

Using Zoom for appointments

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Note: This guide is suitable for using the Zoom website from a Desktop or Laptop computer. It is not suitable advice for those using tablets or mobile phones.

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Recommended equipment

To use Zoom you will need a laptop or desktop PC and a webcam and microphone. Most modern laptops will have an integrated webcam and microphone, however you may wish to invest in better equipment to allow you to better work on Zoom.

Investing in a microphone headset will allow both the analyst and the user to hear a little better.

We recommend that you use the following which are available at a number of online retailers.

Webcam

Logitech C920s Pro webcam

<https://www.logitech.com/en-gb/product/hd-pro-webcam-c920s?crd=34>

Microphone/ headset

Logitech H340 USB Headset

<https://www.logitech.com/en-gb/product/usb-headset-h340?crd=1873>

Other things to consider

Internet connection

You will need to make sure that you have a fast internet connection. The best way of doing this is to have a cable that runs directly to your router. If you can't do this, instead try to position yourself in a room that isn't far from your wireless router.

Keeping a healthy PC

Make sure that your computer:

- Has antivirus software installed
- Has the latest version of Windows or Mac OS installed

Setting up a meeting

Create an account

To start, set up a Zoom account at the link below:

<https://zoom.us/signup>

We recommend using the 'pro' account option for 11 pounds a month because this tends to have a better connection. However, the free version will still allow you to create and participate in meetings.

Simply follow the instructions on the sign up page and when you're done, click on 'my account'

Download the Zoom desktop app

Download the Zoom Client for meetings here:

<https://zoom.us/download>

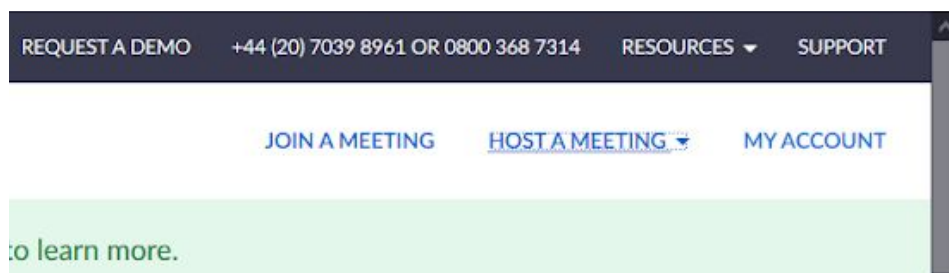
Once installed this will allow you to use Zoom instantly and is an alternative to the Zoom homepage in your browser.

Managing your appointments

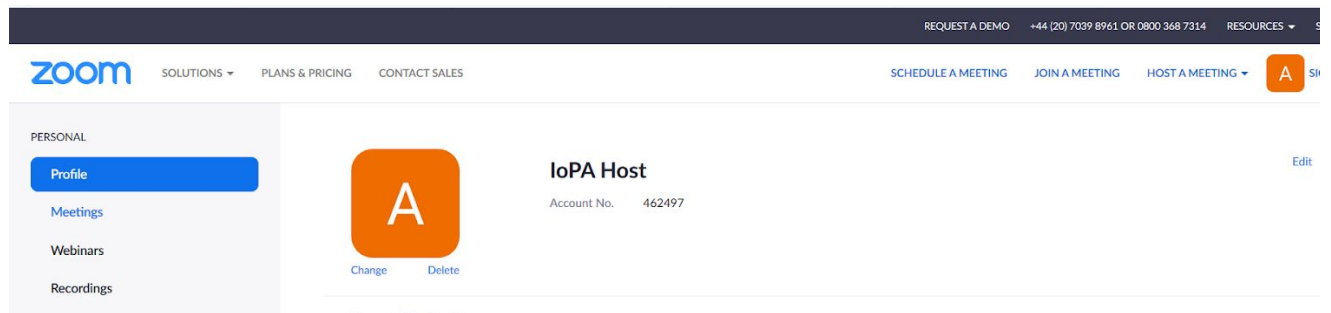
We recommend that you create a new meeting for each user, using the scheduling system.

Users do not need to sign up for a Zoom account to access the meeting. However, if they choose to sign up for an account, it will reveal their email address to you and anyone else they contact. **Please make sure users are aware of this before starting.**

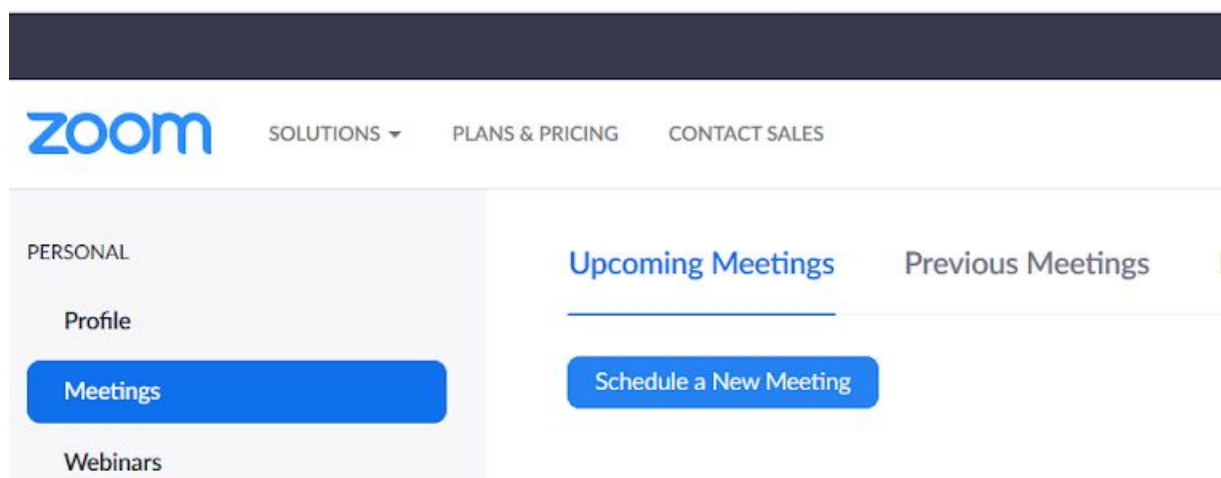
To do this, return to the zom.is website and click on 'My Account' in the top right of the screen.



Then click on 'meetings' on the left of the screen.



Now click on 'Schedule a New Meeting' on the next screen.



Type in the details of the meeting at the next screen:

Schedule a Meeting

Topic

Description (Optional)

When

Duration hr min

Time Zone

Recurring meeting

Registration Required

Meeting ID Generate Automatically Personal Meeting ID 595-181-8479

You will need to fill out:

- Date and time of your first Zoom meeting/appointment with this user
- Duration of how long you are planning to see the user for (e.g. 1 hour)
- Select the tick box 'recurring meeting'

Meeting recurrence

Change the recurrence field to 'weekly'

Then select the days on which this meeting will take place. For this example I have selected 'Monday, Tuesday, Thursday and Friday'.

Now select the 'end date' of the meetings - we recommend putting this a few months into the future.

When 03/19/2020 11:00 AM

Duration 1 hr 0 min

Time Zone (GMT+0:00) London

Recurring meeting Every week on Mon, Tue, Thu, Fri, until Aug 31, 2020, 50 occurrence(s)

Recurrence Weekly

Repeat every 1 week

Occurs on Sun Mon Tue Wed Thu Fri Sat

End date By 08/31/2020 After 7 occurrences

Registration Required

Meeting Password Require meeting password

Meeting Options

Leave the rest of these as follows:

Meeting ID Generate Automatically Personal Meeting ID 240-300-5536

Meeting Password Require meeting password

Video


Host on off

Participant on off

Audio Telephone Computer Audio Both

Meeting Options

Enable join before host

Mute participants upon entry 

Enable waiting room

Record the meeting automatically on the local computer

Meeting ID: Generate automatically

Meeting password: Unchecked (unless you want to use this feature - see section 1.2)

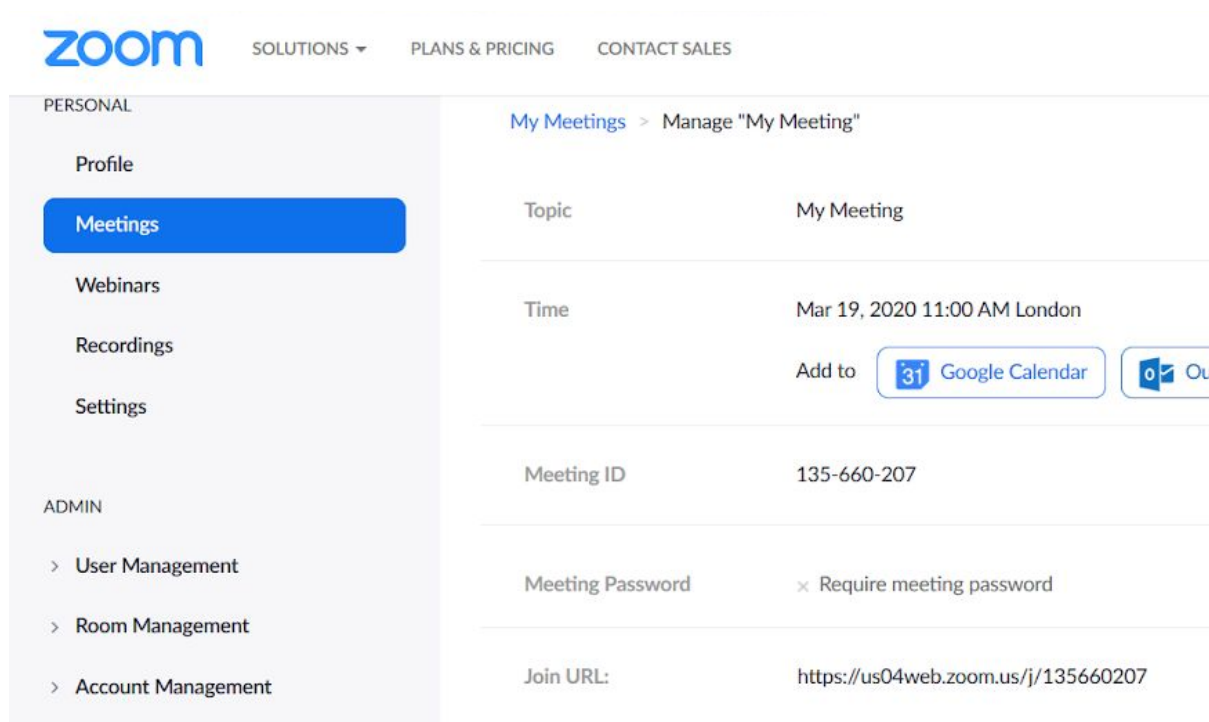
Video: Off for both host and participant

Audio: Computer audio

Meeting options: all unchecked

Once you have completed all of these settings, click 'save'.

Sharing the meeting number with a user



The screenshot shows the Zoom web interface. At the top, there is a navigation bar with the Zoom logo and links for SOLUTIONS, PLANS & PRICING, and CONTACT SALES. On the left, there is a sidebar menu with sections for PERSONAL and ADMIN. The PERSONAL section includes Profile, Meetings (highlighted in blue), Webinars, Recordings, and Settings. The ADMIN section includes User Management, Room Management, and Account Management. The main content area shows the 'Manage "My Meeting"' page. It displays the following information:

Topic	My Meeting
Time	Mar 19, 2020 11:00 AM London
Add to	Google Calendar Outlook
Meeting ID	135-660-207
Meeting Password	× Require meeting password
Join URL:	https://us04web.zoom.us/j/135660207

There are several options for sharing your meeting with the user. By far the easiest is to copy the 'Meeting ID' and send it to the user with instructions to visit the Zoom website:

zoom.us/join

Then all the user needs to do is visit the above webpage and type in the Meeting ID.

You can send the meeting ID to the user via any means of contact you have with them, and they can join the meeting using only the meeting number without revealing any other information. Users don't need to sign up with an account to join the meeting.

However, if the user chooses to sign up with a Zoom account, it will reveal their email address to you and anyone else they contact. **Please make sure the user is aware of this.**

They can also use the 'join URL' which is on the page or you can export the meeting to your Outlook or Google Calendar and then send this as an attachment to the user. However, the simplest method is using the meeting ID.

User considerations

The other user will need to ensure that they are in a quiet, private place and that they have a device that can use Zoom. It is best to use a computer, but Zoom can run on:

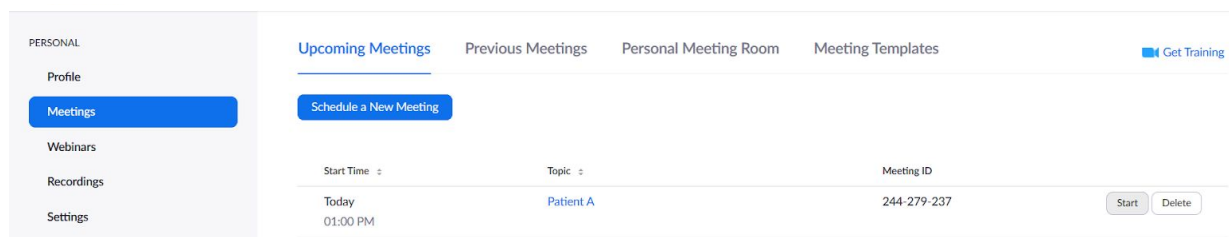
- iPads and android tablets
- Smartphones
- Google Chromebooks

They can easily find the right application for their device, using the Zoom website.

If the user chooses to sign up with a Zoom account to access the meeting, it will reveal their email address to other users. However, they do not need to sign up with an account to use Zoom and can simply enter the meeting number.

Starting your meeting

When the time comes to start your appointment, log in to the Zoom website at zoom.us and click on 'meetings' in the main left hand menu.



Locate the appropriate meeting in the list and click on 'start'.

In the meeting

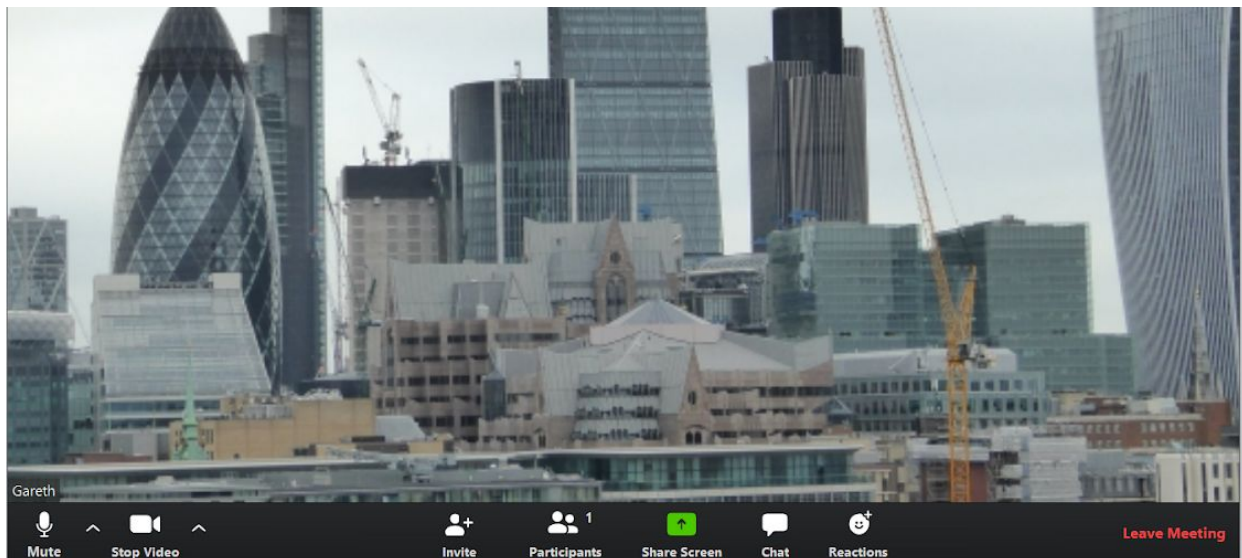
Basic controls

The two most important meeting controls are in the bottom left of the screen. Your video will be switched off by default, to start it, use the 'start video' button in the bottom left. You can continue to just use audio if you do not want to use video.

'Mute' and 'stop video' allow you to stop and start your audio and video easily. The two:

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arrows at the side of these buttons, allow you to quickly adjust settings on your audio and video, and to test if they are working or not.

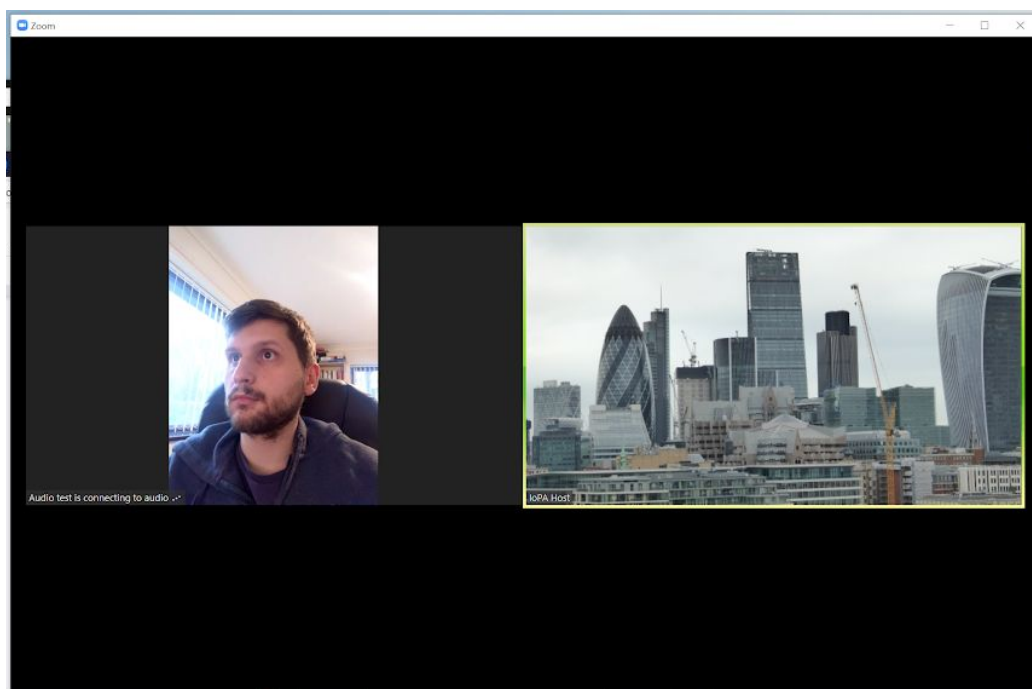


You can find out more about these controls at this link:

<https://support.zoom.us/hc/en-us/articles/200941109-Attendee-Controls-in-a-Meeting>

Changing the view

In the top corner of the screen, you can adjust your own view so that you can see either just the user (speaker view) or your own video feed along with the user (gallery view, shown below). It is easy to switch between these two modes by pressing the button in the top right.



Turn Video on/off

You can either start the meeting without the video or turn it off when you have established your connection. Most analysts might wish to work without the video, but this depends on you and the user. Both users and analysts will need a confidential place to be able to speak freely.

Ending the meeting

When it is time to end the meeting simply click on 'leave meeting' in the bottom right of the screen.

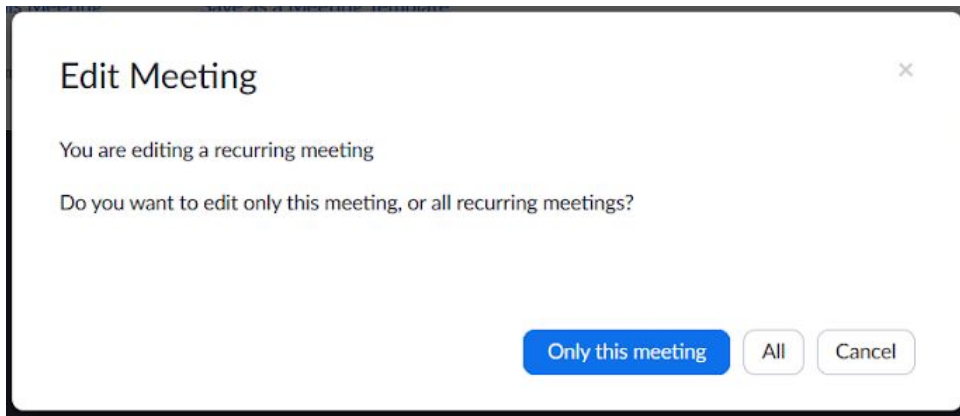
Making changes to your meetings

To make any changes to your meetings, go to the 'meetings' in the menu on the left, and click on the relevant meeting topic.

On the next page, scroll to the bottom and click on 'edit this meeting'.

The screenshot displays the Zoom meeting settings interface. On the left, the 'ADMIN' sidebar includes links for Dashboard, User Management, Room Management, Account Management, and Advanced. Below these are links for Attend Live Training, Video Tutorials, and Knowledge Base. The main settings area is divided into sections: Meeting Password (Require meeting password), Invite Attendees (Join URL: https://zoom.us/j/244279237), Video (Host: On, Participant: On), Audio (Telephone and Computer Audio, Dial from United Kingdom), and Meeting Options (Enable join before host, Mute participants upon entry, Enable waiting room, Only authenticated users can join). At the bottom, there are buttons for Delete this Meeting, Save as a Meeting Template, Edit this Meeting, and Start this Meeting, along with a Help icon.

Then click on 'all'



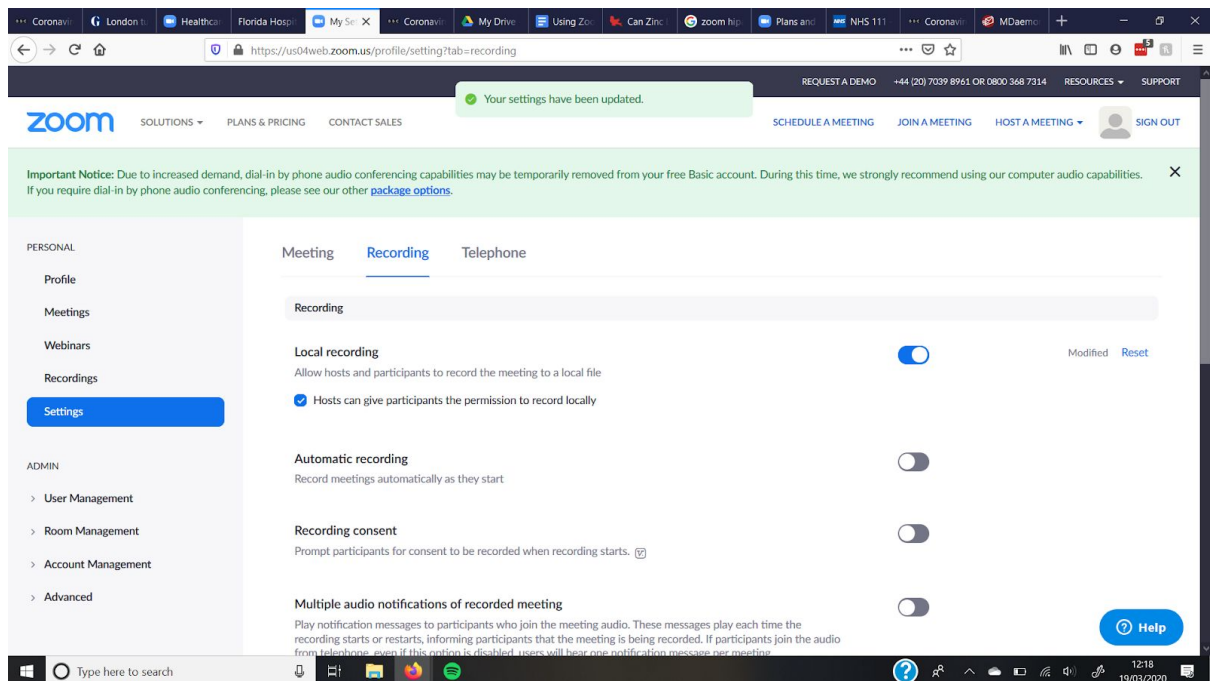
You will now be able to adjust all of the settings for the meeting, including the title, date, time and duration.

Disabling the ability to record

As default, Zoom will NOT automatically record meetings, however, it is still possible to create recordings on a meeting by meeting basis.

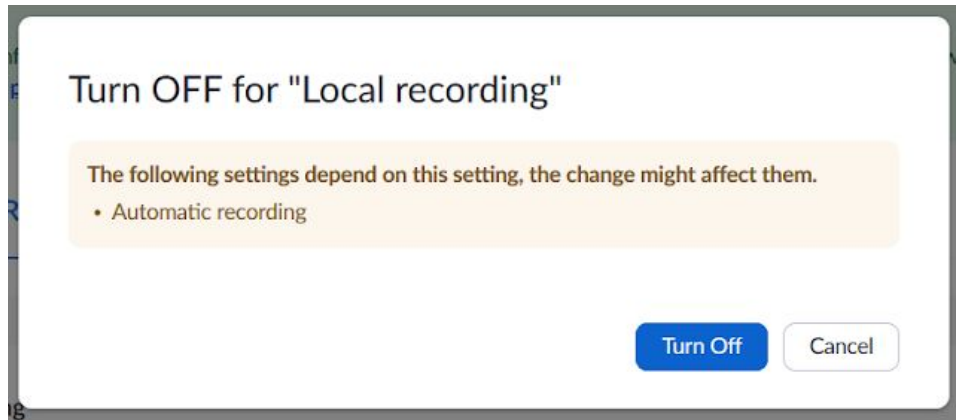
To prevent any mistakes, we recommend that you switch this ability off entirely in Zoom settings. To do this, in the main menu on the left, go to:

Settings



Then at the top, select 'recording'.

Then, the Blue switch at the right needs to be switched **OFF** by clicking on it.



You will be asked to confirm this change with this dialogue box. Click on **'turn off'**.

The switch should now be grey.

FAQ

Are my Zoom calls going to be recorded?

It is possible to record Zoom calls automatically, however this is not a feature that is switched on by default. To completely disable the possibility of recording on any meeting, follow the instructions in this guide.

Is Zoom secure?

Zoom is a market leader in videoconferencing, in part because it uses the American Encryption Standard (AES) for all of its video calls. This standard of encryption is very sophisticated. It was developed by the US National Security Agency and the AES standard is used for all US government and military communications.

Because of this encryption standard, Zoom is much more secure than Skype, Google Hangouts or regular phone calls, all of which either use lower standards of encryption or are not encrypted at all.

Zoom is used by corporations, governments, universities and healthcare providers across the world including:

- The US Department of Homeland Security
- The US Department of Energy
- Stanford University
- John Hopkins University Hospital
- US National Heart, Lung and Blood Institute

The Institute is confident that Zoom is the best video-conferencing solution for our needs.

What can I do to ensure maximum security?

To ensure maximum security:

- Never share your password to your zoom account with anyone
- Do not share your meeting numbers or links with anyone except your users
- Carry out regular antivirus scans on your computer
- Be careful of any emails that ask for your Zoom password or other information

Treat Zoom like you would any other secure system, such as your bank account. Don't take any risks that you wouldn't take with any other kind of sensitive information.

What if the appointment time for my user is changed?

This won't affect anything - you can still use the same meeting ID to meet at the new time. There's no need to adjust anything, though you may want to edit the meeting time in meeting settings to avoid confusion.

Further questions and support

Plenty of support on how to use Zoom is provided by Zoom LLC.

You can view quick start videos here:

<https://support.zoom.us/hc/en-us/articles/206618765-Zoom-Video-Tutorials>

You can sign up for 'live' training covering all the basics here:

https://zoom.us/webinar/register/8915786869708/WN_Qkc7KpkNSFOdITwpZkGFIQ

And there are lots of articles on how Zoom works on the Zoom support website

<https://support.zoom.us/>

If you have a specific question that only IOPA can answer, get in touch at:

support@iopa.org.uk