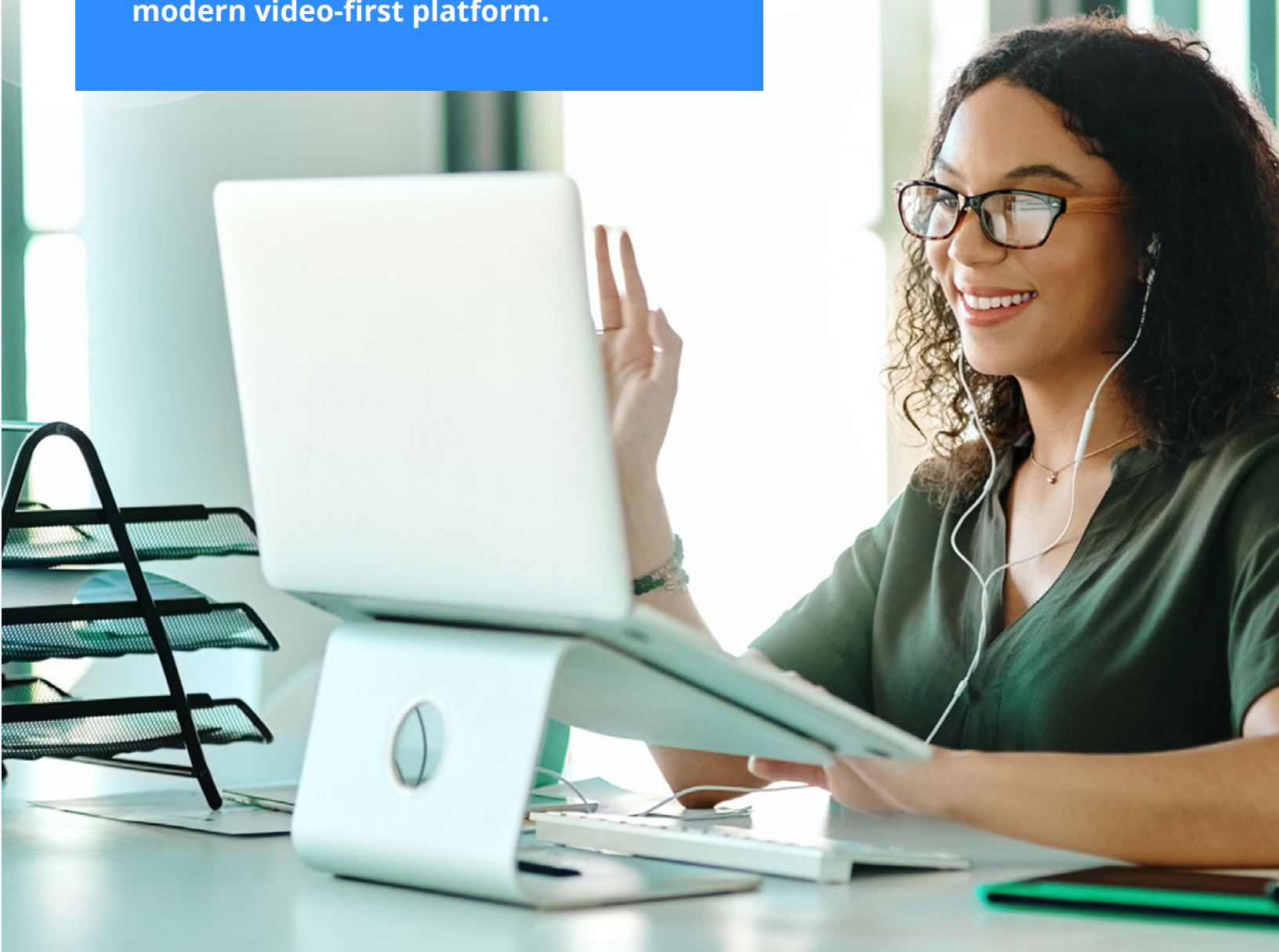# Deployment Guide for Administrators

An admin's guide to deploying Zoom's modern video-first platform.

zoom

1. Verify System Roles

Each user in a Zoom account automatically has a system role, which can be owner, administrator, or member. To set up and manage your account, you will need the appropriate system role. The **Account Owner** is the only role who can initially designate new **Administrators** or custom access roles for the account.

Review Role-Based Access Control and verify you have the appropriate system role before proceeding.

2. Attend Administrator Training

It's important that you understand how to configure and manage your new Zoom account. For guidance, we strongly recommend attending **Zoom Administrator** training. This free 60-minute training is hosted by our Zoom Training Team and covers all of the basics for configuring your new Zoom account. The session is offered live and on-demand to accommodate any schedule.

Register for Live Training or Watch a Recording

3. Configure Account Settings

Accounts settings allow you to change settings for all users in your account. You can also lock settings on/off to prevent users from changing them. Please reference Account Settings for guidance on accessing and changing account settings.

Additional Account Configuration Resources:

**Available for Business, Education, or API Plans only.

- Configure Network Firewall or Proxy Server Settings
- Define User Roles
- Define User Groups
- Add Managed Domains (Business, Education, API Plans Only)
- Customize Branding (Business, Education, API Plans Only)
- Zoom Rooms Quick Start Guide

4. Set-up Integrations (optional, but recommended)

Calendar Integrations

If you are using Outlook or Google Calendar, install a calendar add-on or extension to maximize scheduling efficiency for your users:

[Scheduling from the Outlook add-in](#)

[Scheduling from the Outlook plugin](#)

[Scheduling from the Chrome Google Calendar extension](#)

[Scheduling from the Firefox Google Calendar extension](#)

[Scheduling using the Gsuite Google Calendar add-in](#)

Zoom App Marketplace

For information on other integrations that may help streamline your existing workflows, please visit [our App Marketplace.](#)

5. Confirm Your License Needs

Basic vs Licensed user roles

Do all of your users need paid Zoom licenses? Learn more about Zoom account types and determine what license types are most suitable for your various users.

- [User Roles](#)

Add-on licenses

Need to upgrade your Capacity or access to additional add-on products? Zoom makes it easy to purchase and assign licenses from your account.

- [Assigning a License](#)

6. Provision Users

Account admins and owners can add and manage users manually from the Zoom web portal, or use the suggestions below to provision users more efficiently. See [Managing Users](#) to get started.

Save Time by Importing Users

Save time provisioning users by adding users in bulk via batch .csv import:

- [Batch importing and updating users](#)

- [User Management](#)

Provision Users via Single Sign-On

Allows users to access Zoom using their company log-in credentials by configuring Single Sign-On.

- Getting Started with SSO

- Also see: Guidelines for Vanity URL requests

7. Deploy/Install the Zoom Desktop Client

The Zoom Client provides Zoom users the best in-session experience. There are two methods to deploy the Zoom client across your organization.

Self-Install

Admins can instruct end-users to download and install the Zoom Client online on their own here: https://zoom.us/download

Mass Install Deployment for the Zoom Client

Admins can deploy the Zoom Desktop Client on behalf of end-users through MSI deployment for Windows or Mac, making the transition more seamless so users can get started more quickly!

- Windows: Mass Installation and Configuration for Windows

- Mac: Mass Deployment with Preconfigured Settings for Mac

Additional Resources:

Starting the Zoom Desktop Client

8. Equip Your Team for Success

Promote Zoom Training

- Live Training Webinars – Zoom Help Center

Provide Zoom User Guides & Resources

- Meeting and Webinar Best Practices

- Zoom Rooms User Guide (If applicable)

- Quick Start Guide for Zoom Phone Users (If applicable)

- Zoom Support Videos

- Zoom Help Center

Clearly Outline Support Process for End-Users

- Establish internal key contacts for Zoom user support

- Refer end-users to our Zoom Help Center

For technical product assistance during any phase of your deployment, please contact your CSM or Zoom Support.

Best Practices for Zoom Administrators

Promote Instant Meetings

Many organizations leverage instant messaging/internal chat tools as another method for real-time internal communication in a virtual work environment. A good rule of thumb of when to send a message via chat vs an instant (ad-hoc) Zoom meeting: If the message you need to communicate is complex or will require several minutes to type out, then you are most likely better off hopping on an instant Zoom meeting. Of course, be mindful of global teams and working hours, but encourage and promote the use of collaborative instant meetings over complex or long-winded chat conversations.

Meet Now vs Scheduled Meetings

Leverage Recurring Meetings

Zoom allows you to schedule meetings with multiple occurrences so that each occurrence uses the same meeting ID and settings. You can schedule these meetings in daily, weekly, and monthly increments. The setting is great for scheduling bi-weekly team meetings, monthly all-hands meetings and weekly 1:1s!

Scheduling Recurring Meetings

Establish Internal Best Practices Around Using Personal Meeting ID

The Personal Meeting Room is ideal for use with people you meet with regularly. However, because it is always accessible with the same Meeting ID and personal link, it should not be used for back-to-back meetings or for meetings with people you do not meet with regularly. Think of your Personal Meeting ID as being similar to your personal phone number. Once a participant has your PMI, they can join it at any time the meeting is in use, unless you lock the meeting or use the Waiting Room feature to admit participants individually.

Using Personal Meeting ID (PMI)

Monitor Adoption & Usage

Usage Reports

A powerful tool that provides account owners and admins with a variety account, meeting, and webinar statistics to review how your organization is utilizing Zoom.

Getting started with reports

Dashboard (available for Business, Education or API Plans)

A great tool for administrators to view Zoom information ranging from overall usage to live in-meeting data.

Getting Started with Dashboard