JAMS Zoom Manual

Updated 2020

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What is Zoom?
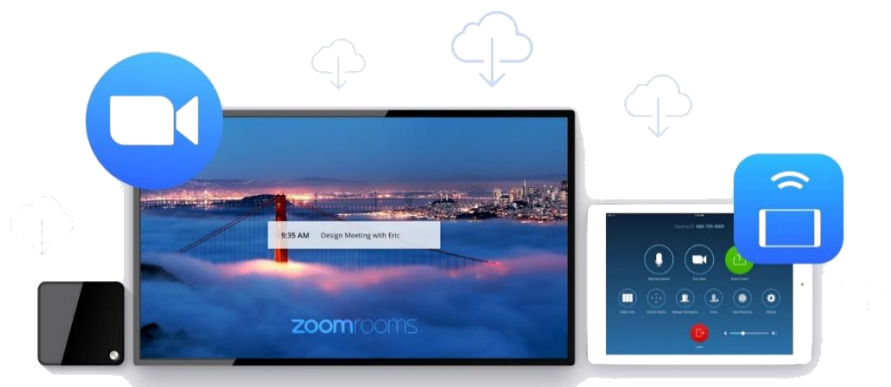
Zoom provides platform that brings HD video conferencing, mobility and web meetings together as a cloud service. So you can have crystal-clear video conversation and high quality screen sharing, anytime, from anywhere. It is available for Windows, Mac, iOS, Android and the Zoom rooms.

Each Zoom room is equipped with a dedicated iPad/Tablet for the use of the system.

iPad Tablet Interface Overview:

Start Meeting

Start an instant meeting by inviting others

Scheduled meetings for the room appear here

Join a Zoom meeting by entering a meeting ID

Share content from your laptop or mobile device

Make a phone call

One touch to start a scheduled meeting

Meet Now

1 Tap the **Meet Now** icon on the menu bar.

2 Select **rooms, contacts and H.323/SIP** endpoints to invite.

3 Tap **Meet Now** to start an instant meeting.

No one is invited.

Tip Tap the ∨ icon to adjust the duration of the meeting.

Control Meeting

Mute/unmute
room microphone

Change video
display layout
Speaker view: displays
active speaker
Gallery view: shows all
attendees in grid

View and manage
meeting participants

Leave the meeting or
end the meeting if host

Invite others into
the meeting

Share content from
your laptop or
mobile device

Start recording to
the cloud. (Once
the meeting is
over, a link to your
recording will be
emailed to you.)

Manage Participants (as Host)

After tapping **Manage Participants** in the meeting controls:

Tap the participant's name
to ask them to start their
video or stop their video,
pin or spotlight their video,
allow them to record, make
them the host, or remove
them from the meeting

Mute All participants,
Unmute All participants,
or tap **More** to Lock the
Meeting, or choose to
Mute Participants On Entry
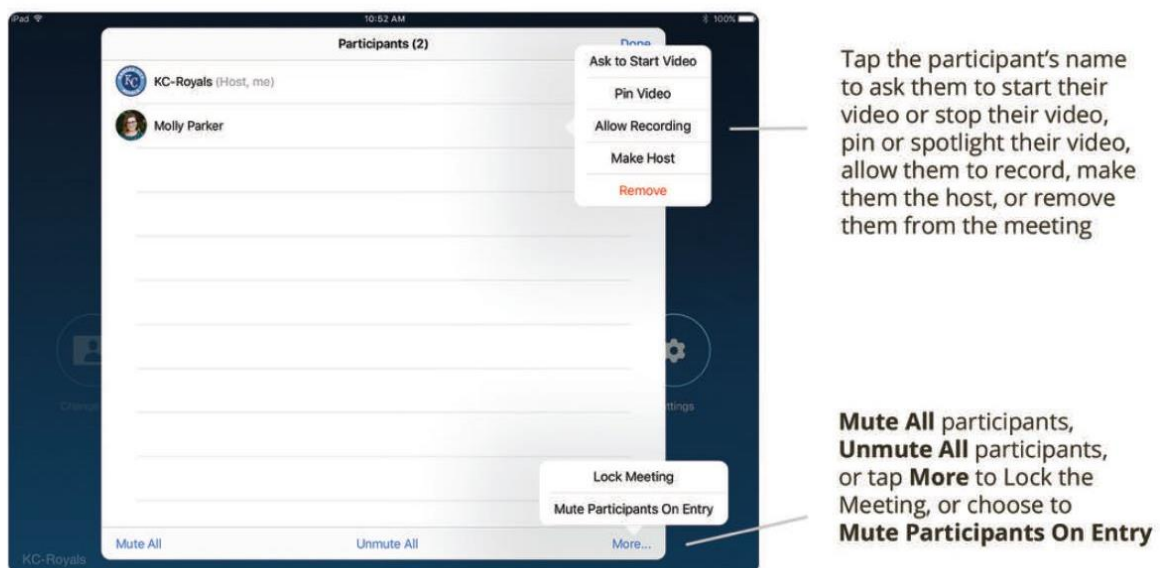
Invite Others to Join Zoom Room Meeting

1 Tap **Invite** on the Controller.

2 Select how you want to invite from the top of the controller

Invite by Contacts

Search by name, or scroll to find **rooms, contacts or H.323/SIP endpoints.**
Click **Invite.**

Invite by Email

Tap **Invite by Email.**
Enter the invitee's email address.
Tap **Send Invitation.**

Invite by Phone

Tap the **flag** icon to select the country you are calling. Enter the phone number and tap the **phone** icon to call.

Invite by Room System

Enter the IP address or E.164 number of the device you're calling. Tap **H.323** or **SIP.**
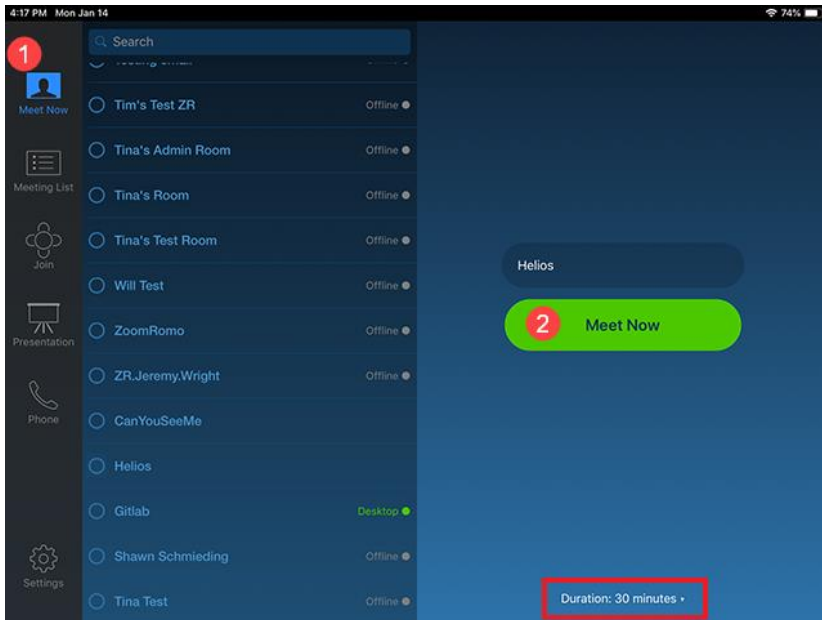Tap **Call.**

Meeting Instructions

Start Meeting (If you are the host)

1.   Ensure TV is on and set to Zoom PC (either remote, or wall plate depending on room set-up)


2. Log into iPad (Code *if needed* is 5267)

3. Set the duration (typically you'll move it to the max of 240 minutes)

4. Touch **Meet Now**, to start your Zoom meeting.

Once in meeting you can:
- Adjust camera settings / position
- Invite others to meeting (by sending Zoom meeting information)
- Mute / Unmute the room
- Control the room's TV layout (how people will see the zoom from within the room)
- Manage participants
- Record the meeting
- Start to share content from connected devices.

Join Meeting (If you are NOT hosting the meeting)

1. Have on hand - the meeting ID for the Zoom meting you are planning on joining.

2. Ensure TV is on and set to Zoom PC (either remote, or wall plate depending on room set-up)

3. Log into iPad (Code *if needed* is 5267)

4. Touch **Join** (on the left column of options).

5. Type in the meeting ID on the iPad (or computer, polyphone, etc. – depending on your room set-up)

6. Touch Join on the bottom of the keypad to join the meeting.
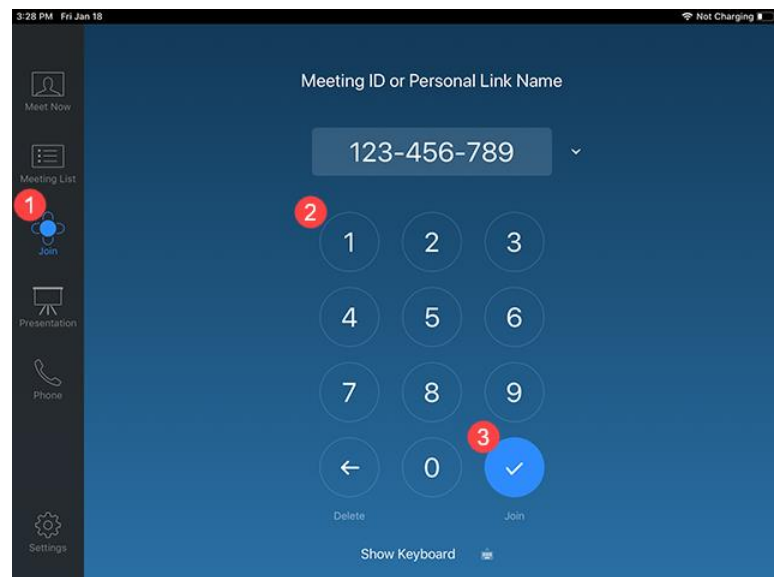
Polycom Trip Controller Overview:

Main Screen

On the controller, you can view today's scheduled meetings and tap **Start** at the time of the meeting. You can also:

- **Meet Now**: Start an instant meeting.
- **Join**: Join a meeting by entering the meeting ID.
- **Phone**: Call out to a phone number, **NOT ENABLED**
- **Presentation**: Start a local screen share within the room.
- **Settings**: Tap the gear icon at the top right to access the settings.
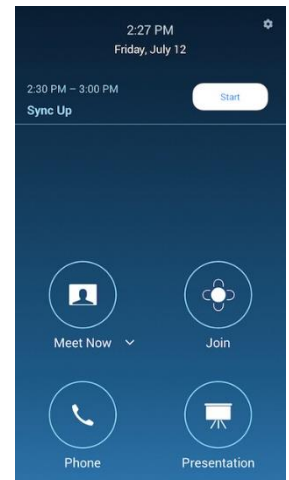
In-Meeting Controls
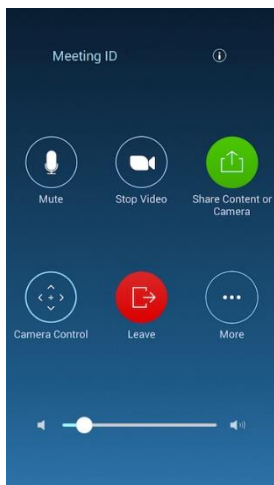
- **Mute**/**Unmute Microphone**: Mute or unmute the room's microphone.
- **Start**/**Stop Video**: Start or stop the room's video camera.
- **Share Content or Camera**: Display instructions to share content from your laptop or mobile device.
- **Camera Control**: Change PTZ camera settings or presets.

More: Access additional controls.

- **Manage Participants / Participants**: View the meeting participants. If you're the host, you will see controls to manage participants.
- **Invite**: Invite by contact, email, phone, or room system.
- **Switch Camera**: Switch to a secondary camera.
- **Change View**: Change your video display layout to one of these options.
  - **Speaker**: Display the video of the active speaker.
  - **Thumbnail**: Display the video of the active speaker. All other attendees are displayed with thumbnails below the active speaker.
  - **Gallery**: Display all attendees in a grid layout.
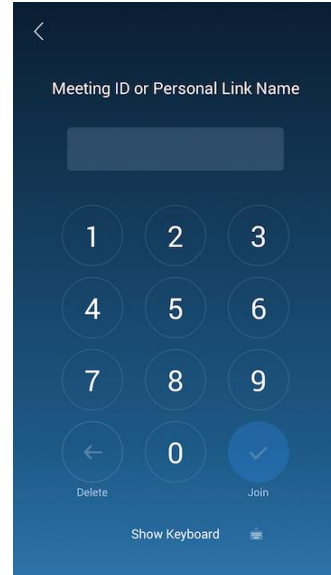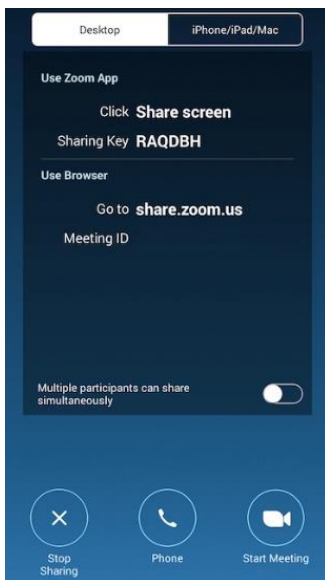- **Settings**: Access room settings (requires room passcode).
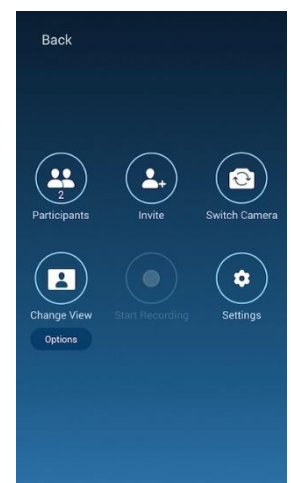
Join a Meeting

To Join a Meeting by Meeting ID or Personal Link Name (on the controller):

1. Tap **Join**.
2. Enter the meeting ID. You can also tap **Show Keyboard** to enter a personal link name.
3. Tap **Join**.
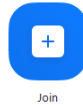
Presentation

To Share a Screen within the Room:

1. Tap Presentation.
2. Follow the on-screen instructions for sharing a computer screen, or tap **iPhone/iPad/Mac** to view the instructions for iOS devices.

3. You can also:
- **Stop Sharing**: Tap Stop Sharing on the control to end the share.
- **Phone**: Call out to a phone number, if enabled.
- **Start Meeting**: Tap Start meeting to start a Zoom meeting.

Getting Started on Windows and Mac

Sign in and Join

1. Open the Zoom desktop client or zoom.us/join
2. Join a meeting using one of these methods:
   - Click **Join a Meeting** if you want to join without signing in.
   - **Sign in** to Zoom then click **Join.** If you want to log in and start or schedule your own meeting,

3. Enter the meeting ID number and your display name.
   - If you're signed in, change your name if you don't want your default name to appear.
   - If you're not signed in, enter a display name.

Select if you would like to connect audio and/or video and click **Join**

Home

After signing in, you will see the **Home** tab, where you can click these options:

- **New Meeting**: Start an <u>instant meeting</u>. Click the downwards arrow to enable video or use your <u>personal meeting ID (PMI)</u> for instant meetings.

- **Join**: <u>Join a meeting</u> that is in progress.
- **Schedule**: <u>Set up a future meeting</u>.
- **Share Screen**: <u>Share your screen in a Zoom Room</u> by entering in the sharing key or meeting ID.
- **Upcoming meeting**: Displays the next meeting for the current day. <u>Add a third-party calendar service</u> if you want to sync upcoming meetings.
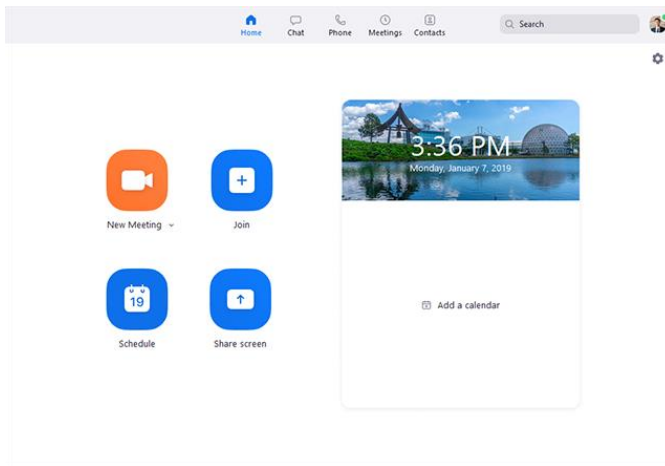
- Click your profile picture for these options:
  - <u>Add a personal note</u>**.**
  - **Settings**: Access <u>settings</u> you can change in the client.
  - Change your status to **Available**, **Away**, or **Do Not Disturb**.
  - **My Profile**: Open the Zoom web portal to <u>edit your profile</u>.
  - **Help**: Open the <u>Zoom Help Center</u>.
  - **Check for Updates**: Check if Zoom is up to date.
  - **About Zoom**: View the current version.
  - **Switch to Portrait View**: Switch the Zoom window to portrait view if you prefer a narrower window.
  - **Sign out**
  - **Upgrade to Pro** (if you are on a free account)
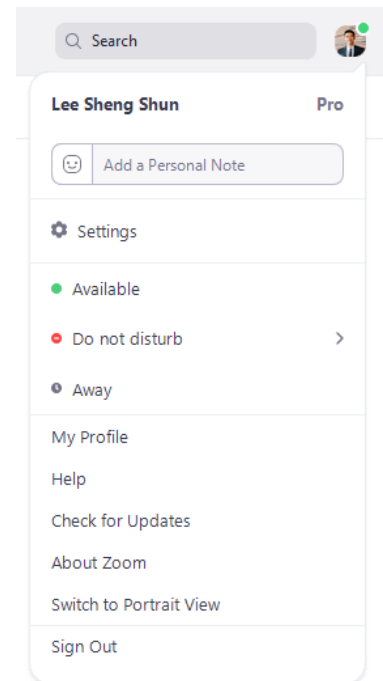
# Chat

Select the **Chat** tab to view private conversations with your contacts or group conversations (channels).
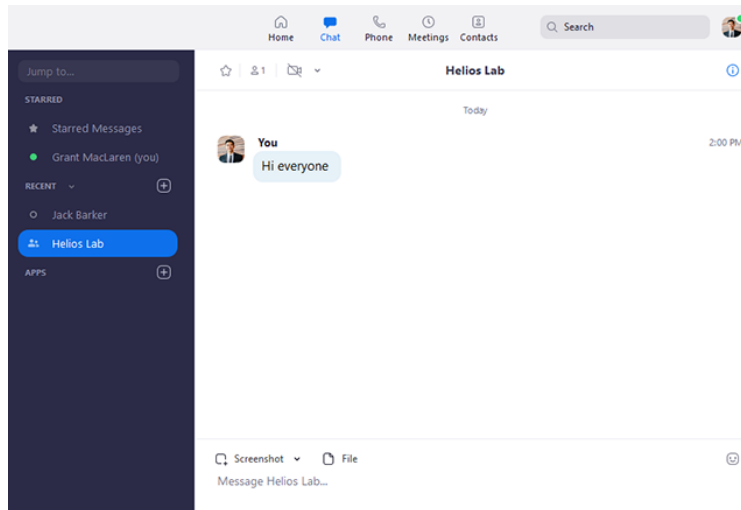
You can access these features in the left-side panel:

- **Jump to** search box: Search for a contact or channel.
- **Starred Messages**: View messages you have starred.
- Click your name to use your personal chat space.
- Add icon ⊞ (next to **Recent**): Start a new chat with one of your contacts, create a channel for group chats, or join an existing channel.
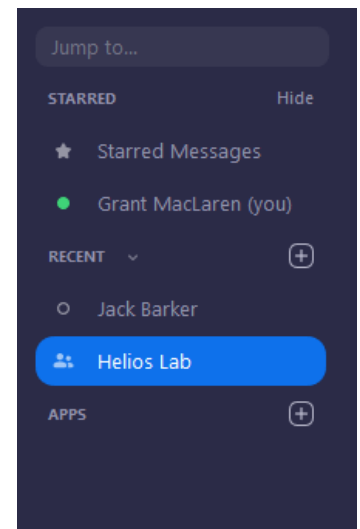
Meetings

Select the **Meetings** tab and click **Upcoming** to view, start, edit, and delete scheduled meetings.
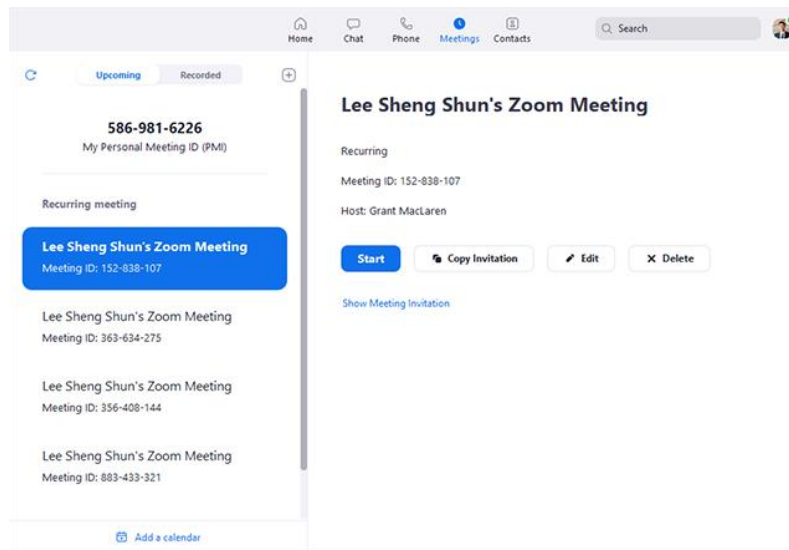
You can click the following options after selecting a scheduled meeting in the left-side panel:

- Add icon ⊕: <u>Schedule a new meeting</u>.
- Refresh icon ↻: Refresh the meeting list if you don't see your scheduled meeting.
- **Start**: <u>Start the scheduled meeting</u> that you have selected in your upcoming meetings.
- **Copy Invitation**: Copy the scheduled meeting's <u>invitation text</u>, allowing you to manually paste into an email, instant messenger etc. Click **Show Meeting Invitation** if you want to view the invitation you're copying.
- **Edit**: Edit the <u>meeting options</u> for your scheduled meeting.
- **Delete**: Permanently delete your scheduled meeting.

For iOS (Apple) Operating Systems

Sign in and Join

1. Open the Zoom mobile app. If you have not downloaded the Zoom mobile app yet, you can download it from the App Store.

2. Join a meeting using one of these methods:
- Tap **Join a Meeting** if you want to join without signing in.
Sign in to Zoom then tap **Join.**

3. Enter the meeting ID number and your display name.
- If you're signed in, change your name if you don't want your default name to appear.
- If you're not signed in, enter a display name.

4. Select if you would like to connect audio and/or video and select **Join.**
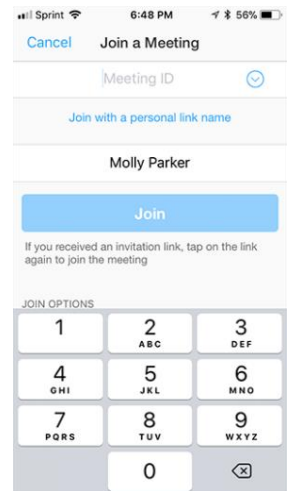
Meet & Chat
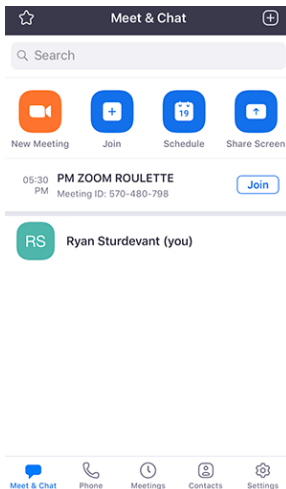
After signing in, tap Meet & Chat for these meeting features:

New Meeting: Start an instant meeting using your Private Meeting Room (PMI) or a new meeting ID.

Learn about in-meeting controls for hosts.

Join: Join a meeting using the meeting ID. Learn about in-meeting controls for attendees.

Schedule: Schedule a one-time or recurring meeting.

**Share Screen**: Enter a sharing key or meeting ID to share your device screen to a Zoom Room

Meetings

- **Start**: Start an instant meeting using your PMI or a meeting you have scheduled
- **Send Invitation**: Invite others to your PMI by text message, email or copying the meeting details and pasting them into a calendar invite.
- **Edit**: Change the settings of your PMI
- Tap a scheduled meeting to view, edit, start, join or delete it.

Note: You can only edit, start or delete meetings you are the host of.

Settings
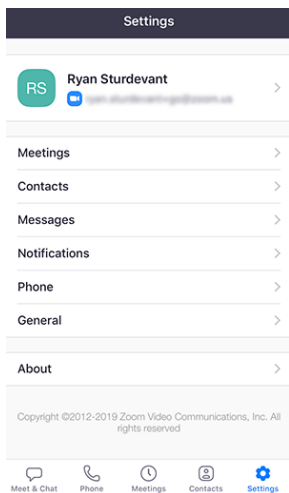
Tap **Settings** to view meeting and chat settings.

- Tap your name to change your profile picture, name, and password.

- **Meetings**: Change settings for enabling/disabling your microphone, speaker, or video when you join a meeting.

- **Contacts**: Find phone contacts that are using Zoom, and approve contact requests.

- **Messages**: Enable or disable link preview in chat messages.

- **Notifications**: Change when Zoom notifies you of new messages.

- **Phone** (only visible if you have Zoom Phone): View your direct phone number and company number.

- **General**: Enable/disable integrated calling or blur snapshot on task switcher

- **About**: View the app version and send feedback.

For Android Operating Systems
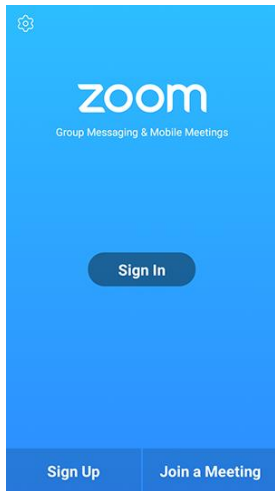
Sign in and Join

1. Open the Zoom mobile app. If you have not downloaded the Zoom mobile app yet, you can download it from the Google Play Store.

2. Join a meeting using one of these methods:
   - Tap **Join a Meeting** if you want to join without signing in.
   - Sign in to Zoom then tap **Join.**

3. Enter the meeting ID number and your display name.
   - If you're signed in, change your name if you don't want your default name to appear.
   - If you're not signed in, enter a display name.

4. Select if you would like to connect audio and/or video and tap **Join Meeting**.
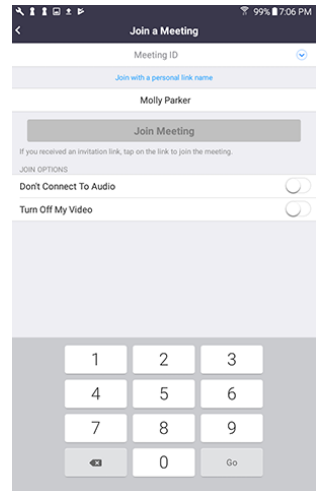
Meet & Chat
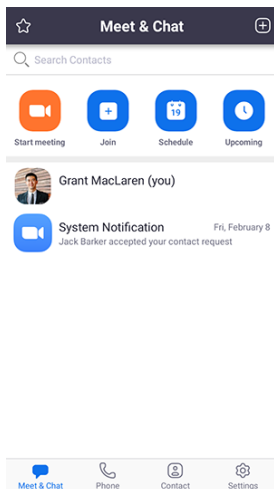
After signing in, tap **Meet & Chat** for these meeting features:

- **Start meeting**: Start an instant meeting using your PMI or a new meeting ID. Learn about in-meeting controls for hosts.

- **Join**: Join a meeting using the meeting ID. Learn about in-meeting controls for attendees.

- **Schedule**: Schedule a one-time or recurring meeting.

- **Upcoming Meetings**: View, edit, start, or delete your scheduled Zoom meetings.

- Plus icon ⊞: Start a one-on-one chat with a contact.

- Star icon ☆: View and start a chat with your starred contacts and channels.

Settings

Tap **Settings** to view meeting and chat settings.

- Tap your name to change your profile picture, name, and password.
- **Contacts**: Find phone contacts that are using Zoom, and approve <u>contact requests</u>.
- **Meeting**: Change <u>settings</u> for enabling/disabling your microphone, speaker, or video when you join a meeting.
- **Notifications**: Change when Zoom notifies you of new messages.
- **Phone** (only visible if you have Zoom Phone): View your direct phone number and company number.
- **Chat**: Enable or disable link preview in chat messages.
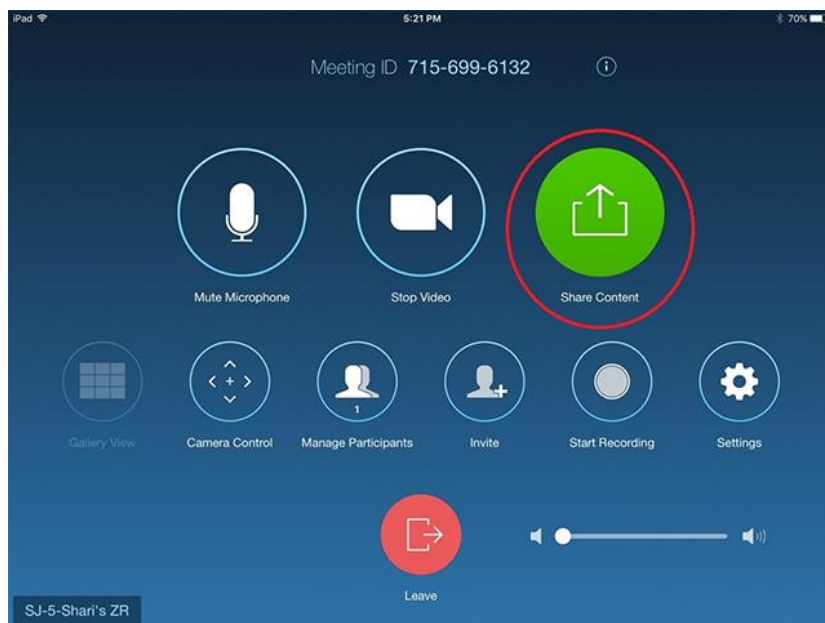- **About Zoom**: View the app version and send feedback.
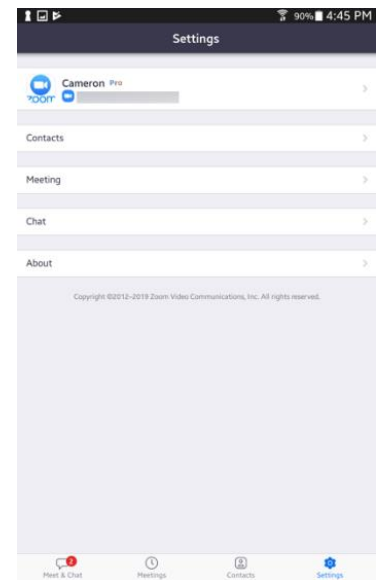
Screen Sharing

Direct Screen Sharing Using (Zoom Desktop Client or Mobile App)

To share your screen from a Windows or Mac laptop when proximity detection is not available:

1. After the meeting begins, click the **Share Content** button on the iPad controller in the Zoom Room.


The iPad controller displays a dialog where you can choose whether to enable sharing for Laptop or iPhone/iPad/Mac.

2. Tap the **Desktop** tab.

    The controller and the TV in the Zoom Room will display the Share Laptop Screen panel with instructions to laptop users for sharing their screen. Participants can share using either the Zoom desktop client or a browser.

3. Click **Share screen** on the Zoom desktop app or mobile app.
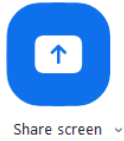
Share screen ⌄

4. Enter the sharing key and click **Share** (desktop) or **OK** (mobile).

   Zoom Rooms will show your shared screen on the Zoom Rooms display. You will see the screen share controls.
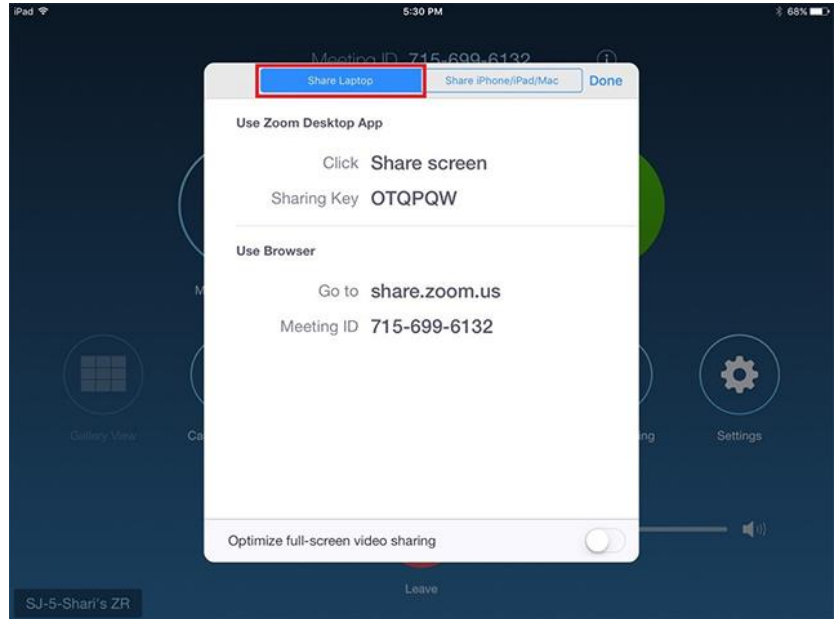
Direct Screen Sharing Using Web Client/Browser

If you do not have access to the Zoom desktop client or mobile, follow these steps to share your screen using a browser.

1. Visit share.zoom.us.

2. Enter the meeting ID and click **Share Screen**.

3. Click join from your web browser.

4. Enter your name and click **Join**.

5. Click **Share Screen** located in your meeting tool bar.

6. Select the screen you want to share then click **Share**. If you are using multiple monitors, you will see each screen.
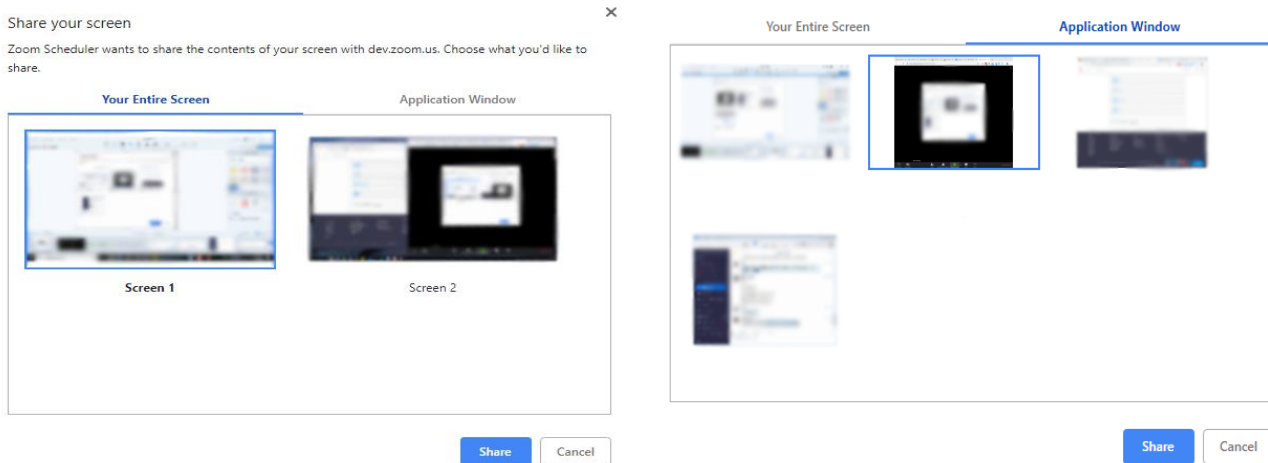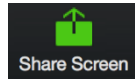
To share a specific application window, click the **Application Window** tab, select an application, then click **Share**.
Notes:
1. When sharing an application, live changes made to a document may not appear for others. If you experience this issue, please stop sharing and restart the share or share your entire screen to avoid this issue.
2. For Windows 10 users, if several applications are open, a limited number will be listed as an option to share. If the application you want to share is not listed, close unnecessary applications and try again.

7. While screen sharing, you will have access to the following controls:

1. A notification at the top of your Zoom meeting window shows a preview of your shared screen. Click **Pause Share** to pause screen sharing.

2. Click **Resume Share** to start screen sharing again. You can also click **Stop Share** to stop sharing your screen.

3. A floating notification bar appears on top of your browser. Click **Stop sharing** to stop sharing your screen. Chick **Hide** to remove the floating notification bar.
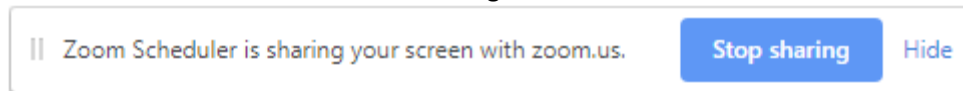
Turn a room into a "Zoom" Room

These instructions are to help guide you to turn a conference room (with a TV), to utilize zoom without having an actual Zoom Room. In order to do this you will need:

- Zoom Pro Account Log-In Information
- Laptop
- Conference Room with TV (and necessary connection cables)
- Optional
    - External Camera
    - External Microphone

1. Connect Laptop to the room's TV.

    1. Connect external devices if using them.

2. Open the Zoom desktop client or Visit zoom.us/signin.

3. Enter the email address & password for the Zoom Pro Account.

4. Start the Meeting.

    1. If the Meeting is already scheduled with that account, click Start from the home screen (under that meeting) to begin the Zoom Meeting.

    2. If it has not been scheduled, click the **New Meeting** tile on the home screen to begin an ad-hoc meeting.

5. Once in the meting please follow the instruction *Getting Started on Windows and Mac* on Pg. 11 for more details.