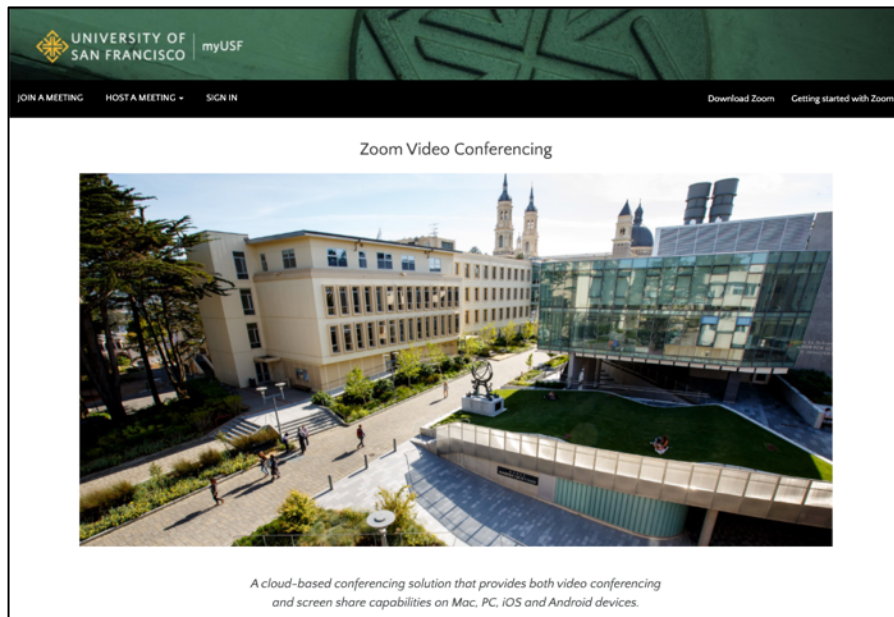


Activate and Setup your Zoom Account

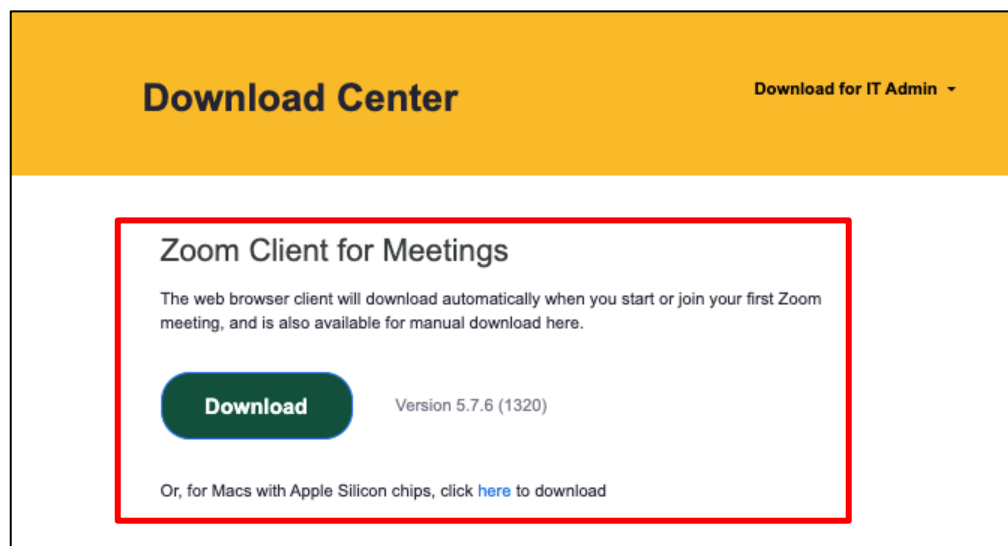
This guide covers the activation and setup of the USF Zoom account. To start, visit the USF Zoom site:

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



Click on the link **Download Zoom** on the upper right side of the page and then click on the **Download** link for **Zoom Client for Meetings** to download the application installer. After locating the downloaded installer, double click on the file to install Zoom on your Mac or PC.

Download Zoom Getting started with Zoom

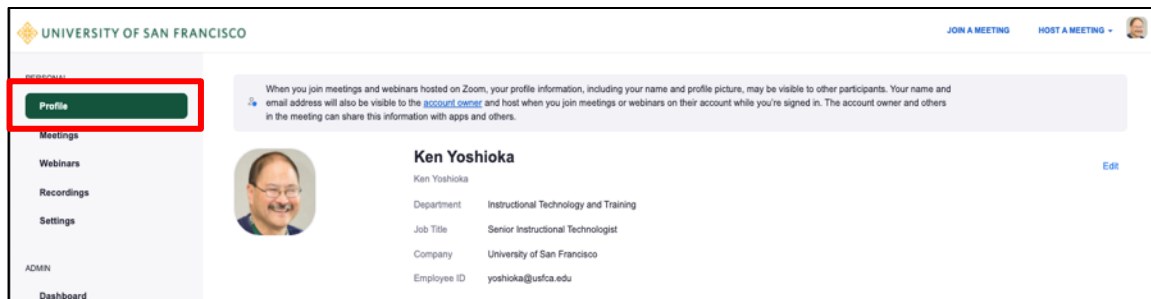


Activating your account and your Zoom Profile

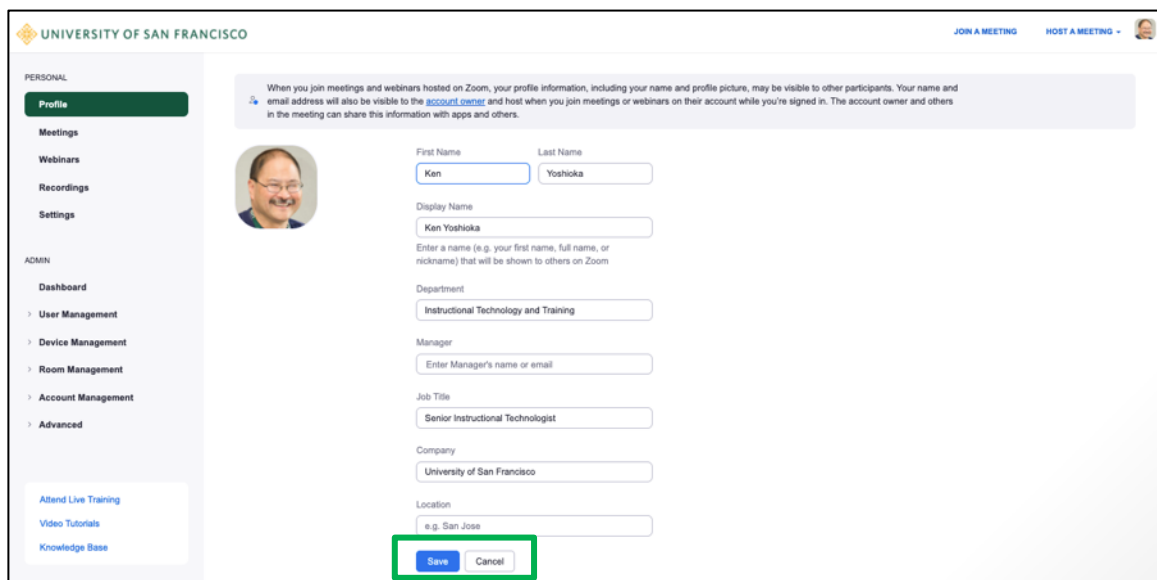
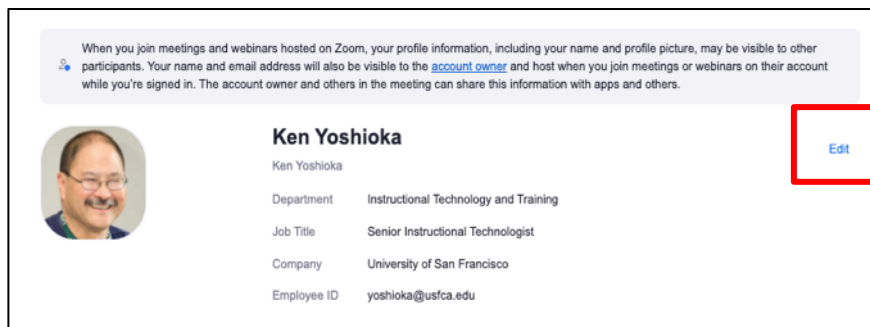
On the <https://usfca.zoom.us> site, click on **Sign In** and enter your USF username and password to login and activate your account.



Once signed in, check the options to personalize your profile and meeting links. To do this click on **Profile** in the left column.



The top section allows you to upload a photo and set your display name as you want it. Click **Edit** and make the changes for name, photo and Job information and click **Save Changes** to finish.



In the section Personal Meeting ID, you can set up a meeting ID which can be used for any scheduled or instant meeting. Click on the **Edit** link and type in the 9 or 10 digit number that will be your Personal Meeting ID. Check the box **Use Personal Meeting ID for instant meetings**. Click **Save** to finish.





In the section Personal Link, you can personalize a meeting link to send out that attendees can click on to join any of your scheduled or instant meetings. Click on the **Customize** link to create a personalized name for your link. Click **Save Changes** to finish.

Customize Your Zoom Meeting Settings

Next click on **Settings** link along the left side of the account page. We won't be going through every setting, just the ones that you may want to adjust to fit your account needs.

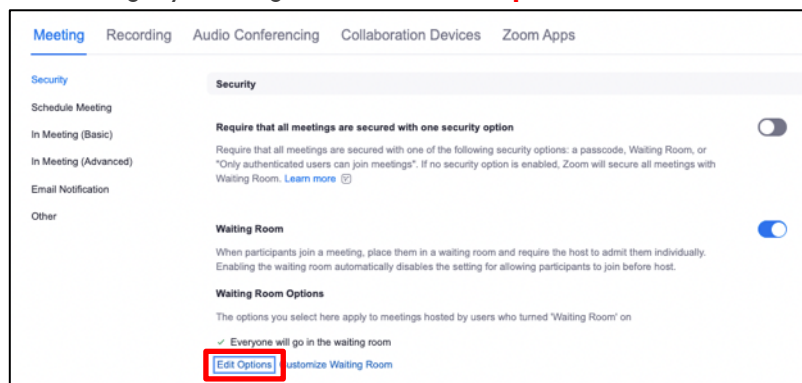
Settings guide

On the right side of the settings page are designations of the status of each particular setting. Here is a quick guide to the toggles for the settings

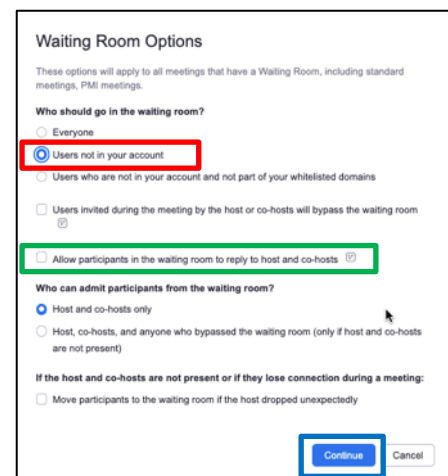
Blue toggle		Setting or feature is enabled and can be changed by each user
Gray toggle		Setting or feature is disabled and can be changed by each user
Greyed out blue toggle		Setting or feature has been enabled and locked by the administrator
Greyed out gray toggle		Setting or feature has been disabled and locked by the administrator

Security

The one setting we want to take look at is the Waiting Room. The default setting is to hold everyone in the waiting room when enabled for scheduled or instant meetings. You can customize the setting by clicking on the link **Edit Options**.



In the Options window, you can change the setting to only hold **users not in your account**. There are other customizations to the waiting room that you may want to enable or adjust depending on your needs. One feature that you can enable is the ability for people in the waiting room to **reply to the messaging** that the hosts and co-hosts can send to participants in the waiting room. Once you have made your changes, click the button **Continue** to finish.



Schedule Meeting

Here you can set up some default configurations for meetings that you schedule. First, for **Host Video** and **Participant Video** the recommendation is to start with video on and then people can choose to turn off their camera. For **Audio Type**, select Telephone and Computer Audio to provide options for connecting audio to the meeting.

Next if you would like participants to be able to join the meeting before the host, click on the switch on the right side of the page to turn on the feature. You can then check the box to set a time when the participants can enter before the start time.

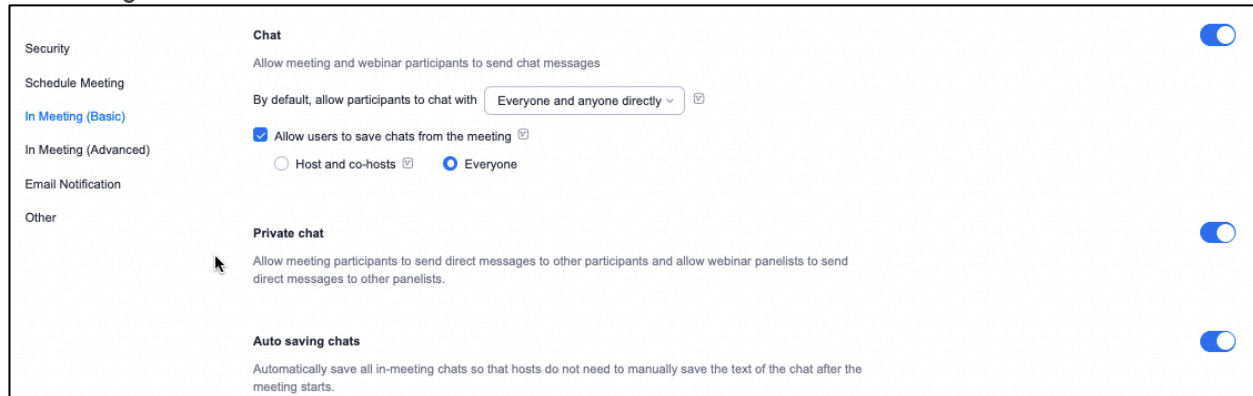
Finally, there are the option to use your Personal Meeting ID or PMI for meetings. The recommended choices are to enable the PMI (it's usually defaulted to being on), but to not enable the use of the Personal Meeting ID when scheduling a meeting. This defaults scheduled meetings to create a random ID which is more secure but allows the option to select your PMI for any scheduled meeting. Finally, enable the choice to use your PMI for any instant meetings. This way if you start a new meeting from the Zoom app on your computer or mobile device it will default to use your PMI for that type of unscheduled "instant" meeting.

In Meeting (Basic)

In this section, we cover settings for the in meeting tools tht you can set as defaults for all of your meetings.

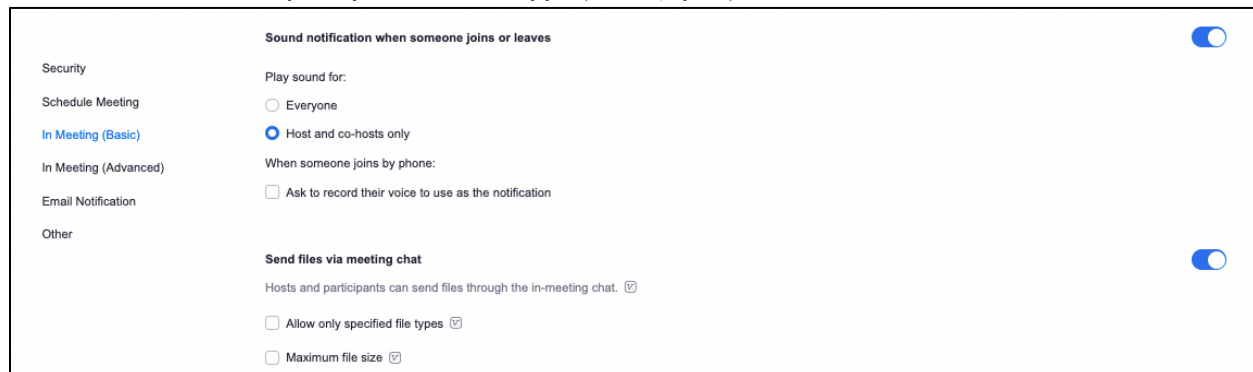
Chat

Meeting chat is enabled by default but you can also choose chat permissions as a default for all meetings including chat behavior, saving of chat by participants and autosaving chats by the scheduling host.



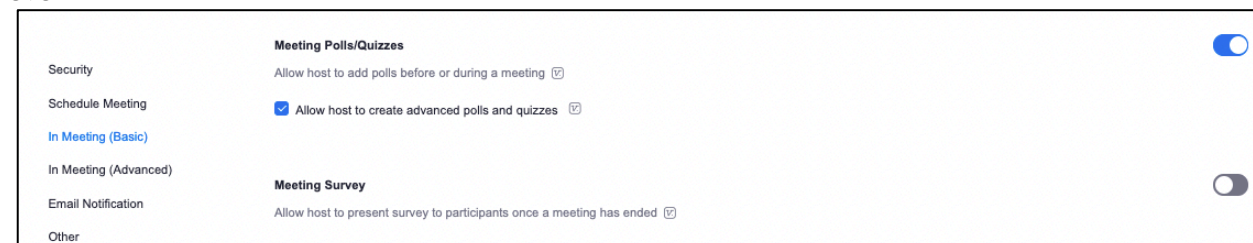
Notifications and Sending Files

You can determine how visual and audio notifications will work when participants enter and leave the meeting. The setting is on by default but you can turn it off completely or change who sees and hears the notifications. You can also enable the feature to allow everyone in the meeting to be able to send files through the chat. Note you can only send files to the entire meeting and not to individuals. You can specify certain file types (.docx, .pdf) and set a file size limit too.



Polls and Surveys

Polls are enabled by default for all accounts but you can check the box to enable the advanced polls to have access to a wider range of question types and tools. You can also enable Meeting Surveys to allow the host to present an end of meeting survey at the end of a presentation or event.



Screen Sharing and Annotation

The screen sharing permissions default to Host Only and it is advisable to keep that setting for better security and to adjust sharing permissions during the meeting. Annotation is also on by default so that any participant has the ability to annotate on a shared screen. There is a checkbox in case you want to limit the annotation to the person who is sharing the screen too.

Security	Screen sharing	<input checked="" type="checkbox"/>
Schedule Meeting	Allow host and participants to share their screen or content during meetings	
In Meeting (Basic)	Who can share?	
In Meeting (Advanced)	<input checked="" type="radio"/> Host Only <input type="radio"/> All Participants ⓘ	
Email Notification	Who can start sharing when someone else is sharing?	
Other	<input checked="" type="radio"/> Host Only <input type="radio"/> All Participants ⓘ	

Security	Annotation	<input checked="" type="checkbox"/>
Schedule Meeting	Allow host and participants to use annotation tools to add information to shared screens ⓘ	
In Meeting (Basic)	<input type="checkbox"/> Allow saving of shared screens with annotations ⓘ	
In Meeting (Advanced)	<input checked="" type="checkbox"/> Only the user who is sharing can annotate ⓘ	

Slide Control and Reactions

You can enable the feature called Slide Control to provide the ability for participants in turn to control the movement of slides in Powerpoint or Google Slides shared by the host. You can also enable Non-verbal feedback to provide participants the ability to show verbal cues to the presenter like slow down or speed up. Meeting reactions are enabled by default which provides the raise hand feature as well as emojis to respond visually to questions or prompts.

Security	Slide Control	<input checked="" type="checkbox"/>
Schedule Meeting	During a presentation, the person who is sharing can allow others to control the PowerPoint or Keynote slide presentation ⓘ	
In Meeting (Basic)	Non-verbal feedback	<input checked="" type="checkbox"/>
In Meeting (Advanced)	Allow meeting participants to communicate without interrupting by clicking on icons (yes, no, slow down, speed up, coffee cup). These icons are found in the Reactions menu in the toolbar, and when selected, they display on the participant's video and in the participants list until dismissed. ⓘ	
Email Notification	Meeting reactions	<input checked="" type="checkbox"/>
Other	Allow meeting participants to communicate without interrupting by reaction with emojis (e.g. clap, heart, laugh). These emojis are found in the Reactions menu in the toolbar, and when selected, they display on the participant's video and in the participants list for 10 seconds. Participants can change their emoji skin tone in Settings. ⓘ	
	<input checked="" type="radio"/> All emojis ⓘ	
	<input type="radio"/> Selected emojis 👍 🙌 🍷 🍷 🍷 🍷 🍷 🍷	

In Meeting (Advanced)


Breakout Rooms and Closed Captioning

Breakout rooms are enabled by default but you can enable the feature to assign participants to breakout rooms while schedule, usually referred to as pre-assignment. The checkbox to broadcast messages to breakout rooms is also on by default. All of the closed captioning options are checked by default including the option for Live Transcription which provides the ability for the host to turn on machine generated captions for any meeting.

Security	Breakout room Allow host to split meeting participants into separate, smaller rooms	<input checked="" type="checkbox"/>
Schedule Meeting	<input checked="" type="checkbox"/> Allow host to assign participants to breakout rooms when scheduling ⓘ	
In Meeting (Basic)	<input checked="" type="checkbox"/> Allow host to broadcast message to participants ⓘ	
In Meeting (Advanced)		
Email Notification	Remote support Allow meeting host to provide 1:1 remote support to another participant	<input type="checkbox"/>
Other	Closed captioning Allow host to type closed captions or assign a participant/3rd-party service to add closed captions	<input checked="" type="checkbox"/>
	<input checked="" type="checkbox"/> Allow use of caption API Token to integrate with 3rd-party Closed Captioning services	
	<input checked="" type="checkbox"/> Allow live transcription service to transcribe meeting automatically	
	<input checked="" type="checkbox"/> Allow viewing of full transcript in the in-meeting side panel ⓘ	
	Save Captions Allow participants to save fully closed captions or transcripts	<input checked="" type="checkbox"/>

Virtual Backgrounds and Video Filters

Virtual backgrounds and video filters are on by default and you are able to add additional images for your virtual backgrounds to be a part of your account.

Security	Virtual background Customize your background to keep your environment private from others in a meeting. This can be used with or without a green screen.	<input checked="" type="checkbox"/>
Schedule Meeting	<input checked="" type="checkbox"/> Allow use of videos as virtual backgrounds ⓘ	
In Meeting (Basic)	Manage 9 virtual background(s) ⓘ	
In Meeting (Advanced)		
Email Notification	Video filters Turn this option on to allow users to apply filters to their videos ⓘ	<input checked="" type="checkbox"/>
Other		

Immersive View and Focus Mode

Enabling Immersive View will allow you to place the video thumbnails of the Zoom gallery into a virtual background like a tiered classroom or table to create the illusion of a real space.

Security	Immersive View	<input checked="" type="checkbox"/>
Schedule Meeting	Allow hosts to curate case-specific scenes, such as a classroom or boardroom for their meetings or webinars.	
In Meeting (Basic)	<input checked="" type="checkbox"/>	
In Meeting (Advanced)	Focus Mode	<input checked="" type="checkbox"/>
Email Notification	A mode that shows only hosts and co-hosts' videos and profile pictures during a meeting. Focus Mode can be found in the "More" menu in the in-meeting toolbar. <input checked="" type="checkbox"/>	
Other	<input type="checkbox"/> Allow host to enable focus mode when scheduling <input checked="" type="checkbox"/>	



Enabling Focus Mode will allow you to change the meeting views by the participants to see only the host and co-hosts as well as any participants that have been spotlighted. You can also decide whether any shared screen by the participants can be seen by just the host and co-host or by all participants in the meeting.

Other

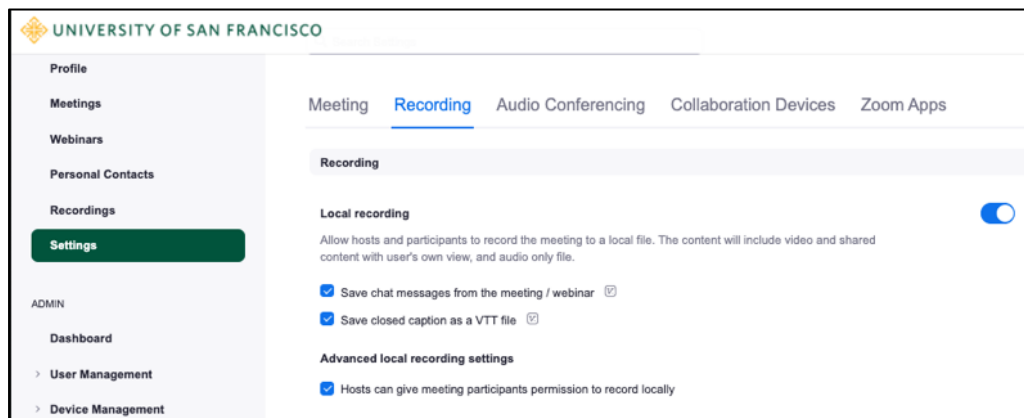
Schedule Privilege

If you have a need to have a colleague to be able to schedule Zoom meetings for you, you can assign them to be authorized to schedule meetings on your behalf. Note that when a scheduler creates a meeting for you, it will show up in your account and in the account of the scheduler.

Security	Schedule Privilege
Schedule Meeting	You can assign users in your account to schedule meetings on your behalf. You can also schedule meetings on behalf of someone that has assigned you scheduling privilege. You and the assigned scheduler must be on a Paid plan within the same account.
In Meeting (Basic)	Assign scheduling privilege to Add
In Meeting (Advanced)	No one
Email Notification	I can schedule for No one
Other	

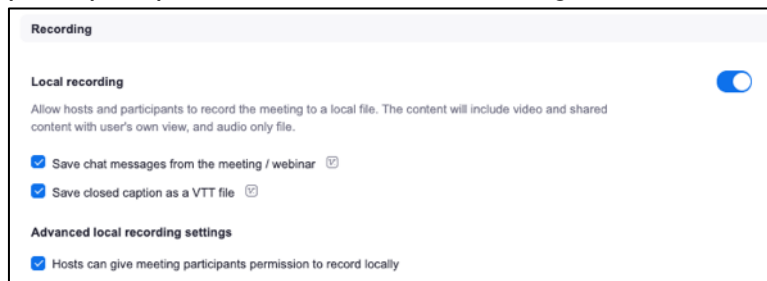
Customize Your Zoom Recording Settings

Here you can configure your default settings for all of your cloud recordings. To begin, login to your USF Zoom account at <https://usfca.zoom.us> and click on Settings on the left side of the page. Then click on the Recording tab at the top center of the page.

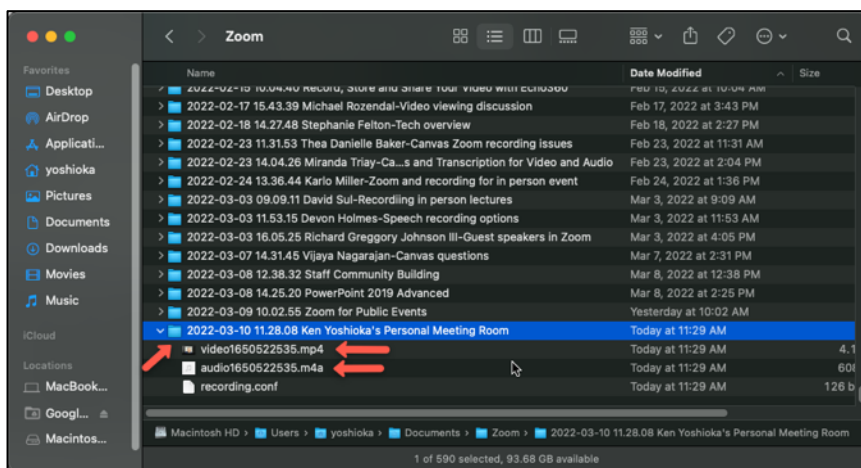


Recording to your Local Computer

In the Local recording section, you can choose to auto save the chat file as well as captions that are provided by either a 3rd party service or Live Transcription. Finally there is an option to assign a participant permission to record the meeting to their own computer too.

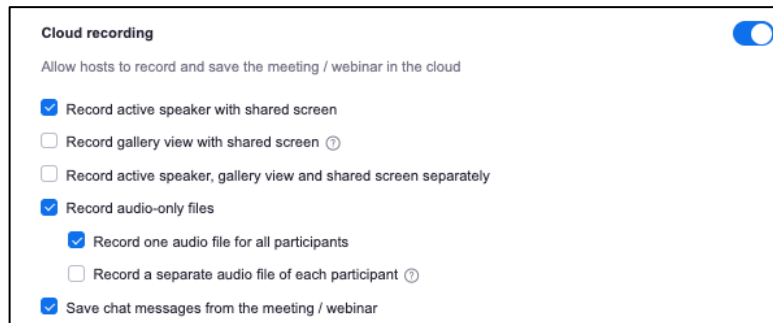



When you record to the local computer, the files are stored in a folder labeled as Zoom In your Mac or PC's Documents folder. When the meeting ends, Zoom will convert the Zoom recording to useable media. Each meeting will have it's own dated folder with the mp4 video and m4a audio files.





Recording to the Cloud

In the Cloud recording section, the default is to record active speaker with shared screen and to record an audio only file of all the participants. In addition, the chat messages are saved by default and a part of the meeting recording. You can uncheck the save chat messages box to prevent the chat messages from being a part of the recording.

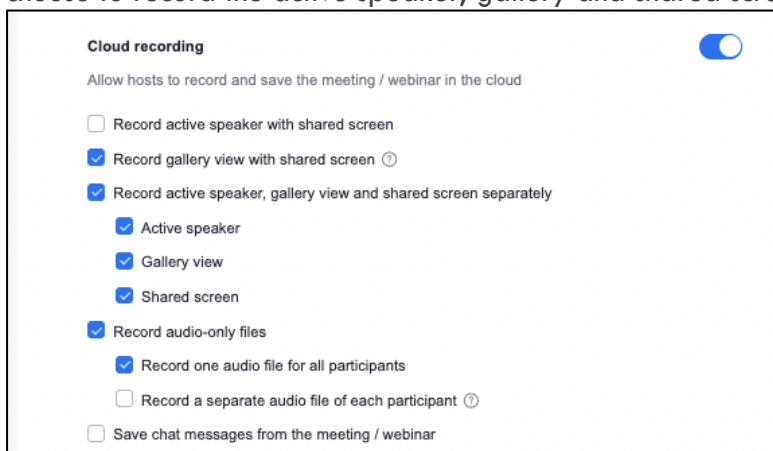



Cloud recording 

Allow hosts to record and save the meeting / webinar in the cloud



- ☒ Record active speaker with shared screen
- ☐ Record gallery view with shared screen 
- ☐ Record active speaker, gallery view and shared screen separately
- ☒ Record audio-only files
 - ☒ Record one audio file for all participants
 - ☐ Record a separate audio file of each participant 
- ☒ Save chat messages from the meeting / webinar

You can change the settings to record the gallery view with the shared screen and in addition choose to record the active speaker, gallery and shared screen as separate recordings.

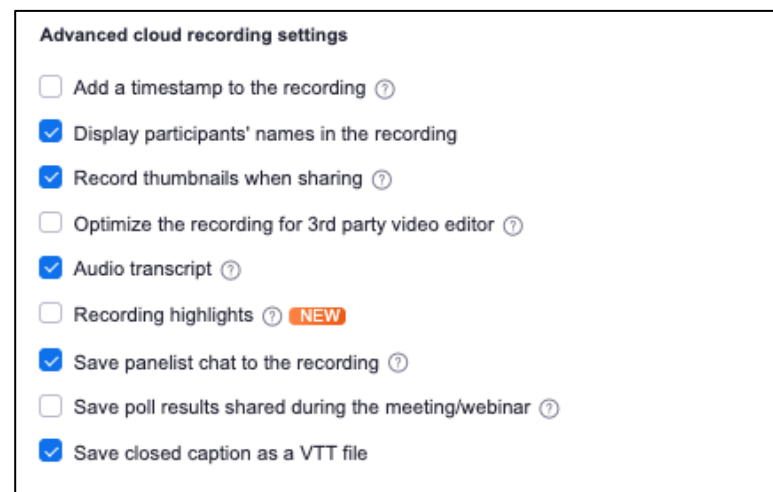


Cloud recording 








Allow hosts to record and save the meeting / webinar in the cloud

- ☐ Record active speaker with shared screen
- ☒ Record gallery view with shared screen 
- ☒ Record active speaker, gallery view and shared screen separately
 - ☒ Active speaker
 - ☒ Gallery view
 - ☒ Shared screen
- ☒ Record audio-only files
 - ☒ Record one audio file for all participants
 - ☐ Record a separate audio file of each participant 
- ☐ Save chat messages from the meeting / webinar

The next section is the Advanced cloud recording settings. The default settings are usually fine for most recordings but the one setting you may want to enable is Optimize the recording for 3rd party video editor. This will provide better compatibility with video editors like iMovie and Camtasia.



Advanced cloud recording settings

- ☐ Add a timestamp to the recording 
- ☒ Display participants' names in the recording
- ☒ Record thumbnails when sharing 
- ☐ Optimize the recording for 3rd party video editor 
- ☒ Audio transcript 
- ☐ Recording highlights  **NEW**
- ☒ Save panelist chat to the recording 
- ☐ Save poll results shared during the meeting/webinar 
- ☒ Save closed caption as a VTT file

Below the Advanced cloud recordings settings section are the recording permissions; all of these settings can remain in their default selections but you can change the permissions in each recording before sharing. One important note is that there is a retention policy for all Zoom cloud recordings and recordings are automatically deleted and sent to the trash after 182 days. After 30 days in the trash, they are permanently deleted. If you need to keep a recording, then the files need to be downloaded before permanent deletion.

Allow cloud recording sharing
☒

By disabling this setting, nobody else can access the shareable link. This setting is applicable for newly generated recordings only.

Automatic recording
☐

Record meetings automatically as they start

Modified [Reset](#)

IP Address Access Control
☐

Allow cloud recording access only from specific IP address ranges

Require users to authenticate before viewing cloud recordings
☐

Right before sharing cloud recordings, meetings hosts can choose from one of the options configured below to require users to authenticate before viewing recordings.

Modified [Reset](#)

Set recording as on-demand by default
☐

Users must register before they can watch the recording

Require passcode to access shared cloud recordings
☒

Passcode protection will be enforced for shared cloud recordings. A random passcode will be generated which can be modified by the users. This setting is applicable for newly generated recordings only.

Modified [Reset](#)

Viewers can see the transcript
☒

When this setting is turned on, users with the sharing link will be able to view transcripts of recordings. This setting is applicable to newly generated recordings only.

Viewers can see the chat
☒

When this setting is turned on, users with the sharing link will be able to view chat history of recordings. This setting is applicable to newly generated recordings only.

Delete cloud recordings after a specified number of days
☒

Specify a time range (days):

The host can delete cloud recordings
☒

Allow the host to delete the recordings. If this option is disabled, the recordings cannot be deleted by the host and only admin can delete them.

Recording notifications - Zoom clients ⓘ

Show a disclaimer to participants when a recording starts
☒ All participants ☐ Guest only ⓘ

Play voice prompt for
☒ All participants ☐ Guest only ⓘ ☐ No one

☐ Ask host to confirm before starting a recording

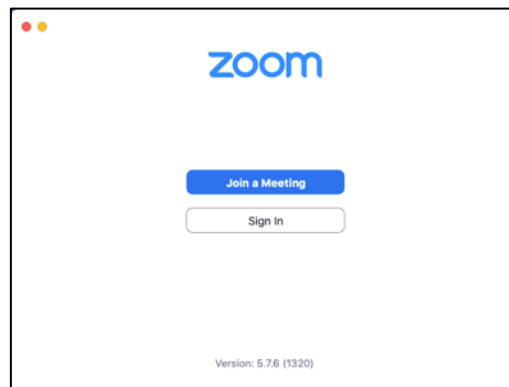
Recording notifications - Phone users

By default, phone users will hear one audio notification indicating that a recording has started.

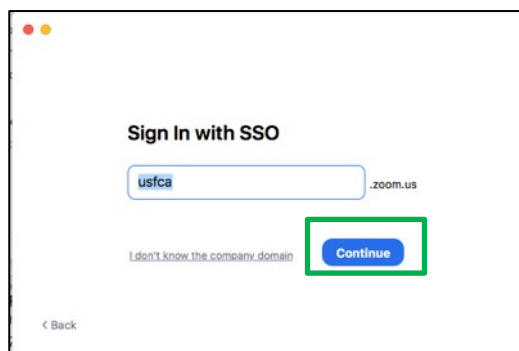
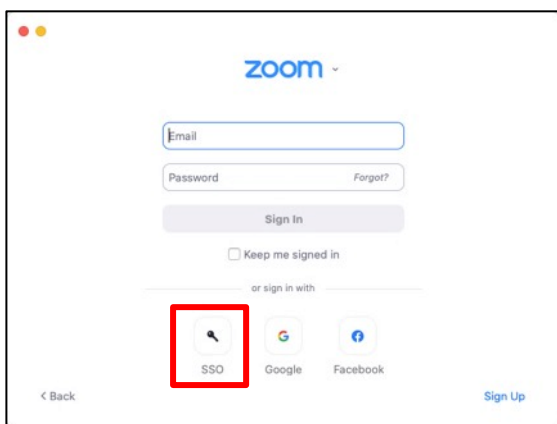
☐ Require phone-only users to press 1 to consent to being recorded ⓘ

☐ Multiple notifications for phone users ⓘ

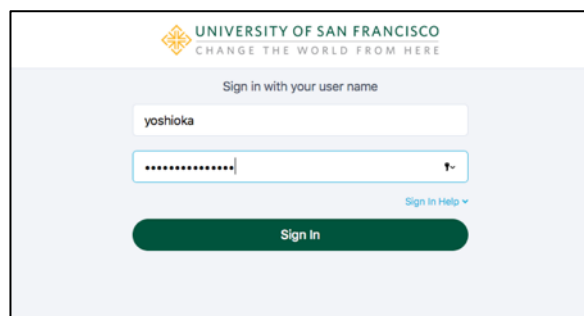
Finally launch the Zoom client you installed earlier and you will view the startup screen. Click **Sign In** to continue.



Click on **the icon SSO** and enter **usfca** into the field under **Sign In with SSO** and click **Continue**.



You will be redirected to the USF login page to login with your USF username and password to sign in to Zoom.



Once you have signed in, you will see the Zoom app window to start, join and schedule meetings.

