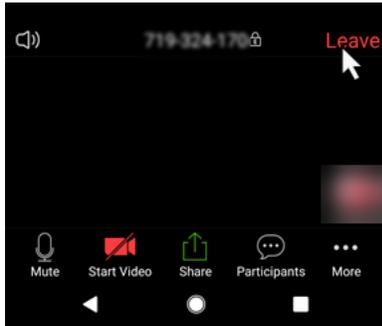


4. The icons on the bottom of your screen correspond to those described on p. 6.



- **Mute/Unmute** – As shown, the device is not Muted. Use the volume up/down buttons on your device to adjust the audio volume.
- **Start/Stop Video** – As shown video is OFF.
- **Share, Participants,** and tap on “... **More**” to access **Chat**.

5. **End/Leave the Meeting** – To end the meeting for all participants, tap “Leave” on the top left of your screen.



If you need assistance, please contact Helpdesk at [helpdesk@ceicmh.org](mailto:helpdesk@ceicmh.org), or (517) 346-8215