



SCHEDULE A ZOOM MEETING FROM OUTLOOK

OVERVIEW

The Zoom Microsoft Outlook plugin is designed to make scheduling a meeting in Microsoft Outlook quick and convenient. The plugin allows you to schedule and start instant Zoom meetings, as well as make existing meeting events Zoom meetings. The Outlook Plugin can also sync free/busy times to the Zoom Client based on your Outlook Calendar events (PC only, requires version 3.5 or higher - [download the latest version](#)).

Note: Due to new security protocol, the Outlook plugin is only supported on macOS 10.14.1 and above. If you are running an older version, we recommend updating macOS, using the [Office 365 add-in \(web and desktop\)](#), or disabling System Integrity Protection (SIP) on the operating system.

This article covers:

- [Downloading the plugin](#)
- [Scheduling a meeting](#)
- [Scheduling a personal audio conference \(PAC\)](#)
- [Making an existing event a Zoom meeting](#)
- [Missing plugin icon](#)

PREREQUISITES

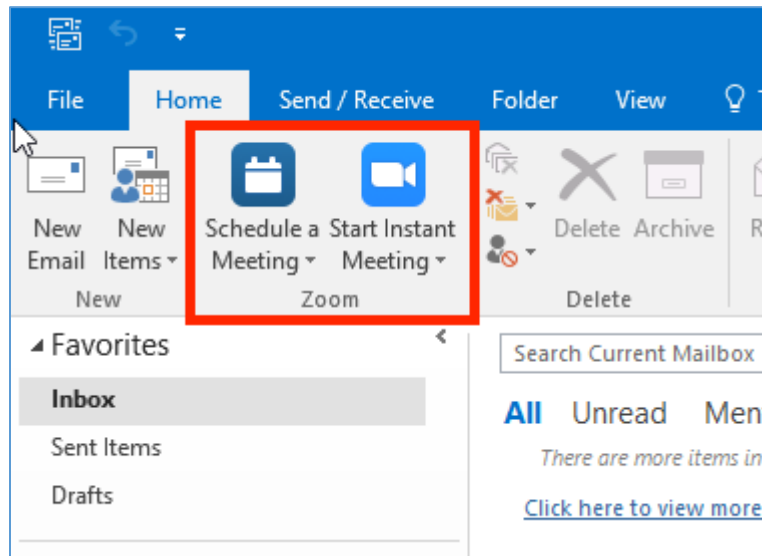
- **Windows:** Microsoft Outlook 2010 or higher (2007 with limited features), or Outlook as part of Microsoft Office 365
- **Mac:** Microsoft Outlook 2011 or higher, macOS 10.14 Mojave or below*
- You must have the Zoom client installed and be logged in to your account
- Install the Zoom Microsoft Outlook Plugin from Zoom
- 64-bit PC or Mac (the Outlook plugin is a 64-bit application; if you're using a 32-bit system, consider using the [Office 365 Add-In](#))

*macOS 10.15 Catalina does not support plug-ins, including the Microsoft Outlook Plugin for Zoom.

DOWNLOADING THE PLUGIN

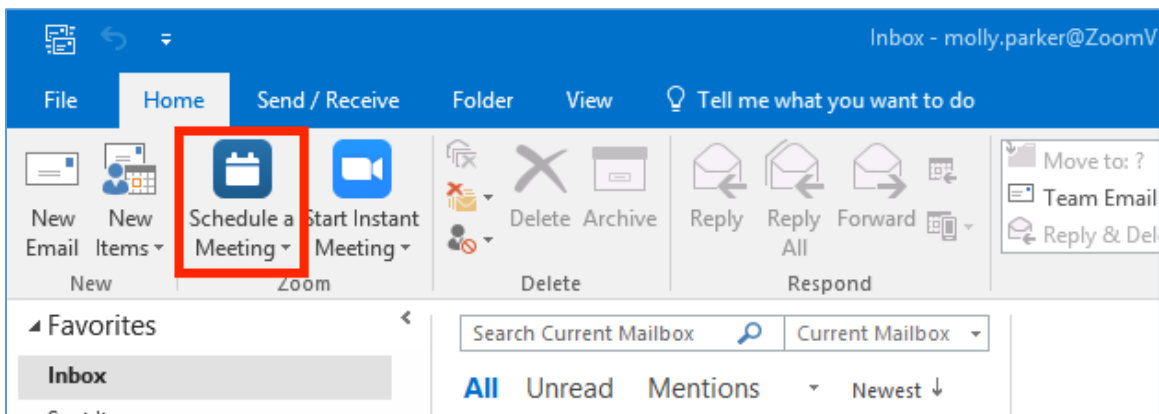
You can download the Zoom Microsoft Outlook Plugin MSI file from the [Download Center](#). Once the download is complete, run the MSI file and follow the install wizard to complete the installation. You will need to restart Outlook before using the Plugin.

Note: Several versions of Outlook do not support the options to **Schedule a Meeting** or **Start Instant Meeting**. If you do not see these in the main ribbon bar, please check to see if they appear after creating a new appointment or calendar event.



SCHEDULING A MEETING

1. Click the Schedule a Meeting button.



2. Select your desired settings for scheduling a meeting.

The screenshot shows the Zoom meeting scheduling settings interface. It is organized into several sections:

- Meeting ID:** Two radio buttons are present: "Generate Automatically" (selected) and "Personal Meeting ID" (unselected).
- Meeting Password:** A checkbox labeled "Required meeting password" is currently unchecked.
- Video (when joining a meeting):** Two rows of radio buttons. The first row is for "Host:", with "On" unselected and "Off" selected. The second row is for "Participant:", with "On" unselected and "Off" selected.
- Audio Options:** Four radio buttons are shown: "Telephone" (unselected), "Computer Audio" (unselected), "Telephone and Computer Audio" (selected), and "3rd Party Audio" (unselected). Below these is a text field "Dial in from United States and other 2 countries/reg..." with an "Edit" link.
- Advanced Options:** A list of checkboxes: "Enable join before host" (checked), "Mute participants on entry" (checked), "Only signed-in users with specified domains can join this meeting" (unchecked), "Record the meeting automatically" (unchecked), "List in the Public Event List" (unchecked), "Force include Join URL in location field" (checked), and "Insert Zoom meeting invitation above existing text" (unchecked). Below these is a dropdown menu "Select a language to send invitation:" set to "English". At the bottom of this section is a text field "Alternative Hosts:" containing the example text "Example:john@company.com;peter@school.edu".

At the bottom of the form, there are three buttons: "Save and do not show again" (unchecked), "Cancel", and "Continue".

- **Video - Host:** If you select on, the host's video will be automatically started when starting the meeting. If you choose off, the host's video will be off, but they will be able to turn it on.

- **Video - Participant:** If you select on, the participant's video will be automatically started when joining the meeting. If you choose off, the participant's video will be off, but they will have the option to turn it on.
- **Audio Options:** Choose whether to allow users to join using **Telephone** only, **Computer Audio** only, **Telephone and Computer Audio**, or [3rd Party Audio](#) (if enabled for your account).
- **Require meeting password:** Enter a password if you want to require participants to enter it to join the meeting.
- **Enable [join before host](#):** Allow participants to join the meeting without you or before you join.
- **Mute participants upon entry:** If join before host is not enabled, this will mute all participants as they join the meeting.
- **Use Personal Meeting ID:** Check this if you want to use your [Personal Meeting ID](#). If not selected, a random unique meeting ID will be generated.
- **Recording the meeting automatically:** Check this if you want the meeting to be automatically recorded. Select if you want it to be recorded [locally](#) (to your computer) or to the cloud. Learn more about automatic recording.
- **Force include Join URL in location field:** This will include the join URL in the location field even if you attempt to remove it.
- **Insert meeting details above the invite:** Insert the Zoom meeting details at the top of the meeting invite (before any custom text entered in the meeting invite).
- **Select a language to send invitation:** This option allows you to choose the language you would like the Zoom invite to be in.
- **Alternative hosts:** Enter the email address of another Zoom user who is Licensed, on your account to allow them to start the meeting in your absence. Read more about [Alternative Host](#).
- **Save and do not show again:** Check this if you would like to use these same settings as a default for other meetings going forward. The settings window will not pop up and you will need to manually open it to edit the settings.

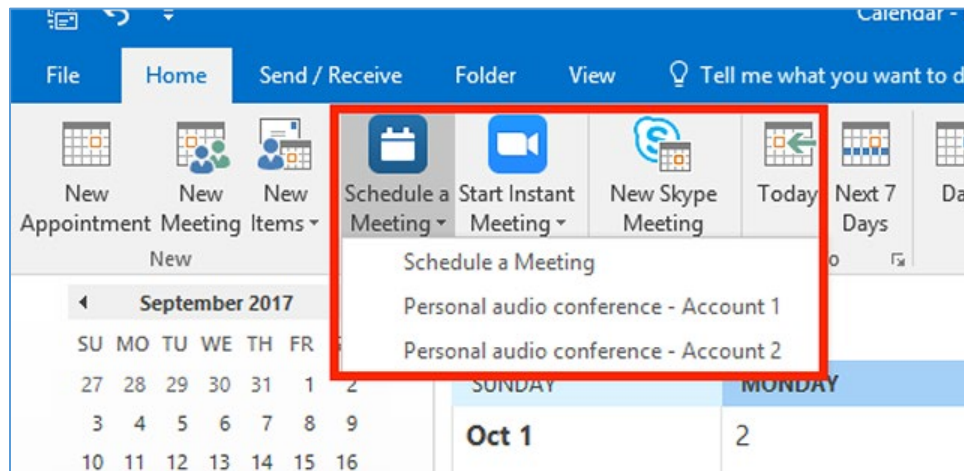
3. Click **Continue**. The calendar invitation will automatically generate with the meeting information.

Note: You can cancel the Zoom meeting or change the settings of the Zoom meeting in the calendar invitation by selecting the corresponding buttons in the menu.

SCHEDULING A PERSONAL AUDIO CONFERENCE (PAC)

Note: Before following these steps, make sure you [select the appropriate dial-in numbers in the web portal](#).

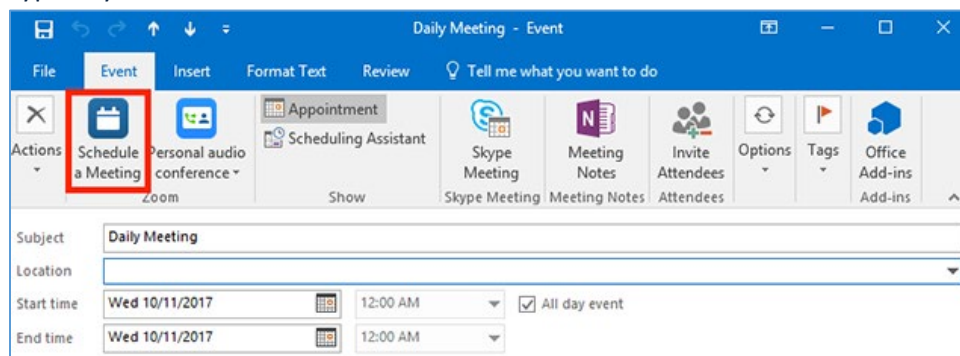
1. Enable and configure [personal audio conferencing](#) in the web portal.
2. Click on the arrow at the bottom of **Schedule a Meeting**.
3. If you have multiple PAC accounts, choose which you would like to schedule with.



1. This will automatically populate a calendar event with your PAC information. Change the date and time and add attendees as needed
2. Click **Send**.

MAKING AN EXISTING EVENT A ZOOM MEETING

1. Open an existing calendar event in Outlook.
2. Select either **Schedule a Meeting** or [Personal Audio Conference](#) to schedule the meeting type of your choice.



3. Select your desired settings for scheduling a meeting. See the [Scheduling a Meeting](#) section for more details.

The screenshot shows the Zoom meeting scheduling settings dialog box. It is organized into several sections:

- Meeting ID:** Two radio buttons are present: "Generate Automatically" (selected) and "Personal Meeting ID" (with a blurred input field).
- Meeting Password:** A checkbox for "Required meeting password" is currently unchecked.
- Video (when joining a meeting):** Two rows of radio buttons. "Host:" has "On" and "Off" (selected). "Participant:" has "On" and "Off" (selected).
- Audio Options:** Four radio buttons: "Telephone", "Computer Audio", "Telephone and Computer Audio" (selected), and "3rd Party Audio". Below them is a text field "Dial in from United States and other 2 countries/reg..." with an "Edit" link.
- Advanced Options:** A list of checkboxes: "Enable join before host" (checked), "Mute participants on entry" (checked), "Only signed-in users with specified domains can join this meeting" (unchecked), "Record the meeting automatically" (unchecked), "List in the Public Event List" (unchecked), "Force include Join URL in location field" (checked), and "Insert Zoom meeting invitation above existing text" (unchecked). Below these is a dropdown menu "Select a language to send invitation:" set to "English". At the bottom of this section is a text field "Alternative Hosts:" containing the example "Example:john@company.com;peter@school.edu".

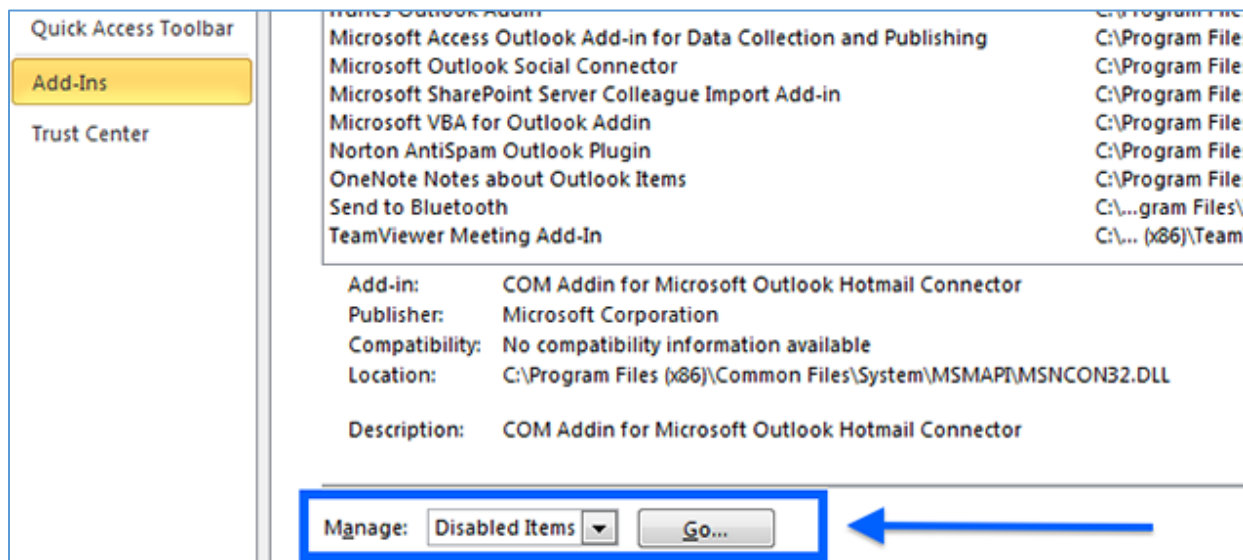
At the bottom of the dialog box, there is a checkbox "Save and do not show again" (unchecked), and two buttons: "Cancel" and "Continue".

4. Click Continue.
5. The invitation will now automatically fill in with the details.
6. Click Save & Close.

MISSING PLUGIN ICON

If you do not see the Schedule a Meeting icon in the menu ribbon, open your **Outlook options**.

1. Select **Disabled Items**.
2. Choose the **Zoom Outlook plug-in**
3. Select **Enable**.



For assistance with [Zoom](#) contact Academic Innovation:
academicinnovation@utsa.edu or (210) 458-4520