

Zoom Workplace Meeting Management Host User Training Manual Version 1.0

Chapter 1

Introduction to Zoom Workplace

Chapter Objectives

After completing this chapter, you will be able to:

- Understand what Zoom Workplace is.
 - Identify the responsibilities of a Zoom Meeting Host.
 - Understand the meeting lifecycle.
 - Recognize the Zoom Workplace interface.
 - Learn the recommended hardware requirements.
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1.1 What is Zoom Workplace?

Zoom Workplace is a unified collaboration platform that enables organizations to conduct online meetings, webinars, team collaboration, messaging, and video conferencing from desktop and mobile devices.

For meeting hosts, Zoom Workplace provides tools to:

- Schedule and host meetings
- Admit participants
- Control participant permissions
- Share presentations and applications
- Record meetings
- Manage waiting rooms
- Secure meetings against unauthorized access

The Zoom Workplace desktop application is the recommended client for meeting management because it provides the complete set of host controls.

Note

Although meetings can be joined using a web browser, the desktop application provides the best meeting management experience and access to all host features.

1.2 Roles in a Zoom Meeting

Each participant joins a Zoom meeting with a specific role.

Role	Description
Host	Has complete control over the meeting.
Co-host	Shares many host responsibilities.
Participant	Can attend the meeting with permissions granted by the host.
Waiting Room Participant	Has joined the meeting but is waiting for host approval.

Only the **Host** can perform tasks such as:

- Admit participants
 - Lock meetings
 - Remove participants
 - Start cloud recording
 - Manage security settings
 - Assign co-hosts
 - End the meeting for all
-

1.3 Responsibilities of the Host

The Host is responsible for the overall management of the meeting.

Typical responsibilities include:

Before the Meeting

- Verify Internet connectivity.
- Check camera and microphone.
- Test audio.
- Join the meeting early.
- Claim Host using the Host Key (if required).

During the Meeting

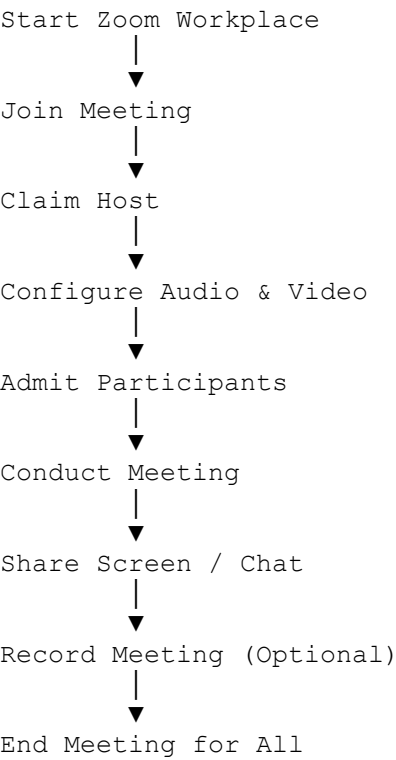
- Admit participants.
- Manage the waiting room.
- Mute or unmute participants.
- Share presentations.
- Record the meeting.
- Maintain meeting security.

After the Meeting

- Stop recording.
 - Ensure discussions are complete.
 - End the meeting for all participants.
 - Save recordings (if recorded locally).
-

1.4 Zoom Meeting Lifecycle

A Zoom meeting generally follows the workflow below.



This sequence represents the standard workflow followed by most meeting hosts.

1.5 Recommended Equipment

For smooth meetings, the following equipment is recommended.

Equipment	Purpose
Laptop/Desktop	Runs Zoom Workplace
Stable Internet Connection	Video conferencing
USB Camera	Video input
Speakerphone / Microphone	Audio communication
Power Adapter	Prevents battery interruption
UPS (Optional)	Backup power during outages

For conference rooms:

- Position the camera at eye level.
- Place the speakerphone at the center of the meeting table.
- Ensure adequate room lighting.
- Avoid strong backlighting from windows.

These recommendations are based on the hardware setup procedures described in your training materials.

1.6 Best Practices Before Every Meeting

✓ Join at least **10–15 minutes** before the scheduled start time.

✓ Verify:

- Camera
- Speaker
- Microphone
- Internet connection

✓ Close unnecessary applications to improve system performance.

✓ Keep the Host Key readily available if you need to claim host privileges.

✓ Keep meeting documents and presentation files open before participants join.

Chapter 2

Installing and Starting Zoom Workplace

Chapter Objectives

After completing this chapter, you will be able to:

- Install Zoom Workplace on a Windows computer.
 - Sign in using your Zoom account.
 - Understand the Zoom Workplace Home screen.
 - Join a meeting using a Meeting ID and Passcode.
 - Become familiar with the meeting interface and toolbar.
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2.1 Installing Zoom Workplace

Zoom Workplace is available for Windows, macOS, Linux, Android, and iOS. For meeting hosts, the **Windows desktop application** is recommended because it provides the complete set of host controls.

System Requirements

- Windows 10/11 (64-bit recommended)
 - Stable broadband Internet connection
 - Webcam (USB or integrated)
 - Speaker and Microphone
 - Minimum 4 GB RAM (8 GB recommended)
-

Installing the Application

1. Download the Zoom Workplace installer from the Zoom website.
2. Double-click the downloaded installer.
3. Click **Yes** if Windows displays a User Account Control prompt.
4. Wait while Zoom Workplace installs automatically.
5. Click **Finish**.
6. Launch **Zoom Workplace** from the Desktop or Start Menu.

Tip

Always install the latest version of Zoom Workplace to ensure access to the newest features and security updates.

Figure 2.1 – Zoom Workplace Installation

Download the zoom workplace from official website (<https://www.zoom.com/>) and install by following on screen instructions.

2.2 Starting Zoom Workplace

To start the application:

1. Click the **Start** button.
2. Search for **Zoom Workplace**.
3. Click **Zoom Workplace**.

Alternatively,

Double-click the **Zoom Workplace** desktop shortcut.

After a few seconds, the Zoom Workplace Home screen appears.

Zoom Workplace Home Screen

The Home screen generally contains:

- Home
- Team Chat
- Meetings
- Calendar
- Contacts
- More

Depending on your organization's license and permissions, additional modules may also appear.

2.3 Signing In

If your organization provides Zoom accounts, sign in using the supplied credentials.

Steps:

1. Click **Sign In**.
2. Enter your email address.
3. Enter your password.
4. Click **Sign In**.

Alternatively, you may sign in using:

- Google
 - Microsoft
 - Apple
 - Single Sign-On (SSO)
-

Forgot Password

If you cannot remember your password:

1. Click **Forgot Password**.
 2. Enter your registered email.
 3. Follow the password reset instructions sent by Zoom.
-

2.4 Understanding the Home Screen

After signing in, Zoom Workplace displays the Home page.

Common options include:

Option	Purpose
New Meeting	Starts an instant meeting
Join	Joins an existing meeting
Schedule	Creates a future meeting
Calendar	Displays upcoming meetings
Team Chat	Opens chat workspace
Contacts	Displays saved contacts

New Meeting

Starts an instant meeting immediately.

Useful for:

- Quick discussions
 - Testing camera
 - Testing microphone
 - Ad-hoc meetings
-

Join

Allows users to join an existing meeting using:

- Meeting ID

- Personal Link
- Passcode

This is the option most commonly used by participants.

Schedule

Creates meetings in advance.

The scheduler allows configuration of:

- Meeting title
 - Date
 - Time
 - Duration
 - Waiting Room
 - Passcode
 - Recording options
-

2.5 Joining a Meeting

The training materials describe the following process for joining a meeting before claiming host privileges.

Steps

1. Open **Zoom Workplace**.
2. Click **Join** on the Home screen.
3. Enter the **Meeting ID**.
4. Enter your **Display Name**.
5. Click **Join**.
6. If prompted, enter the meeting **Passcode**.
7. Click **Join Meeting**.

Once connected, Zoom loads the meeting interface.

2.6 Joining Audio

After entering the meeting, Zoom prompts you to connect audio.

Click:

Join with Computer Audio

This allows Zoom to use your computer's selected speaker and microphone.

If necessary:

- Click **Test Speaker and Microphone**
 - Verify that you hear the test sound.
 - Speak into the microphone and confirm that the input level responds.
-

Best Practice

Always test audio before admitting participants to avoid delays once the meeting begins.

2.7 Understanding the Meeting Window

After joining, the Zoom meeting interface appears.

The bottom toolbar typically contains:

Button	Function
Mute	Enable/disable microphone
Start Video	Turn camera on/off
Security	Meeting security controls
Participants	Participant management
Chat	Meeting chat
Share	Screen sharing
Record	Local or cloud recording
Reactions	Participant reactions
Apps	Zoom Apps (if enabled)
More	Additional meeting tools
End	Leave or end the meeting

The exact buttons displayed may vary depending on your Zoom license, version, and the permissions assigned to your account.

2.8 Preparing Before Participants Join

Before admitting participants, verify the following:

- ✓ Internet connection is stable.
- ✓ Camera displays a clear image.
- ✓ Speaker volume is appropriate.
- ✓ Microphone captures your voice.
- ✓ Meeting documents or presentation files are ready.

✓ Background noise is minimized.

Completing these checks helps ensure that the meeting starts smoothly and reduces interruptions during the session.

Chapter Summary

In this chapter, you learned how to:

- Install Zoom Workplace.
- Launch the application.
- Sign in to your Zoom account.
- Navigate the Home screen.
- Join a meeting using a Meeting ID and Passcode.
- Connect audio.
- Understand the Zoom meeting interface and toolbar.
- Perform essential pre-meeting checks.

Chapter 3

Configuring Hardware and Claiming Host

Chapter Objectives

After completing this chapter, you will be able to:

- Connect the required hardware for a Zoom meeting.
- Verify that Windows detects the camera and speakerphone.
- Configure audio and video devices in Zoom Workplace.
- Claim Host privileges using the Host Key.
- Verify that Host controls are available before admitting participants.

This chapter is based on the hardware setup and host claim procedures described in your training materials.

3.1 Hardware Required

Before starting the meeting, ensure that the following equipment is available and functioning correctly.

Equipment	Purpose
Laptop/Desktop	Runs Zoom Workplace
USB Camera	Video conferencing
Speaker-cum-Microphone	Audio input and output
Internet Connection	Connects to Zoom servers
USB Cables	Device connectivity
Power Adapter	Prevents interruption due to battery drain

Best Practice

Whenever possible, connect the laptop to AC power to prevent unexpected shutdown during long meetings.

3.2 Connecting the Camera

Step 1: Connect the Camera

1. Connect the camera to the computer using the USB cable.
 2. Connect the power adapter if the camera requires external power.
 3. Wait until Windows automatically installs the device.
-

Step 2: Verify Camera Detection

1. Press **Windows + X**.
2. Select **Device Manager**.
3. Expand **Cameras**.

Verify that the camera appears without any warning symbols.

If a yellow warning icon appears:

- Reconnect the USB cable.
 - Restart the camera.
 - Restart the computer if necessary.
-

Step 3: Position the Camera

For the best viewing experience:

- Place the camera at eye level.
 - Position it facing participants.
 - Keep the camera centered.
 - Remove any object blocking the lens.
-

Step 4: Test the Camera

1. Open the **Camera** application in Windows.
 2. Verify:
 - Clear video
 - Proper framing
 - Correct focus
 - Smooth movement (PTZ cameras)
-

3.3 PTZ Camera Controls (If Available)

Some conference rooms use **Pan-Tilt-Zoom (PTZ)** cameras.

Typical controls include:

- Pan Left / Right
- Tilt Up / Down
- Zoom In
- Zoom Out
- Preset Positions

Before participants arrive:

- Verify that movement is smooth.

- Store commonly used preset positions.
 - Check that all participants are visible.
-

3.4 Connecting the Speaker-cum-Microphone

Step 1: Connect the Device

Connect the speakerphone using:

- USB cable, or
- Bluetooth (if supported)

Wait until Windows completes driver installation.

Step 2: Configure Windows Sound

Open:

Settings → **System** → **Sound**

Under **Output**, select:

- Speakerphone

Under **Input**, select:

- Speakerphone Microphone
-

Step 3: Test the Speaker

Click:

Test

You should hear the Windows test sound.

Step 4: Test the Microphone

Speak normally.

Observe the microphone level meter.

The meter should move while speaking.

Step 5: Position the Speakerphone

For optimum sound quality:

- ✓ Place it at the center of the meeting table.
 - ✓ Keep it away from walls.
 - ✓ Do not cover the microphones.
 - ✓ Avoid placing notebooks or papers on top of the device.
-

3.5 Configuring Audio in Zoom Workplace

After joining the meeting:

Locate the **Mute** button in the lower-left corner of the Zoom meeting window.

Click the ▲ (up arrow) beside **Mute**.

The Audio menu opens.

Select:

Microphone

Choose:

- Speakerphone Microphone

Speaker

Choose:

- Speakerphone Speaker

Click:

Test Speaker & Microphone

Follow the on-screen instructions.

3.6 Configuring Video in Zoom Workplace

Locate the **Start Video** button.

Click the ▲ (up arrow) beside **Start Video**.

Select the required camera.

Verify:

- Live video appears.
- Camera angle is correct.
- Participants are clearly visible.
- Lighting is adequate.

If multiple cameras are connected, ensure that the correct device is selected.

3.7 Claiming Host Using the Host Key

After joining the meeting, you may initially join as a participant. To access meeting management features, you must claim the Host role using the assigned six-digit Host Key.

Steps

1. Join the meeting.
2. Click **Participants** on the meeting toolbar.
3. In the Participants panel, click **Claim Host**.
4. Enter the **6-digit Host Key**.
5. Click **Claim Host**.

If the Host Key is correct, Zoom immediately grants Host privileges.

3.8 Verifying Host Status

Once Host privileges have been obtained:

Verify that:

- ✓ **Host** appears beside your name in the Participants panel.
- ✓ The **Security** button is visible.
- ✓ Waiting Room controls are available.
- ✓ Recording controls are enabled (if permitted).
- ✓ Breakout Rooms appear (if enabled for the meeting).

These indicators confirm that you have successfully become the meeting Host.

3.9 Common Problems and Solutions

Problem	Possible Cause	Solution
Camera not detected	Loose USB connection	Reconnect the camera and verify it in Device Manager
No microphone audio	Wrong input device selected	Select the correct microphone in Windows and Zoom
No speaker output	Incorrect output device	Select the speakerphone under Zoom Audio Settings
Unable to claim Host	Incorrect Host Key	Verify the six-digit Host Key with the meeting organizer
Host controls unavailable	Host role not claimed	Repeat the Claim Host process

Best Practices

- Connect all hardware **before launching Zoom Workplace**.
 - Test the camera, microphone, and speaker **at least 10–15 minutes before the meeting**.
 - Use wired USB devices whenever possible for greater reliability.
 - Keep the Host Key available before joining the meeting.
 - Verify that the **Host** label appears beside your name before admitting participants.
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Chapter 4

Managing Participants and the Waiting Room

Chapter Objectives

After completing this chapter, you will be able to:

- Understand the Participants panel.
- Admit participants from the Waiting Room.
- Mute and unmute participants.
- Rename participants.
- Remove unauthorized participants.
- Assign a Co-host.
- Manage participant permissions.
- Maintain an orderly and secure meeting.

The procedures described in this chapter are based on the host management functions outlined in your training materials.

4.1 Understanding the Participants Panel

The **Participant's** panel is the primary interface used by the Host to manage meeting attendees.

To open the Participants panel:

1. Join the Zoom meeting.
2. Locate the **Participants** button on the meeting toolbar at the bottom of the Zoom window.
3. Click **Participants**.

The panel opens on the right side of the screen and displays:

- Host
 - Co-host(s)
 - Participants currently in the meeting
 - Participants in the Waiting Room (if enabled)
-

4.2 Understanding the Waiting Room

The **Waiting Room** is a security feature that places participants in a virtual waiting area before they enter the meeting.

Instead of joining immediately, participants wait until the Host admits them.

Benefits

- Prevents unauthorized entry.
- Allows verification of participant identity.
- Prevents interruptions before the meeting starts.

Best Practice

Enable the Waiting Room for meetings involving confidential or official discussions.

4.3 Admitting Participants

When a participant joins, a notification appears.

To admit the participant:

1. Click **Participants**.
2. Under **Waiting Room**, locate the participant's name.
3. Verify the participant's identity.
4. Click **Admit**.

The participant immediately joins the meeting.

Admitting Multiple Participants

If several participants are waiting:

1. Open the **Participants** panel.
2. Review the list.
3. Click **Admit All** (if available).

Only use this option when all waiting participants are known and authorized.

4.4 Removing Participants from the Waiting Room

If an unknown or unauthorized participant attempts to join:

1. Open the **Participants** panel.
2. Locate the participant under **Waiting Room**.
3. Click **Remove**.

The participant is denied entry.

Security Note

If you are unsure of a participant's identity, contact the meeting organizer before admitting them.

4.5 Muting Participants

Background noise can reduce meeting quality.

The Host can mute individual participants or all participants.

To Mute an Individual Participant

1. Open **Participants**.
2. Hover over the participant's name.
3. Click **Mute**.

The participant's microphone is turned off.

4.6 Asking a Participant to Unmute

Hosts cannot always unmute participants directly.

Instead:

1. Hover over the participant's name.
2. Click **Ask to Unmute**.

The participant receives a notification and can enable their microphone.

4.7 Muting All Participants

During presentations or lectures, muting everyone helps reduce distractions.

Steps

1. Open **Participants**.
 2. Click **More** at the bottom of the Participants panel.
 3. Select **Mute All**.
 4. If prompted, choose whether participants may unmute themselves.
 5. Click **Continue**.
-

4.8 Allowing Participants to Unmute

After muting all participants, Zoom provides the option to:

✓ Allow participants to unmute themselves

or

✓ Prevent participants from unmuting.

For formal presentations or examinations, it is recommended to disable self-unmute until the discussion session begins.

4.9 Renaming Participants

Sometimes participants join using nicknames or device names.

Hosts may rename them for easier identification.

Steps

1. Open **Participants**.
 2. Hover over the participant's name.
 3. Click **More**.
 4. Select **Rename**.
 5. Enter the new display name.
 6. Click **Rename**.
-

Example

Before:

Galaxy A54

After:

Dr. R. Kumar

4.10 Removing Participants

If a participant becomes disruptive or joins accidentally, the Host may remove them from the meeting.

Steps

1. Open **Participants**.
2. Hover over the participant's name.
3. Click **More**.
4. Select **Remove**.
5. Confirm the action.

The participant is immediately disconnected from the meeting.

Important

Removing a participant should only be done when necessary, as they may not be able to rejoin depending on the meeting settings.

4.11 Assigning a Co-host

A Co-host can assist with meeting management by handling participants, chat, and other controls.

To Assign a Co-host

1. Open **Participants**.
2. Hover over the participant's name.
3. Click **More**.
4. Select **Make Co-host**.
5. Confirm the prompt.

The participant will now have Co-host privileges.

Note

The ability to assign a Co-host depends on the Zoom account type and meeting settings.

4.12 Moving a Participant Back to the Waiting Room

If required, the Host can return a participant to the Waiting Room.

Typical situations include:

- Temporary removal from discussions.
- Identity verification.
- Waiting while confidential matters are discussed.

Steps

1. Open **Participants**.
 2. Hover over the participant's name.
 3. Click **More**.
 4. Select **Put in Waiting Room**.
-

4.13 Best Practices for Participant Management

- ✓ Join the meeting at least 10 minutes early.
 - ✓ Admit only authorized participants.
 - ✓ Verify participant names before admitting them.
 - ✓ Mute participants during presentations.
 - ✓ Rename participants who join with unclear display names.
 - ✓ Assign a Co-host for large meetings.
 - ✓ Remove disruptive participants only when necessary.
 - ✓ Use the Waiting Room for confidential meetings.
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4.14 Troubleshooting

Problem	Possible Cause	Solution
Participant cannot enter	Waiting Room enabled	Click Admit in the Participants panel
Participant cannot speak	Microphone muted	Use Ask to Unmute or allow self-unmute
Background noise	Multiple microphones active	Mute unnecessary participants
Unknown participant	Unrecognized display name	Verify identity before admitting or remove if unauthorized
Co-host option unavailable	Feature disabled or unsupported account	Check account permissions and meeting settings

Chapter 5

Meeting Security and Host Controls

Chapter Objectives

After completing this chapter, you will be able to:

- Understand the importance of Zoom meeting security.
- Use the **Security** menu to control participant activities.
- Lock and unlock meetings.
- Manage the Waiting Room.
- Control participant permissions.
- Secure confidential and official meetings.
- Apply recommended security practices before, during, and after meetings.

The security options described in this chapter are based on the meeting management procedures outlined in your training materials.

5.1 Why Meeting Security is Important

Meeting security helps prevent:

- Unauthorized participants joining the meeting.
- Accidental interruption of presentations.
- Screen sharing by unauthorized users.
- Disruptive behavior.
- Unauthorized recording or annotation.
- Information leakage during confidential discussions.

For official meetings, the Host should review the security settings before admitting participants.

Best Practice

Enable the **Waiting Room** and **Meeting Passcode** for all official meetings.

5.2 Opening the Security Menu

The **Security** button is available only to the Host (and Co-host, if permitted).

Steps

1. Join the meeting.
2. Claim Host privileges (if required).

3. Locate the **Security** button on the meeting toolbar.
4. Click **Security**.

The Security menu opens and displays the available participant permissions.

5.3 Understanding the Security Menu

The Security menu typically provides the following options:

Option	Purpose
Lock Meeting	Prevent additional participants from joining
Enable Waiting Room	Hold participants until admitted
Share Screen	Allow or block participant screen sharing
Chat	Enable or disable participant chat
Rename Themselves	Allow or prevent participants from changing their names
Unmute Themselves	Allow or prevent participants from enabling their microphones
Start Video	Allow or disable participant cameras
Annotation	Allow or prevent participants from annotating shared content

The available options may vary depending on your Zoom account type and meeting configuration.

5.4 Locking a Meeting

Once all expected participants have joined, the meeting can be locked to prevent anyone else from entering.

Steps

1. Click **Security**.
2. Select **Lock Meeting**.

A check mark indicates that the meeting is locked.

While locked:

- New participants cannot join.
 - Existing participants remain connected.
 - The Host may continue managing the meeting normally.
-

When to Lock a Meeting

It is recommended to lock the meeting:

- After all invited participants have joined.
- During confidential discussions.

- During examinations or interviews.
 - During official committee meetings.
-

5.5 Unlocking a Meeting

If an expected participant arrives late:

1. Click **Security**.
 2. Clear the **Lock Meeting** option.
 3. Admit the participant through the Waiting Room.
 4. Lock the meeting again if necessary.
-

5.6 Enabling or Disabling the Waiting Room

The Waiting Room allows the Host to verify participant identity before granting access.

To Enable

1. Click **Security**.
2. Enable **Waiting Room**.

Participants joining the meeting will wait until admitted.

To Disable

1. Click **Security**.
2. Disable **Waiting Room**.

New participants join the meeting directly (unless restricted by other settings).

5.7 Controlling Screen Sharing

Allowing all participants to share their screens may cause accidental interruptions.

To Change Screen Sharing Permission

1. Click **Security**.
2. Locate **Share Screen**.
3. Select or clear the option.

When disabled:

- Only the Host (or designated users) can share content.
-

Recommended Setting

For lectures, presentations, and official meetings:

✓ Allow screen sharing only for the Host.

Enable participant sharing only when required.

5.8 Managing Chat Permissions

The Host may allow or restrict participant chat.

Steps

1. Open **Security**.
2. Enable or disable **Chat**.

If chat is disabled:

- Participants cannot send chat messages.
 - The Host may still communicate through announcements if available.
-

Recommended Setting

Meeting Type	Chat Recommendation
Lecture	Enable
Examination	Disable
Interview	Disable
Official Meeting	Enable if required

5.9 Preventing Participant Renaming

Participants sometimes change their display names after joining.

To prevent this:

1. Open **Security**.
2. Disable **Rename Themselves**.

Participants will no longer be able to change their display names during the meeting.

This helps maintain accurate attendance records.

5.10 Controlling Participant Microphones

The Host may prevent participants from unmuting themselves.

Steps

1. Open **Security**.
2. Disable **Unmute Themselves**.

Participants must request permission before speaking.

This feature is useful for:

- Conferences
 - Large seminars
 - Official presentations
 - Training sessions
-

5.11 Controlling Participant Video

To prevent participants from enabling their cameras:

1. Click **Security**.
2. Disable **Start Video**.

Participants will not be able to start their cameras until permission is granted.

This can improve privacy and reduce bandwidth usage during large meetings.

5.12 Controlling Annotation

During screen sharing, participants may annotate shared content.

To disable annotation:

1. Click **Security**.
2. Disable **Annotation**.

Use this setting during:

- Official presentations
 - Board meetings
 - Online examinations
 - Policy discussions
-

5.13 Recommended Security Settings

The following table summarizes recommended settings for different meeting types.

Feature	Official Meeting	Lecture	Examination	Interview
Waiting Room	✓	✓	✓	✓
Lock Meeting	✓	Optional	✓	✓
Share Screen	Host Only	Host Only	Host Only	Host Only
Chat	Optional	✓	✗	✗
Rename	✗	✗	✗	✗
Start Video	Optional	✓	Optional	✓
Annotation	✗	✗	✗	✗

5.14 Security Checklist

Before the meeting:

- ☐ Waiting Room enabled
- ☐ Passcode enabled
- ☐ Host claimed
- ☐ Camera tested
- ☐ Microphone tested

During the meeting:

- ☐ Admit only authorized participants
- ☐ Lock meeting after everyone joins
- ☐ Monitor participant list
- ☐ Restrict screen sharing if required
- ☐ Monitor chat

After the meeting:

- ☐ Stop recording
- ☐ End Meeting for All
- ☐ Review attendance (if applicable)

5.15 Troubleshooting

Problem	Possible Cause	Solution
Security button not visible	User is not the Host	Claim Host using the Host Key
Participants continue joining	Meeting not locked	Enable Lock Meeting
Participant shares screen unexpectedly	Screen sharing allowed	Restrict Share Screen to Host only
Participants change display names	Rename permission enabled	Disable Rename Themselves
Participants annotate slides	Annotation enabled	Disable Annotation from the Security menu

Chapter 6

Screen Sharing and Collaborative Presentation

Chapter Objectives

After completing this chapter, you will be able to:

- Understand the Screen Share feature in Zoom Workplace.
- Share your entire screen, a specific application, or a document.
- Share presentations with audio.
- Optimize screen sharing for videos.
- Stop and resume sharing.
- Allow another participant to share content.
- Use annotation tools during presentations.
- Apply best practices for effective online presentations.

The procedures described in this chapter are based on the Zoom Workplace meeting management functions included in your training materials.

6.1 Introduction to Screen Sharing

Screen Sharing is one of the most frequently used features in Zoom Workplace. It enables the Host or authorized participants to present information such as:

- Microsoft PowerPoint presentations
- Microsoft Word documents
- Microsoft Excel spreadsheets
- PDF files
- Software demonstrations
- Web browsers
- Videos
- Entire desktop

Screen sharing allows all participants to view the selected content in real time.

6.2 Starting Screen Sharing

Steps

1. Join the Zoom meeting.
2. Verify that you are the **Host** (or have permission to share).
3. Locate the **Share** button on the meeting toolbar.
4. Click **Share**.

The **Select a Window or an Application** dialog box opens.

6.3 Understanding the Share Window

The Share window displays several tabs depending on your Zoom Workplace version.

Common options include:

Option	Purpose
Screen	Share the complete desktop
Window	Share only one application
Whiteboard	Open Zoom Whiteboard
Documents	Share supported cloud documents
Advanced	Advanced sharing options

Which Option Should You Choose?

Scenario	Recommended Option
PowerPoint Presentation	Window
MS Word Document	Window
Excel Sheet	Window
Demonstration of Multiple Applications	Screen
Software Training	Screen
Whiteboard Session	Whiteboard

6.4 Sharing the Entire Screen

Sharing the entire desktop allows participants to see everything displayed on your monitor.

Steps

1. Click **Share**.
2. Select **Screen**.
3. (Optional) Enable:
 - **Share sound**
 - **Optimize for video clip**
4. Click **Share**.

Your entire desktop becomes visible to participants.

Advantages

- Easy to switch between applications.

- Suitable for software demonstrations.
 - Useful when multiple applications will be shown.
-

Limitations

Participants can also see:

- Desktop notifications
- Pop-up windows
- Other applications
- Personal information displayed on the desktop

Best Practice

Close unnecessary applications and disable desktop notifications before sharing your screen.

6.5 Sharing a Single Application

Instead of sharing the entire desktop, Zoom allows sharing only one application.

Steps

1. Click **Share**.
2. Select the required application.

Examples:

- Microsoft PowerPoint
- Microsoft Word
- Microsoft Excel
- PDF Reader
- Web Browser

3. Click **Share**.

Participants will only see the selected application.

Advantages

- Better privacy
 - Fewer distractions
 - Prevents accidental exposure of confidential information
-

6.6 Sharing PowerPoint Presentations

PowerPoint presentations are commonly used during meetings.

Recommended Method

1. Open the presentation before the meeting.
2. Start Zoom.
3. Click **Share**.
4. Select the **PowerPoint** window.
5. Click **Share**.
6. Start Slide Show mode.

Participants will see only the presentation.

Tips

- ✓ Use Presenter View only if you have multiple monitors.
 - ✓ Keep presentation notes hidden from participants.
 - ✓ Test slide transitions before the meeting.
-

6.7 Sharing Videos

When sharing a video, participants should receive both video and audio.

Steps

1. Click **Share**.
2. Select the video player window.
3. Enable:

☒ **Share sound**

☒ **Optimize for video clip**

4. Click **Share**.

These options improve playback quality and ensure participants hear the video's audio.

6.8 Using Zoom Whiteboard

Zoom Whiteboard provides a collaborative drawing space.

To open it:

1. Click **Share**.
2. Select **Whiteboard**.
3. Click **Share**.

The Whiteboard allows you to:

- Draw diagrams
 - Write notes
 - Highlight concepts
 - Brainstorm ideas with participants
-

6.9 Annotation Tools

When sharing content, annotation tools may be available (if enabled by the Host).

Common annotation tools include:

- Text
- Draw
- Stamp
- Arrow
- Spotlight
- Eraser
- Save

The Host can enable or disable participant annotation through the **Security** menu.

Tip

Disable participant annotation during formal presentations to avoid accidental markings on shared content.

6.10 Allowing Another Participant to Share

If another participant needs to present:

Method 1 – Using the Security Menu

1. Click **Security**.
2. Enable **Share Screen** for participants.

Method 2 – Assign Co-host

Assign the presenter as a **Co-host** to provide additional presentation privileges.

6.11 Stopping Screen Sharing

When your presentation is complete:

1. Move the mouse to the top of the screen.
2. The floating Zoom toolbar appears.
3. Click **Stop Share**.

Participants return to the normal meeting view.

6.12 Best Practices for Presentations

Before sharing:

- ✓ Close unnecessary applications.
- ✓ Disable email and chat notifications.
- ✓ Open all presentation files.
- ✓ Test videos before the meeting.
- ✓ Verify Internet connectivity.

During the presentation:

- ✓ Speak clearly.
- ✓ Pause briefly after changing slides.
- ✓ Avoid rapidly switching between applications.
- ✓ Use Zoom controls instead of keyboard shortcuts whenever possible.

After the presentation:

- ✓ Stop sharing.
 - ✓ Return to Gallery View or Speaker View.
 - ✓ Invite questions from participants.
-

6.13 Troubleshooting

Problem	Possible Cause	Solution
Participants cannot see presentation	Screen sharing not started	Click Share and select the correct window
Wrong application displayed	Incorrect window selected	Stop sharing and choose the correct application
Participants cannot hear video	Share sound not enabled	Enable Share sound before sharing
Video playback appears slow	Optimization disabled	Enable Optimize for video clip
Annotation marks appear unexpectedly	Annotation enabled	Disable participant annotation through Security

6.14 Presentation Checklist

Before presenting, verify:

- ☐ Correct application is open.
- ☐ Screen sharing permissions are enabled.
- ☐ "Share sound" is selected (if using multimedia).
- ☐ "Optimize for video clip" is selected (for videos).
- ☐ Notifications are disabled.
- ☐ Internet connection is stable.
- ☐ Presentation files are ready.

Chapter 7

Managing Chat, Reactions, Polls and Meeting Recording

Chapter Objectives

After completing this chapter, you will be able to:

- Use the Zoom Workplace **Chat** feature effectively.
- Send messages to all participants or selected individuals.
- Manage participant chat permissions.
- Use meeting reactions and the Raise Hand feature.
- Launch and manage polls.
- Record meetings using Local or Cloud Recording.
- Understand recording notifications and storage.
- Follow best practices for recording official meetings.

The procedures described in this chapter are based on the meeting management functions provided in your training materials.

7.1 Meeting Chat

The **Chat** feature enables participants to exchange text messages during a meeting without interrupting the speaker.

Chat can be used for:

- Asking questions
 - Sharing web links
 - Providing instructions
 - Sharing meeting notes
 - Communicating technical issues
-

Opening the Chat Panel

Steps

1. Join the meeting.
2. Locate the **Chat** button on the meeting toolbar.
3. Click **Chat**.

The Chat panel opens on the right side of the meeting window.

7.2 Sending Chat Messages

To Send a Message to Everyone

1. Open **Chat**.
2. Click in the message box.
3. Ensure **Everyone** is selected in the recipient list.
4. Type your message.
5. Press **Enter** or click **Send**.

Example

Good morning everyone.

The meeting will begin shortly.

Please keep your microphones muted unless invited to speak.

Sending a Private Message

If private chat is enabled:

1. Open **Chat**.
2. Click the recipient drop-down list.
3. Select the participant's name.
4. Type your message.
5. Press **Enter**.

Only the selected participant receives the message.

Note

Private chat may be disabled by the Host depending on meeting policies.

7.3 Managing Chat Permissions

The Host can control whether participants are allowed to use chat.

To Modify Chat Permissions

1. Click **Security** or **Host Tools** (depending on your Zoom version).
 2. Locate the **Chat** option.
 3. Enable or disable participant chat as required.
-

Recommended Settings

Meeting Type	Chat Setting
Lecture	Enabled
Official Meeting	Enabled (Host discretion)
Examination	Disabled
Interview	Disabled
Training Programme	Enabled

7.4 Using Meeting Reactions

Meeting reactions allow participants to provide quick, non-verbal feedback.

Common reactions include:

-  Thumbs Up
-  Clap
-  Heart
-  Celebrate
- Raise Hand

Reactions disappear automatically after a few seconds (except Raise Hand).

Opening Reactions

1. Click **Reactions** on the meeting toolbar.
2. Select the desired reaction.

The selected reaction appears beside the participant's video.

7.5 Raise Hand

The **Raise Hand** feature helps maintain order during meetings.

Instead of interrupting, participants can indicate that they wish to speak.

The Host can view raised hands in the Participants panel.

Host Actions

When someone raises their hand:

- Invite the participant to speak.

- Ask them to unmute.
 - Lower the hand after the discussion.
-

Best Practice

During lectures or committee meetings:

- Encourage participants to use **Raise Hand** rather than interrupting.
-

7.6 Creating and Launching Polls

Polls enable Hosts to collect responses from participants.

Typical uses include:

- Attendance confirmation
- Feedback collection
- Voting
- Training assessments
- Opinion surveys

Important

Polls must usually be created before the meeting unless your Zoom account supports in-meeting poll creation.

Launching a Poll

Steps

1. Click **Polls** (or **Polls/Quizzes**) on the meeting toolbar.
 2. Select the required poll.
 3. Click **Launch**.
 4. Wait for participants to submit responses.
 5. Click **End Poll**.
 6. Optionally click **Share Results**.
-

7.7 Recording a Meeting

Zoom Workplace supports:

- **Local Recording** (saved on the host computer)
- **Cloud Recording** (available with supported Zoom licenses)

Recording is useful for:

- Training programmes
 - Committee meetings
 - Workshops
 - Lectures
 - Documentation
-

Starting Recording

Steps

1. Click **Record** on the meeting toolbar.
2. Select:
 - **Record on this Computer** (Local)
or
 - **Record to the Cloud** (Cloud)

Recording starts immediately.

A recording indicator appears in the upper-left corner of the meeting window.

Participants are notified that recording has started.

7.8 Pausing and Stopping Recording

During the meeting:

Click **Pause Recording** if you wish to temporarily suspend recording.

Click **Resume Recording** to continue.

When the meeting is complete:

1. Click **Stop Recording**, or
2. End the meeting.

Zoom automatically processes the recording.

7.9 Accessing Recorded Meetings

Local Recording

After the meeting ends:

Zoom converts the recording into playable video files.

Typical output includes:

File	Purpose
MP4	Video recording
M4A	Audio recording
TXT	Chat transcript (if enabled)

Cloud Recording

Cloud recordings become available through the Zoom web portal after processing is complete.

The Host can:

- View recordings
 - Download recordings
 - Share recording links
 - Delete recordings
-

7.10 Recording Best Practices

Before recording:

- ✓ Inform participants that recording will begin.
- ✓ Verify sufficient disk space.
- ✓ Check microphone and camera.

During recording:

- ✓ Minimize background noise.
- ✓ Keep presentations organized.
- ✓ Avoid unnecessary interruptions.

After recording:

- ✓ Verify successful processing.
 - ✓ Store recordings securely.
 - ✓ Share recordings only with authorized users.
-

7.11 Troubleshooting

Problem	Possible Cause	Solution
Chat unavailable	Disabled by Host	Enable chat from Security settings if appropriate
Private chat not available	Private messaging disabled	Use Everyone chat or adjust meeting settings
Poll button not visible	Polls not enabled or not created	Enable Polls in meeting settings and prepare polls before the meeting
Cannot start recording	User is not the Host or recording permission not granted	Claim Host or obtain recording permission
Recording not saved	Meeting ended before processing completed or insufficient disk space	Wait for conversion to finish and verify available storage

7.12 Quick Reference

Feature	Toolbar Location	Primary Use
Chat	Chat	Send messages
Reactions	Reactions	Non-verbal feedback
Raise Hand	Reactions	Request permission to speak
Polls	Polls / Quizzes	Collect participant responses
Record	Record	Record meeting audio and video

Chapter 8

Ending Meetings, Post-Meeting Activities and Troubleshooting

Chapter Objectives

After completing this chapter, you will be able to:

- Properly conclude a Zoom Workplace meeting.
 - Understand the difference between **Leave Meeting** and **End Meeting for All**.
 - Transfer Host privileges to another participant.
 - Save and access meeting recordings.
 - Review meeting reports (where available).
 - Troubleshoot common meeting issues.
 - Follow best practices after every meeting.
-

8.1 Ending a Meeting

At the conclusion of the meeting, the Host is responsible for closing the meeting in an orderly manner.

Before ending the meeting:

- Confirm that all agenda items have been discussed.
 - Ask participants if they have any final questions.
 - Stop any ongoing screen sharing.
 - Stop recording (if recording is in progress).
 - Inform participants that the meeting is about to end.
-

8.2 Leave Meeting vs End Meeting for All

Clicking the **End** button displays two options.

Option	Description
Leave Meeting	The Host leaves the meeting and transfers Host privileges to another participant (or Zoom prompts to assign a new Host). The meeting continues.
End Meeting for All	Ends the meeting immediately for all participants. Everyone is disconnected.

When to Use "Leave Meeting"

Choose this option when:

- Another person will continue conducting the meeting.
- You need to leave before the meeting concludes.
- A Co-host or another participant will take over.

When to Use "End Meeting for All"

Choose this option when:

- The meeting has concluded.
- No further discussion is required.
- Recording has been stopped.
- All participants should leave the meeting.

Best Practice

Always use **End Meeting for All** for official meetings after confirming that all agenda items have been completed.

8.3 Transferring Host Privileges

If the Host must leave before the meeting ends, Host privileges can be transferred.

Steps

1. Open the **Participants** panel.
2. Hover over the participant's name.
3. Click **More**.
4. Select **Make Host**.
5. Confirm the prompt.

The selected participant becomes the new Host and gains access to Host controls.

Note

Ensure the new Host is familiar with Zoom Workplace and authorized to manage the meeting.

8.4 Saving Meeting Recordings

If the meeting was recorded locally, Zoom automatically converts the recording when the meeting ends.

Conversion Process

1. After clicking **End Meeting for All**, Zoom begins converting the recording.
2. Wait until the conversion reaches **100%**.
3. Do not shut down the computer during conversion.
4. Once complete, the recording folder opens automatically.

Typical files include:

File Type	Description
MP4	Video recording
M4A	Audio-only recording
TXT	Chat transcript (if enabled)

For Cloud Recordings, Zoom uploads and processes the recording automatically. The recording can then be accessed from the Zoom web portal.

8.5 Attendance and Meeting Reports

Depending on your Zoom account type and permissions, attendance information may be available.

Reports may include:

- Participant names
- Join time
- Leave time
- Total duration
- Attendance summary

These reports are useful for:

- Training programmes
- Workshops
- Academic sessions
- Committee meetings
- Official documentation

Note

Availability of attendance reports depends on your Zoom license and account settings.

8.6 Closing the Zoom Application

After the meeting:

1. Close any shared documents or presentations.
2. Exit the Zoom meeting.
3. Close the Zoom Workplace application.
4. Disconnect external devices such as:
 - USB Camera
 - Speakerphone
 - External Microphone (if used)

If using a conference room:

- Switch off the camera.
- Disconnect power (if required).

- Store equipment safely.

8.7 Common Problems and Solutions

Problem	Possible Cause	Recommended Solution
Cannot join meeting	Incorrect Meeting ID or Passcode	Verify the Meeting ID and Passcode provided by the organizer.
Unable to claim Host	Incorrect or unavailable Host Key	Confirm the six-digit Host Key with the meeting owner.
No camera video	Camera disconnected or wrong camera selected	Reconnect the camera and select the correct device under Start Video → Camera .
No microphone audio	Incorrect microphone selected	Use Mute ▲ → Select Microphone and test the microphone.
No speaker sound	Incorrect output device	Select the correct speaker under Mute ▲ → Speaker .
Participants cannot hear shared video	"Share sound" not enabled	Stop sharing and restart screen sharing with Share sound enabled.
Screen sharing unavailable	Permission restricted	Ask the Host to enable participant screen sharing or make you a Co-host.
Chat disabled	Host has disabled chat	Request the Host to enable chat if appropriate.
Recording option unavailable	Recording permission not granted	Claim Host or ask the Host to grant recording permission.
Poor audio/video quality	Weak Internet connection	Use a wired connection if possible, close unnecessary applications, and stop other bandwidth-intensive activities.

8.8 Meeting Host Best Practices

Before the Meeting

- ✓ Join at least **10–15 minutes** early.
- ✓ Verify camera, microphone, and speaker.
- ✓ Check Internet connectivity.
- ✓ Open presentation files in advance.
- ✓ Claim Host before participants arrive.

During the Meeting

- ✓ Admit only authorized participants.

- ✓ Keep the Waiting Room enabled when appropriate.
 - ✓ Mute participants during presentations.
 - ✓ Monitor chat and raised hands.
 - ✓ Lock the meeting after all expected participants have joined.
 - ✓ Record the meeting only after informing participants.
-

After the Meeting

- ✓ Stop recording.
 - ✓ Save or verify recording files.
 - ✓ End the meeting for all participants.
 - ✓ Close Zoom Workplace.
 - ✓ Disconnect and safely store conference room equipment.
-

8.9 Host Quick Reference Checklist

The following checklist summarizes the complete meeting workflow.

Before the Meeting

- ☐ Camera connected
 - ☐ Speakerphone connected
 - ☐ Internet available
 - ☐ Zoom Workplace opened
 - ☐ Joined meeting
 - ☐ Host claimed
 - ☐ Audio tested
 - ☐ Video tested
-

During the Meeting

- ☐ Admit participants
 - ☐ Monitor Waiting Room
 - ☐ Mute participants when required
 - ☐ Share presentation
 - ☐ Launch polls (if required)
 - ☐ Monitor chat
 - ☐ Record meeting (if approved)
 - ☐ Apply security controls
-

After the Meeting

- ☐ Stop recording
 - ☐ Confirm recording conversion
 - ☐ Answer final questions
 - ☐ End Meeting for All
 - ☐ Verify recording files
 - ☐ Close Zoom Workplace
-

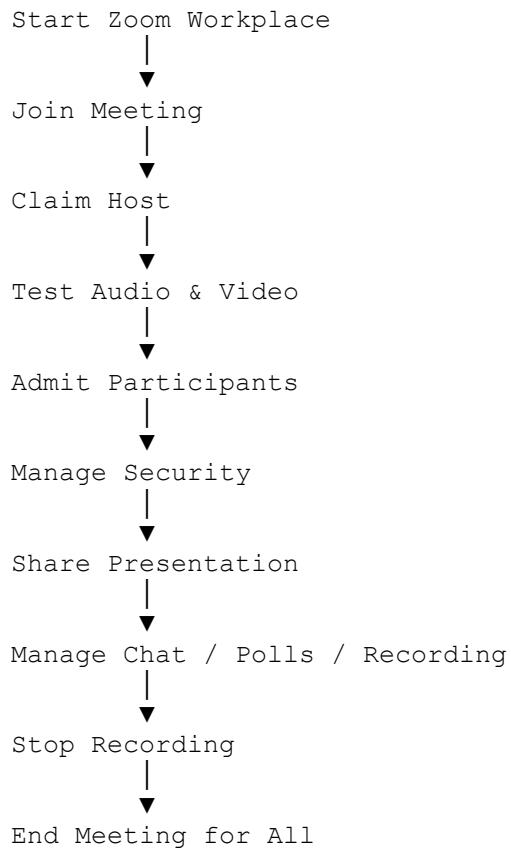
8.10 Keyboard Shortcuts (Windows)

Shortcut	Function
Alt + A	Mute/Unmute microphone
Alt + V	Start/Stop video
Alt + S	Start/Stop screen sharing (<i>Host only</i>)
Alt + H	Open Chat panel
Alt + U	Open Participants panel
Alt + R	Start/Stop local recording (<i>Host only</i>)
Alt + Y	Raise/Lower hand
Alt + Q	Leave or End Meeting

Note

Keyboard shortcuts may vary slightly depending on the Zoom Workplace version and operating system.

Appendix A – Quick Host Workflow



*****End of Manual*****