

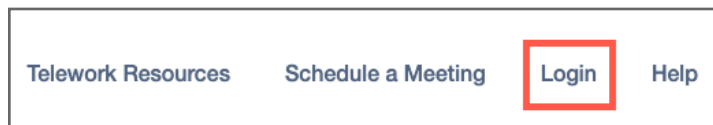
Introduction

As you will start your time at UCSF, you will need to create a Zoom account associated with your UCSF email address. Let's take a moment to walk through the process for creating a UCSF Zoom account.

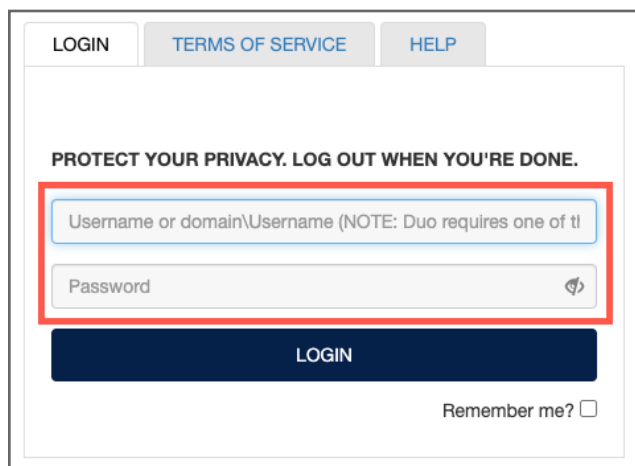
NOTE: The CSH instance of Zoom will no longer be available for anyone except for **Telehealth employees** beginning **September 1st, 2024**. It is encouraged to create your existing Zoom meetings in Outlook prior to September 1st (This process will be highlighted later in this guide) to avoid missing any meetings in the future.

Creating your UCSF Zoom Account

1. Navigate to <https://ucsf.zoom.us>
2. Select the **Login** link.



3. On the **MyAccess** login screen, enter your **UCSF email address** and **password** before clicking the **Login** button.



NOTE: If prompted, complete the Duo Multi-factor Authentication prompt to complete the login process.

4. Congratulations! You have successfully created your UCSF Zoom account.

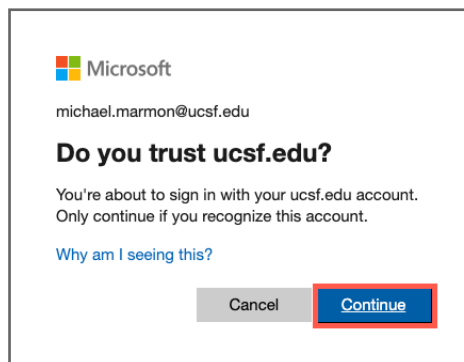
How to add the Zoom Add-In to Outlook Web Email



With your UCSF Zoom account created successfully, you are now able to configure Outlook Web Email to use the Zoom Add-In.

1. Navigate to <https://email.ucsf.edu>
2. A UCSF log-in screen will load, enter your **UCSF email address** and **password** before clicking the **Sign In** button.



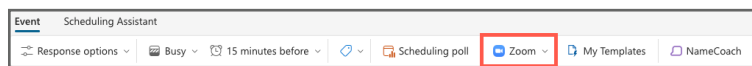
3. If prompted, complete the Duo Multi-factor Authentication prompt.
4. Select the **Yes, this is My Device** option to remember it within Duo.
5. If prompted, select **Continue** to trust UCSF.edu before loading OWA.



6. Select the  icon.
7. Select the  **Calendar** option.

How to add the Zoom Add-In to Outlook Web Email (continued)

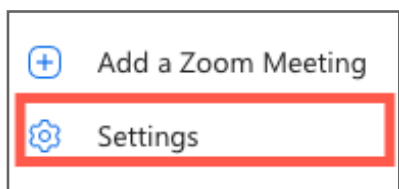
- Click the link.
- Select the next to **Zoom**.
- Click the to save your changes.
- Click the **New Event** button and verify that the **Zoom add-in** appears in the *New Event – Calendar* window.



Accessing the Zoom Add-In in Outlook Web Email

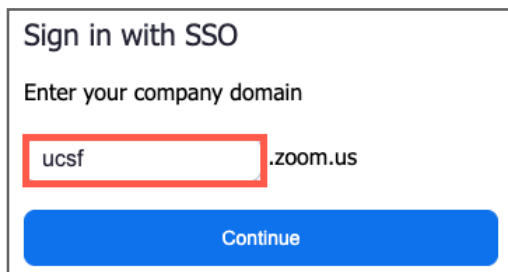
The process for accessing the Zoom Add-In within Outlook Web Email is a simple process that can be initiated when you create a meeting invite.

- From your Outlook Web Email inbox, select the **Calendar** icon ().
- Click the button.
- From the **Zoom dropdown**, select the **Settings** option.



- In the **Zoom panel**, select the option.

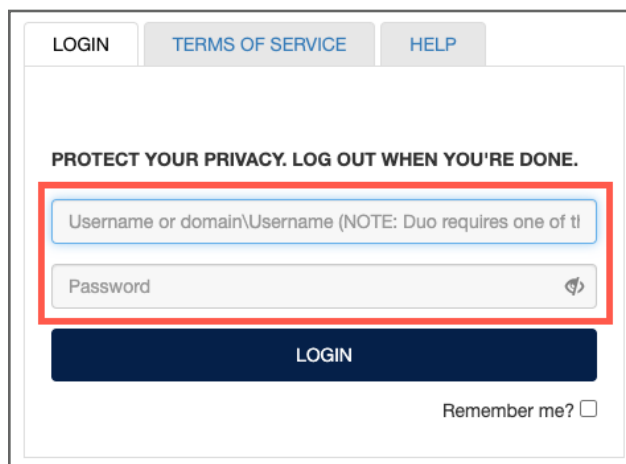
- On the **Sign in with SSO** screen, enter *UCSF* into the *domain* field before clicking **Continue**.



- When prompted click **Allow**.



- On the **MyAccess** screen, enter your **UCSF email address** and **password**.



- Congratulations! You have successfully accessed the Zoom Add-in within Outlook Web Email.


Creating Meeting Invites with Zoom

As a reminder, your CSH Zoom account **will not** be accessible after **September 1st, 2024** and you will need to re-create all your meetings that occur or re-occur after that date. The following steps will assist you with creating meeting invites with Zoom links in Outlook Web Email.

NOTE: To expedite the process for creating meeting invites, it might be helpful to have your Google Calendar and blank Outlook calendar invites side-by-side to easily copy and paste the meeting information.

- From the Outlook calendar (), select the button.

Creating Meeting Invites with Zoom *(continued)*

2. Select the  icon then the **Settings** option.

3. Enter a **Title** for the meeting.

NOTE: The **Title** should be *descriptive* of the meeting topic.

4. Enter the **name** or **email address** for the meeting participants.

 Optional

NOTE: To view the **availability** for an invitee, select the **Scheduling Assistant** tab to view their **availability** from *today moving forward*.

5. Enter the **Start** and **End time** for the meeting

🕒

5/29/2024

11:00 AM

All day

5/29/2024

11:30 AM

Don't repeat

NOTE: If the meeting is all day, simply select the **All day** toggle.

6. Select the **Does not repeat** dropdown to make this invite a **recurring** meeting (e.g., Daily, weekly, monthly or yearly).

7. Enter a **message** or **agenda** for the recipient of the invite.

Type / to insert files and more

📎
🖼️
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📧

8. From the **Zoom Settings** panel, you can select the type of Meeting ID: **automatically generated** or **Personal Meeting ID** (e.g., Static ID, which does not change).

Meeting ID

Generate Automatically

Personal Meeting ID (PMI) 577 321 8274

9. Alternative hosts can be added by selecting the **Show** link under the **Advanced Options** heading. Scroll down to the **Alternative Hosts** field before entering the **user's name** or **email address**.

Alternative Hosts

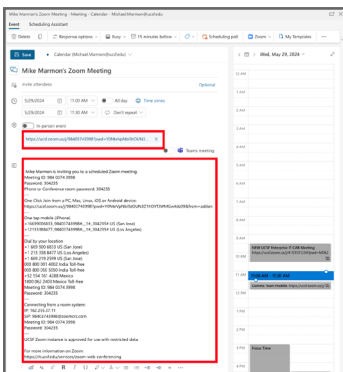
Example: john@company.com, peter@schoo

NOTE: A **UCSF email address** is required for *alternative hosts*.

10. From the **Zoom Settings** panel, select the **Add Zoom Meeting** button.

Add Zoom Meeting

11. Verify that a **Zoom link** has been added to the **location** field and that the **message** field has been updated with the Zoom *meeting* information.



NOTE: Verify that the **Teams Meeting** toggle is **unchecked**.

Teams meeting

12. Once your invite is ready, you can click the **Send** button to send it to the intended recipients.

➤ Send

13. Congratulations! You have successfully created a meeting invite within Outlook Web Email with a Zoom meeting link.