



## Getting Started with Zoom

If you've not used Emory Zoom before, here's how to begin:

**NOTE: Zoom will not work in Emory Healthcare's VDT/VDI environment. You must be on the local desktop, outside of VDT/VDI to use Zoom.**

- 1) EHC Staff, create your EHC account by visiting <https://emoryhealthcare.zoom.us> and selecting "Login"
  - Enter your EHC credentials at Emory's authentication page
  - Your account will be created automatically, and you will see your Zoom Profile page  
(NOTE: Emory Physicians will need to visit <https://emory.zoom.us> as part of School of Medicine)
- 2) Download the Zoom Client from <https://emoryhealthcare.zoom.us/download>. Login via SSO Only!  
(You will need **administrative rights** for your computer to install the Zoom meeting client)

## Schedule a Recurring Meeting or Persistent Meeting

- To schedule a recurring meeting in Zoom
  - Login to <https://emoryhealthcare.zoom.us> , go to "My Meetings", then "Schedule a New Meeting"
  - When entering meeting information, select **Recurring Meetings**
  - Zoom allows for 50 occurrences for daily, weekly and monthly meetings if scheduled via the web portal
- Create a **persistent meeting** with No Fixed Time  
(The meeting ID will stay the same number and will not expire if the host joins the meeting ID within 365 days)
  - Login to <https://emoryhealthcare.zoom.us> , go to "My Meetings", then "Schedule a New Meeting"
  - When entering meeting information, select **Recurring Meetings**
  - Under the Recurring Meeting Options, Select Recurrence -> No Fixed Time
- To schedule a recurring meeting in Outlook / Office 365 with Zoom information
  - Follow the instructions above for creating a **persistent meeting** in Zoom
  - Once the meeting has been created, use the "Copy the Invitation" link next to the meeting URL to copy the Zoom meeting information to the clipboard
  - Open Outlook, go to calendaring and create a Meeting/New Event
  - Paste the Zoom meeting information into the calendar invite
- **Zoom does NOT ALLOW a user to host concurrent meetings**
  - If you need to host concurrent meetings, use the Scheduling Privileges feature (see topic further down)
  - If you schedule meetings for a user in a different enterprise account, that person will need to generate a meeting ID in their own account to share and be used in a calendar invite where they are the host
  - If you must schedule concurrent meetings, you should consider and look into using Microsoft Teams

## Using Personal Meeting ID (PMI) vs. Auto Generated Meeting ID

*A Personal Meeting ID (PMI) is assigned to each user automatically as a permanent virtual room.*

- For most Zoom meetings, use the **automatically generated meeting ID** option when creating a single meeting.
  - This prevents different meeting participants from joining the wrong meeting with the same meeting ID
  - For recurring meetings in Zoom, it will **only** generate a meeting ID automatically
- For Ad Hoc meetings, or if utilizing the waiting room option, you can use your PMI
  - Login to <https://emoryhealthcare.zoom.us/>
  - To find the PMI section, go to Meetings, **Personal Meeting Room** and select "Edit this Meeting". Scroll down and under **Meeting Options** check the waiting room option and click Save
  - You can also change your other PMI settings and customize the number



## Scheduling Privileges

You can delegate **users in the same Enterprise Zoom** account to schedule meetings on your behalf. Some users like Emory Physicians may be in the University Zoom enterprise account and you will not be able to use this feature.

- To give scheduling privileges to someone else
  - Login to <https://emoryhealthcare.zoom.us/>. Select “My Meeting Settings”
  - Scroll all the way down until you see “Assign scheduling privilege to”
  - Enter your designee’s Email address (firstname.lastname@emoryhealthcare.org)
  - If you get an error, check the email address or that the person has an existing Zoom account
- To schedule for another user
  - When scheduling your meeting, go to “Advanced Options”
  - Select “Schedule for”, then select your host
  - (The host must have already granted you permission to do this ahead of time)
- If the other user **is not in the same enterprise account**
  - Have the other user create a persistent meeting in their own Zoom account (see previous instructions)
  - Once the meeting is created, ask them to share the meeting information with you to use in calendar invites for them
  - You will want to obtain the meeting URL link and phone dial in numbers with meeting ID information

## How to Secure a Zoom Meeting

There are several options a user can enable to secure meetings

- When scheduling a meeting, you can enable the **Password** feature which can be set for individual meetings or for all of your meetings
- The **Waiting Rooms** feature can be enabled to prevent participants from joining a meeting automatically and participants can be admitted individually or all at once
  - Participants in the waiting room are not able to chat, talk, share content or video with anyone while in the waiting room
- During a meeting, Hosts or Co-hosts can use the **Security icon** in the meeting controls to secure the meeting and minimize disruption during a meeting
  - Options include enabling/disabling the waiting room, screen share, chat, lock the meeting, and ability for participants to rename themselves

## Alternative Hosts and Co-Hosts

**All hosts must be within the same Enterprise Zoom account** to be able to use this feature. Some users like Emory Physicians may be in the University Zoom enterprise account and you will **NOT** be able to use this feature.

- Before the meeting, a host may designate an alternative host to start the meeting if s/he is unable to
  - To assign an alternative host, when scheduling your meeting, go to “Advanced Options”
  - Enter the firstname.lastname@emoryhealthcare.org email address for your alternate host; Click Save

*Note: The first alternative host to join before the meeting scheduler will be granted host controls. The scheduler / original host may reclaim host controls by going to Participants > More > Reclaim Host.*

- When in the meeting, hosts may assign co-hosts or a different host as needed
  - Click the “Participants” tab along the bottom of your Zoom window
  - Find your future co-host’s or host’s name and select the blue “More” button and select the desired role



## Invite and Manage Participants during a Meeting

*From within a meeting, you may invite additional participants and manage participant permissions*

- During a meeting, click the “Participants” icon, then click “Invite”
  - The Host or co-host can search for Emory contacts and invite directly
  - Copy the URL or click Copy Invitation to send by email or Zoom chat to contacts both inside and outside of Emory
- Meeting hosts and co-hosts can manage participants by clicking on the “Participants” icon along the bottom of your Zoom window. Managing Participants will give you the ability to:
  - Mute / unmute participants’ microphones and ask to start cameras
  - Grant host or co-host rights
  - Remove a participant from the meeting
  - Report a participant to Zoom
  - Rename participants
  - Put a participant in the waiting room
- To change screen sharing options for participants, click the arrow next to the “Sharing” icon along the bottom of your Zoom window
  - Choose “Advanced Sharing Options”
  - Choose who can share or if participants can share at the same time or if only the host can share

## Instant Messages (IMs) and Persistent Chat

*Using the Zoom Meeting Client, you may chat with individual participants or groups within or outside of meetings in the Emory Enterprise and add external contacts to chat with as well. This feature is not available via the web portal.*

- IMs are different from in-meeting chat, which goes away once the meeting is complete
- Persistent chat history (outside of a meeting) is available for 180 days
- You can share files up to 512 MB (screenshots, images, and documents to an individual or group)
- To create or join a Channel (aka Group)
  - Open the Contacts window on your Zoom Client
  - Click the “+” button next to “Contacts” and “Channels”
  - Create a Channel/Group, or Join a Channel
  - Use Add a Contact to invite by email address a Non-Emory contact to a channel
- To find Emory contacts
  - Click on Contacts in the Zoom client and then search for a name
  - Click on their name to add to your contact list

**Note:** All Emory’s enterprise Zoom accounts are linked so you can search for contacts under “Company Contacts” even if a user is in a different enterprise account. They must have a Zoom account under one of our enterprise accounts.

## Meeting ID Expiration Guidelines

- An *instant meeting ID* expires when the instant meeting ends
- You can start your scheduled meeting at any time after you scheduled it.



- A *non-recurring meeting ID* (also known as a one-time meeting ID) will expire **30 days** after the scheduled date if the meeting is not recorded. You can also restart the same meeting ID within the 30 days and if you restart the meeting, it will remain valid for another 30 days.
- A recurring meeting ID expires if it isn't used for 365 days

**Note:** Webinar IDs will expire and be unusable past the webinars scheduled end-time if the webinar is not currently in progress. The webinar will be deleted from previous webinars 30 days after the scheduled end time

## Other Useful Features and Information

*There are plenty of other features in Zoom, and here are a few highlights*

- To create an **Audio Only** Zoom meeting
  - Login to <https://emoryhealthcare.zoom.us/> , go to “My Meetings”, then “Schedule a New Meeting”
  - Create the meeting normally as if a full Zoom meeting
  - Once saved, click on “Copy the Invitation” and copy the phone dial in information
  - Open Outlook, go to calendaring to create a New Event and paste the phone dial in information into the invite
- To **Test audio and video** before the meeting
  - Click the arrow next to the microphone icon in your Zoom window
  - Select “Test Speaker and Microphone”
  - Follow the steps to hear and playback your audio
  - Make adjustments as necessary if using multiple audio / speaker devices
- **International Dial-In Numbers** allow international participants to dial in via telephone if network bandwidth is poor. For a list of numbers visit: <https://zoom.us/zoomconference>