When the installation completes you may see this screen, if so click on “Sign In”

Sign In with SSO (Single Sign On)

OR, if Zoom opens up as shown below

If you see this screen then you should click on the user icon (A) and select “Sign Out” (B) of the Zoom Client so we can insure your account is connected to the Yale licensed version of Zoom
Install/Configure Zoom

This is the Sign-On screen you should see

Your default browser will open and you will need to do a CAS login. If you have been using the free version of Zoom with your Yale email you may get prompted to allow them to “Switch your Account”. You may also have to confirm an email that they send to you. In any case you DO want to switch your account so that you have access to all the features of Yale’s licensed Zoom.
After the CAS login you will see this screen, click on Open Zoom.us.app

Click here to open the Zoom App

If you see this screen then you have successfully installed the Yale Zoom Client. Now you need to adjust your account settings as instructed on the following pages to insure an optimal experience for you and your students. Quit the Zoom application.
Using your favorite browser navigate to:
https://yale.zoom.us

Click on Sign in. You may be prompted to do a CAS login. You should be taken to the Yale Zoom Profile page for your account, shown below.

Click on the Profile tab (A) You can change your user Icon with an image of your choice by clicking on Edit (B). This is the image that will appear if your video is off.

We suggest you change your personal meeting ID (PMI) to your Yale phone number (NOT a generic department phone number, this number must be unique to you) or some other 10 digit number that you can easily remember. Click on Edit (C). When changing your PMI also check “Use this ID for instant meetings” (D)

After changing your PMI please send it to your office of education contact
Install/Configure Zoom

Click on the Settings tab
This tab is broken up into multiple sections. We suggest you make sure you have the following settings. This guide will not show you every setting but will guide you to configure the settings we think you should configure.

In the security section
Require...security option: ON
Waiting Room: ON
Select Everyone
Turn all the passcode settings OFF
It is ok to leave this passcode setting ON
In the “Schedule Meeting” section (B) make sure the following are configured:

- **Host video**: ON
- **Participants video**: ON
- **Audio Type**: Telephone and Computer Audio
- **Join before host**: ON
- **Enable Personal Meeting ID**: ON
- **Use Personal Meeting ID (PMI) when scheduling a meeting**: OFF
- **Use Personal Meeting ID (PMI) when starting an instant meeting**: ON
- **Mute all participants when they join a meeting**: ON
In the “Meetings Basic” section (A) (scroll down to find it), make sure the following are configured:

- **Require Encryption**: ON
- **Chat**: ON
- **Private Chat**: ON
- **Sound notification when someone joins or leaves**: OFF
- **Co-Host**: ON
- **Polling**: ON
- **Screen Sharing**: ON
- **Who can share?**: Host Only
- **Who can start sharing when someone else is sharing?**: Host Only
- **Disable desktop/screen share for users**: OFF
- **Annotation**: ON
- **Allow saving of shared screens with annotations**: ON
- **Whiteboard**: ON
- **Allow saving of whiteboard content**: ON
- **Remote Control**: OFF
- **Nonverbal feedback**: ON
- **Meeting Reactions**: ON
- **Allow removed participants to rejoin**: OFF
- **Allow participants to rename themselves**: ON
Install/Configure Zoom

In the “Meetings Advanced” section (scroll down to find it), make sure the following are configured:

- **Breakout room**: ON
- Allow Hosts to assign participants to breakout rooms...: ON
- **Closed Captioning**: ON (check all boxes below as well)
- Virtual Background: ON
- Identify Guest Participants: ON
In the “Email Notification” section (A) (scroll down to find it), make sure the following are configured:

When attendees join meeting before host: **Your Choice. If on you will get an email when someone enters your waiting room**
In the “Meetings” section (A), click on “Personal Room” (B), then click on the “Edit” button.

Make sure you don’t have a passcode set for your PMI as shown here.

Make sure you have waiting room enabled. This should not be checked.

To make changes click here.
Your Zoom app is now configured properly.

To find where the Zoom app is installed on your computer:
https://support.zoom.us/hc/en-us/articles/360032812931-Starting-the-Zoom-Desktop-Client

More help can be found:

At the Teaching and Learning Center Website:
https://medicine.yale.edu/tlc/covid19/

At the Poorvu Center:
https://poorvucenter.yale.edu/academic-continuity-zoom

And from Zoom
https://support.zoom.us/hc/en-us/articles/206618765-Zoom-Video-Tutorials
https://support.zoom.us/hc/en-us/categories/200101697-Getting-Started