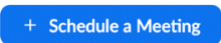A.

1. To set up a zoom call, first go to zoom.us/signin on your browser and login using your usual zoom account. The username will be the account you or your team use, and the password will be the same as the one to the intranet.

2. Look at the already scheduled meetings on your account to make sure there are no conflicts. To do this, you want to click the "Meetings" menu option on the left side of the screen.
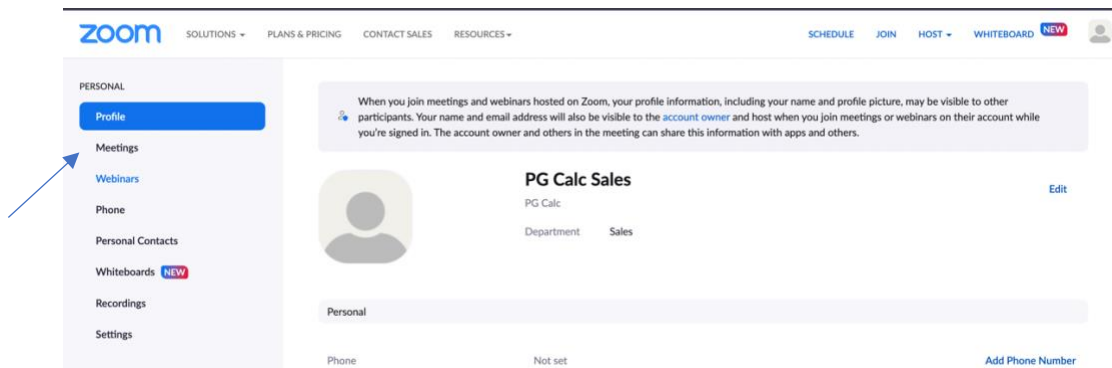
3. From there you should be able to see what's on the schedule for meetings. One-off meetings will appear under their date with the time, but recurring meetings (like the gift admin prospects meeting below) will appear below that, without a time attached.
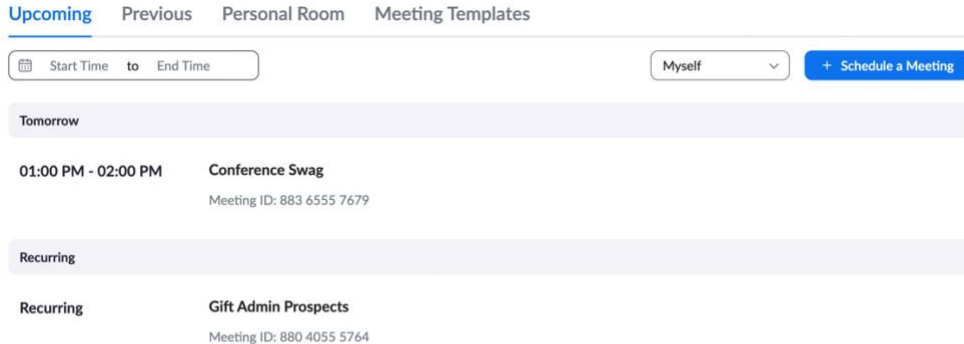
4. Check on the recurring meeting. If it's a meeting you attend, you should know the timing. If it's not, check with your group to make sure you aren't trying to both use the account at the same time. If you're all clear, you can schedule your own meeting. If you aren't, jump ahead to section B.

5. Click the Schedule a Meeting button at the top right.

6. This opens a scheduling page.
   a. **Schedule For:** this should stay as "Myself" unless you have access to other accounts – this will be covered below in section B.

b. **Topic:** change to the name of the meeting

c. **When:** make sure the time and date match what you want your invitation to be.

d. **Duration:** should be the proposed length of the meeting. Zoom will not shut you out if you go over, but you should be cognizant if the account is needed by anyone else after your meeting. If the space exists in the schedule, add in a little extra time in the duration to give yourself breathing room.

e. **Time Zone:** this should default to wherever you are, but make sure it's in the same time zone as the meeting you're scheduling. Also remember to double check the time zone of the different meeting attendees to make sure you're using the right time (ie make sure your meeting with the person on the west coast is correct in the PT/ET timing)

Schedule Meeting

a. Schedule For	Myself	⌄
b. Topic	My Meeting	
	+ Add Description	
c. When	📅 07/20/2022	2:00 ⌄ PM ⌄
d. Duration	1 ⌄ hr 0 ⌄ min	
e. Time Zone	(GMT-4:00) Eastern Time (US and Canada) ⌄	

Zoom won't let you have a meeting that lasts no time at all, so you have to add in minutes before dropping the hours to 0.

f. **Registration, Meeting ID, and Template:** all should be left at their defaults.

g. **Security:** Passcode should always remain checked, but you can decide whether or not to have meeting attendees go into a waiting room when they join or if they go straight into the meeting.

f.
Registration ☐ Required

Meeting ID ⦿ Generate Automatically ○ Personal Meeting ID 619 590 8155

Template [Select a template   ⌄]

g. Security ☑ Passcode [287508   💬]
Only users who have the invite link or passcode can join the meeting

☑ Waiting Room
Only users admitted by the host can join the meeting

☐ Require authentication to join

h. **Video:** This determines if attendees' camera are on when they join the meeting. This can be personal preference.

i. **Audio and Options:** should be left at their defaults.

j. Click Save!

h. Video
Host ⦿ on ○ off
Participant ⦿ on ○ off

i.
Audio ○ Telephone ○ Computer Audio ⦿ Both

Dial from United States ✏️

Options [Show]

j. [Save] [Cancel]

7. Now you're on your meeting information page. To get invite information, click "Copy invitation" next to the invite link.

PG Calc Zoom Instructions – Last edited 9/25/23 by EML

My Meetings > Manage "My Meeting"

Start this Meeting

Topic	My Meeting
Time	Jul 20, 2022 02:00 PM Eastern Time (US and Canada)
	Add to [31] Google Calendar [O] Outlook Calendar (.ics) [Y] Yahoo Calendar
Meeting ID	840 9510 4023
Security	✓ Passcode ******** Show ✓ Waiting Room
	✕ Require authentication to join
Invite Link	https://us02web.zoom.us/j/84095104023?pwd=M2lqWWxjbjBXU3N1cEtHRThKYzlRQT09 ⬀ Copy Invitation

8. Click "Copy Invitation" on the pop up, which will copy it to your clipboard. From there, you can paste it into your Outlook meeting and you're all set.
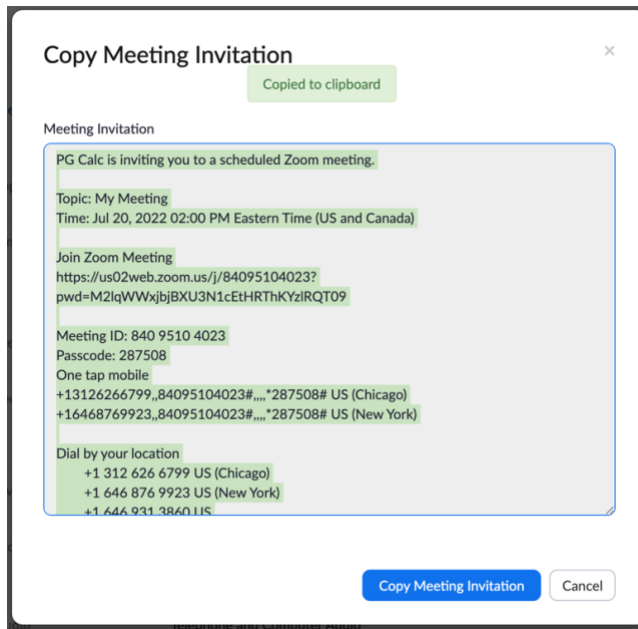

B. What if your account has a meeting when you need to set up a zoom?
   1. The first thing to check is whether you have a drop down next to "Myself" on your meetings page.
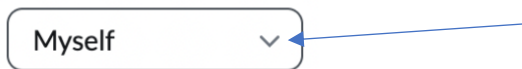

If you do, click it – it will drop down to the other accounts you can schedule while logged in here. As an example, from the sales1 account, you can see and schedule meetings for Gary's account and for the Marketing Services account.
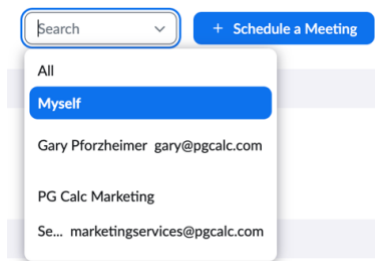
   2. If there is space in the calendars of the other accounts you have access to, follow the steps in A5-8, but instead of scheduling for "Myself", schedule for the account you want to use.

3. If you don't have a dropdown, you can simply log out by clicking the icon in the top right corner and log into a different account.
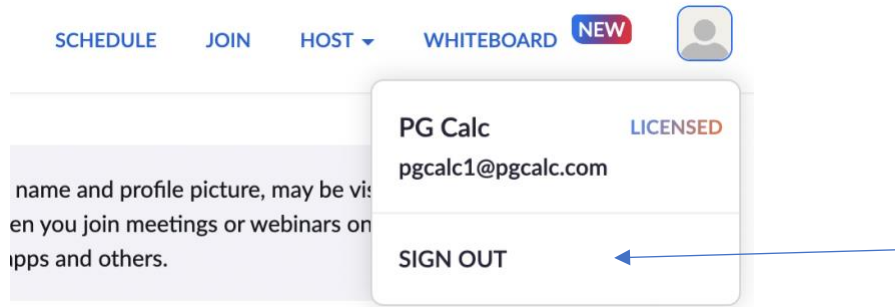
PG Calc has 11 accounts, so you should be able to use one of the others. On the Intranet, under Utilities>Zoom, there is a list of all the usernames. Each password will be the same and match the intranet's. You can go through until you find an account that has space for you.