Zoom: Getting Started

A guide to connecting with Zoom

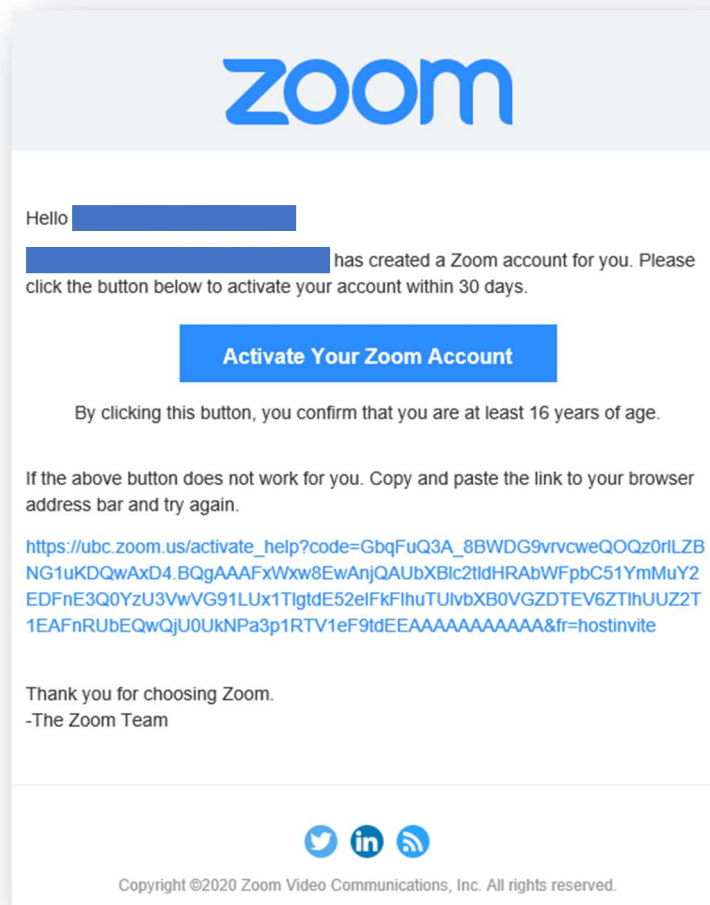# Zoom: Getting Started

Request for an account

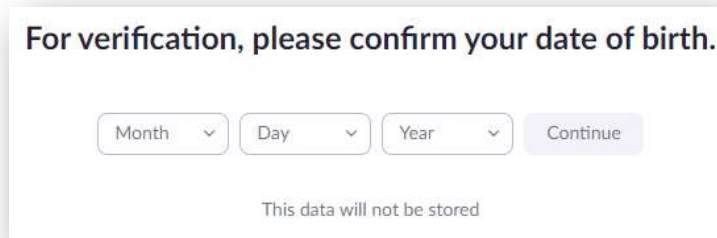1. Email av.helpdesk@ubc.ca with the following info:

    - Name, Email, Faculty, Department

    - For onboarding large groups please create a spreadsheet with the following columns:

Name	Email	Faculty/Group	Department

2. Upon approval, you'll receive an email invitation to activate your account. Click 'Activate your Zoom Account'.

3. You may be asked to verify your date-of-birth to confirm that you are at least 16 years of age, as per the invitation email. This is due to Zoom's security measures with respect to licenses used for K-12 or Higher-Ed purposes, of which UBC has.
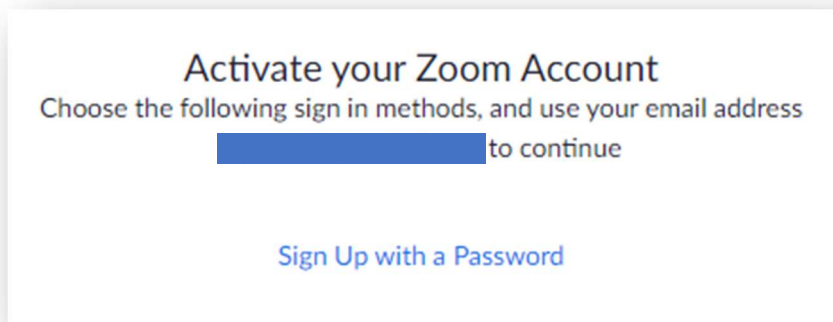

4. A webpage will open asking to "Activate your Zoom Account". Please choose 'Sign Up with a Password'.

5. Fill in your First and Last Name, create a Password and press 'Continue'.

6. You have finished creating your account. The Zoom client should automatically download for you to install. You can also download the Microsoft Outlook plugin.
   - Alternatively, you can download both the Zoom client and Outlook plugin from zoom.us/download
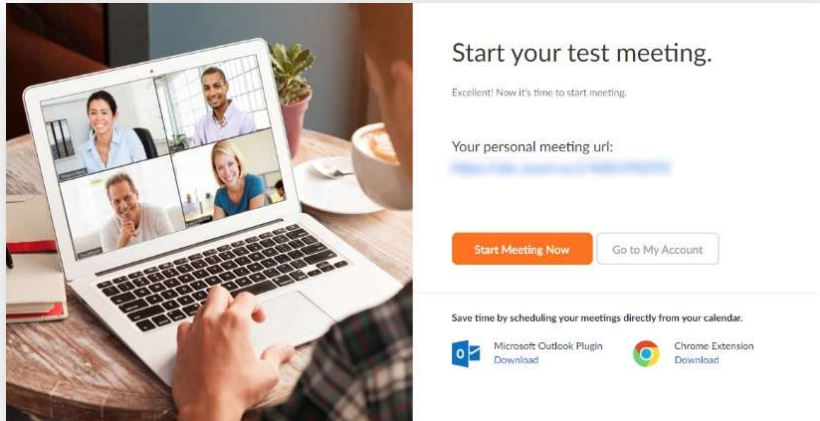
Sign in and Join

After launching Zoom, click **Join a Meeting** to join a meeting without signing in. If you want to log in and start or schedule your own meeting, click **Sign In**.
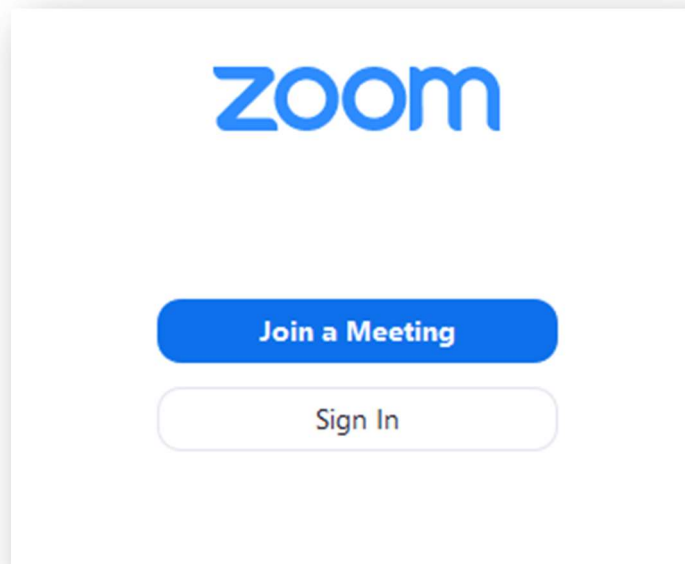
To sign in, use your Zoom account (Email and Zoom created password). If you have a Zoom account but cannot remember your password, click **Forgot**.
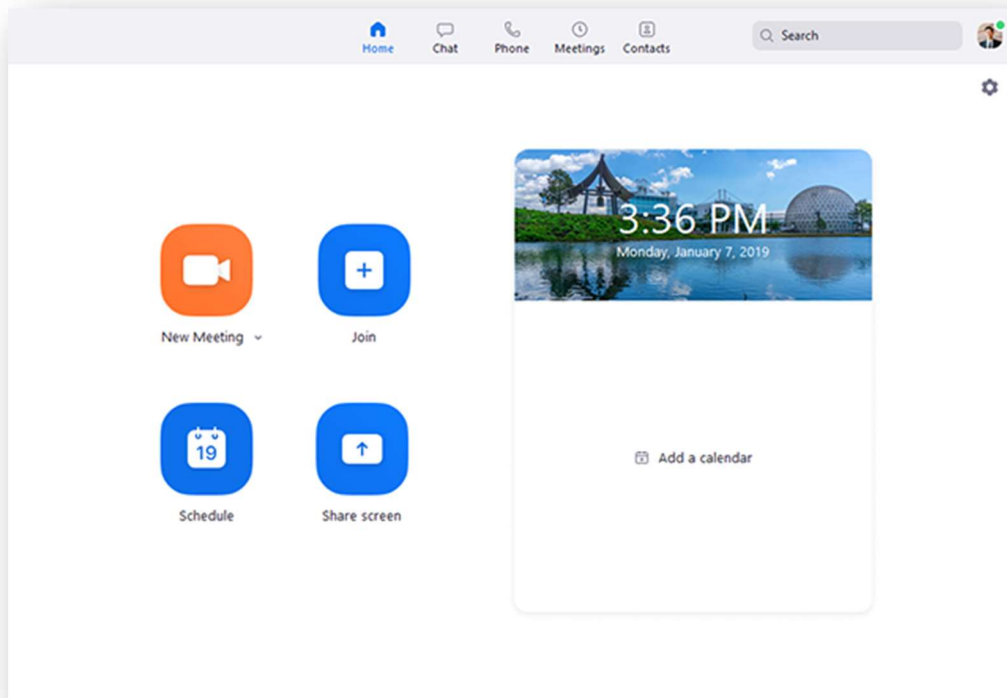
Home

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

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

Join: Join a meeting that is in progress.

Schedule: Set up a future meeting.

Share Screen: Share your screen in a Zoom Room by entering in the sharing key or meeting ID. Upcoming meeting: Displays the next meeting for the current day. Add a third-party calendar service if you want to sync upcoming meetings.
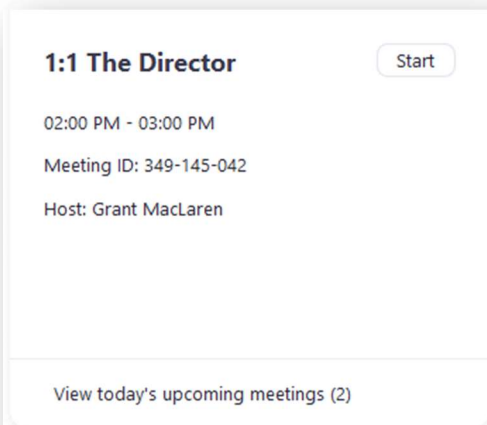
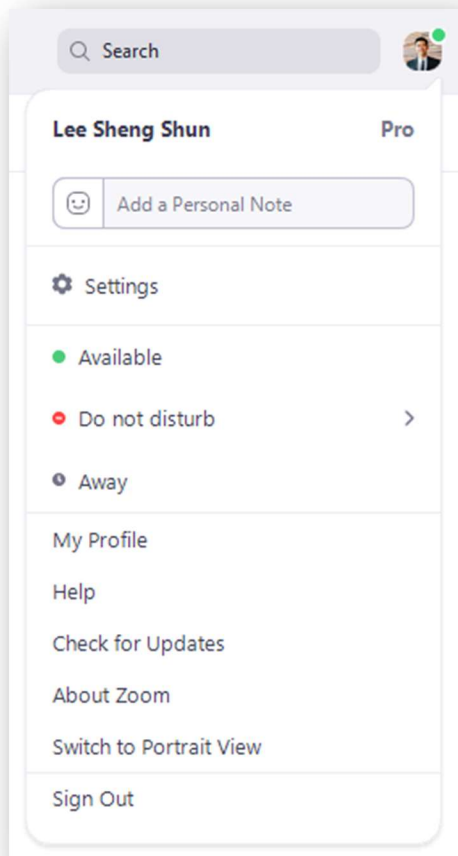Click your profile picture for these options:

Add a personal note.

Settings: Access settings you can change in the client. Change your status to **Available**, **Away**, or **Do Not Disturb**.

My Profile: Open the Zoom web portal to edit your profile.

Help: Open the Zoom Help Center.

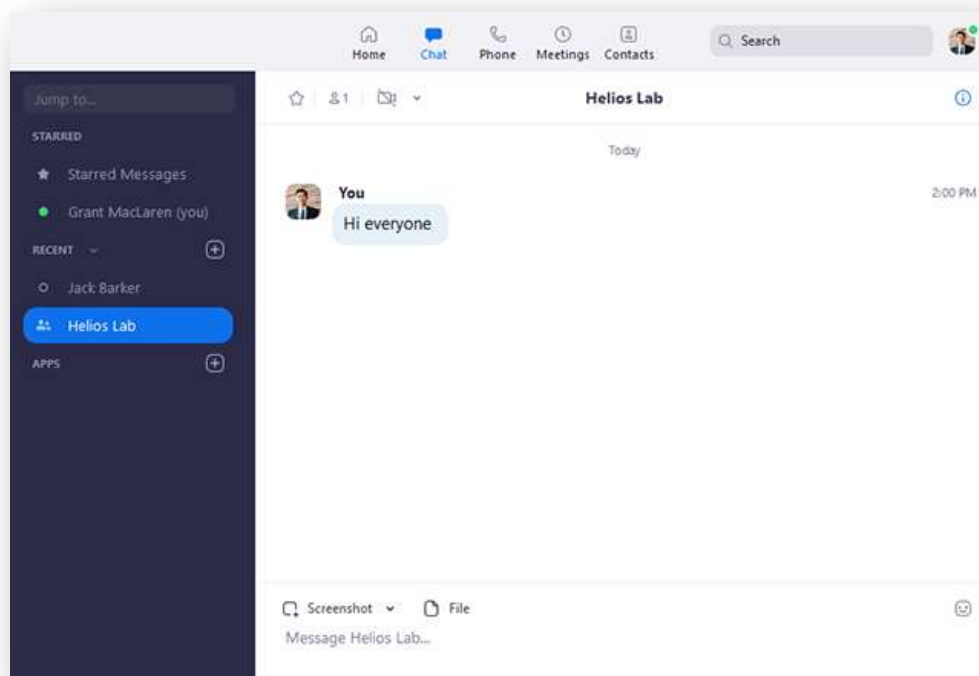**Check for Updates**: Check if Zoom is up to date.

About Zoom: View the current version.

Switch to Portrait View: Switch the Zoom window to portrait view if you prefer a narrower window.
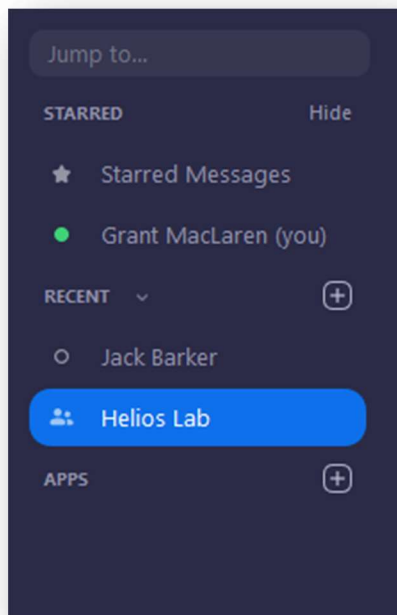
Sign out

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](#).

Under **Recent**, click a contact to view chat history and continue to chat with them. Contacts have a [status icon](#) before their name.
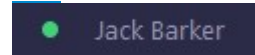
Under **Recent**, click a [channel](#) (indicated by the group icon before the name) to view the channel's chat history and send messages to channel members.
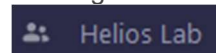
After selecting a contact or channel in the left-side panel, you can use these features in the chat window:

- **Star icon** ☆:

    Add the contact or channel to your starred list, giving you quick access to those contacts or channels.
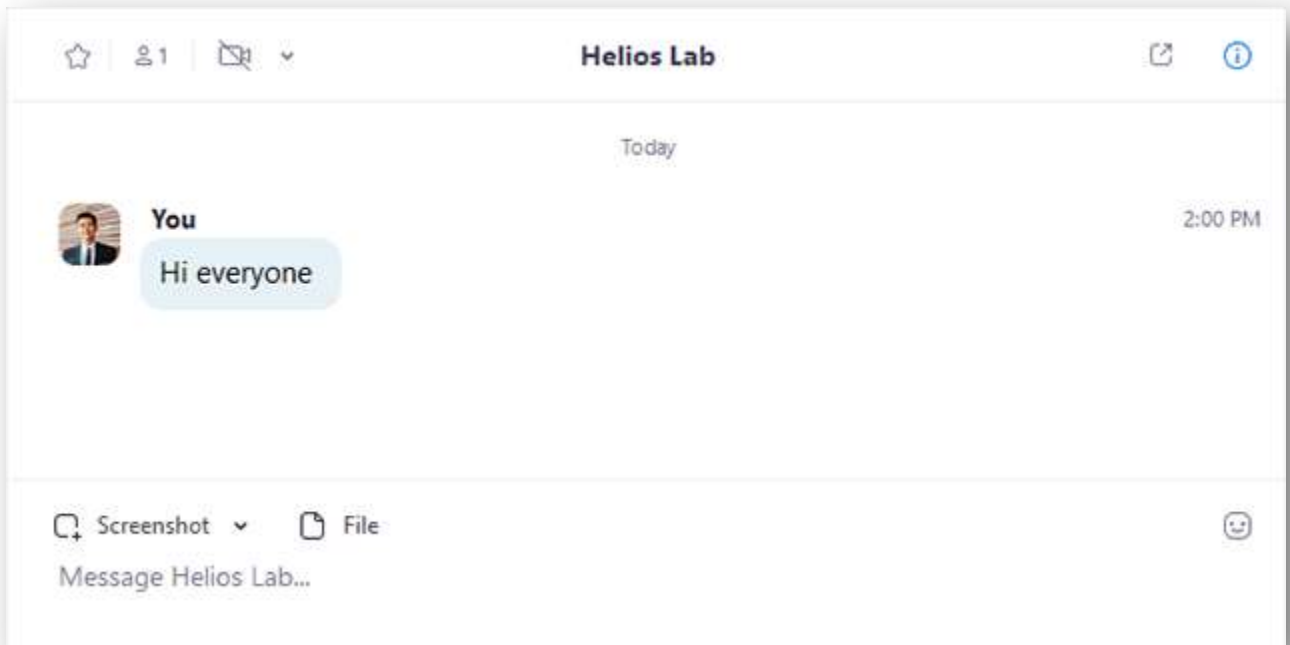
- **Video icon** 🎥:

    Start a meeting with the contact. If a channel is selected, this will start a meeting with all members of the channel.

- **New window icon** ⧉ (hover your pointer over the contact or channel name to display this icon):

    Opens the selected chat in a new window.

- **Info icon** ⓘ:

    View additional options for the contact or channel. Also gives you quick access to files, images, and starred messages in the selected chat.

- **Message box**:

    Compose and send messages to your contact or channel. You can also send screenshots, files, code snippets, and animated GIFs.

Meetings

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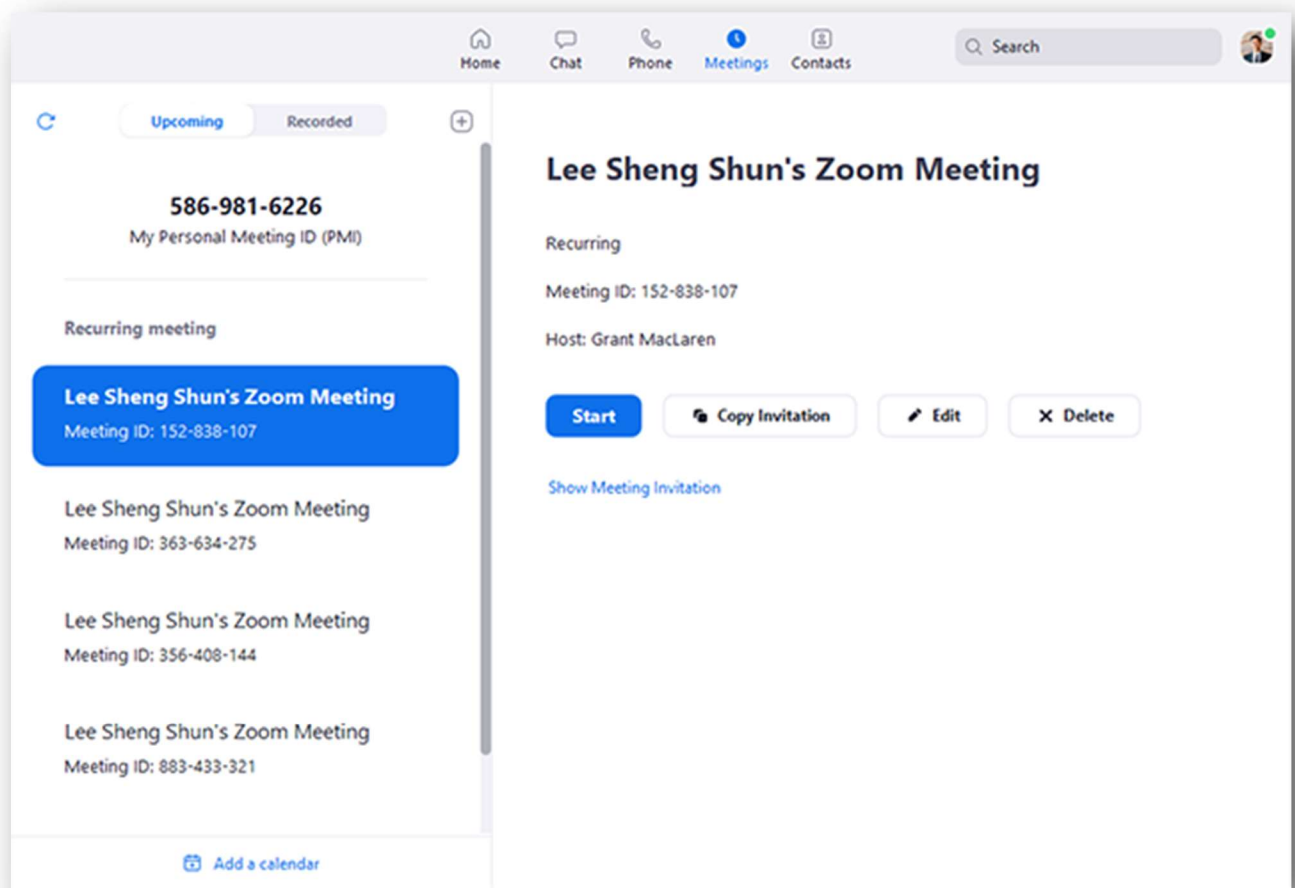
You can click the following options after selecting a scheduled meeting in the left-side panel:

- **Add icon** ⊕: Schedule a new meeting.

- **Refresh icon** ↻: Refresh the meeting list if you don't see your scheduled meeting.

- **Start**: Start the scheduled meeting that you have selected in your upcoming meetings.

- **Copy Invitation**: Copy the scheduled meeting's invitation text, 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 meeting options for your scheduled meeting.

- **Delete**: Permanently delete your scheduled meeting.

Contacts

Select the **Contacts** tab to view and manage your contacts.
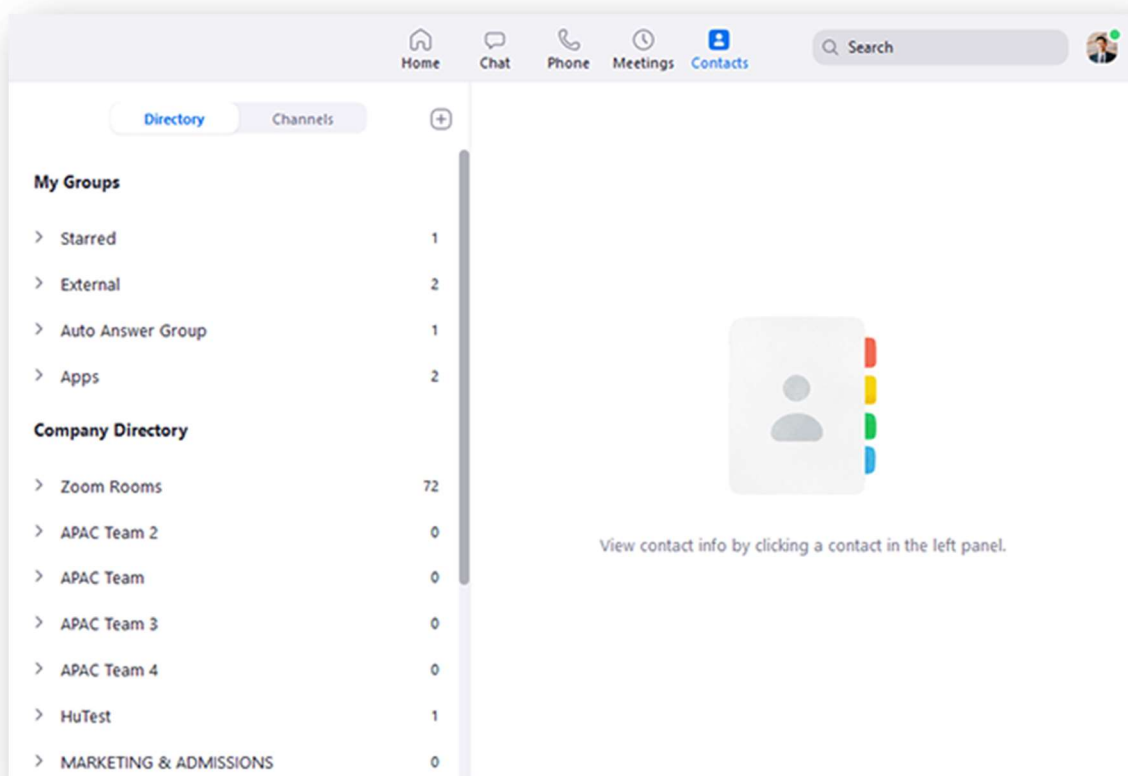
- **Directory** tab: View a directory of all your contacts, including [starred](#), external, and [auto answer](#) contacts. If your organization has Zoom Rooms, you will also see a list of Zoom Rooms.
- **Channels** tab: View a directory of your channels (used for group messaging). Starred channels appear at the top of the list.
- **Add icon** ⊕: Show options for [contacts](#) and [channels](#). You can add a contact, create a contact group, create a channel, or join a channel.

In-Meeting Controls

Once you have started or joined a meeting, you can access the meeting controls located at the bottom of the meeting window (move your mouse in the Zoom window to display meeting controls).

Learn more about meeting controls for hosts, co-hosts, and attendees. You can also join a test meeting to familiarize yourself with meeting controls before joining a scheduled meeting.

Video Conference Etiquette

Here is a list of guidelines for presenting and participating in videoconference sessions:

- When **attending via desktop or mobile device, make a** test VC call **before your session** to ensure your computer will connect.
- Use microphones to present and to interact with other sites. **Mute microphones when you are not speaking**.
- **Sit within the view of the camera**. Adjust the camera to capture as many people present as possible
- Verify that you can see and hear other participants and the presentation at the beginning of your VC session.
- **Avoid side conversation and the use of devices** during videoconference events.
- Be aware of body language, treat participants at other sites as if they were in the same room as you.