Special Interest Communities

Zoom Video Conferencing

Overview of Topics:

Virtual Meeting Best Practices

Scheduling a Meeting

Joining a Meeting

In Meeting Controls

Virtual Meeting Best Practices

Set basic meeting rules. Some participants aren't going to be familiar with the ins and outs of virtual meetings, so it is important to set some basic ground rules at the very beginning of the meeting so that everyone has the knowledge they need to get the most value out of the meeting. Some examples of good rules to verbalize right upfront are:

1 – Use Mute. Mute yourself when you are not speaking, and when you are done speaking, return to mute. This will remove the annoyance of background noise that distracts other attendees.

2 – Say your name before speaking. This is especially important in large groups and in meetings where not everyone is using their video.

3 – Advise that you will be following the Agenda. Show attendees you appreciate and value their time by making an effort to stay on topic for the time appointed in the meeting agenda. You may even want to share your screen and have the agenda shared for all to see. See the next tip for more details on the Agenda.

Use an Agenda. Craft a detailed agenda with time allotted for each topic. State the objectives and goals, and why you are covering each topic. Distribute the agenda and other materials to attendees at least two business days before the meeting (but not too far in advance!) and ask them to review the agenda and come prepared to engage and interact. During the meeting, keep tabs on the time by asking an attendee to remind you if you need to move things along.

Encourage everyone participating to use video. Attendees are more engaged when they can see what's happening. With webcams, participants can usually see the facilitator's and attendees' faces on the screen, making it harder for them to zone out or multitask. It is valuable to see the facial expressions of attendees in order to more clearly see when they seem confused, frustrated or concerned.

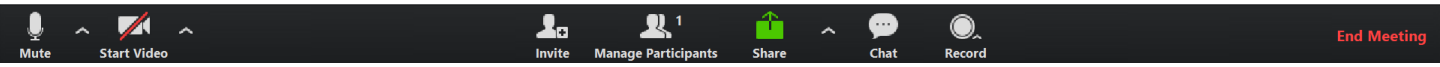
Practice your presentation. If not word for word, then at least do a run through to make sure your time allotments are accurate. Keep it interesting by using different tactics to maximize engagement such as: shared documents, multiple speakers, ask attendees pointed questions by name, conduct a poll, share impactful images that illustrate a point or make the attendees laugh.

Don't forget to Listen. During the meeting be sure to focus on not only your presentation, but on what others are saying as well.

Enlist helpers. Facilitating a meeting, monitoring the chat box, identifying who needs to be muted because the background noise is distracting the rest of the attendees, and more all requires your attention. It is very difficult for one individual to do everything when managing a virtual event. Find others who can assist with some of the meeting moderation tasks.

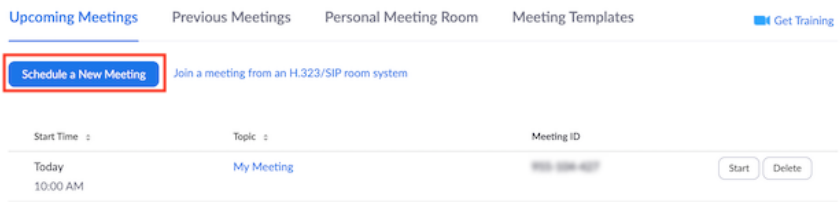
Scheduling a Meeting

https://support.zoom.us/hc/en-us/articles/201362413-How-Do-I-Schedule-Meetings-



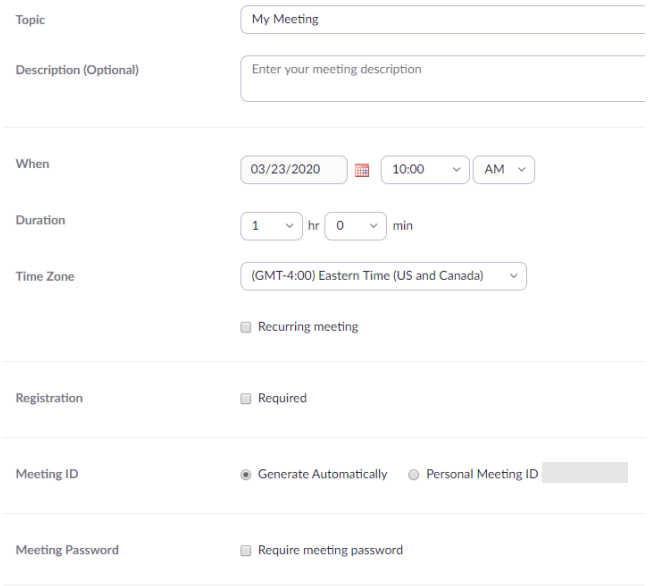
Sign in to the Zoom web portal.

Click Meetings and click Schedule A New Meeting.



Select the meeting options. Note that some of these options might not be available if they were disabled and locked to the off position at the account or group level.

Topic: Enter a topic or name for your meeting.
Description: Enter in an option meeting description.
When: Select a date and time for your meeting. You can manually enter any time and press enter to select it.
Duration: Choose the approximate duration of the meeting. This is only for scheduling purposes. The meeting will not end after this length of time.
Time Zone: By default, Zoom will use the time zone set in your profile. Click the drop-down menu to select a different time zone.
Recurring meeting: Check if you would like a recurring meeting (the meeting ID will remain the same for each session). This will open up additional recurrence options.
Registration: Check this option if your meeting will require registration. Instead of a join link for your participants, you will be provided a registration link.
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.

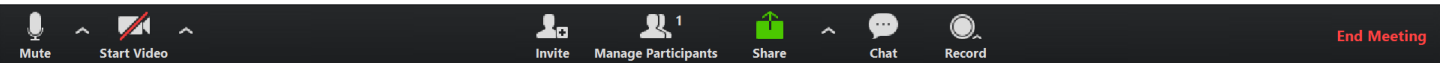


Require meeting password: You can select and input your meeting password here. Joining participants will be required to input this before joining your scheduled meeting.

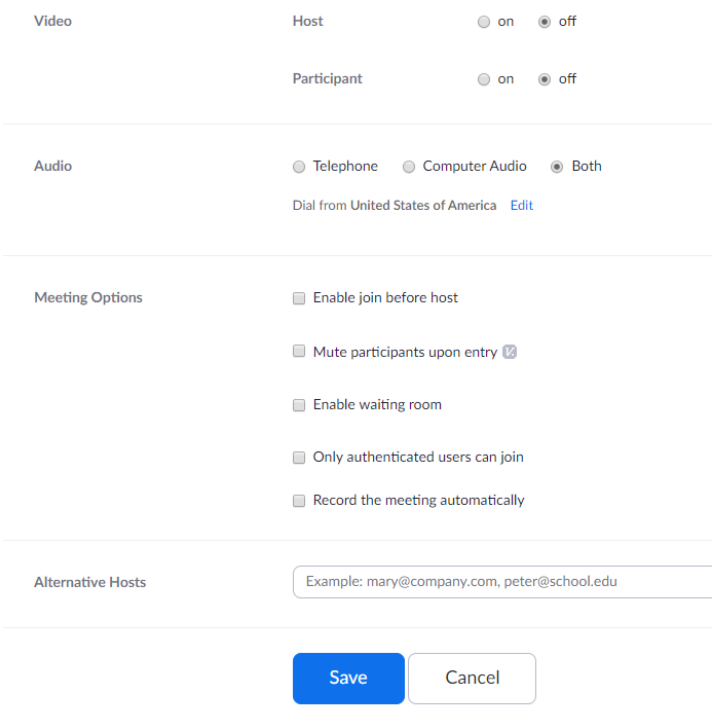
- **Note:** The meeting password must meet these requirements.
- 10 characters maximum
- Passwords are case sensitive
- We recommend using alphanumeric characters and these special characters: @ * _ -
- The Zoom desktop client allows alphanumeric characters and these special characters: @ * _ -
- The Zoom web portal allows any characters, but these characters are not allowed: & <> \

Scheduling a Meeting (cont.)

https://support.zoom.us/hc/en-us/articles/201362413-How-Do-I-Schedule-Meetings-



Host Video: Choose if you would like the host video on or off when joining the meeting. Even if you choose off, the host will have the option to start their video.
Participant Video: Choose if you would like the participants' videos on or off when joining the meeting. Even if you choose off, the participants will have the option to start their video.
Audio Options: Choose whether to allow users to join using Telephone only, Computer Audio only, Telephone and Computer Audio (both), or 3rd Party Audio (if enabled for your account).
Dial in From: If Telephone or Telephone and Computer Audio is enabled for this meeting, click Edit to select the dial-in countries that you would like included in the invitation. By default, this includes your Global Dial-In Countries listed in My Meeting Settings.



Meeting Options

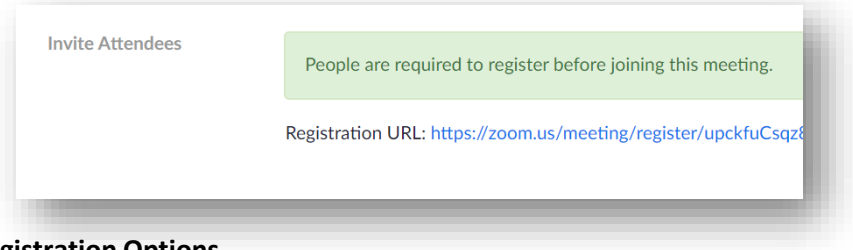
- **Enable join before host:** Allow participants to join the meeting without you or before you join. The meeting will end after 40-minutes for Basic (free) users if 3 or more people join the meeting.
- **Mute participants on entry:** If join before host is not enabled, this will mute participants as they join the meeting. Participants can unmute themselves after joining the meeting.
    - **Note:** To mute all participants currently in a meeting, see the options to manage participants further in instructions.
- **Enable waiting room:** Allows the host to control when participants join the meeting by placing them in a waiting room.
- **Only signed-in users can join this meeting:** Restrict access to the meeting so that only signed-in users can join.
- **Record 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 (zoom.us/recording).
- **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.

Click Save to finish.

Registration

https://support.zoom.us/hc/en-us/articles/211579443

If the "Registration: Required" box is checked, after scheduling the meeting, the Registration URL will appear. You can copy the invitation to send to your members/prospective attendees. Once the registration is complete, the attendee will receive the login information for the Zoom meeting. In the Branding section, you can customize your registration page with a banner and logo.

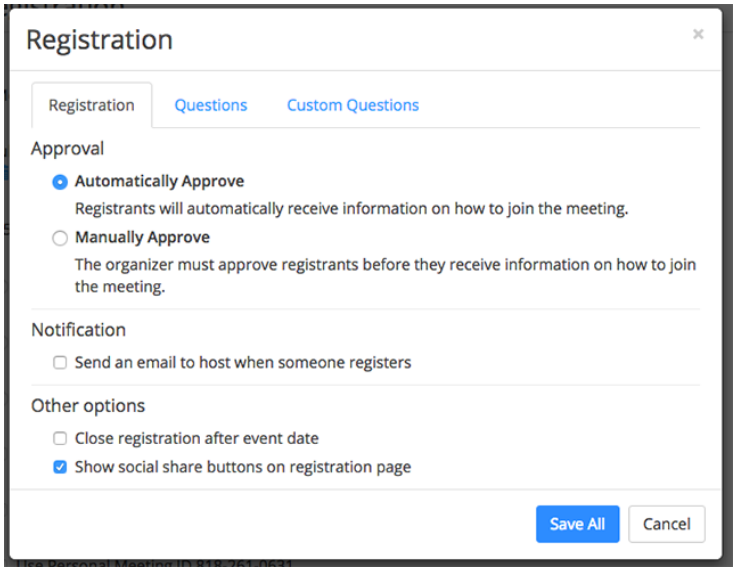


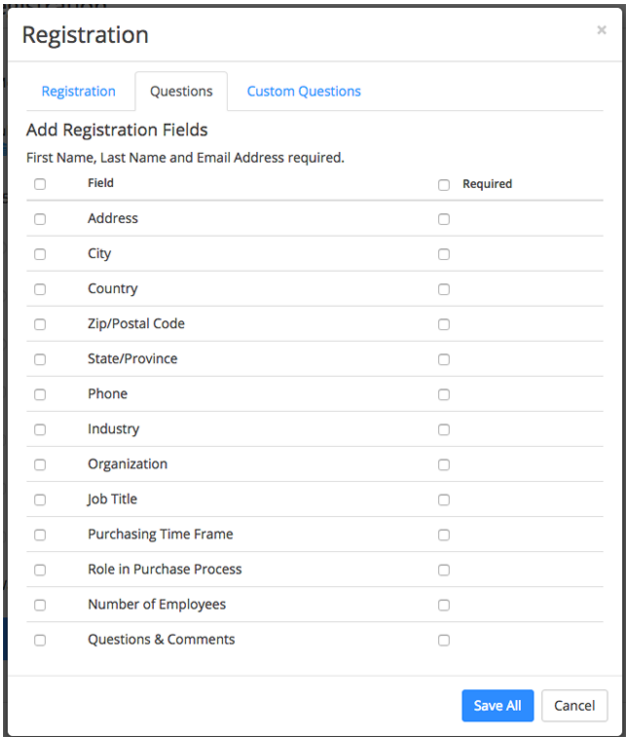
Registration Options

In this section you can configure the registration process by changing the approval type, registration questions, and some additional registration settings. There are 2 types of approval:

- **Automatic Approval:** Anyone who signs up will receive information on how to join.
- **Manual Approval:** Anyone who signs up will need to be approved by the host on the meeting management page.

As the host you can opt in or out for email notifications when someone registers. you can also not allow registration after the scheduled meeting time has passed. You can also pick which registration questions are asked. Custom questions are supported.





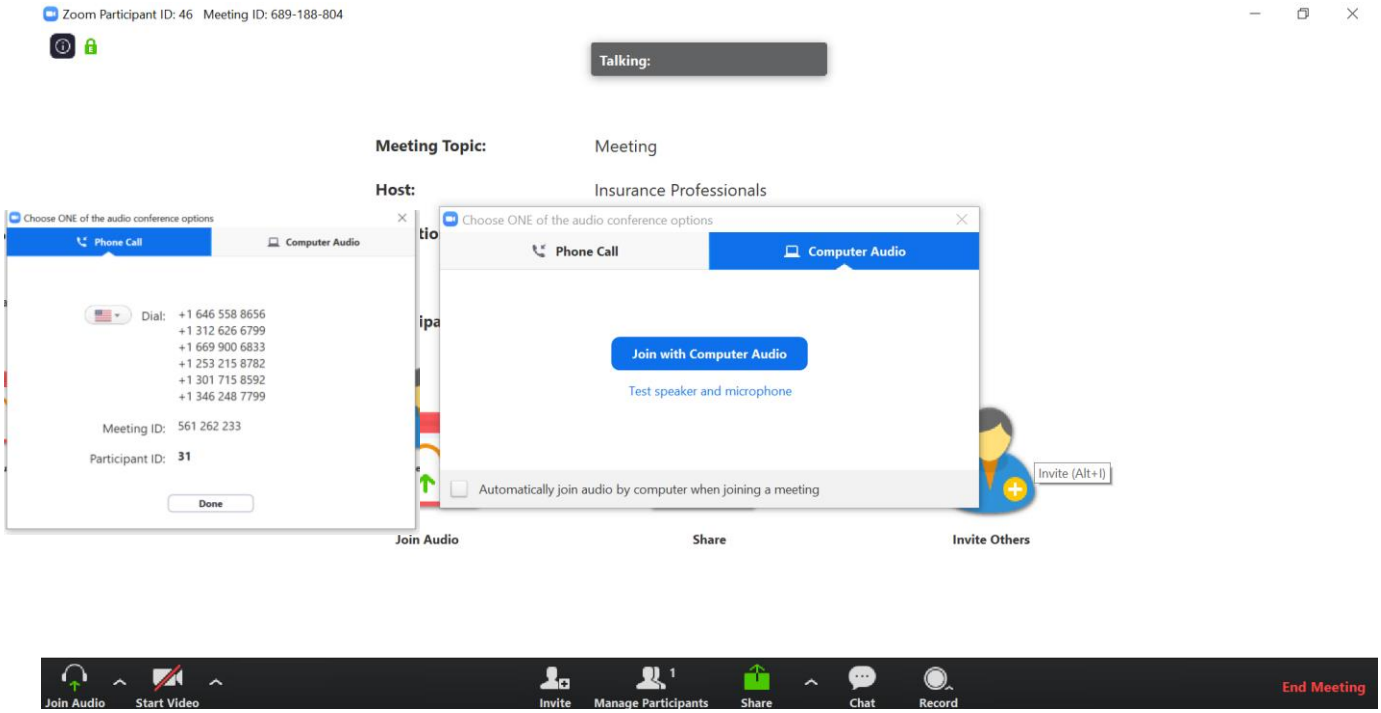
Joining a Meeting

https://support.zoom.us/hc/en-us/articles/201362193-How-Do-I-Join-A-Meeting-

Before joining a Zoom meeting on a computer or mobile device, you can download the Zoom app from our Download Center. Otherwise, you will be prompted to download and install Zoom when you click a join link.

You can also join a test meeting to familiarize yourself with Zoom.

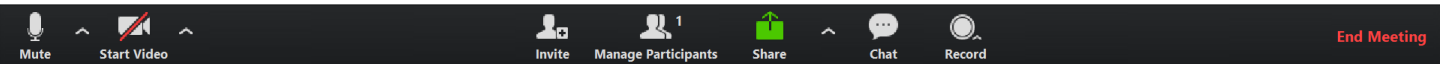
When Joining, the option to select **Computer Audio or Phone Call** will appear if these are both listed as options when setting up a meeting. Be sure to use the Participant ID when calling in to connect your online presence to your phone.



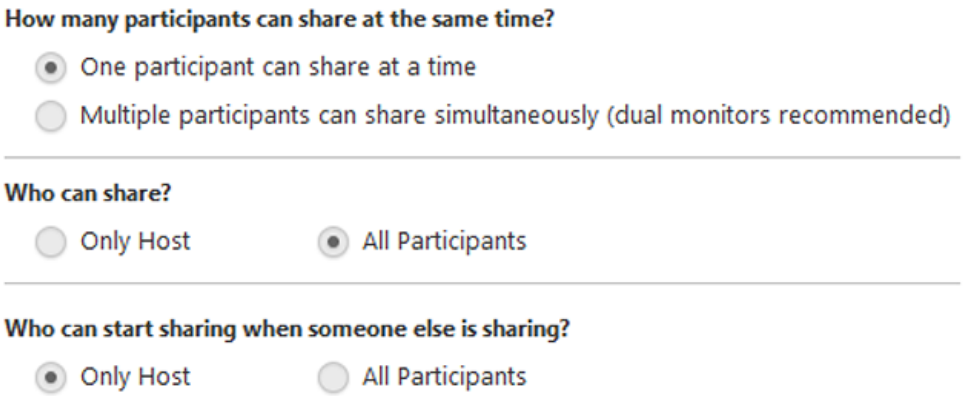
In Meeting Controls

https://support.zoom.us/hc/en-us/articles/201362603-What-Are-the-Host-Controls-

The host controls will appear at the bottom of your screen if you are not currently screen sharing.

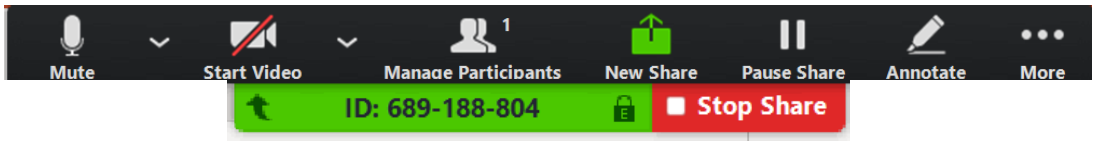


Mute/Unmute: This allows you to mute or unmute your microphone.
Audio Controls (click ^ next to Mute/Unmute): The audio controls allow you to change the microphone and speaker that Zoom is currently using on your computer, leave computer audio, and access the full audio options in the Zoom settings.
Start/Stop Video: This allows you to start or stop your own video.
Video controls (click ^ next to Start/Stop Video): If you have multiple cameras on your computer, you can select which Zoom is using, access the full video controls, and select a Virtual Background.
Invite: Invite others to join your meeting.
Manage Participants: Opens the Participants window.
Share Screen: Start sharing your screen. You will be able to select the desktop or application you want to share.
Screen Share controls (click ^ next to Share Screen): Select who can share in your meeting and if you want only the host or any participant to be able to start a new share when someone is sharing. Advanced screen sharing options are the following:



Chat: Access the chat window to chat with the participants.
End Meeting (only available to the host): This will end the meeting for all participants. If you want to have the meeting continue, you should give another participant host control before leaving the meeting.

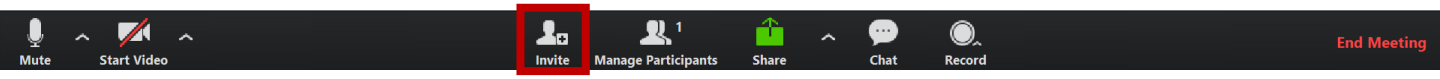
When you are screen sharing, the controls will appear at the top of your screen, but you can drag it to another location.



Invite

https://support.zoom.us/hc/en-us/articles/201362183-How-Do-I-Invite-Others-To-Join-a-Meeting-

During a meeting, you can invite people to join the conference by clicking on Invite tab in your meeting controls.

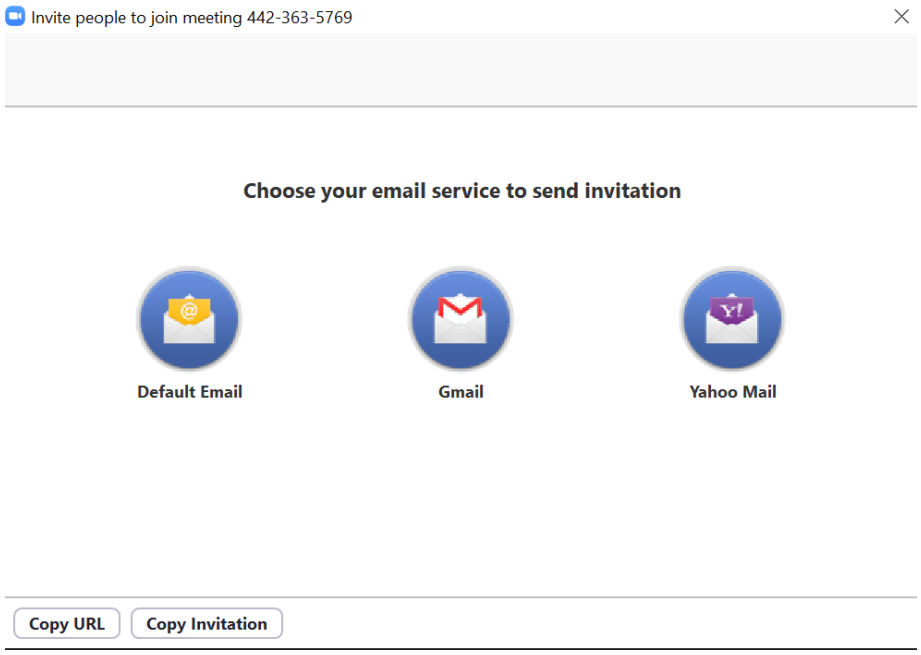


Once you click invite, you can choose the option to Invite by Email or Copy the meeting ID URL.

Invite by Email
After clicking on Invite in the meeting controls, click on one of the three email options.

Default Email will open up your default email application (ex. Outlook, iCal, etc.)
Gmail or Yahoo Mail will open a web browser and will prompt you to log you in with your Yahoo or Gmail account. If you are already logged in, a new email will be composed automatically with the meeting information included in the body of the email.

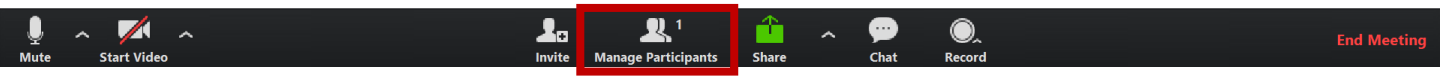
Copy URL or Copy Invitation
Click Copy URL or Copy Invitation if you want to send your instant meeting information elsewhere. Copy URL will copy the join link and Copy Invitation will copy the full invitation text. You can then paste it using ctrl-V on a PC, cmd-V on a Mac, or by right-clicking and choosing Paste.



Managing Participants

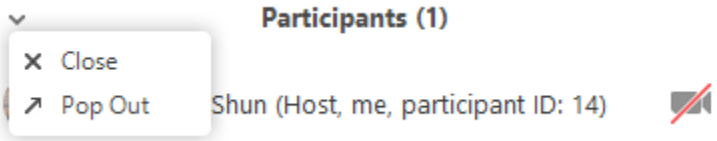
https://support.zoom.us/hc/en-us/articles/115005759423

As the host in a meeting, you can manage the participants. By default, any participant in a meeting can share their video, screen, and audio.



Click Manage Participants in the host controls to display the participants list:

Click the drop-down menu located at the top-left corner to close the participants list or click Pop Out to separate the participants list from the meeting window:

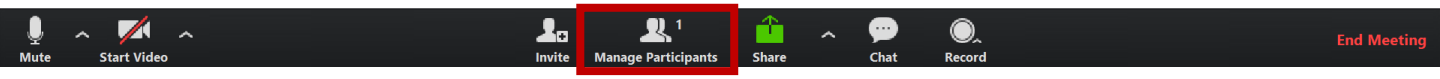


Hover over a participant and click More for these options:

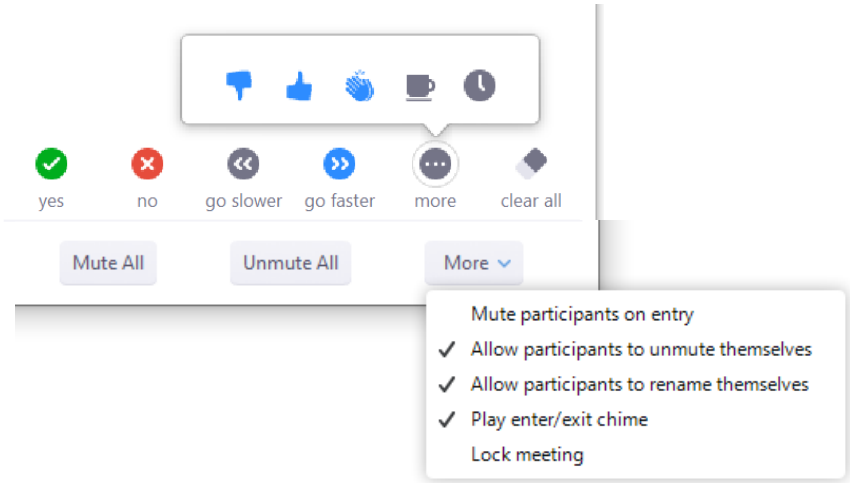
- **Chat:** Open the chat window to send messages directly to the panelist.
- **Stop Video:** Stop the participant's video stream so they are unable to start their video. If the participant hasn't started their video, you will see the Ask to Start Video option.
- **Make Host (only available to the host):** Assign the attendee to be the host. There can only be one host.
- **Make Co-Host (only available to the host):** Assign the attendee to be a co-host. You can have an unlimited number of co-hosts.
- **Allow Record (only available to the host):** Allow the attendee to start or stop a local recording of the meeting. Attendees do not have access to start a cloud recording.
- **Rename:** Change the attendee name that is displayed to other participants. This change only applies to the current meeting.
    - **Note:** To change your own name that is displayed, hover over your name in the participants list and click Rename. You can permanently change your name in your profile.
- **Put in Waiting Room:** Place the attendee in a virtual waiting room while you prepare for the meeting. The host must enable waiting room for this option to appear.
- **Put On Hold:** If the waiting room is not enabled, you'll see this option to place the attendee on hold.
- **Remove:** Dismiss a participant from the meeting. They won't be able to rejoin unless you allow participants and panelists to rejoin.

Managing Participants (cont.)

https://support.zoom.us/hc/en-us/articles/115005759423



You will also have access to enable or disable these options at the bottom of the participants list:



Mute All / Unmute All: Mute or unmute all participants currently in the meeting.
More:

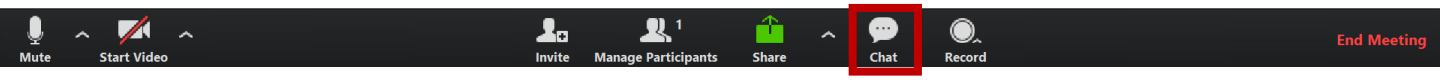
- **Mute participants on entry:** Automatically mute participants as they join the meeting.
- **Allow participants to unmute themselves:** Participants can unmute themselves if they want to speak to others in the meeting.
- **Allow participants to rename themselves:** Participants can change their screen name displayed to other participants.
- **Play enter/exit Chime:** Play a sound when participants join and leave the meeting
- **Lock meeting:** Don't allow other participants to join the meeting in progress.
- **Merge to meeting window:** Merge the participants list with the main meeting window. This option is only available if you separated the participants list from the main meeting window.

Engagement Icons: These are great tools to request feedback from the attendees. Ask questions of the audience and ask them to select Yes or No. Or ask if the presenter should slow down or go faster. The thumbs up or thumbs down can be used to determine if the audience likes or dislikes something. Attendees can also use the “break” or “away” icons to silently indicate if they needed to step away from the meeting.

Chat

https://support.zoom.us/hc/en-us/articles/203650445-In-Meeting-Chat

The in-meeting chat allows you to send chat messages to other users within a meeting. You can send a private message to an individual user or you can send a message to an entire group. As the host, you can choose who the participants can chat with or to disable chat entirely.



Accessing the Chat
While in a meeting, click Chat in the meeting controls.

This will open the chat on the right. You can type a message into the chat box or click on the drop down next to To: if you want to send a message to a specific person.

When new chat messages are sent to you or everyone, a preview of the message will appear and Chat will flash orange in your host controls.

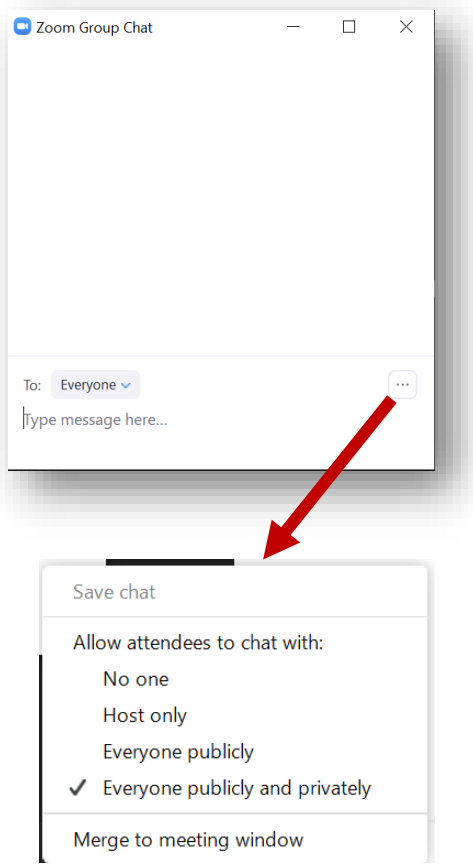
Changing In-Meeting Chat Settings
If you're the meeting host, you can change the in-meeting chat settings.

While in a meeting, click Chat in the meeting controls.

Click the More icon (3 dots) to display in-meeting chat settings.

You can access the following options:

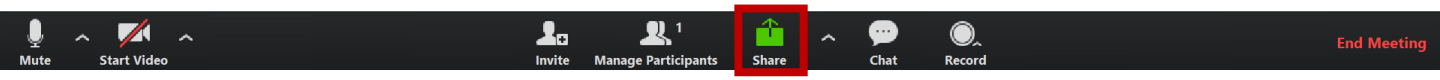
- **Save chat:** Save all chat messages in a TXT file.
- **Allow attendees to chat with:** Control who participants can chat with.
    - **No one:** Disables in-meeting chat.
    - **Host only:** Only the host can send messages to everyone. Participants can still send private messages to the host.
    - **Everyone publicly:** Participants can only send public messages. Public messages are visible to all participants. Participants can still send private messages to the host.
    - **Everyone publicly and privately:** Participants can send public or private messages. Public messages are visible to all participants. Private messages are sent to a specific participant.



Screen Sharing

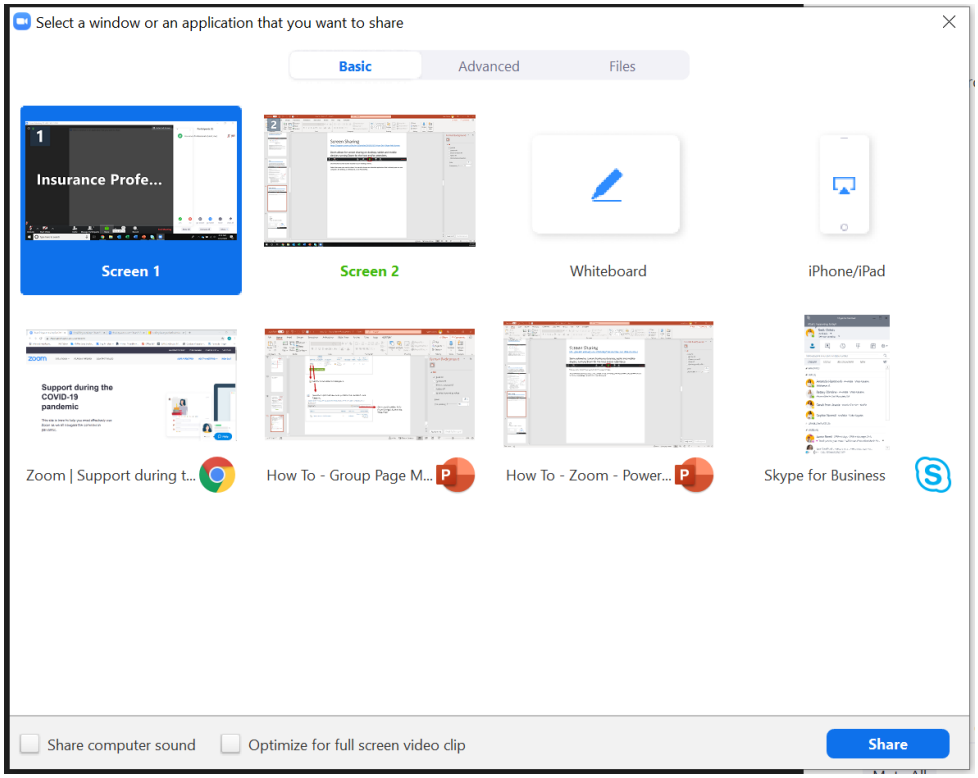
https://support.zoom.us/hc/en-us/articles/201362153-How-Do-I-Share-My-Screen-

Zoom allows for screen sharing on desktop, tablet and mobile devices running Zoom for the host and/or attendees.



Click the Share Screen button located in your meeting controls.

Select the screen you want to share. You can also choose an individual application that is already open on your computer, the desktop, a whiteboard, or an iPhone/iPad.



Best Practice: Select the individual application to share and not your Desktop (which appears as Screen 1 or Screen 2 if you have Dual Monitors). When sharing your Desktop or Screen, all applications running on that monitor will be visible to the attendees including any pop-up email notifications or Instant Messaging systems that you are using.

(Optional) Enable these features:

- **Check Share Computer Sound:** If you check this option, any sound played by your computer will be shared in the meeting.
- **Check Optimize for full screen video clip:** Check this if you will be sharing a video clip in full screen mode. Do not check this otherwise, as it may cause the shared screen to be blurry.

Click Share.

- Zoom will automatically switch to full screen to optimize the shared screen view. To exit full-screen, click Exit Full Screen in the top-right corner or press the Esc key.
- To disable automatic full screen when viewing a shared screen, disable this option in your desktop client settings: Enter full screen automatically when a participant shares screen.