



## Online Meetings

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### Introduction

The Zoom software needed to attend an online meeting is free, but does require a download for a computer or an app installation for a phone or tablet; software/app installation is not required but is recommended for the full meeting experience (see below).

It is possible to join some meetings by phone only, but you will need the dial-in phone number and meeting id for the meeting and possibly a password. If the host configures the meeting to allow phone-only dial-in, the meeting id and possible password should be supplied in the meeting invite or other posted meeting information.

The Zoom web site is <https://zoom.us> where the computer downloads are found. The same site allows the creation of an account, which is needed to host a meeting. It is possible to host meetings from a free account, but there are limitations to the duration of the meeting and the number of attendees. The

basic paid account starts at \$14.99 per month. Online help within the Zoom site is available for both attending and hosting a meeting, as well as account setup. Basic instructions are shown below for each activity.

This document will probably not supply answers for all situations that could be encountered during the activities it covers. More detailed help is available on the Zoom web site in the form of Videos ([How To Videos & Zoom Video Tutorials](#)) and “Frequently Ask Questions” ([FAQ](#)). Additional help is available from the support menu for various common help topics. After account creation, the zoom account “home page” for the account also offers online training seminars from a link called “Get Training.” There is a lot of information on the web site, so this document will only cover the basics and recommendations for settings most often needed in our kind of meetings.

Further, there are many you-tube videos posted that provide instructions for both setting up Zoom meetings and joining a meeting (visit <https://www.youtube.com/> and search for “Zoom Meeting”). An example of a decent one is: <https://m.youtube.com/watch?v=fMUXzrgZvZQ>.

If needed, feel free to contact [webchair@aanorthport.org](mailto:webchair@aanorthport.org) by email for additional help, but it may be difficult to provide help in a timely manner; depending on the number of help requests. This document will be updated as we learn more about the issues encountered, so please submit any problem solutions, suggestions, or general feedback by email as well.

## Compute Software

To download computer software for joining and hosting a meeting; click on the Resources menu as shown below (from <https://zoom.us>); see further below for basic instructions to create an account.

The screenshot shows the Zoom website's header with several navigation links: REQUEST A DEMO, 1.888.799.966, RESOURCES ▾, and SUPPORT. Below the header, there are links for JOIN A MEETING and HOST A MEETING. A green banner message reads: "We have developed resources to help you through this challenging time. Click here to learn more." The main content area features the text "In this together. Keeping you connected wherever you are." A large red arrow points from the word "Resources" in the header to the "RESOURCES ▾" button. A second red arrow points from the "RESOURCES ▾" button to the open dropdown menu. A third red arrow points from the "RESOURCES ▾" button to the "HOST A MEETING" link. The dropdown menu itself contains the following items: Download Zoom Client, Video Tutorials, Live Training, Webinars and Events, Zoom Blog, and FAQ.

## Joining a Meeting from the Phone/Tablet App

The best way to obtain the phone/tablet app is to visit the Apple App Store for iPhone or Google Play Store for android and search for “Zoom”. The app is free to download and install.

Once the app is installed on the phone or tablet, it will automatically open when you click on the meeting link that will be provided by the host, although you may be presented with a choice and you have to pick the Zoon app. The first time, allow your device to use the device's audio.

In some cases, the meeting link will be included in the meeting details from the Intergroup web-site (<https://www.aanorthport.org/>) and/or the meeting app (the “Chair app” which is also available from the Apple App Store for iPhone or Google Play Store for android and search for “Meeting Guide”); usually a clickable link within the meeting or possibly in the Notes of the meeting.

If the meeting link is given by the host in a text or email, click on the link and the meeting app will open, prompting for further information, like your name (which will be shown to others in the meeting) and possibly a meeting id. If needed, a meeting id will be supplied with the link. Some meetings may also require a password to enter. Note that, there is a rename option after joining if you forget to use only last initial.

If the app is not installed before attempting to join the meeting, there will be options to download the app when you click on the meeting link. Click on “Join Meeting” to join without the app, but this option will show a web page that does not offer all the features within the meeting that are provided by the app. The app is recommended over this approach.

## App Updates

It is also important to keep the phone/tablet app up-to-date. Zoom releases fixes to security issues found in the app somewhat frequently. Like any other app, check for updates to the Zoom app often and apply any available updates from the Apple App Store for iPhone or Google Play Store for android.

## Joining a Meeting from a Computer

The diagram above showing the “Download Client Software” indicates the Resources menu item to “Download Client Software”. Clicking on this menu item opens the following page which is used to download the required computer software as shown:

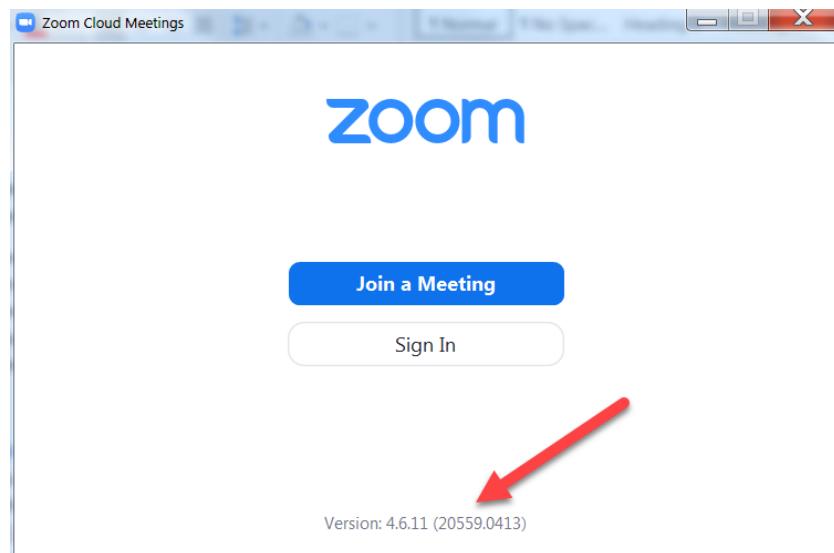
The screenshot shows the Zoom website homepage. At the top, there is a dark navigation bar with links for REQUEST A DEMO, 1.888.799.9666, RESOURCES ▾, and SUPPORT. Below the navigation bar, the Zoom logo is on the left, followed by SOLUTIONS ▾, JOIN A MEETING, HOST A MEETING ▾, SIGN IN, and a blue button labeled SIGN UP, IT'S FREE. A green banner at the top states, "We have developed resources to help you through this challenging time. Click here to learn more." An 'x' icon is in the top right corner of the banner. Below the banner, a message says, "The web browser client will download automatically when you start or join your first Zoom meeting, and is also available for manual download here." In the center, there is a large blue button with the word "Download" in white. A red arrow points to this "Download" button. At the bottom of the page, the text "Version 4.6.8 (19178.0323)" is visible.

After the software is installed, clicking on a meeting link will open a web page that will prompt to open the meeting software.

If the meeting link is given by the host in an email, click on the link and the meeting app will open in a web browser. After starting the meeting software, it may prompt for further information, like your name (which will be shown to others in the meeting) and possibly a meeting id. If needed, a meeting id will be supplied with the link. Some meetings may also require a password to enter. Note that, there is a rename option after joining if you forgot to use only last initial.

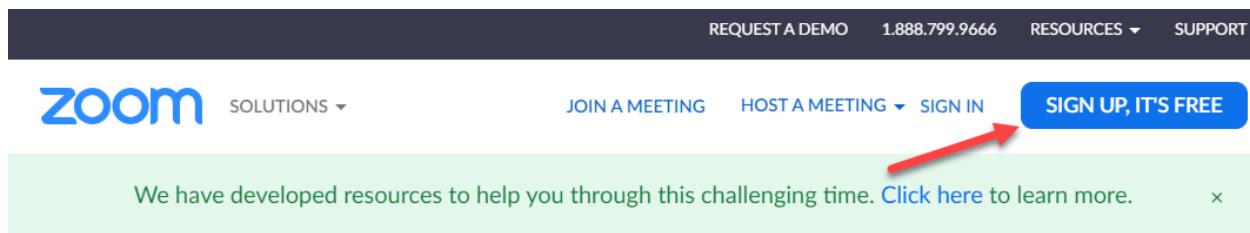
## Software Updates

It is also important to keep the up to date. Zoom releases fixes to security issues found in the app somewhat frequently. Check for and install updates often by visiting the downloads page at [https://zoom.us/download#client\\_meeting](https://zoom.us/download#client_meeting) and download the latest version in the same way the software was originally obtained (see above). The Zoom downloads page lists the latest available version next to the Download button. To obtain the version already downloaded, start the Zoom client and look at the bottom to see the version.



## Account Setup

Click on “SIGN UP, IT’S FREE” to create your free or paid account.



In this together.  
Keeping you connected

The user account requires an email address, which serves as the username, and a password must be provided that meets the posted requirements. Alternatively, the sign-in can be linked to a Google or Facebook account, which are not ideal in this user’s opinion. The email address approach also provides a communication mechanism for certain activities while hosting meetings. The instructions below assume the email approach. The account itself is free and the limitations are listed on screen.

A screenshot of the Zoom "Sign Up Free" registration page. The page has a header with "REQUEST A DEMO", "1.888.799.9666", "RESOURCES ▾", and "SUPPORT". Below the header, the Zoom logo and "SOLUTIONS ▾" are on the left, followed by "JOIN A MEETING", "HOST A MEETING ▾", "SIGN IN", and a "SIGN UP, IT'S FREE" button. The main form area is titled "Sign Up Free". It has a field labeled "Your work email address" containing "your.email@goes.here.com", with a red arrow pointing to it. Below the email field is a reCAPTCHA notice: "Zoom is protected by reCAPTCHA and the [Privacy Policy](#) and [Terms of Service](#) apply." At the bottom of the form is a large blue "Sign Up" button, also with a red arrow pointing to it. A small note below the button states: "By signing up, I agree to the [Privacy Policy](#) and [Terms of Service](#)." Below the form, there is an "or" separator and two social login buttons: "Sign in with Google" (with a Google icon) and "Sign in with Facebook" (with a Facebook icon).

Zoom then sends an email titled “Please activate your Zoom account” to the address given asking to confirm.

REQUEST A DEMO 1.888.799.9666 RESOURCES ▾ SUPPORT

**ZOOM** SOLUTIONS ▾ JOIN A MEETING HOST A MEETING ▾ SIGN IN SIGN UP, IT'S FREE



We've sent an email to [your.email@goes.here.com](mailto:your.email@goes.here.com).  
Click the confirmation link in that email to begin using Zoom.

- if you did not receive the email,
- [Resend another email](#)

If you do not receive the email, double check the email address on the screen, but note that it may take a few minutes for it to arrive. If incorrect, hit the back button and correct the email, else hit the “Resend another email” option. Once you have the email in your inbox, then click on “Activate Account” link.

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Welcome to Zoom!

To activate your account please click the button below to verify your email address:

**Activate Account**

By clicking this button, you confirm that you are at least 16 years of age.

This will open a new window asking for your information that is tied to the account; enter your name or group name as desired and choose a password for the account which must adhere to the password rules given on the screen. For an account that will be used for a particular “Group”, it is best to use the “Group Name” instead of your first and last name, because this will become the name used in the “Personal Meeting Room” later on to host a meeting. Click Continue when the data is entered.

Also, at this point, another email is sent titled “Welcome to Zoom!” to confirm that the account has been created successfully. This email includes an option to “Upgrade Now” which can be done later if needed (see below).

The next page allows invitations to other Zoom users, if desired, but can usually be skipped. The following page allows a “Test Meeting” by simply clicking on the “Start Meeting Now” button; which opens your “Personal Meeting Room” where you can begin to become familiar with the Zoom meeting features.

The other option will open a window to the newly created free account; click on “Go to My Account” after trying out the “Test Meeting”. With the free account, there will be a “pop-up” section near the bottom right of the screen indicating that the “basic plan” or free account has a limit of 40 minutes on meetings with 3 or more participants.

Click on “Upgrade Now” to see the options for a paid account, or close the “pop-up” if desired. Within the “Upgrade Page”, make sure to select the “Pro” option at the top. The others are far more expensive and probably not applicable for our type of meetings. To see the more complex option details, click on the “>” icon next to each of the “Available Add-ons”, but most of these options would probably not be needed. The pricing comparison page is <https://zoom.us/pricing>.

The basic \$14.99 per month “Pro” account is probably sufficient for most meetings and the payment does automatically charge a credit card each month until it is cancelled. Once the credit card is processed, another email titled “Welcome to Zoom Pro!” is sent to confirm that the upgrade was successful. This email includes links to helpful videos to help get started.

Note that a single account allows multiple meetings per day and per week; see the “Options for Hosting a Meeting” below or online help for limitations and detailed “how to” instructions.

## Options for Hosting a Meeting

Once an account is created, the same site (<https://zoom.us>) can be used to sign in, manage the account, and setup a meeting or meetings.

The screenshot shows the top navigation bar of the Zoom website. It includes links for REQUEST A DEMO, 1.888.799.9666, RESOURCES, SUPPORT, ZOOM SOLUTIONS, JOIN A MEETING, HOST A MEETING (with a dropdown arrow), SIGN IN, and SIGN UP, IT'S FREE. A red arrow points to the HOST A MEETING link.

To go straight to the login page, use this link: <https://zoom.us/signin> and use the email address and password used to create the account. The “home page” gives several options, including an initially hidden section to change settings. Click on the “>” at the far right in the “Meetings” heading near the top of the page. The most important settings are covered below in the “Common Settings Changed” section of this document.

The screenshot shows the main content area of the Zoom website. It features a “Meetings” section with links for Upcoming Meetings, Previous Meetings, Personal Meeting Room, Meeting Templates, and Get Training. Below this is a “Schedule a New Meeting” button. A red arrow points to a small blue square icon with a white “>” symbol located to the right of the “Meetings” heading.

The following sections provide a brief description of the types of meetings that can be created from either a paid or free account, followed by information specific to paid accounts.

### Personal Meeting Room

A “Personal Meeting Room” is simply a meeting that is always available with the same “meeting invite” information. It can be used at any time without scheduling ahead of time or setting meeting specific settings (it uses the default settings). It has a constant “Meeting Id” and password; if a password is applicable with the prescribed password setting.

### Scheduled Meeting

A “Scheduled Meeting” is just as the name suggests. It is created to start at a prescribed date and time and can be recurring. It has other features that separate it from the “Personal Meeting Room” in that it can have a custom “Meeting Name” and includes the ability to set certain settings just for the meeting/recurring meeting; possibly overriding the default settings. A “Scheduled Meeting” can be setup to use the “Meeting Id” of the “Personal Meeting Room.” The number of settings that can be adjusted during meeting creation increases with a paid account.

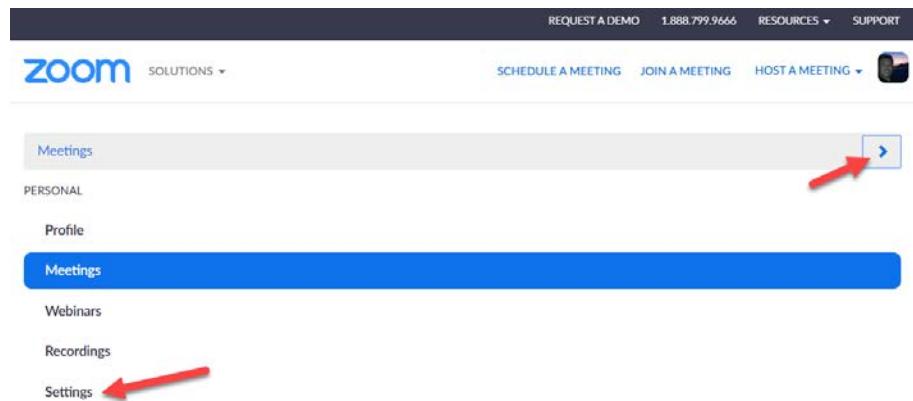
### Meeting Templates

A “Meeting Template” is a mechanism to store a set of meeting options to be used later to create more meetings with the same characteristics. Once a meeting has been created with the desired characteristics, you can edit the meeting and save it as a template. New meetings can then be created using the saved template. This option is only available for a paid account.

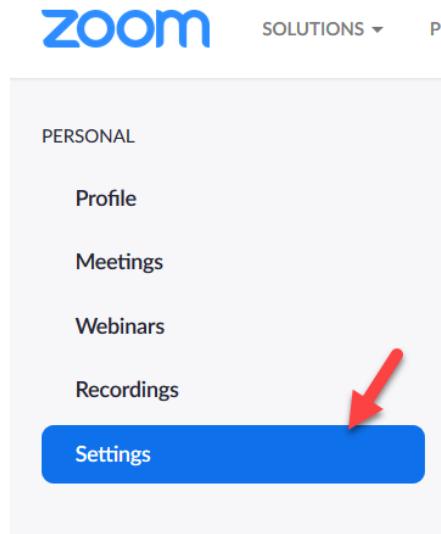
## Common Settings Changes

There are a great many settings available for a Zoom account that control how users will join a meeting and what can be done within a meeting. Some of these settings are of particular interest due to the nature of our meetings and our traditions. The flowing sections indicate known settings that should be controlled by the account owner.

To view the settings from a free account, expand the “Meeting Bar” and click on Settings as shown below.

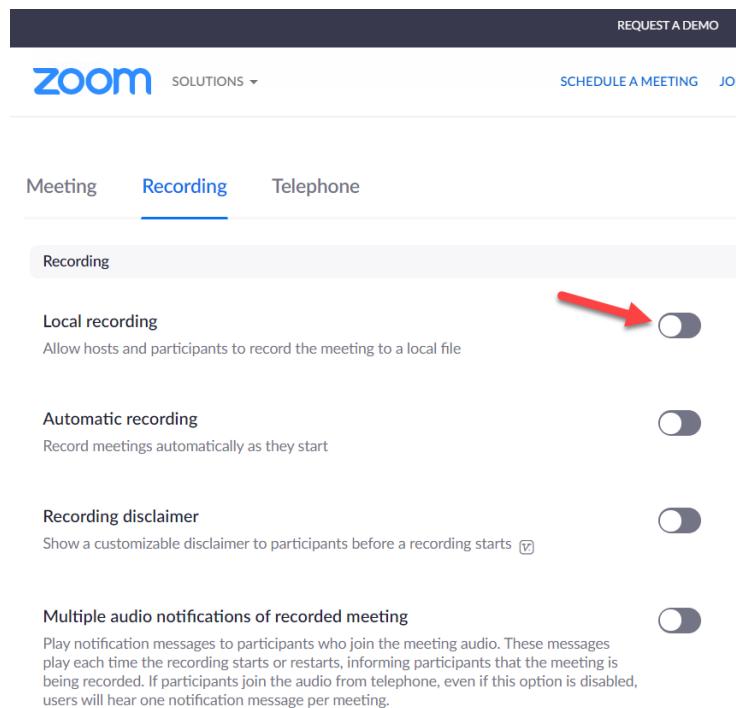


Note that the size of the font affects the way the screen renders. The diagram below shows what this looks like at a smaller font; in the left menu bar. Click on Settings to view the types of settings as shown below.



## Recordings

By default, Zoom allows meetings to be recorded or worse may record all meetings automatically. All recording options should be turned off as shown below.



## Telephone

Within the telephone settings section, there is a setting called “Mask phone number in the participant list”. This option should be turned on as shown below.

The screenshot shows the Zoom Settings interface. At the top, there are links for REQUEST A DEMO, 1.888.999.4444, SCHEDULE A MEETING, and JOIN A M. Below this, the Zoom logo and SOLUTIONS are visible. A navigation bar with tabs for Settings, Meeting, Recording, and Telephone (which is underlined) is present. Under the Telephone tab, there are three settings with toggle switches:

- Show international numbers link on the invitation email (switch is off)
- Toll Call (switch is on)
- Mask phone number in the participant list (switch is on, indicated by a red arrow pointing to it)

## Meeting – Schedule Meeting

In the Meeting settings, there are several setting headings, the first of which is “Schedule Meeting.” In this section, the “Audio Type” should be “Both” and the “Join Before Host” should be turned off as shown below.

Meeting      Recording      Telephone

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Schedule Meeting 

Host video    
Start meetings with host video on

Participants video    
Start meetings with participant video on. Participants can change this during the meeting.

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

These options can also be overridden as meetings are created and should have the same settings (“waiting room” covered below).

Audio  Telephone  Computer Audio  Both 

Dial from [Edit](#)

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Meeting Options 

Enable join before host 

Mute participants upon entry 

  Enable waiting room

## Meeting – In Meeting (Basic)

There are a couple settings in the “In Meeting (Basic)” section that are recommended. “Allow host to put attendee on hold” should be on and “Who can start sharing when someone else is sharing” should be “Host Only”.

Allow host to put attendee on hold  →

Allow hosts to temporarily remove an attendee from the meeting.

Always show meeting control toolbar 

Always show meeting controls during a meeting  V

Show Zoom windows during screen share 

Screen sharing 

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

Who can share?

Host Only  All Participants ②

Who can start sharing when someone else is sharing?  ←

Host Only  All Participants ②

## Meeting – In Meeting (Advanced)

There is one important setting in the “In Meeting (Advanced)” section. It is recommended that we use the “waiting room” for our meetings to “keep out unwanted guests”. This option should be turned on as shown below. When this option is turned on, the host will need to allow each person to join the meeting.

Waiting room  →

Attendees cannot join a meeting until a host admits them individually from the waiting room. If Waiting room is enabled, the option for attendees to join the meeting before the host arrives is automatically disabled.  V

Show a "Join from your browser" link 

Allow participants to bypass the Zoom application download process, and join a meeting directly from their browser. This is a workaround for participants who are unable to download, install, or run applications. Note that the meeting experience from the browser is limited

## Setting up an Alternate Host

The alternate host options are only available for a paid account.

### **TODO**

When creating a meeting or afterward using the “Edit Meeting” option, the option to list an “Alternate Host” is available near the bottom of the meeting information. This must be an email address for another person that will attend the meeting ... (details TBD as to whether or not the alternate must be registered with a Zoom account...probably a requirement but need to check).