

IMPERIAL COUNTY BEHAVIORAL HEALTH SERVICES

# Zoom Video Conferencing

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<b>Created</b>	<b>Updated</b>
03/13/2020 Vanessa T. Lopez	03/18/2020 Vanessa T. Lopez

# Zoom Video Conferencing

**Purpose:** This document serves as a user guide for how to create a Zoom Account and how to initiate a Zoom video conference meeting with users in different locations. Only the “Meeting Host” needs to have a Zoom Account.

## **Requirements:**

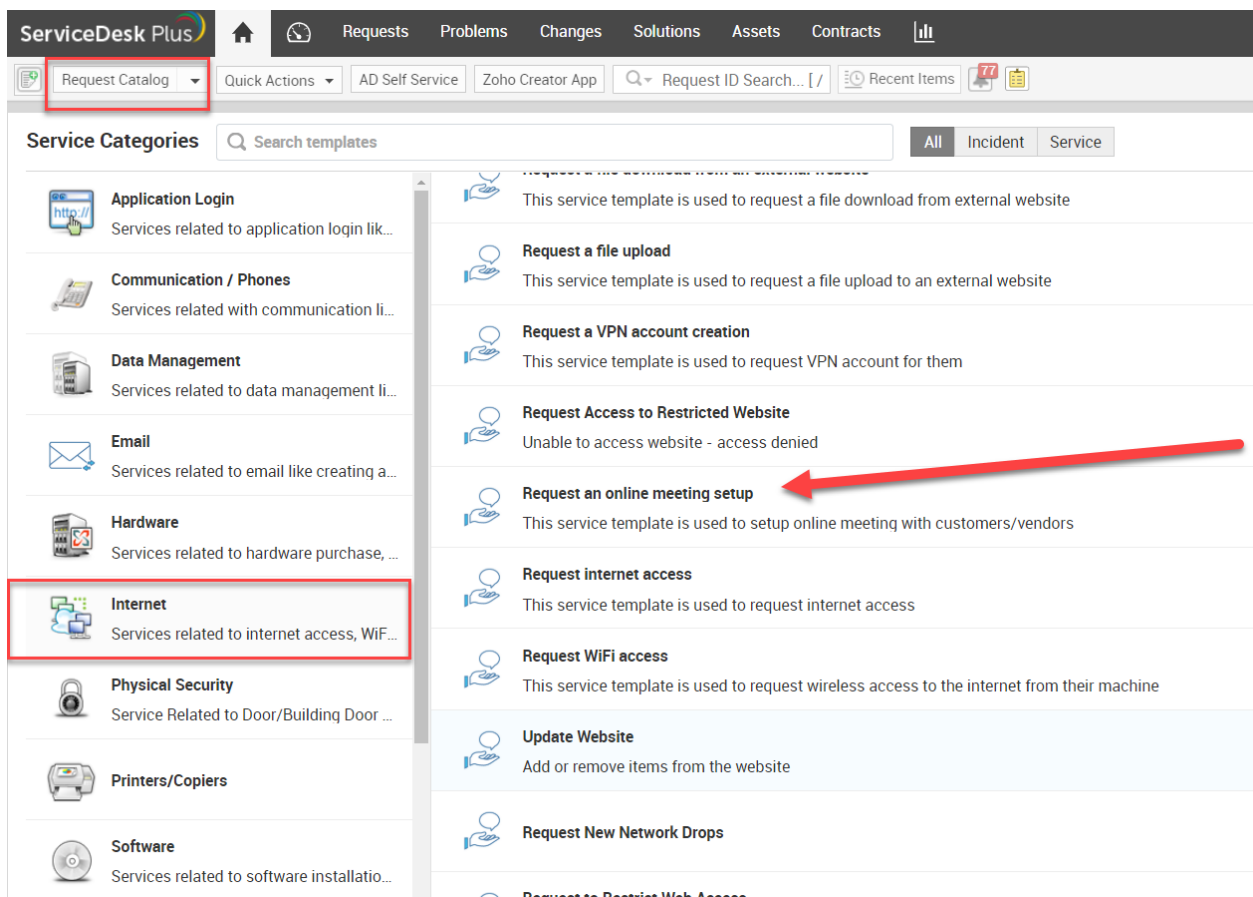
In order to join the meeting you will need the following:

1. A desktop computer, laptop, tablet or a smartphone.
2. High speed internet connection.
3. A Zoom account.

## **How to Create a Free (Basic) Zoom Account:**

### **Step 1: ManageEngine Ticket**

Please create a ticket in Manage Engine. Click “Request Catalog”, Click on “Internet” and select “Request an online meeting setup”:



The screenshot displays the ServiceDesk Plus interface. At the top, there is a navigation bar with options: Requests, Problems, Changes, Solutions, Assets, and Contracts. Below this is a secondary bar with 'Request Catalog' (highlighted with a red box), Quick Actions, AD Self Service, Zoho Creator App, a search bar for Request ID, and Recent Items. The main content area is titled 'Service Categories' and includes a search bar and tabs for 'All', 'Incident', and 'Service'. On the left, a list of service categories is shown, with 'Internet' (Services related to internet access, WiFi...) highlighted by a red box. On the right, a list of service templates is displayed, including 'Request an online meeting setup' (This service template is used to setup online meeting with customers/vendors), which is pointed to by a red arrow.

## Step 2: Provide information

Please provide the following information:

**Subject:** Setup Zoom account for: *Enter user's name and email account*

**Description:** Enter the same information as the subject line

**Technician:** Select Vanessa T. Lopez from drop down

**BHS Location:** Select your current location (address)

**BHS Team and Groups:** Select your current unit (Team)

Once information is entered, please click on “add request”. A ticket will be created and a notification will be sent to Technician to start the account setup process.

The screenshot shows the ServiceDesk Plus interface for creating a request. The form is titled "Request an online meeting setup". The fields are as follows:

- Name: Isabel Ornelas
- Asset(s): Search and associate assets here
- Subject: Please setup a Zoom meeting account for Isabel Ornelas - isabelornelas@co.imperial.ca.us
- Description: Please Please setup a Zoom meeting account for Isabel Ornelas - isabelornelas@co.imperial.ca.us
- Site: Behavioral Health Services
- Technician: Vanessa T. Lopez
- BHS Location: El Centro, 202 North 8th Street (3rdFloor) | Central Services (Admin Building)
- BHS Teams and groups: Information Systems / Systems Technology

At the bottom of the form, there is an "Attachments" section with an "Attach file" button. A red arrow points to the "Add request" button, which is next to "Reset" and "Cancel" buttons. A "Live Chat" button is also visible in the bottom right corner.

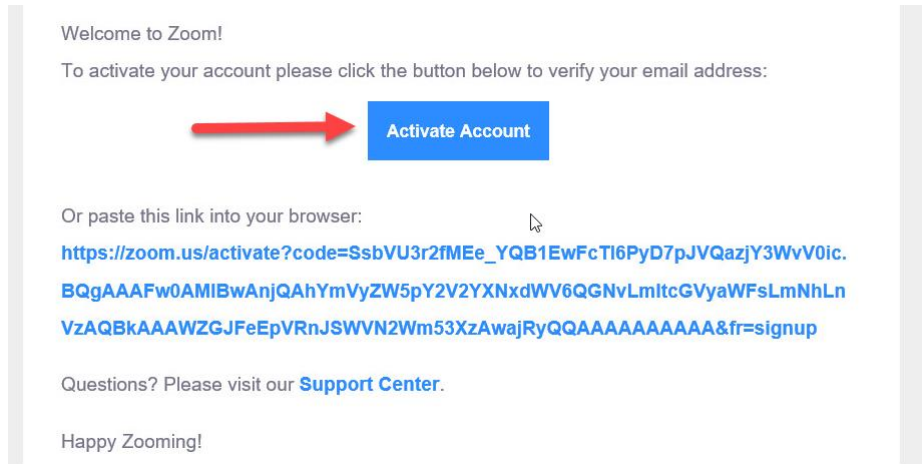
## Step 3: Notification confirmation

You will receive an email notification from “Helpdesk” including the ticket number. Information Systems will be contacting you once the request is completed via email.

*Please note: If you do not have access to ManageEngine, please email the information described above to [vanessatlopez@co.imperial.ca.us](mailto:vanessatlopez@co.imperial.ca.us) or call ext. 1620.*

## Step 4: Notification to Activate Account

Go to your work email account, open email from Zoom and click “Activate Account”



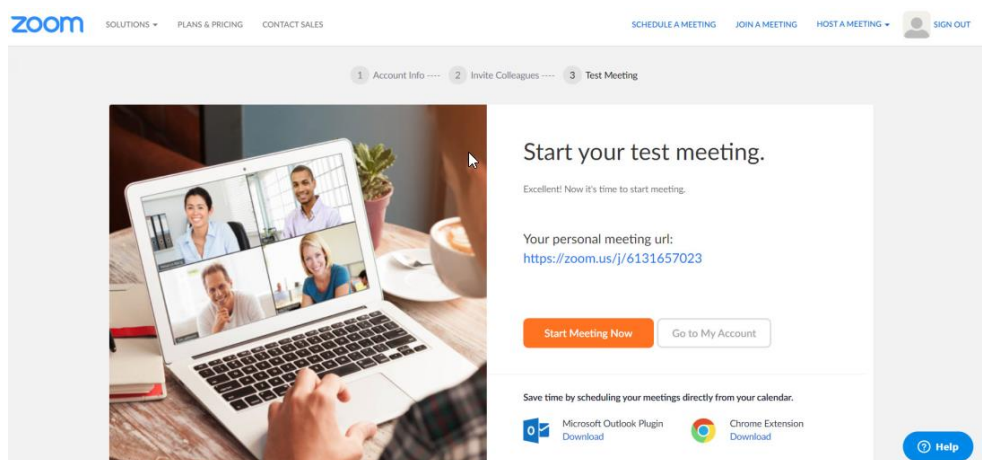
## Step 5: Complete Activation Process

Continue with account activation process by entering in the fields the required information and click “continue”



## Step 6: Enjoy your meeting sessions

You are ready to start meeting session



## Free (Basic) Zoom Account Notes

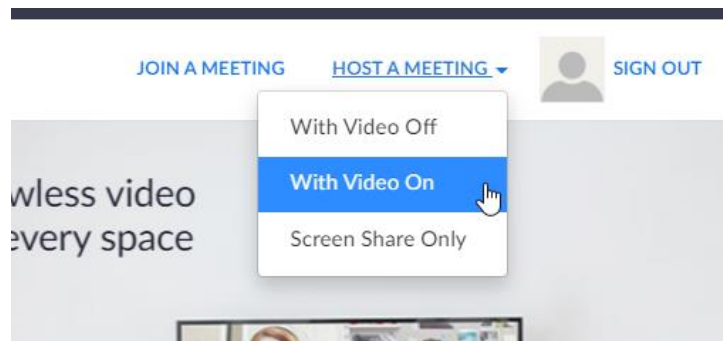
- Zoom sessions are always end-to-end encrypted
- If discussing client information:
  - Do not record meeting session
  - Do not discuss any information in chat
- There is a 40 minutes maximum duration for sessions with 2 or more participants (1-to-1 meetings have no maximum durations)
- Meetings can have up to 100 participants.

Zoom Pro (Paid) Accounts do not have the above limitations and are also required for telemedicine sessions. Please contact Information Systems to request a Zoom Pro Account purchase.

## How to create a Zoom meeting session

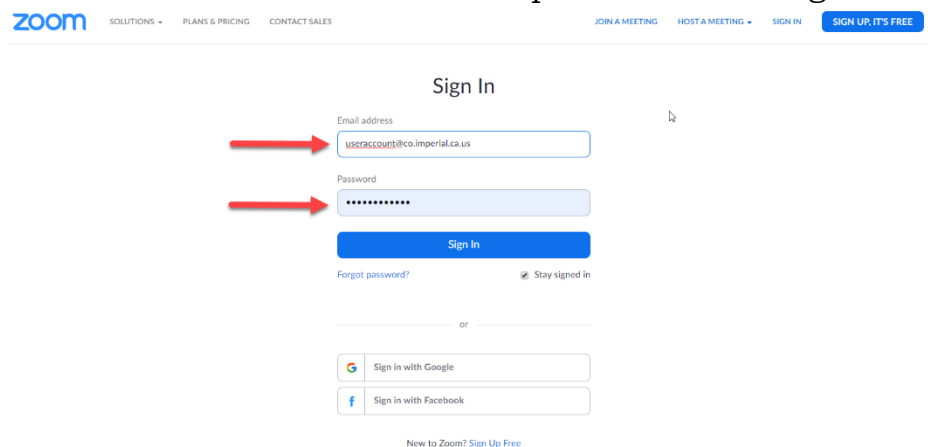
### Step 1: Hosting a Meeting

Go to Zoom Website <https://zoom.us/> and Click on the HOST A MEETING dropdown located at the top right corner of the website and select “With Video On”



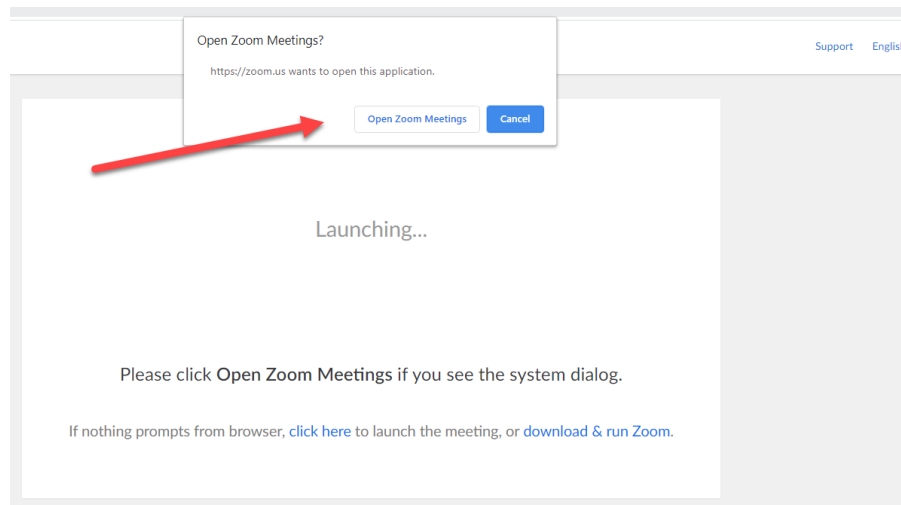
### Step 2: Sign In

Enter user's work email address and ZOOM password. Click Sign in.

A screenshot of the Zoom Sign In page. The page has a white background with the Zoom logo and navigation links at the top. The main content area is titled 'Sign In' and contains a form with two input fields: 'Email address' and 'Password'. The 'Email address' field contains the text 'useraccount@co.imperial.ca.us' and has a red arrow pointing to it. The 'Password' field contains a series of dots and also has a red arrow pointing to it. Below the password field is a blue 'Sign In' button. There are also links for 'Forgot password?' and a checkbox for 'Stay signed in'. At the bottom, there are options to 'Sign in with Google' and 'Sign in with Facebook', and a link for 'New to Zoom? Sign Up Free'.

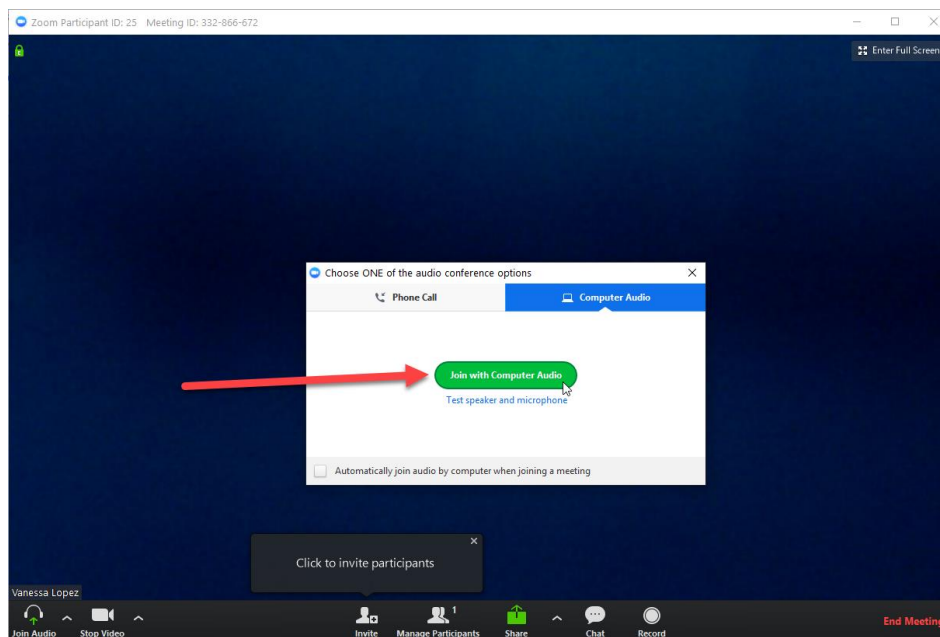
### Step 3: Granting Access to Zoom Meeting

Click on “Open Zoom Meetings” box:



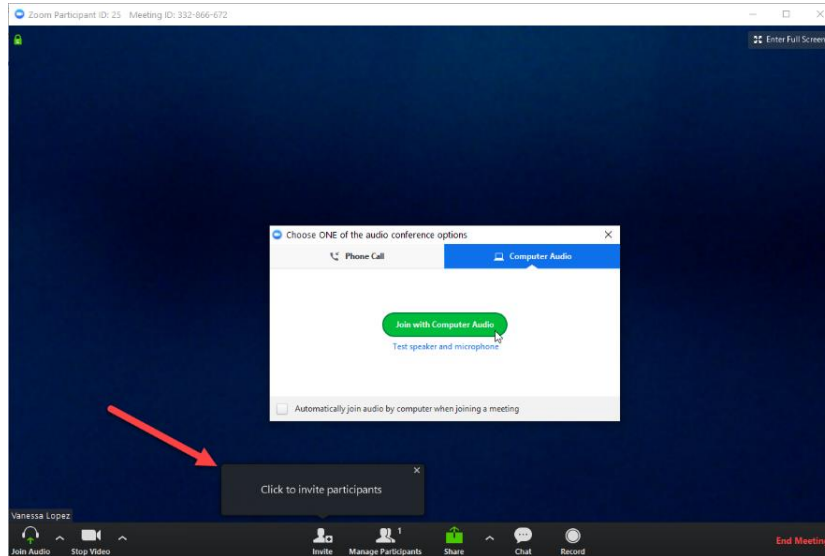
### Step 4: Setting up Audio Options

Click “Join with Computer Audio” If you have a webcam with built in microphone, Otherwise, use the “Please call” option and follow the prompts.

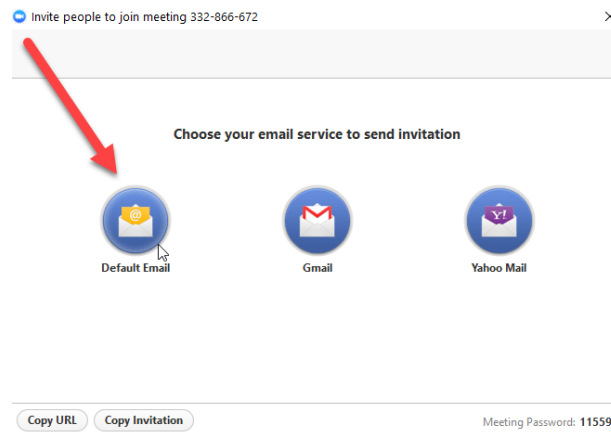


## Step 5: Inviting Participants to Join Zoom Meeting

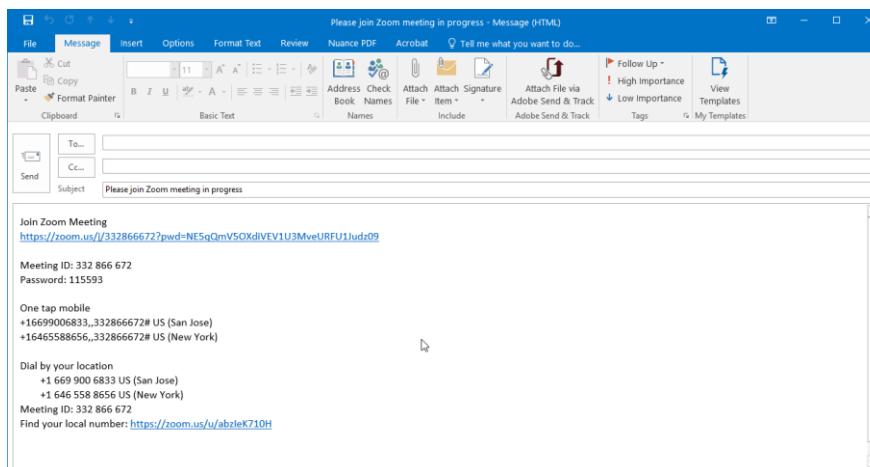
Click “Invite” to send invitation to participants to join Zoom Meeting



Choose “Default Email” as your email service to send invitation

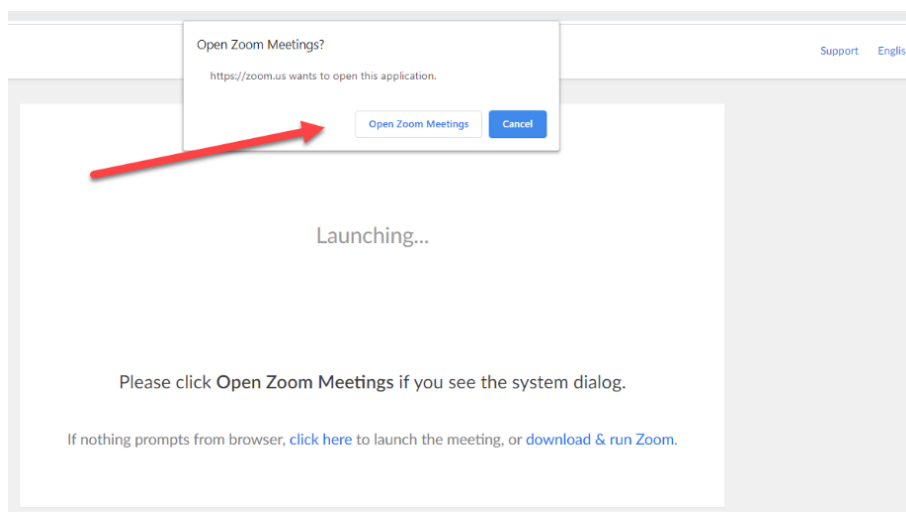


A new email message will prompt including the meeting session link. Enter the email address of the user's you would like to invite to the meeting and send email.



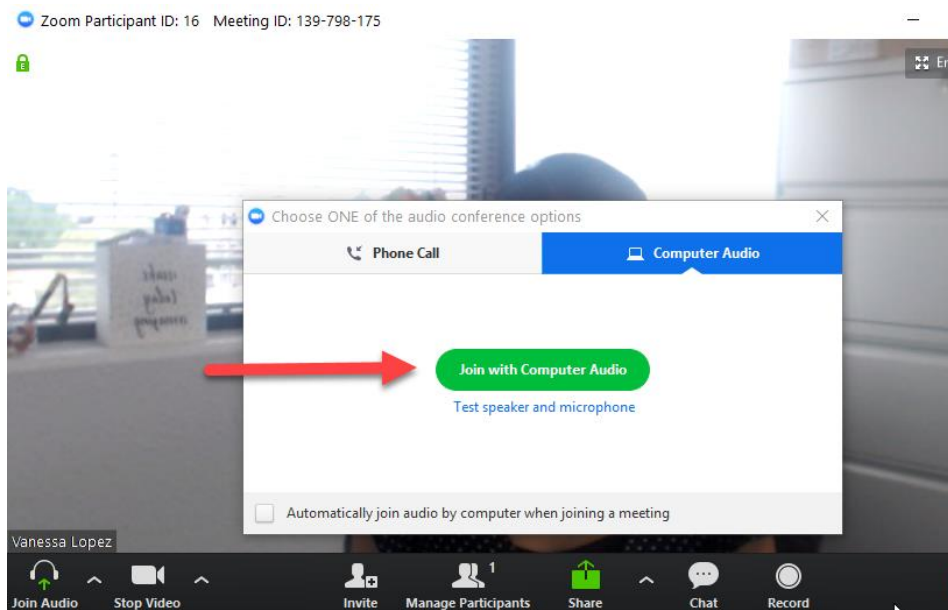
## Step 6: Join the Zoom Meeting (Participants)

Invited attendees will need to click on the email link to join the meeting. Link will redirect them to zoom website and will request to open Zoom Meeting



## Step 7: Setting Audio Options (Participants)

A new window will appear with the meeting participants. Please select Joint with Computer Audio if you have a webcam with builtin microphone, otherwise use the "Phone Call" option and follow the prompts.





## Step 8: Zoom Meeting Ready

Zoom session meeting will start automatically and you will be able to see all participants once they join the meeting.

