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Education Features Update

Ministry of Education & Science of the Ukraine





Agenda

Zoom Web Portal, Desktop & Mobile Client

Zoom AI Companion

Zoom Docs

Zoom Polls & Surveys

Zoom Whiteboard

Zoom Clips

Additional Resources

ZOOM Web Portal & Desktop & Mobile Client



Sign in to Zoom

zoom.us

- Please go to zoom.us.
- Click Sign In.
- Sign in with Email and Password, SSO, Apple, Google or Facebook.



Your Web Portal

Meetings Settings

- The Zoom Web Portal allows you to set up your:
 - Profile +
 - Meeting settings +
 - Schedule, edit and view your meetings +

My Settings - Zoom	× +					~
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Profile						
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Your Web Portal

Meetings Settings

- The Settings tab choose specifics settings for your Meetings and Recording
- Pick settings for
 - + Meeting security
 - + Meeting features

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ZOOM SOLUTIONS - PLANS	& PRICING CONTACT SALES RESOURCES - SCHEDULE JOIN HOST - WHITEBOARD NEW
Profile	Q. Search Settings
Meetings	
Webinars	Keeting Recording Audio Conferencing Collaboration Devices Zoom Apr. >
Personal Contacts	Security
Whiteboards NEW	
Recordings	Require that all meetings are secured with one security option Require that all meetings are secured with one of the following
Settings	security options: a passcode, Waiting Room, or "Only authenticated users can join meetings". If no security option is enabled, Zoom will secure all meetings with Waiting Room. Learn more 💿
Account Profile	
Reports	Waiting Room
	When participants join a meeting, place them in a waiting room and require the host to admit them individually. Enabling the waiting room automatically disables the setting for allowing participants to join before host.
Zoom Learning Center	Waiting Room Options
Attend Live Training	The options you select here apply to meetings hosted by users who turned 'Walting Room' on
Video Tutorials	\checkmark Everyone will go in the waiting room
Knowledge Base	 People in the waiting room are sorted by join order
	Edit Options Customize Waiting Room
	Require a passcode when scheduling new meetings

A passcode will be generated when scheduling a meeting and

Zoom Desktop Client



Download & Install

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- Please go to zoom.us/download.
- Locate Zoom Desktop Client.
- Click **Download**.
- Open the install file and follow the instructions to install the Zoom desktop client.



Zoom Desktop Client

Sign In

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- Click Sign In.
- Sign in with email and password, SSO, Apple, Google, or Facebook.



Zoom Desktop Client

Home Screen

- Start a New Meeting.
- Join a meeting.
- Schedule a meeting.
- Share Screen to display on a nearby screen.
- View a list of today's upcoming meetings.
- Click your **Profile Picture** to open **Settings**, **Check for Updates**, and more.



Zoom Mobile App

Android & iOS

- Go to zoom.us/download.
- Locate Zoom Mobile Apps.
- Select the desired operating system.

Sign In

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Join a Meeting

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zoom

Settings

More **Display name** Jacob LICENSED Department jac***@zoom.us Sign out ADDED FEATURES Whiteboard S Apps Workspace Reservation Contact settings Contacts SETTINGS Meetings Contacts Matching & Requests 0 2 Team Chat Phone settings S Phone ත General ÷ Accessibility OTHER Q.6 C1 Ð 01 ... Meetings Team Chat Phone Mail Calendar More



Whiteboard

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OUR VISION

Al-first work platform for human connection



zoom

ZOOM Workplace





The smart assistant that empowers you to increase productivity, improve team effectiveness, and enhance skills.





Use Case

When you just get back from being out of the office...

Get caught up quickly on your first day back

- Better understand what's being discussed
- Get a list of action items from a chat channel
- Summarize unread chats within a chat channel
- Summarize recent activity within a chat channel
- Prompt Al Companion with: "When is my next meeting with PERSON"





When you're juggling multiple tasks during a meeting...

Capture valuable information in a meeting

- What the discussion was about
- Attendee Feedback
- Key points made by each person
- The outcome of the discussion
- Ask additional questions that are answered via web search from AI Companion within the meeting
- Find out more information about Attendees (i.e. who they report to, where they are based, etc.)
 - Retain access to valuable information from the meeting



Use Case

 (\checkmark)

When you need an answer quickly...

- Leverage complex documents to **get concise answers** quickly by finding:
 - What you want
 - When you want it
 - How you want it formatted

Al Companion can be used to query documents like:

- Benefits policies
- Instructional guides
- Support documentation

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Use Case

When you don't have time for your next steps...

After a meeting, ask AI Companion to create content:

- Write a thank you note ۲
- Create an initial draft
- Create a task list with owners & due dates
- Create a Product Spec
- Prepare a Project Brief/Plan
- Upload context (doc) & ask AI Companion to create:
 - Unique ideas ۲
 - Alternative layouts
 - Updated tone of a draft ۲



Use previous meeting content to get prepared



What Can Zoom AI Companion Do?

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Al Companion 2.0

Your personal AI Companion to help you get more done.



Meeting Summary

Save time taking notes and share important action items. Summaries are shared in 36 supported languages.

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т 90 / п ±	Increased transparency	Faster time to market	Continuous improvement	

Whiteboard Content Generation

Generate ideas for your whiteboard as stickies, tables, or mind maps. Refine & categorize existing content on whiteboards.



Smart Recordings

Review meeting highlights and next steps quickly when AI Companion divides meeting recordings into chapters by topic

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Jumpstart Your Drafts

Al Companion can help you summarize lengthy, complex documents and create new content

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Al Companion 8:45 AM	Overall Status			
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 Market research on customer needs, trends and competition 	2 Outline product requirements and key features	3 Dave Anderson	12(18)2033	No. 25
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Analyze a Document

Get info about documents connected to Zoom Workplace, including email attachments, documents from chat and Zoom Docs.



How Do I Use AI Companion?

Al Companion fits right into how you use Zoom — just look for the ***** icon within Zoom, such as in your Zoom Meetings controls toolbar or the Zoom Team Chat window.





AI Companion side panel

Get instant help from your personal productivity assistant



Let AI Companion help you recap content, locate information, and manage tasks

Draw information from multiple sources across Zoom, including third-party apps

Get contextual responses based on which tool you're using in the Zoom Workplace App

zoom



AI Companion Side Panel

Using AI Companion Side Panel

- Your personal AI Companion to help you get more done. This new digital AI assistant in Zoom Workplace will stay with users throughout their day.
- Open up the AI Companion side panel on the Zoom client by clicking the AI Companion icon I in the top menu bar.
- Select a prompt or write a message to Al Companion.
- Or you can type in / to bring up additional options including selecting a specific:
 - Meeting
 - Chat
 - Contact
 - Other items

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What meetings do I have today What are some meeting icebreakers	Brainstorr team bond Write a sh to share g	n ideas for a ding activity nort message ratitude		Creatil Cebreak Icebreak Meter's a icebreak Quick 1. Two • H t t v 2. One
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Meeting Summary with AI Companion

Capture key takeaways without hitting record



- \rightarrow Automatically generate a summary of your meeting using Zoom's AI Companion
- \rightarrow Instantly gather an overview and next steps without recording your conversation
- $\rightarrow\,$ Share your summary with participants via chat, email, or a Zoom Calendar card





Overview

- Generate a summary and next steps of what was discussed in your meetings and share through email and Team Chat
- Summaries for meetings you hosted can be managed from the web portal and will be sent through email and posted to the meeting's dedicated group chat in Team Chat.
- Meeting Summaries are supported in more than 30 languages.
- Participants must be signed in to their Zoom account during the meeting to automatically receive the summary.
- Only the meeting host and co-host can start or stop the meeting summary through the in-meeting controls.
- Can be managed by admins at the account, group & user level.





How To Start

- For meetings you host, you can start or stop the meeting summary through the in-meeting controls.
 - Activating meeting summary, triggers meeting transcription, the meeting summary is generated based on the transcript after the meeting ends.
- The summarization of the meeting only begins when the host or co-host clicks Start Summary.
- Users can also adjust their settings to have Meeting Summary start as soon as the meeting starts, skipping the need to manually enable summary generation in their meetings.
 - Note: This does not require the host to be present, as the Meeting Summary generation will begin as soon as someone starts your meeting.
- The participants will see a notification when the meeting summary has started.
- The notification type will depend on the participants' client version.
- To stop the summary, click **Stop Summary**.





Request Enablement

- If the host does have Meeting Summary enabled for their meetings, any meeting participants can request that it be started for the current meeting.
 - The host will receive an in-meeting request to start Meeting Summary for the current meeting.
- If the host does not have Meeting Summary enabled for their meetings, the host, co-hosts, and any participants can request that it be enabled.
 - If the host or another meeting participant is an admin, they will be prompted to enable it during the current meeting.
 - For Pro accounts, an admin in the meeting will be prompted to enable both the in-meeting Meeting Summary feature & the web-portal Meeting Summary setting through the meeting window prompt. This will take effect immediately.
 - For Business accounts & higher, an admin in the meeting will be prompted in the meeting window to open the web portal and enable Meeting Summary setting. This will take effect upon the start of the next meeting.
 - If no one in the meeting has the necessary admin permissions, admins will receive the request as an email from Zoom.



Ask Admin to Enable Meeting Summary with AI Companion





View the Meeting Summary - Team Chat

- If the host enables sharing, meeting participants can access the summary through email & Team Chat.
- The meeting summary is only available through Zoom Team Chat if the meeting was scheduled with Continuous Meeting Chat enabled.
- To access the summary on Team Chat, select Team Chat on the Zoom desktop client.
 - Find & select the group chat with the same name as the meeting topic.
 - Search for the message from Zoom Meetings, then click View Details.
 - If desired, hosts can click Edit to modify the summary, then click Save.
 - A host can also delete the summary by clicking **Delete**. Please note, this action cannot be undone.





View the Meeting Summary - Email

- Once the meeting summary is available, a copy of it is provided through email.
- Summaries for meetings that have continuous meeting chat disabled are only shared through email.
- To see the meeting summary, open your email inbox.
 - Find & select the email with the same subject as the meeting topic.
 - If desired, hosts can click Edit Summary Here in the body of the email to modify the summary.
 - The host will be prompted to sign in to their Zoom account, and continue editing the summary through the web portal.
- Please note:
 - Users not logged in to their Zoom account will not receive an email summary, as there was no email address associated with their presence in the meeting.
 - Participants joining the meeting ad hoc (through the in-meeting contact invitation or sharing the join link) will not receive the summary, as they were not on the original invitee list.





Managing the Meeting Summary

- To view, edit & share the summaries of meetings you hosted, sign in to the Zoom web portal.
- In the navigation menu, click Meeting Summary with Al Companion.
- In the My Summaries tab, select or search for the desired meeting. Click the meeting name to open up the meeting summary.
- Here you can:
 - **Share** send the summary through email.
 - You will be prompted to enter one or more email addresses or contact names, then click share.
 - Edit modify the summary & click save.
 - **Delete** permanently delete the summary.





Supported Languages

- Users can now use AI Companion's in-meeting questions capability in 32 languages (in preview).
 - Generally available
 - English
 - Core languages
 - Spanish, Japanese, French, German, Portuguese, Chinese & Italian.
 - Additional Languages:
 - Arabic (MSA), Chinese (Traditional), Bengali (Bangladesh+India), Czech, Danish, Dutch, Estonian, Farsi / Persian, Finnish, French-CA, Hindi, Hungarian, Indonesian, Korean, Malay, Polish, Romanian, Russian, Swedish, Tamil, Tagalog, Telugu, Turkish, Ukrainian & Vietnamese



Enabling AI Companion Meeting Summary

Settings > AI Companion

Meeting summary with Al Companion

As a host, you can generate a summary. Summaries are sent after the meeting has ended based on the share options. 🕢

Turn on meeting summary automatically when meetings start

Send an email notification when sharing with users

Automatically share summary with:

Only me (meeting host) (i)

Only meeting host, co-hosts, and alternative hosts

Only me (meeting host) and meeting invitees in our organization

All meeting invitees including those outside of our organization

*Participants must be signed in to their Zoom account during the meeting to automatically receive the summary

Meetings

Al Companion Meeting Summary (App version)



Meetings
Al Companion Meeting Summary (Web Portal)

Meetings

Phone	My Summaries > Meeting Summary for Test Meeting Summ
Personal Contacts	Meeting Summary for Test Meeting Summary
Whiteboards	Sep 19, 2023 15:08:28 Central Time (US and Canada) ID:
Notes NEW	Summary
Surveys & Polls NEW	
Recordings	Sales Boost: Surveys, Packages, Innovations & Training Blake and Mark discussed ways to increase sales for Zoom Phone. They considered sending customer surveys and pitching higher packages to
Meeting Summary with Al Companion	companies showing growth potential. Mark suggested the idea of brainstorming new product innovations, as well as exploring international phone support. The duo also agreed on the need for training decks for customers. Mark committed to working on these action items.
Clips BETA	Next Steps
Workspace Reservation	Mark will start working on a training deck and sales strategies.
Settings	A Share
Scheduler	

AI Companion In-Meeting Questions



Meetings C X AI Companion You 9:22 AM What are the action items after the meeting? Al Companion 9:22 AM Yes, here are some action items: · Jada will send out updated marketing campaign strategy · Macy will send out meeting notes · Antwan will connect with Jada to incorporate Brock's feedback · Team will meet again next week for progress update You 9:25 AM Catch me up Al Companion 9:25 AM The group brainstormed marketing strategies, including social media ads, email campaigns, influencer partnerships, and in-store promotions. They also discussed creating a viral marketing campaign and a referral program. The team identified the target audience and agreed to tailor their messaging to different demographic segments. Catch me up ... 2 No other participants can see this conversation Ask anything about this meeting...

Overview

- Quickly catch up and get clarity on what you missed during a meeting without interrupting it using pre-populated prompts like:
 - Catch me up
 - Was my name mentioned?
 - Are there any actions items?
- Users can ask additional questions, as well.
- Questions and responses are supported in more than 30 languages.
- Only the meeting host can start or stop Al Companion through the in-meeting controls.
- Questions can only be answered if the content was discussed while AI Companion is active in the current meeting.
- Can be managed by admins at the account, group & user level.



zoom

Turning on During a Meeting

- Start a meeting as the host with the Zoom desktop client.
- In the meeting control toolbar, click Al Companion.
 - The AI Companion panel will open in the meeting.
- Under Who can ask questions to Al Companion?, select which group of meeting participants can interact with Al Companion:
 - All participants: Allows all participants to ask questions.
 - All participants only from when they join: Allows all participants to ask questions about the discussion since they joined the current meeting.
 - Only hosts: Allows only the original host, alternative host, and users with host privileges assigned before the meeting starts to ask questions.
- Click Start to begin having the meeting conversations analyzed.
 - If transcription is enabled for the meeting, you will be able to ask questions about anything that happened prior to starting AI Companion Question, if transcription was not enabled, the transcription will start once AI Companion Questions is enabled. Therefore, you would only be able to get answers for questions based on the transcription from that point forward.
- Click Got it to confirm; all participants will see a notification informing them that AI Companion is active.



AI Companion

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Enablement Requests

- If the host has AI Companion enabled for their meeting, any meeting participant can request that it be started for the current meeting.
 - The host will receive an in-meeting request to **Start** Al Companion for the current meeting.
- If the host does not have AI Companion enabled for their meetings, the host, co-host & any participants can request that it be enabled.
 - If the host or another meeting participant is an admin, they will be prompted to enable it during the current meeting.
 - For Pro accounts, an admin in the meeting will be prompted to enable both the in-meeting Al Companion feature and the web-portal Al Companion setting through the meeting window prompt. This will take effect immediately.
 - For Business accounts and higher, an admin in the meeting will be prompted in the meeting window to open the web portal and enable Al Companion setting. This will take effect upon the next meeting start.
 - If no one in the meeting has the necessary admin permissions, admins will be sent the request as an email from Zoom.

Al Companion



Participant View

Host View

Ask Host to Start Al Companion

Use AI Companion to ask questions, catch up on meetings, and more





Asking a Question

- When AI Companion is active in a meeting, all participants will be able to ask questions about the meeting discussions thus far.
 - It's important to ensure that your caption language is set correctly, as this ensures AI Companion is transcribing your speaking language correctly, which improves the quality of the generated transcript for AI Companion questions.
 - If no caption language has been set, English is used by default.
- In the meeting control toolbar, click AI Companion.
- The AI Companion panel will open on the right side of the meeting window.
- Click a **provided question**, or click the text compose box at the bottom to enter a **custom question**.
 - Al Companion will provide a generated response based on what it has heard & properly analyzed thus far in the meeting.



zoom

Supported Languages

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 - English
 - Core languages
 - Spanish, Japanese, French, German, Portuguese, Chinese & Italian.
 - Additional Languages:
 - Arabic (MSA), Chinese (Traditional), Bengali (Bangladesh+India), Czech, Danish, Dutch, Estonian, Farsi / Persian, Finnish, French-CA, Hindi, Hungarian, Indonesian, Korean, Malay, Polish, Romanian, Russian, Swedish, Tamil, Tagalog, Telugu, Turkish, Ukrainian & Vietnamese





Enabling AI Companion In-Meeting Questions

Settings > AI Companion

Allow users to ask Al Companion questions about the meeting

Allow hosts and invited participants to ask questions to AI Companion during a meeting. Questions are answered based on the conversation transcript. 😿

Automatically allow access when the meeting starts (i)

Share access with: (i)

- All participants and invitees
- All participants only from when they join
- O Participants and invitees in our organization
- O Participants in our organization only from when they join

Only meeting host

Meetings

AI Companion Smart Recording

Meetings



L Download (4 files)

Smart Recording

Overview

- Review cloud recordings faster through highlights, smart chapters, summaries, and next steps, and get analytics on key meeting and conversation factors.
- Recording highlights, smart chapters, and next steps can be edited by the owner of the cloud recording (the host) or a user with permission to manage cloud recordings.
- Smart Recording currently only supports cloud recordings in English.
- Not available for Education accounts that provide educational services to children under the age of 18.
- Use of Smart Recording with Al Companion is not available in all countries.
- Can be managed by admins at the account, group & user level.



Smart Recording

Manage Cloud Recordings

- Once the cloud recording & audio transcript have finished processing, go to the Zoom web portal to manage & edit the recording highlights, smart chapters, next steps, trim, download & more.
- In the navigation menu, click **Recordings**.
- On the Cloud Recordings tab, click the name of the recorded meeting or webinar you would like to view.
- Click the Video thumbnail with the play icon.
- The recording will open and the transcript text appears to the right of the video.





Smart Recording

Meeting Coaching Analytics

- Zoom AI Companion can analyze & provide metrics on key factors in your meeting conversations, such as talk speed, talk-listen ratio, longest spiel, filler word usage, & your patience in discussion.
- These metrics can be viewed when viewing a cloud recording after it has finished processing.
- Coaching is available only for host & eligible account admins.
- On the cloud recording page of the Zoom Portal, select the video thumbnail you want to view; once it is open under the video, click My meeting Coach tab.
 - Your metrics for this recording will display below.





Enabling Smart Recording with AI Companion Settings > AI Companion tab

* Cloud Recording will also need to be enabled

Recording

Smart Recording with Al Companion

By enabling it, your cloud recording can have recording highlights, summary and smart chapters, and next steps. technology, which may include third-party models. Zoom does not use any audio, video, chat, screen sharing, attachments or other communications-like content (such as poll results, whiteboard and reactions) to train Zoom's or third-party Al models. Learn More 📧

Create with each recording:

- Recording highlights ⑦
- Smart chapters 💿
- 🗹 Next steps 🕜
- 🕗 Meeting Coach 🕐



Meetings

Whiteboard Content Generation

Overview

- Users can generate ideas, refine and extend existing content, and add objects to a canvas for an improved Whiteboard experience.
- Currently, Whiteboard Content Generation only supports prompts in English.
- Use of Whiteboard Content Generation with Al Companion is not available in all countries
- Can be managed by admins at the account level.







Zoom Docs Capabilities



Collaborative Document



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	Column creation improvements	PD		Make column creation and modification r	D Zhati	11/30/2023	

Project Management

Unlike a traditional document, Zoom Docs offers an easy-to-use and flexible solution that tackles three core use cases — all in one place for teams to collaborate

zoom

Collaborative documents

Create beautiful documents

- Add many different types of content to a page (text, table, image, video, audio, tasks, lists, etc.)
- Use drag and drop to move blocks around for a flexible layout
- Customize your pages effortlessly to make them beautiful

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Collaborative documents

Share information securely

- Control access to documents by restricting access based on your use case
- Invite specific collaborators by adding Zoom Team Chat Channels, individual contacts, and limit access to 'Only collaborators'
- Share company documents with easy-to-understand permissions
 - E.g., employee handbooks by granting access to 'Anyone in {organization name}'
 - External users, allow access to 'Anyone signed-in with the link' by sharing the document link with them



Wiki Project hub

Enhance collaboration, transparency, and efficiency throughout the project lifecycle

- **Centralized Project Materials:** Consolidate all project-related materials in one location
- Enhance Oversight: Utilize a data table to improve project visibility and keep stakeholders informed about progress
- Streamline Task Management: Assign tasks, track progress, and monitor deadlines using task lists

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Optimize project management

Docs + Al Companion Help me write, revise & summarize

- Draft, brainstorm, improve writing, change tone, adjust length, summarize, explain, etc.
- Lower the barrier for ordinary users to utilize Al with an intuitive user experience

Video games represent more than just simple entertainment or mindless play; they have evolved to become a significant form of art. Unfortunately, there are still some individuals who fail to recognize this evolution and hastily dismiss them as a frivolous waste of precious time.

🔶 Translate to Spanish

Replace

Los videojuegos representan más que un simple entretenimiento o juego sin sentido; han evolucionado hasta convertirse en una forma de arte significativa. Desafortunadamente, todavía hay algunos individuos que no reconocen esta evolución y la descartan apresuradamente como una pérdida frívola de tiempo precioso.

Always check Al content for accuracy

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		Change tone to	Formal
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		Use plain language	
		Translate to	>
		Convert to a list	
		Clarify	
		Explain	
		Summarize	

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Meeting agenda Email Blog post Proposal Checklist	
Marketing and sales	
Sales pitch Social media caption Press release Newsletter	
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Analysis and research	

Docs + Al Companion Generate from meeting summaries

- No dedicated notetaker needed
- Access meeting summary and create content from meetings after they occur

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The team discussed the progress and challenges of various projects, including potential delays, dependencies, and the involvement of new team members. They also deliberated on the risk levels of projects, the need for experienced senior members to guide novice users, and the importance of recording the status of each step. Additionally, they explored the adoption of new technology solutions, the importance of onboarding, and the need to address user errors and bugs. The team also discussed the start of a new task, the need to synchronize efforts, and the potential one-week delay in launching something. Lastly, they discussed the risk levels of different projects, the importance of everyone being in the office by 9:30, and the potential challenges involved in adopting a new technology solution.

✤ Write a meeting note of Xu	n Xiao's Zoom Meeting	< 2/2 →
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Always check Al content for acc	Shorter Longer More formal More casual	

Docs throughout the lifecycle

Pre-, mid-, and post-meeting

Easily manage your meetings and let participants know about the agenda

- Start an instant meeting from a doc, and automatically share the doc with meeting participants
- Create a new meeting event from a doc and include it as an attachment to offer participants better context for the meeting
- Support these functionalities across both the Zoom Workplace web and desktop apps to enhance the seamless utilization of pre-meeting documents

Pre meeting

Quickly start or schedule meetings from Docs (both web and desktop apps)



Setup Zoom Docs

User settings

- Login to the Zoom Workplace web portal, click **Settings**, then select **Docs**
- Here users can customize their Doc settings, including:
 - In-meeting Docs
 - Docs Access
 - Notifications
 - Caching

ZOOM Products Solu	utions Resources Plans & Pl	s	chedule	Join - Host -	Web App ~ 顺
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> AI Companion Clips		All Participants Who can create and share a new doc in meeting			
> Workspaces		⊖ Host only			
Scheduler Mail		 Users in your organization All participants (exclude anonymous users) (?) 			
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Dashboard		Anyone in Zoom IT			
User Management Huddle Management BETA		\bigcirc Anyone who signed in to Zoom with link \bigcirc			Q

Access Zoom Docs

Zoom Workplace Desktop App

Zoom Docs can be accessed by clicking \bullet the **Docs** tab on the Zoom Workplace desktop app

To access Zoom Docs on the Zoom Web • App visit **docs.zoom.us**, and log in to your Zoom account

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Homepage overview

Updates

Receive notifications on docs you have been added to, @ mentions, and more

Recent

List view of the docs you last viewed

My Meetings

See your meeting details, including: time, participants, summary, next steps & any meetings that have a doc linked

My Docs

A list of all folders/docs you have created

Shared With Me

An organized space of all Zoom docs that have been shared with you

Starred

Any favorited folders or docs will show here

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Shortcuts

Click one of these boxes to:

- Create a **new** Zoom doc
- Use AI Companion to create a document
- Choose a **template** for a document
- Import

Open

Click on any title to open that document, see the title, owner, and when you last viewed it

1 Trash

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Docs



New doc overview



Share the document with contacts, channels, or individuals via email. You can also copy a share link and set who has access to the

Share

document.

More Options

Additional controls including, page width, page options, version history, and more.

> Comments Show all comments

Meet

Meet now or schedule a meeting. If you select meet now, you will be added to a new meeting with the doc visible, and you can add teammates so everyone can collaborate together.

Toolbar

Collaborate

Utilize this menu to change font style, add comments, or click the blue circle to bring up additional formatting/insert/embed options

Al Companion assisted writing

○ ○ ^{zoom} Workplace
← Back □

- Press the spacebar to open Al Companion
- Type what you would like Al Companion to do or choose from one of the suggested prompts

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Al Companion generate from meeting

← Back

- Press the spacebar to open Al Companion
- Write **@** to bring up a list of meetings and select the desired one

Smart Treadmill Marketing Plan

Meetings

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Docs

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Templates overview

- Don't want to start with a blank doc? Save time by utilizing a template
- Click **Templates**, then select a template from the pop-up menu
- You can preview any template by hovering over it and selecting **Preview**
- Once you find the desired template, click Use

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zoom

Meeting Doc overview

- Meeting docs present your meeting details, such as time, participants, summary, next steps etc.
- All Zoom meetings you have hosted, attended, or been invited to within the last 15 months will be displayed here
- For any meeting you hosted, you can click Meeting docs, then click Create Meeting doc
- A document will be created for that meeting, you can then further collaborate on the document

Design Workshop Brainstorming

Theeting information

Subject	Design Workshop Brainstorming					
Time	08/10/2024					
Attendess	🍕 Kei Umeko 🤱 Tom Nguyen 🚯 Olivia Smith 🤱 Dave Anderson					

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Summary

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← Back

The first phase involved an open discussion where team members freely shared their ideas, leveraging the virtual whiteboard feature to jot down key points. Encouraging an atmosphere of inclusivity, everyone had the opportunity to contribute, fostering a collaborative environment that sparked creativity.

📏 Chapters

Introduction and Agenda Setting

The first phase involved an open discussion where team members freely shared their ideas, leveraging the virtual whiteboard feature to jot down key points. Encouraging an atmosphere of inclusivity

 ZOOM Surveys & Polls

New Survey & Poll Library

Notes NEW

Surveys NEW

Meeting Summary with Al

Surveys & Polls are now accessible from a single entry point in the web-portal

- A single entry point to Create, Manage, Share and View Survey & Poll results
- A single builder to create Polls & Survey with unified experience (question types...)

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Survey Types

<u>Consumer</u> Survey Polls **Engagement** Survey **Consumer Engagement** Survey are available for Zoom Polls content items are Survey have a limited list of Subscribers, Surveys are similar to survey's, the question types compare to made available to users difference resides in the generic Surveys to fulfil the across all Zoom modalities : execution model, Polls are executed in live sessions. omni-channel expectation, Desktop Client, Mobile Client, assignment & permission are Web Browsers. Quizzes are polls with correct specific to ZCC. answers preset.

Create a Survey

Creating a new Survey

- Sign in at **zoom.us**.
- Select Surveys & Polls, any existing surveys will show.
- Click + Create to build a new Survey.
- Select if you would like to to create a Survey or Poll or quiz, then click Create.



		c	The Settings allow you to onfigure the preferences your survey.	o of Edit the Th the sur	eme of vey.			
Create a Surv ↓	rvey Title		e the survey.			Once complete, click Save or click to save it as a draft or delete.		
View all the added questions in the Question List. 4 Add Question + Add Question		Untitled Untitled Ques Choice 1 Choice 2 + Add Choice Required Show as	Survey	● Single Choice ∨	Select your si	a Question Type for urvey. Options include: + Single choice + Matching + Rank order + Short answer + Long answer + Fill in the blank + Rating scale		

Survey Branding

Surveys look & feel can now be customized

- Select the Background color from a predefined range or even your own color code.
- Customize the image banner with you own logo or brand visual.


Question Skip Logic

Allow Survey Owners to customize the path a respondent takes through the survey based on their previous responses

- Survey creators are now allowed to define the next question based on respondent choice.
- Skip logic is currently available for single choice questions type only.

1. Would you recommend our brand to a friend? * \Rightarrow	
Yes	
No	
	Edit skip logic BETA
	Edit skip logic BETA Duplicate

Edit skip logic	
For the question: Would you recommend our brand to friend?	
Option selected is:	Skip to question:
Yes	Why would you not recommend our Brand $\ \otimes \ \lor$
No	On scale from 1 to 5 how would you rate $\otimes \smallsetminus$

Cancel

Save

Send a Survey

Ways to send a Survey

• Click ... on a created survey to Copy Link.

ZOOM Products Soluti	ions Resources Plar	ns & Pricing	Schee	dule Join ~	Host ~	Web App 🗸 顺
PERSONAL Profile Meetings	Surveys & Polls All Types Surveys	Polls and quizzes				+ Create
Webinars Personal Audio Conference	Q Search	All Status 🗸				
Phone Personal Contacts	Question of the Day	Type Survey	Questions N	1odified \$ 0ct 20, 2023 09:33 4	Res AM 0	
Personal Devices Whiteboards						Copy Link Close Survey Edit
Notes (NEW) Surveys & Polis (NEW)						Preview Duplicate
Recordings Meeting Summary with Al Companion						Delete
Clips BETA						0
Settings						9

Enhanced Results View

Results can now be aggregated in various way

- Surveys and Polls are now persistent, Results views offer multiple data aggregation:
 - + An overview of all collected responses
 - Responses aggregated per meeting, webinar or link sharing
 - + Individual responses

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< Back	Results Overview	Results by Events	Results by Respondents	¥
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tienlapspktnd@gmail.com (Webinar Topic) Oct 27, 2022 9:00 PM	C. (prompt) D. (prompt)		C. (MasterCard D. (L'Oréal)
tienlapspktnd@gmail.com	4. Lorem ips	sum dolor sit (Rank Order)	Somewhat Neutral Important Very Important	

Default Post-Session Survey

Default post-meeting or webinar Survey offer a consistent way to collect feedbacks

- Users are now allowed to define a default Survey that will be offered to meeting or webinar participants at the end of all sessions
- It is possible to filter on the type of user that will be exposed to the survey (internal or external)
- Default Survey can also be defined at the account level by the Admin

Security	Meeting Survey	
Schedule Meeting	Allow host to present a survey to participants once a meeting has	sended
In Meeting (Basic)	Vse default survey 👔	
In Meeting (Advanced)	**DEMO** Remote Court Proceeding FeedbackPlease	~
Email Notification		
Other	This survey will stay published until it's removed as the default survey, and can then be closed.	×
	Who can response to meeting surveys	
	O Everyone in the meeting	
	O Internal users only	
	C External users only	
	Save	

Polling

Expanding possibilities for active feedback and demonstrating knowledge.

To expand Zoom's polling tool beyond the meeting experience, as a portable, flexible feedback system integrated with meetings, chat, contact center, webinars, and pre-and-post meeting. Adding flexible new ways to share, visualize, create, and assess.





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ZOOM Whiteboard



Core Whiteboard Scenarios

Key Activities For Whiteboard Include:



Brainstorming ideas and solutions

- Workshops
- Retrospectives
- Problem solving
- Decision-making



Presenting information

- Visual explanations
- Lectures
- Team building
- Presentations



Organize people and resources for task execution

- Agile & Scrum
- Scrum
- Weekly Team Sync



Mapping ideas, processes, people, and events

- Flow charting
- Org charts
- Activity diagramming
- User journey maps



Collect feedback on a deliverable to improve

- Design review
- Document feedback
- Presentation feedback

Planning

Develop strategies and plans

- Strategic planning
- Contingency planning
- Product roadmaps

Editing Tools

Collaborate Together Using A Broad Set Of Tools For:

- Moving objects
- Freehand drawing
- Creating and editing shapes
- Drawing lines and arrows
- Adding text
- Sticky notes
- Templates
- Inserting images and documents
- Tables
- Mind Map
- Kanban
- Cards



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Zoom Whiteboard Overview



Meeting Workflows Easily collaborate before, during, after you meet



Diagramming Map out your best ideas faster



Facilitation Tools Focus everyone's eyes on the exact same spot

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	of John Chen		Editor +	
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Sharing Outside of Meetings Instantly collaborate from anywhere, at any time



Templates Tools to help solve your team's unique needs



Quick Ideation

Brainstorm and structure content in notes, cards, and tables



Enable Whiteboard

In-Meeting Whiteboard

- To enable Whiteboard, admins will need to go to Account Management → Account Settings.
- Select the Whiteboard tab at the top.
- Click the toggle to Enable In-Meeting Whiteboard.

Account Settings - Zoom	x + ~
\leftrightarrow \rightarrow C \triangleq zoom.us/account/setting	û 🖈 🖪 😩 :
	Q Search Support 1.888.799.0125 Contact Sales Request a Demo
ZOOM Products Solut	ions Resources Plans & Pricing Schedule Join Host -> Web App -> 🔎
ADMIN Plans and Billing 	Q Search Settings
Dashboard User Management	A com Apps Whiteboard Notes Quality Management Zoom Event >
 > Team Chat Management > Device Management 	Groups and members will use the following settings by default. If you don't want the settings below to be changed, you can lock the settings here. Learn More
Room Management Workspaces Management	In-meeting Whiteboard
> Phone System Management	Enable In-Meeting Whiteboard
 Al Management Account Management 	Allow whiteboards to be saved to cloud
Account Profile	
Account Settings	Allow export of whiteboard content
Alerts & Notifications	Users can export in PDF, PNG formats
Location Management (NEW)	Host and Participants Host only
Whiteboard Management	
Notes Management NEW	Allow participants to share whiteboard
	By disabiling this setting, hobody else except the host can share

Enable Whiteboard

Out-of-Meeting Whiteboard & Sharing

- To create whiteboards outside of a Zoom Meeting, click the toggle for Enable Out-of-Meeting Whiteboard.
- Allow whiteboards to be saved to cloud will also be enabled. If you do not want to save whiteboards to the cloud, disable this setting.
- Sharing: if enabled, choose if only users in the same organization can share among themselves or with anyone with a Zoom account.

Account Settings - Zoom	× +		~
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 Plans and Billing Dashboard 	Enable Out-of-Meeting Whiteboard		
> User Management			
> Team Chat Management	Allow whiteboards to be saved to cloud	۵ 💽	
> Device Management			
> Room Management	Allow export of whiteboard content Users can export in PDE. PNG formats		
> Workspaces Management			
> Phone System Management	Whitehoard cloud sharing		
> Al Management			
 Account Management 	Sharing	۵ (
Account Profile	Only users in the same organization		
Account Settings	\bigcirc Allow sharing with anyone with a Zoom account (same organization and		
Alerts & Notifications	external orgs) 🕜		
Location Management (NEW)	✓ Allow users in your organization to collaborate on boards outside your		
Whiteboard Management	organization (out-of-meeting) ⑦ For in-meeting restrictions, visit Read More		
Notes Management (NEW)	Also allow external authentication		

Web Browser

Web Experience

Log in to **zoom.us**.

whiteboard.

Select Whiteboards.

Click + New Whiteboard to create a new

.... × + Whiteboard - Zoom $\leftarrow \rightarrow$ C zoom.us/wb#/ ₫ ☆ * 🖬 😩 🗄 Q Search Support 1.888.799.0125 Contact Sales Request a Demo zoom Products Solutions Resources Plans & Pricing Schedule Join Host ~ Web App ~ 2 PERSONAL Whiteboards New Whiteboard Profile All Whiteboards Recent My Whiteboards Shared with Me Starred Trash Projects Meetings Webinars Templates NEW All templates Phone [5=d] Personal Contacts Whiteboards Pros and Cons Kanban Table Mind Map Meeting Notes Start, Stop, C... 8 Seed Bracket Problem, Notes NEW Q Search ₩ Ξ Surveys & Polls (NEW) Recordings Name \downarrow Starred Owner ~ Modified ~ Settings 8/1/2023, 11:06:17 AM Pros and Cons Jacob * ... Scheduler by Jacob Rename Analytics & Reports Duplicate ADMIN Open in new tab > Plans and Billing View activity Move to project Dashboard Leave Board

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Client Experience

Zoom Client

- Log in to the Zoom desktop client.
- Click the Whiteboard tab to access your Whiteboards.



Dashboard

All Whiteboards

- Dashboard to help manage your whiteboards.
- Create new whiteboards from scratch or utilize a template, both in and out of meetings.
- Manage who has access to the whiteboards created by you or your team.

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All Whiteboards	All Whiteboards					C [†] New
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Dashboard



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Zoom Whiteboard Dashboard

Role Permissions

- Co-Owner can access the whiteboard, edit, share, edit permissions & comment. Can even access the whiteboard when locked.
- Editor can access the whiteboard, edit, share, and comment. Cannot access the whiteboard when locked.
- Commenter can access the whiteboard, and add comments and see comment threads. Cannot access the whiteboard when locked.
- Viewer can access the whiteboard, but cannot comment or edit. Cannot access the whiteboard when locked.



Toolbar







In Meeting

- Select Whiteboard.
- Set the sharing properties for the whiteboard by clicking ^ next to the Whiteboards button.
 - + Allow attendees to access after the meeting will be enabled by default - allowing attendees to access the whiteboard outside the meeting.
- Choose a New, template, or an existing whiteboard.
- Click Open / Create to bring up the whiteboard.



In Meeting

- Collaborate on the whiteboard within your Zoom Meeting.
- If enabled, the cloud icon on the top left will show when your whiteboard is auto-saved to the cloud.

Whiteboard Content Generation

Generate Sticky Notes

- Sign into the Zoom Client, and Click Whiteboard.
- Create or open an existing whiteboard.
- In the left toolbar, click the Al Companion icon.
- Enter a prompt in the prompt field or select from the list of suggested ideas.
- Right next to the prompt field, expand the drop-down list and select Generate Stickies.
- Click the send icon.
 - Click Refine Results to narrow your search criteria, apply filters, and obtain more precise & relevant info.
 - Click Add More to add more relevant content in sticky notes.
 - Click the Close icon to cancel the sticky notes generation.
- When you are satisfied, click the **checkmark** icon.

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Generate a Table

- Create or open an existing whiteboard.
- In the left toolbar, click the Al Companion icon.
- Enter a prompt in the prompt field or select from the list of suggested ideas.
- Right next to the prompt field, expand the drop-down list and select Generate Table.
- Click the send icon.
 - Click Refine Results to narrow your search criteria, apply filters, and obtain more precise & relevant info.
 - Click Fill to complete or populate a table with relevant data or information.
 - Click Add row to insert a new row into the table.
 - Click Add column to insert a new column into the table.
 - Click the Close icon to cancel the table content generation.
- When you are satisfied, click the **checkmark** icon.

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Generate Texts

- Create or open an existing whiteboard.
- In the left toolbar, click the Al Companion icon.
- Enter a command in the prompt field or select from the list of suggested ideas.
- Right next to the prompt field, expand the drop-down list and select Generate Table.
- Click the send icon.
 - Click Refine Results to narrow down your search criteria, apply filters, & obtain more precise & relevant info.
 - Expand the Length drop-down menu to adjust the length of your generated text.
 - Expand the **Tone** drop-down menu to change the tone of your generated text.
 - Click the Close icon to cancel the table content generation.
- When you are satisfied, click the checkmark icon.



zoom

Edit Existing Whiteboard Content

- To organize sticky notes, create or open an existing whiteboard.
- Select one or multiple sticky notes, click the Al Companion icon.
- Select an option that allows you to enhance the selected content.
 - If you select a single sticky note, you can create additional similar stickies.
 - If you choose multiple sticky notes, you have the option to create similar stickies or identify and group related ones together for better organization and management





Format Table

- To format a table, create or open an existing whiteboard.
- Select table you want to format, click the Al Companion icon.
- Format the table using the following options:
 - Click Fill to complete or populate a table with relevant data or information.
 - Click Add row to insert a new row into the table.
 - Click Add column to insert a new column into the table.

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	.1 .1	Use visual aids effectively	Maintain eye contact with the audience	Speak clearly and confidently		
	. . .	Encourage audience participation	Adapt to the needs of the audience	Practice and prepare thoroughly		•

Edit Text

- To edit text, create or open an existing whiteboard.
- Select the text you want to edit, click the Al Companion icon.
- Edit the text using the following options:
 - Length allows you to shorten or lengthen the text, summarize in a single sentence, or rewrite it in bullet points.
 - Tone allows you to modify the tone of the text to match your preference, selecting from options such as Professional, Casual, Formal, or Forceful.

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Zoom Clips

Overview

- Users can easily record themselves and their screen, then immediately share that recording with others.
 - + Those videos can be shared and are stored in the user's 'Clips Library', accessible in both the Zoom Web Portal and the Zoom Workplace app for easy follow-up.
 - + Team members can engage with the videos while view and engagement analytics are tracked.
- Some of the key features of Zoom Clips include:
 - + Easy video recording from the web portal, menu/task bar, or the Zoom Workplace app.
 - + Generate shareable links to easily share your clips.
 - + Set permissions for who can view your clip.
 - + No time spent waiting for a video to render, it is all done within the same screen, in a matter of clicks.
 - + Receive comments on your clips.



Zoom Clips User Flows



Record

User initiates a 'Clip' from any of the 'Entry Points'.

User specifies various settings for the recording (audio, video, screen, etc.)

User completes the recording.

Review

After the Clip is completed, user is taken to the web portal or Clips tab in the client on a 'Review & Edit' page.

User can play the Clip, review, do basic trimming.

Share

User will instantly receive a URL they can share with anyone via multiple means.

Playback

A recipient of the Clip URL can playback the Clip in a browser.

Access will be subject to any viewing permissions placed on the Clip by the creator.

Store

When the Clip is completed, it will be stored in the 'Clips' tab, which is a basic 'Content Management System' for all the user's Clips.

zoom

Enable Clips

Web Experience

- Sign into **zoom.us**.
- Default on, for most accounts, but if needed, Admins will be able to enable/disable Clips.
- Go to Account Management and select Account Settings.
- Scroll over to **Clips**.
- Next to the Clips option, click **Enable**.

ZOOM Products Solution	ons Resources Plans & Pricing	Schedule Join Host - Whiteboard									
Scheduler Analytics & Reports	Q Search Settings										
ADMIN	< am Chat Zoom Apps Whiteboard	Notes 💷 Zoom Events Clips									
> User Management	Groups and members will use the following settings by default. If you don't want the settings below to be changed, you can lock the settings here. Learn More										
 Team Chat Management Device Management 	General										
 > Room Management > Workspaces Management 	Clips BETA	0									
Phone System Management Al Management	screen and share the recording with anyone	л									
 Account Management Account Profile 	Allow users who can access clips to download clips Only admin can download clips when this option is disable	d.									
Account Settings	Auto-generate audio transcript										
Alerts & Notifications Billing	Viewers can see the transcript										

Create a Clip

Web Experience

- Sign in to your account at **zoom.us**.
- Select **Clips** and you will see the Zoom Clips welcome page.
- To create a new Clip, click + New Clip.
- The web launcher page will open the Zoom Workplace app, where it will launch the Create Clip window.

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Workspace Reservation		

Create a Clip

Zoom Workplace App Experience

- Sign in to your account at **zoom.us**.
- Select Clips.
- To create a new clip, click + New Clip.
- The **Record new clip** window will open.

• • •	^{zoom} Workplace	< >	Q	Q Search	ЖE	G Home	ନ୍ତ Team Chat	□1 Meetings	😩 Contacts	Clips	••• More	â () 4		j
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						B	Based on your current license. You can: Create up to 5 clips Record up to 2 minutes for a single clip How to use								
						C	Contact your account owner to upgrade your license to: • Create unlimited clips • Have longer clip length • Have premium features • Learn more								
ුරු Se	ttings														

Recording a Clip

Settings

The Create Clip menu box will open.
 Once all options/settings are set, click
 Start Recording.

Choose to share:

- Your screen & video
- Only screen
- Only video

Select a screen, application, or window to share

Record new clip Preview window, of what will be recorded Select your: Screenshare and video 🖭 🗉 🔳 Microphone and Thomas's Clip 10/31/2024 Video MacBook Pro Microphone (MacBook Pro Screen recording Logitech BRIO Auto (1080p) quality Advanced settings ~ 1080 O Start recording Limit: 2 mins 720 You can also mute or turn off your camera.

Advanced Settings, allow you to enable:

- Virtual background & avatar
- Layout and wallpaper
- Mirror your video
- Noise suppression

Video Preview

2024 Zoom Communications, Inc

Recording a Clip

How to Record

- A countdown will start, then your screen/video will record.
- Share any content you want in the clip.
 If needed, you can Pause the recording and Resume when ready.
- Did you mess up? No worries, simply click **Restart** to restart the recording.
- Once you are finished, click Finish, and the recording will automatically open in the Zoom Workplace app under the Clips tab section.



Mute / Stop video or change mic and video settings

Zoom Clips

AI Companion

- After you create a clip Al Companion will analyze the clip and create a Title, add Description & Tags.
- You can make further edits by clicking on the title or description.
- Click + Add tag or X to add or remove tags.



ZOOM Learning Center

A **free** customer education platform with on-demand courses, live training, and so much more.



Start learning today at learning.zoom.us
ZOOM Community

community.zoom.com







Find Helpful Solutions

Ask Questions

Collaborate with Peers

Browse the community to easily find product solutions. Seek and receive support from community experts.

Connect with community members and share product news.

ZOOM Community

Champion Program



Get Involved

Community Champions are provided with the opportunity to be a part of a group of top community members and recognized for their helpful contributions through digital badges, champion title, and champion avatar collections.

Be a Leader

Showcase helpful behavior and provide contributions in discussion forums.





Make Connections

Regularly connect with fellow community champions and Zoomies to share ideas, issues, and opportunities for the Community.

Receive Rewards

Receive perks such as digital rewards, access to connect with the Zoom Community team, and invitations to exclusive events.



Helpful Zoom Resources

Zoom Learning Center

 Over 45 courses and 14 learning plans of premium training content, covering all Zoom products.

Zoom Help Center

+ The Zoom Help Center is your first stop for accessing all our best tips and tricks as well as answers to your most pressing questions.

<u>Zoom Community</u>

+ Zoom created a Community Site, a forum for Zoom customers to post discussion topics and collaborate.

• Zoom Technical Support

- When you have questions that our Zoom Help Center can't solve, there are several options to get additional support from Zoom technical experts.
- Zoom Blog
 - Subscribe for new blog posts/articles or browse/search for previous industry-specific articles.

Zoom Service Status

+ Upcoming / current maintenance and Past Incident information.

Zoom Release Notes

Subscribe for updates to various Zoom products.

Preview Notes

 Owners and Admins can access to release notes 30 days prior to major releases and 14 days prior to minor releases.

Zoom Uptime

+ Historical status of the Zoom platform (traffic light status)

Zoom Trust Center

+ Visit our Trust Center Resources to help you find more information on Zoom's Security, Privacy, Legal & Compliance, and Trust & Safety.

Zoom Developer Platform

+ An open platform that allows third-party developers to build applications and integrations upon Zoom's video-first unified communications platform.

Virtual Workspaces & Workspace Designer

+ Looking for workspace inspiration? Explore how Zoom can make video collaboration come alive in a wide variety of work settings.



Thank you





