



Zoom – Facilitating a Meeting

Prepared for U3A Network Victoria

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Update based on Zoom version 5.4.4

Table of Contents

How to use this Guide

There is a lot of information in this document, and people come to this document with a range of skills and knowledge. With this in mind we have included a clickable table of contents. So, our recommendation is that you use the table of contents to click on the topic of interest to move you directly to the item on which you need information, rather than read the whole document.

At the bottom of each page is an icon, on which you can click, and you will be returned to the top of the document.

You can also use **"Command + F"** on a Mac or **"Control + F"** on a Windows device to find the subject in which you are interested.

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Introduction

This guide has been developed for members of U3A Network Victoria to make it easier for people to host classes, discussions and meetings over the Internet. The host is the person who arranges the online meeting and performs the role of chairperson or facilitator. There is a U3A Network guide for participants, so if you are not familiar with Zoom meetings you should first read that guide.

If you have suggestions for improvement, ideas for other aspects of Zoom to be included, or spot mistakes, please email russ.incoll@gmail.com.

What is Zoom

Zoom is an Internet based video conferencing tool that can be accessed using a tablet, PC, MacBook, laptop, iPhone or Android phone. Zoom provides a platform allowing users to meet online to run meetings, collaborate, share one another's screens and much more.

Zoom is available as a free download or for a monthly subscription. The paid version offers no meeting time limit (free Zoom is limited to 40-minute meetings), plus more functionality, for example to dial into a meeting via a phone number for sound only or to have over 100 attendees.

We recommend that tutors or hosts use a MacBook, PC, or Laptop to run Zoom and host a meeting, this will provide a device that is easier to manage, and the bigger screen will make managing participants and sharing content easier. For example, on a computer you can see up to 49 participants, on a tablet you can only see nine.

You can use Zoom without downloading the application, but we recommend downloading the software as this enables you to set things up the way you prefer. Without the software allow up to 5 minutes to join the meeting.

Getting Zoom on Your Device

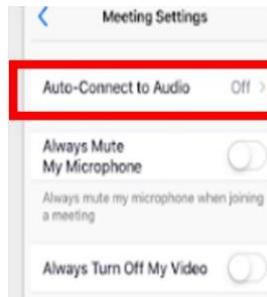
- On a PC or Laptop, to download Zoom, search for "Zoom Download" in your browser or use this address: <https://zoom.us/download> and click on the "Download" button.
- On a mobile device you go to the app store and search for Zoom and then "get" the app.
- Once you have Zoom downloaded you need to sign up to get the full functionality.
- When you enter Zoom you will be asked to sign up (unless you have done this already)
- You use your email address to sign up and then fill in a password
- During the sign-up process you will be asked which service you wish to use for calendar. If you keep an electronic calendar, choose that one.
- If you don't have one, if you have an Outlook account (email program), choose Outlook. Or if you have a Google email account, use Google.
- Now enter your email address and password, your birth date and you are finished.
- If you don't use Outlook or don't have a Google email address, Google is a good calendar, but to use it you will have to open a Google account. Opening an account is free but it will give you a Gmail email address, but you don't have to use it.
- Accept the terms and conditions and click sign up.

This will give you the full functionality that Zoom allows for free users.

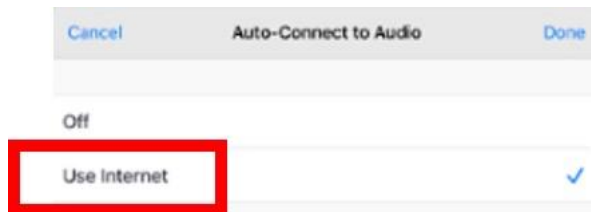
Initial Settings

On a mobile device, there are a couple of settings you really should make before proceeding. Once signed up, you get a screen display with a settings gear cog, which will be in one corner of the screen, usually bottom left of screen. Click on the cog to get a settings menu, click on "Meetings" to get this:



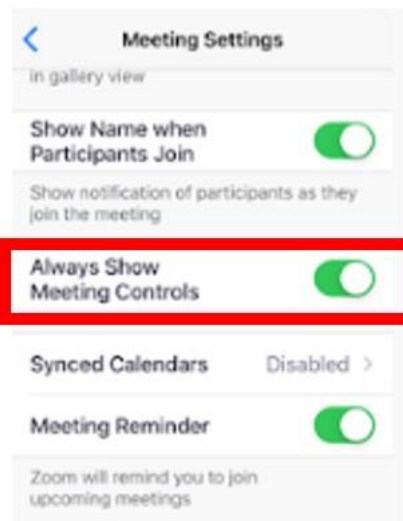


Click on **"Auto-Connect to Audio"** and then select **"Use Internet"**:



Now scroll down to **"Always Show meeting Controls"** and click on the slide to turn it on:

Note: This option is only available for iPhones and iPads, not Android mobile devices



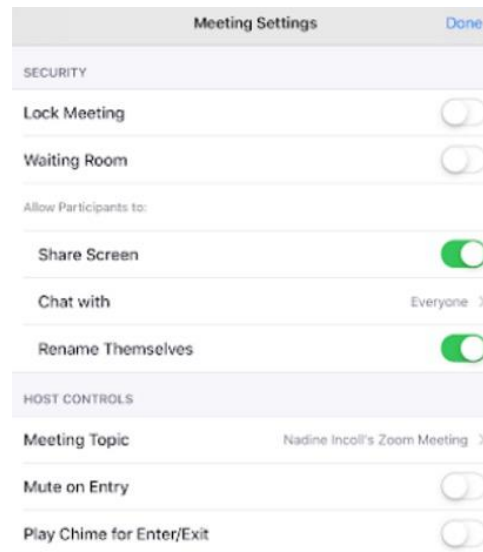
Turning on **Always Show Meeting Controls** will give you a menu in meetings that will always stay on screen and on your mobile device that looks like this:



We will discuss the function of each of these controls later. Clicking on the "more" or the three dots, brings up additional controls which will be explained later:



Clicking on Meeting Settings, if you are the meeting host or co-host, which will bring up the controls you may need to use to control how the meeting runs (these are the main mobile device settings):

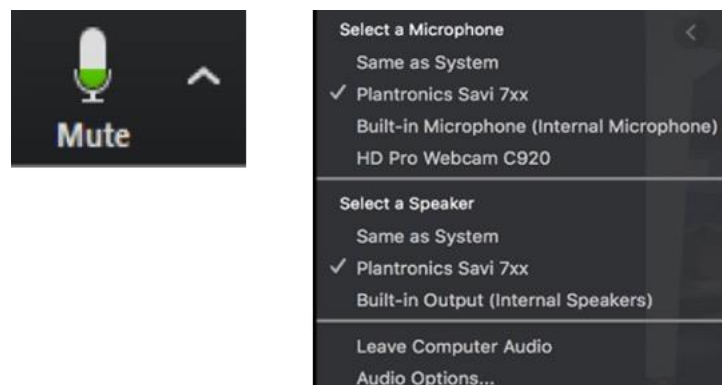


Zoom Settings for Hosts

Computer Equipment

If you are going to host a meeting, our strong recommendation is to do this on a Laptop, PC, or MacBook. They are easy to position for best camera shot, the menus display more options and the menus stay on screen. The bigger screen also enables you to see more participants and to have the participant list visible without losing too much of the screen display. While this guide refers to hosting on a PC, Laptop or MacBook in the use of screen shots, the thrust of the information also applies to hosting on a mobile device.

Some people have found that the use of a headset suits them best, so think about doing this.



If you do use a headset, you will need to click on the up arrow next to the Microphone and select the headset microphone and the ear buds on the menu that pops up.

It is a good idea when you start your meeting to find out what device your audience is using so if you need to assist them to find a menu item you know where to direct them. Remember that older devices do not have all the options that Zoom provides for later devices. For example, **Virtual Background** is not available for Android devices at the moment, and you need an iPad 9.7 or later to do **Virtual Background**. This means that the available menu items vary, as they also do between a free licence and a paid licence.

Remember that in a U3A meeting or class we are more likely encounter problems as quite a few U3A members have older equipment, slower Internet connections or are not very computer literate. So, with this in mind, we may need to keep our presentations fairly simple depending on the audience.

Internet Speed

You may also like to check the speed of your Internet connection. Zoom requires a minimum Internet speed of 600kbps but 1.5mbps is recommended. 600kbps will transmit high quality video, for 720p HD video you will need 1.2mbps, and for 1080 HD



video you will need 1.8mbps. You can check your internet speed by using this link:
<https://www.speedtest.net/>

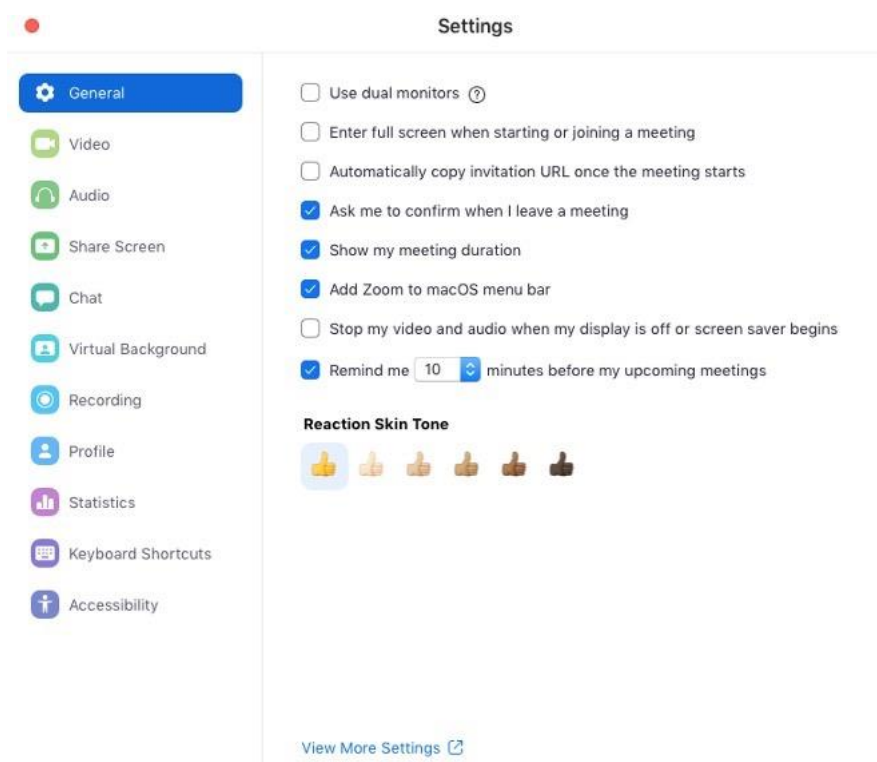
If you have checked your Internet speed and found it satisfactory, problems participants' may have with sound or vision are usually due to their Internet speed. Suggest that they contact their Internet provider.

If there are issues with sharing a video because on Internet speed, get participants to turn their video camera off during the presentation by clicking on the video camera icons. This will reduce the amount of data being received by the Host.

Zoom Basic Settings

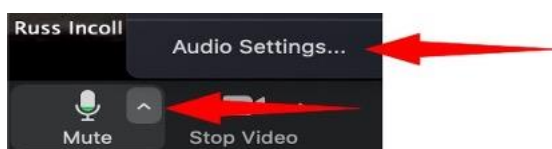
After you have downloaded Zoom, there are many settings to choose and set. Most of these are self-explanatory and individual preferences will dictate your choices. Most of the standard Zoom settings are OK, however, there are a couple of settings that need explanation.

To access settings, open Zoom and click the small cog icon on the upper right. This action will open a range of basic settings that you should work through and choose your preferences. Clicking on the slider will change the status from "off" to "on" or vice versa. The settings screen is shown below. If you choose to use a mobile device, the settings that are important have been described above.

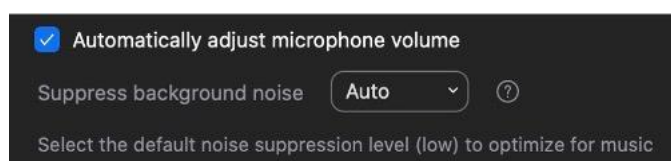


Setting to Suppress Noisy Background

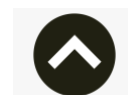
Access this setting under the **Audio** menu item. You can also set this by clicking on the ^ next to the microphone icon during a meeting.



Clicking the ^ brings up this menu:

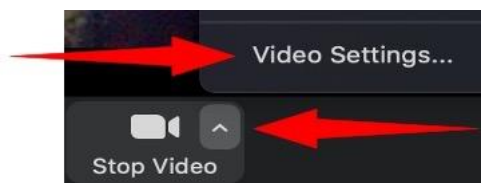


Click on Auto to set higher or lower levels of attenuation

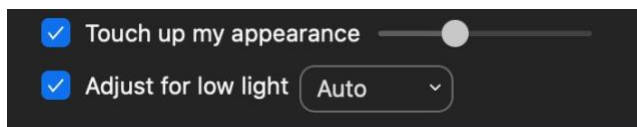


Settings to Remedy a Low Light Situation and Adjust Your Appearance

Access this setting under the **Video** menu item. You can also set this by clicking on the ^ next to the camera icon during a meeting.

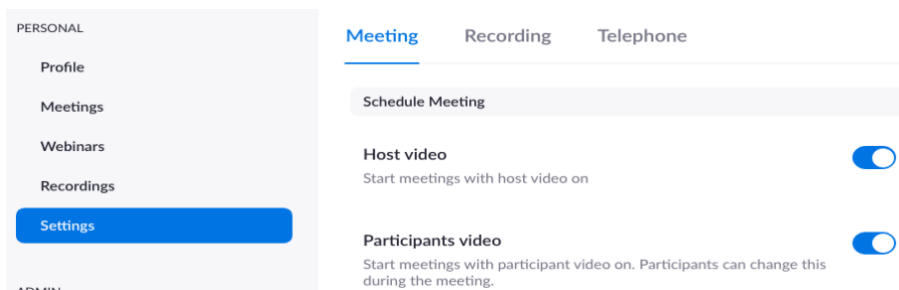


In the Video Settings screen, you can adjust for low light by clicking on the down arrow next to **Auto** and selecting the level you need. Also you can use the slider to adjust your appearance.



Zoom Advanced Settings

After you open Zoom Settings, at the bottom of the screen you will see **"View More Settings"**, click on this to open a web-based Zoom settings menu for your account.



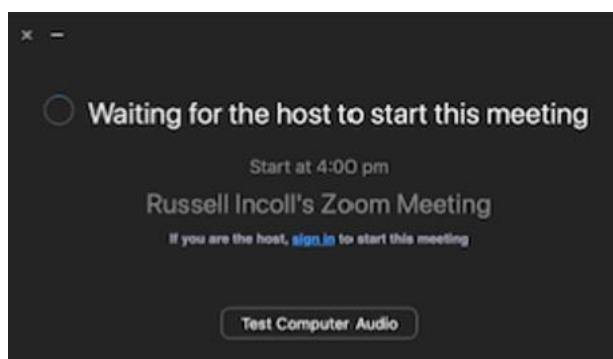
Click on "Meeting" icon to open all of the meeting settings.

Setting Waiting Room & Join Before Host

There are two settings that are important to set, as they impact how people join the meeting. Scroll down to this setting:



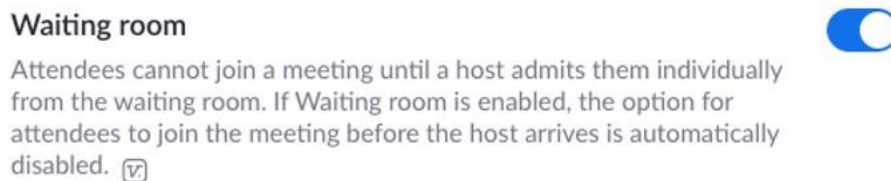
For security reasons our preference is to have this "off" as shown. The slider changes to blue when activated. With this setting set on "off", participants will get this message when joining a meeting before the host:



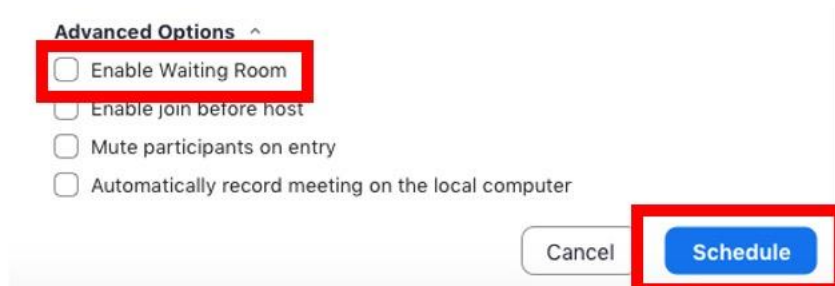
As soon as the host joins the meeting, all the waiting participants will be entered into the meeting automatically. If you join the meeting after the host, you will go straight into the meeting. U3A shared licence meetings allow people to join before host so that the tutor can **Claim Host** and effectively run the meeting, this is discussed later.



However, Zoom also includes a facility to have a waiting room, in which participants “wait” after joining the meeting, this is called the “Waiting Room”. This setting is further down the “In Meeting (Advanced)” menu; scroll down to set this option:



By turning the **"Waiting room"** slider “on” as shown, you will activate a waiting room, which is recommended for security reasons. During the scheduling of a meeting you can also set waiting room “on”, even if you have not set it “on” in preferences. While scheduling, click on **"Advanced"** which will give you these options (using a free licence):



A paid licence will give you an additional option of appointing an alternative host which we will discuss later.

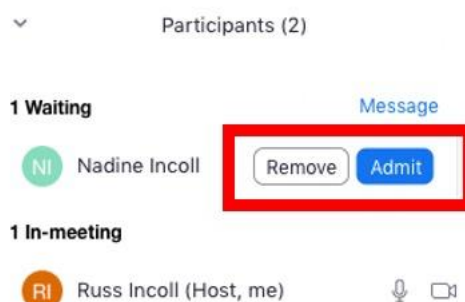
Click on **"Enable Waiting Room"** and then **"Schedule"**

Implications of Having a Waiting Room

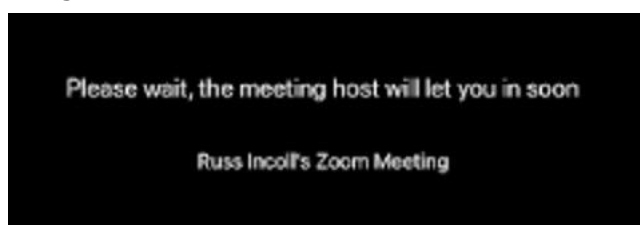
Setting the waiting room on means that no one can enter the meeting until you, the host, admits them. The **"Join before Host"** option discussed above will be de-activated if you activate **"Waiting Room"**. Note that the Security icon also allows a waiting room to be set up on-the-fly during a meeting, but that setting will only apply to that meeting.

If you choose to have a waiting room, you **must** click on the **"Participants"** icon to display a list of participants when you are in the meeting. Otherwise you will not know who is waiting to be admitted. You may like to consider appointing a co-host to monitor participants and admit people; this then allows you to focus on running the meeting.

The participant display with a waiting room looks like this:



The waiting participants have buttons alongside their name that allow the host to **"remove"** them or **"admit"** them to the meeting. If you fail to have the participants list displayed, you may have people waiting without your knowledge. Participants will get this message alerting them to the fact that they are waiting to be admitted:



While in the "more settings" menu you should scroll through the other settings to setup your Zoom to suit the way you want it to operate. While most settings are up to individual preferences, we consider these settings are the most important and our recommendations are:

Passwords Setting

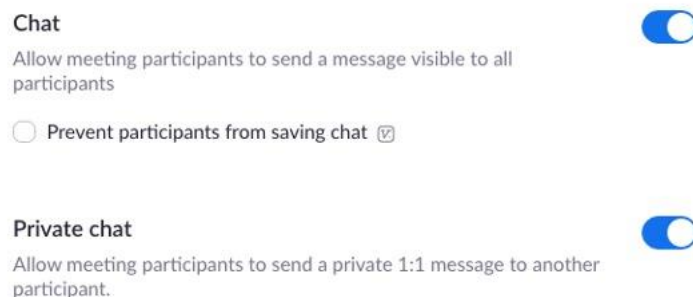
Both these sliders should be set "on" so that passwords are needed to enter meetings, which reduces the likelihood of people bombing your meeting with inappropriate content, i.e. invading your meeting.



Chat Setting

These chat settings enable participants to send text messages to each other privately, or to everyone publicly, during the meeting. Chat is very useful in large meetings in which everyone is usually muted; this is because in large meetings it is best to mute everyone to reduce background noise and chatter.

In a large meeting a co-host can be assigned the job of monitoring chats, so the host can concentrate on running the meeting.



Control Bar and Sharing Settings

It is good to have the menu bar on screen all the time, so set this slider on. However, if you are running a PowerPoint show in full screen, the top menu bar that opens when sharing, may hide some of the content for you as host. In this case you can click on the three dots at the end of the menu bar and hide the menu bar. Clicking on the **"escape"** key will bring the menu back when you need it.

You can also decide on whether only the host can share content, or whether all participants can share. This setting is up to you and the type of meeting you are hosting. However, our recommendation is to not allow participants to share, which will stop inexperienced participants inadvertently sharing and interrupting the meeting when they don't know how to turn it off. This setting can still be changed during the meeting by clicking on the security icon (discussed later).



Always show meeting control toolbar 


Always show meeting controls during a meeting 

Show Zoom windows during screen share 

Screen sharing 


Allow host and participants to share their screen or content during meetings


Who can share?


☒ Host Only ☐ All Participants 


Annotation and Whiteboard Settings

If you set the annotation slide to "on", your participants will be able to write on all shared screens or the whiteboard when they click the annotation icon. There are lots of functions within Annotation, click on the Annotation icon on the menu to see the available options, which include a "clear" to remove all annotations. As host, when you share content, you can choose to display a white board. Activating the Whiteboard slider in settings allows participants to do this as well.

Annotation 

Allow participants to use annotation tools to add information to shared screens 

Whiteboard 

Allow participants to share whiteboard during a meeting 

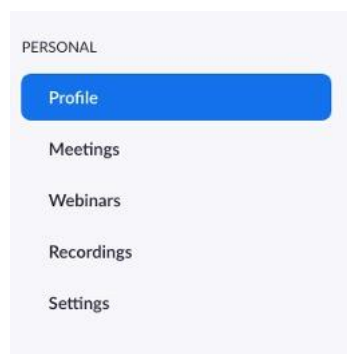
☐ Auto save whiteboard content when sharing is stopped

Allowing Zoom to access your Contacts and Calendar

Inviting people to your meeting is mostly done by email, the content of which email Zoom will generate for you, so having Zoom access your contacts will save a lot of typing. Depending on your email setup, your contacts may already be available to Zoom, which saves you having to type in email addresses.

If your contacts are not available when you install Zoom, you will have to work through the following procedure. Similarly, allowing Zoom to access your calendar will facilitate Zoom adding your scheduled meetings to your electronic calendar automatically.

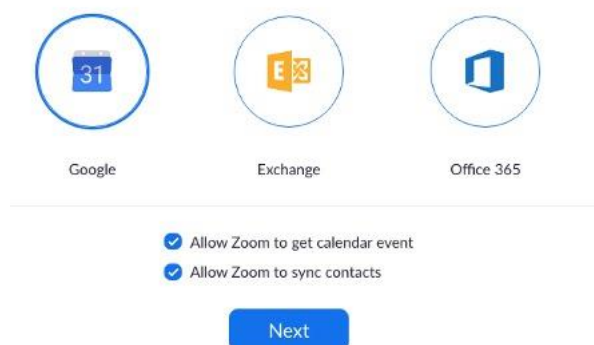
To start the process of allowing Zoom access to your contacts, click on Profile:



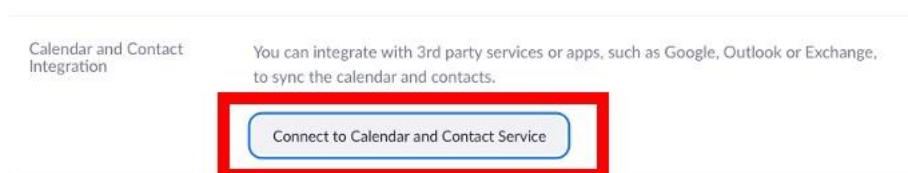
Select the service that you use:



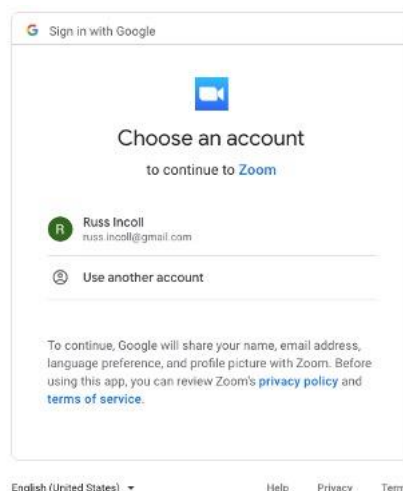
Select a Service



Scroll down to the contact and calendar settings and click on "Connect to Calendar and Contact Service".



Click on your account or enter another account then press enter:



On the screen/s that follow, "allow" Zoom permission when requested and then you are set, Zoom then takes you back to the main settings menu.

Hosting a Meeting using Claim Host – Using a U3A Licence

U3A Mornington and a number of other U3As are now sharing Zoom Pro licences amongst a number of tutors. This means that Zoom classes are centrally timetabled. Under this arrangement you will enter your meeting as a Participant and then you will have to use the Zoom **"Claim Host"** function to take control of the meeting as a Host.

How to Claim Host Rights for your Class

The U3A Course Coordinator will give you a **"Host Key"** (6-digit code) which will enable you to **"Claim Host"** when you join your class.

Once you have the **Host Key**, please follow these steps:

Have Zoom on your Computer/Laptop.

You should download Zoom onto your computer or laptop before you start. Refer to instructions at the start of this guide. Our advice is to use a computer or laptop to host meetings rather than a tablet or iPad.

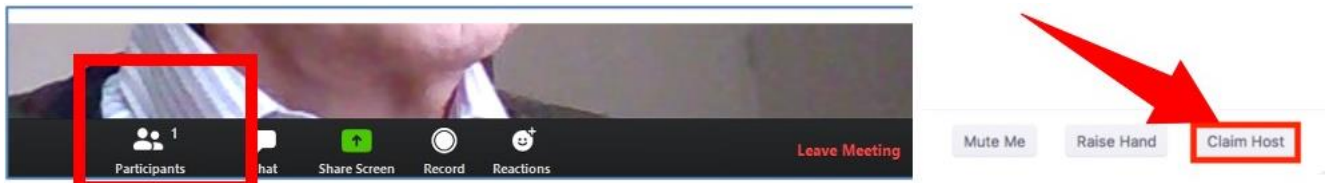


Connect to the meeting.

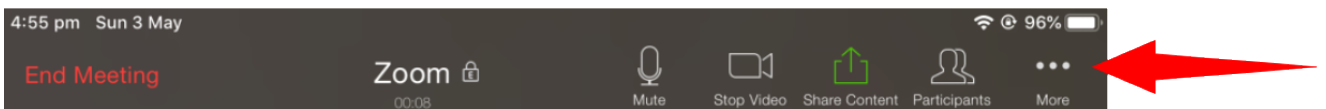
Click on the **"Meeting Link"** provided in the invitation email. As tutor, you may log in 15 minutes before the allocated start time, but not before or you may interrupt an earlier meeting. It is recommended participants join 5-10 minutes before the allocated start time.

Claim Host rights.

On **computers and laptops**, click on the **"Participants"** icon in the menu bar at bottom of the screen to open the Participants window. At the bottom right you will see the **"Claim Host"** option. Click on this to open the window where you enter the claim host 6-digit PIN. Some computers & laptops display three dots ... instead of **"Claim Host"**, click on these to access **"Claim Host"**



On an **iPad or tablet** click **"... More"** on the menu bar at the top right of screen and select **"Enter Host key to claim host"**

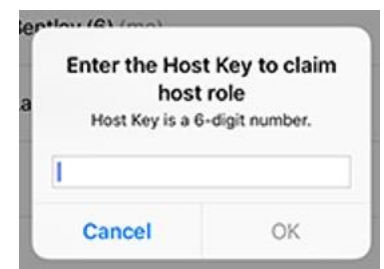


Enter the Host Key.

Click **"Claim Host"** (computer) or **"Enter Host key to claim host"** (tablet) and you will be prompted to enter a **"Host Key"**. Enter the 6-digit code you have been given for this meeting.

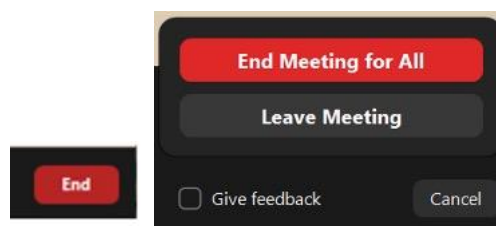
You are now the Meeting Host.

As meeting host you have the ability to manage the meeting in the way you want, you can set up a **"Waiting Room"**, mute participants, allow participants to share and many other functions that we have described above or will cover later.



End the Meeting

As host one of your most important roles is to end the meeting. You must make sure that you take this action and **"End meeting for all"** at or before the end of your scheduled time, to ensure that there is no clash with the next class. (**Do not just Leave Meeting**).



If you have to leave the meeting before the end, you must assign another person the role of host. To do this, open the participant's list and click on the participants name and make them the host, make sure you tell them that they have to end the meeting.

If you don't appoint a replacement host, the last person left in the meeting automatically gets the authority to end the meeting, but they need to know that this is what they must do.

Meeting Controls – Computers and laptops

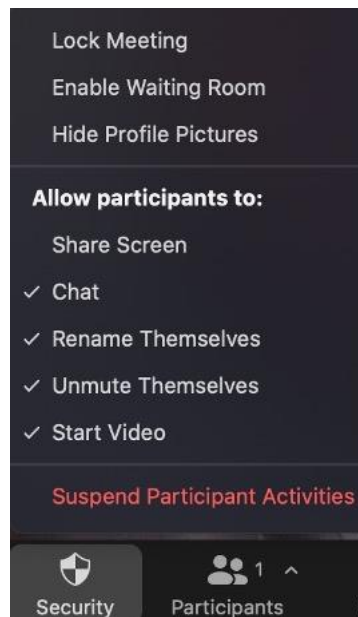
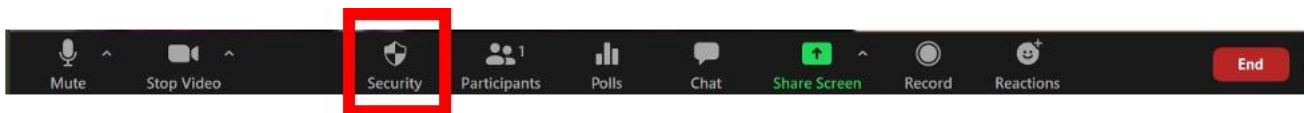
Security Icon

Once you have used **"Claim Host"**, you will see a **"Security"** icon in the Meeting Control Bar at the bottom of your screen. This icon enables you to control aspects of the meeting relating to meeting security and what Zoom functions participants are allowed to use. The function of most are obvious or have already been discussed, but **"Lock meeting"** and



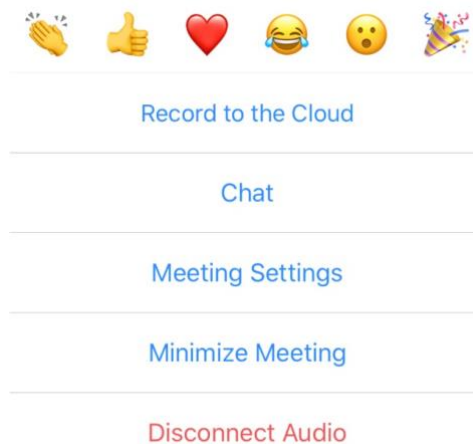
“Suspend Participant Activities” are discussed later in the section on running meetings.

:



Meeting controls – iPad/Tablets

To access the meeting controls on a mobile device, click on the **“More...”** icon on the right end of the menu bar to get this menu:



Now click on **“Meeting Settings”** on the menu that opens. This menu gives you the ability to set up a waiting room and control other aspects of the meeting. These controls are discussed elsewhere in this document.





Schedule a Meeting

Google Calendar add-on

There is a google calendar add-on that enables you to schedule Zoom meetings directly in your calendar and not use email.

With the "Zoom for Google Calendar" (from Google) add-on, you can schedule, join, and manage meetings in the Google Calendar.

For more information see:

<https://support.zoom.us/hc/en-us/articles/360020187492-Google-Calendar-add-on>

Starting an ad hoc Meeting

Once your settings are established, the first step to complete as a host is to schedule your meeting. In U3A it is usually the course coordinator who schedules your meetings for you.

However, if you want to set up an ad hoc instant meeting:

- Open Zoom and click on **"Open Meeting"**. The meeting will immediately start with you on screen.
- Click on **"Participants"** and then **"Invite"** at the bottom of the Participants display.
- Choose **"Email"** and then your preferred email server (I use Gmail). Zoom will now generate an email for you to send to people you want at the meeting. You may have to minimise Zoom to see the generated email.
- Add the participants email addresses into the "To" box in the email. The Zoom generated email has the meeting link, and also the meeting ID and the password.
- When people get this email, they will be able to join your instant meeting.

Using U3A Website to send a Meeting Invitation

If you are a tutor, you can use the email function in your U3A Website (UMAS) to send the invitation email to your class, without the need to enter all their email addresses individually.

- While in Zoom, copy the invitation for the meeting you have set up.
- Now log into the U3A website and login. In the menu on the left, click on **"Send Emails"**, and in the screen that opens, click on **"Enrolments"**.



- Change the **"Reply To"** email address to your own so that should the class members reply to the email, it will come to you.
- Fill in the subject of the email and then paste the Zoom invitation into the body of the email.

Optional. Replace for a different Reply To address
 CC email address. Use semi-colon to separate email addresses. Optional. CC Field
 Subject

- Now move down to the lower section of the screen.

No file chosen
 Choose a Course:
 Include Wait Listed: ☐ Send only to Wait Listed: ☐ Include Inactive: ☐ Email the Tutor: ☐

- In the box **"Choose a Course"**, use the up and down arrows to select your course.
- Now check the options you want in the check boxes below this field, **"Email to Tutor"** is a good one to check because seeing the email in your inbox confirms that UMAS has worked OK.
- If you want to you can choose to send an attachment by clicking on the **"Choose File"** box. Clicking here will take you into your computer directories so you can locate the file you wish to attach. **You can only send one file per email.**
- Make a final check and then click **"Send Enrolment Emails"** and you will then get this warning message:

Includes Active and NOT Wait-listed records
 16 Members found to process in 200S0C01 (not including any CCs)
 Sending all emails from U3A Mornington Inc. office@u3amornington.org.au
CAREFUL, if you click on Yes the email you have created for members in this enrolment will be sent immediately?

- Click on **"Yes"** to send the email. Use this same process to send an invitation for a scheduled meeting.

There is more information on ad hoc meetings in our companion participant guide.

Schedule a Meeting

This is what you may do when you set up a meeting with friends and/or family, or when you use your own licence to host a U3A class. Enter Zoom and click on the **"Schedule"** button.

Changing your Default Calendar for Scheduled Meetings – Computers & Laptops

Changing the calendar that records up-coming meetings can be done while you are scheduling a meeting. After you select **"Schedule"** the **"Schedule Meeting"** window opens and down the bottom is the area where you change your calendar:

Calendar
☐ iCal ☒ Google Calendar ☐ Outlook ☐ Other Calendars
Advanced Options ▾

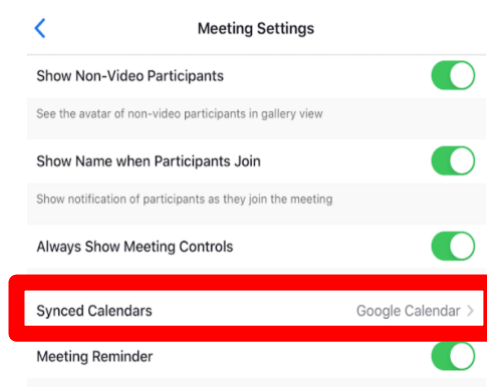
Click on the calendar you want to use and it will be changed when you click on **"Save"**

Changing your Default Calendar for Scheduled Meetings – Mobile Devices

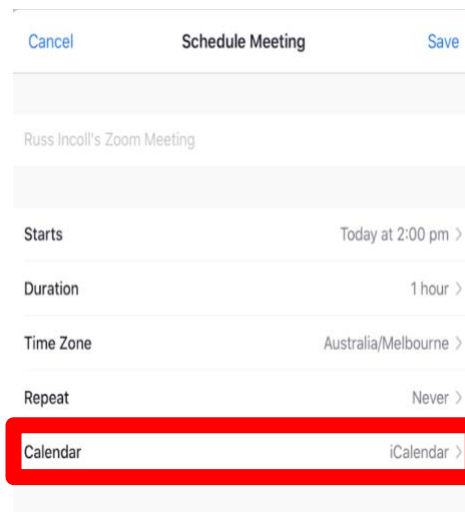
Changing the calendar that records up-coming meetings can be done while you are scheduling a meeting and also by opening the settings menu. First click on **"Settings"**



(Gear Cog) and then click on **"Meetings"**. In the screen that opens, scroll down to **"Synced Calendars"**, click on this to change your calendar.



When scheduling a meeting on a mobile device, the scheduling screen that opens when you click on **"Schedule"** has a field on which you click to change calendar.



Settings for the Meeting

You will then have the screen shown below.

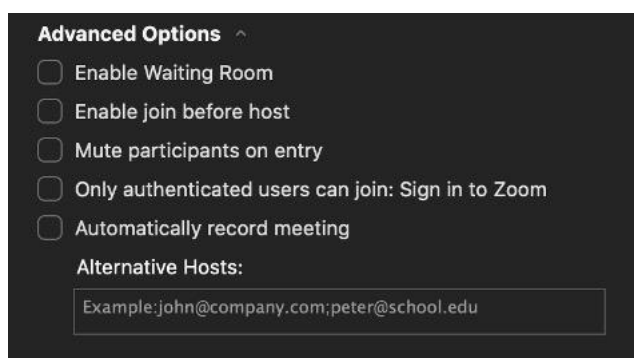
A detailed screenshot of the 'Schedule Meeting' screen. The 'Topic' field contains 'Russ Incoll's Zoom Meeting'. The 'Date & Time' section shows '03/09/2020' from '1:30 pm' to '2:00 pm' on '03/09/2020'. The 'Recurring meeting' checkbox is unchecked, and the 'Time Zone' is 'Australian Eastern Standard T...'. The 'Meeting ID' section has 'Generate Automatically' selected. The 'Security' section has 'Passcode' checked with the value '4G+G3q'. The 'Video' section has 'Host' and 'Participants' both set to 'On'. The 'Audio' section has 'Telephone and computer audio' selected. The 'Calendar' section has 'Google Calendar' selected. At the bottom, there are 'Cancel' and 'Save' buttons.

Most of the fields are self-explanatory, however you will need to make decisions on:

- **Name of meeting:** The name of the meeting informs people of the purpose of the meeting. A good idea is to use the name of your course.
- **Recurring meeting:** Check on this option if you are going to regularly hold the meeting. Completing the detail of this option will be explained later.
- **Audio:** Check "**Computer and Telephone Audio**" to turn it on. This allows people to use their computer audio or to telephone into the meeting if their computer audio is patchy or not working.
- **Password:** Always check "**Require Password**". There have been problems with people "bombing" meetings with inappropriate content, having a meeting password makes this a bit more difficult.
- **Calendar:** Choose the calendar you use, if you don't already have an electronic calendar choose Outlook, if you have an Outlook account, or Google if you have a Google account. If you don't have either, Google is a good one, but you will have to open a Google account. Opening a Google account will give you a Gmail email address, but you don't have to use it.

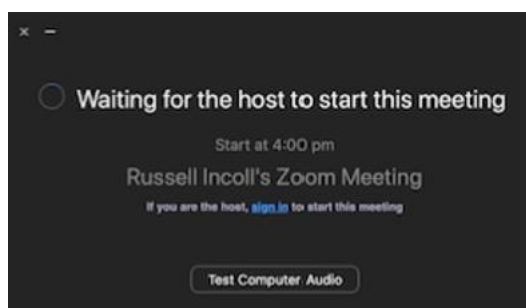
Settings Advanced Options

Click on "**Advanced Options**" at the bottom of the schedule menu to complete scheduling the meeting:



The screenshot shows the 'Advanced Options' panel in Zoom. It contains several checkboxes: 'Enable Waiting Room', 'Enable join before host', 'Mute participants on entry', 'Only authenticated users can join: Sign in to Zoom', and 'Automatically record meeting'. Below these is a section for 'Alternative Hosts' with a text input field containing the example email addresses 'john@company.com;peter@school.edu'.

- **Enable Waiting Room:** As discussed you can set up a Waiting Room so that you, as host, have to admit people into the meeting. You need to have the participants list open so that you can see people arriving into the Waiting Room so you can either admit them or remove them.
- **Enable Join before Host:** As discussed, we recommend not allowing people to join before the host to prevent participants without a moderator. Participants will get a warning message, shown below, advising them that they will be admitted as soon as the host joins the meeting.

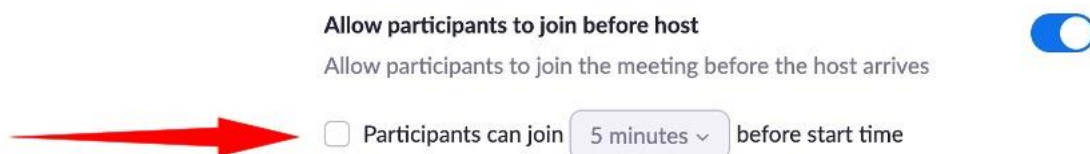


However, if you are scheduling using shared U3A licences you will need to allow "**Join Before Host**" so that the tutor can join the meeting and "**Claim Host**". As host they will have full control over the meeting and, most importantly, they will be able to "**End Meeting for All**", an essential act which ensures that the meeting does not conflict with following classes using the same shared licence.

If you turn "**Join Before Host**" on, the tutor can join the meeting at any time. There is an option to set a time limit on how early the tutors can join the meeting.



Click the check box shown in the graphic below and you will get the choice of 5, 10, 15, minutes or Anytime.

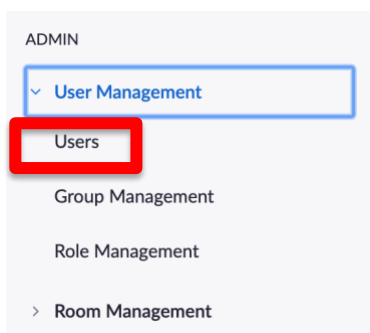


- **Mute participants on Entry:** it is good to have this set "On" for a large meeting. Meetings of up to 10 to 15 work well with no muting of participants. As host you still have the option to mute everyone if background noise or chatter becomes an issue.
- **Only Authenticated users can Join:** You can set up a list of authenticated users to have stricter control on Participants, but this is not something we do at U3A.
- **Automatically Record Meeting:** This is also something we don't do at U3A, but it is available to set; and you can also click the "Record" item during the meeting to start recording. If you record a meeting, at the end of the meeting Zoom will provide information on the recording and where it can be accessed.

Alternative Host

This setting is available on a paid licence and provides another method of setting up a meeting for someone else to host. To do this the U3A must have a licence that allows additional users, and the people whom you want to host a meeting must be added to the users list in Zoom Web based account settings. For example, if I have a licence, I can schedule a meeting and give another person, who is on the list of users on my account, the ability to host that meeting.

To add a user to your account, open the Zoom Web Settings and open the users page by clicking on "User Management" and then "Users":

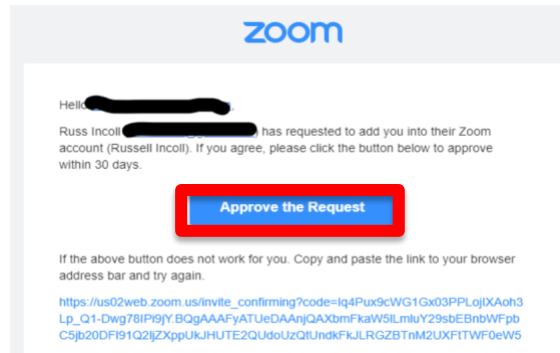


On the screen that opens click on "Add Users". This opens the screen where you can add users to your account. Be aware that if a user you add to your account who has a paid licence that, if they accept, they will lose their paid licence and receive a refund for the balance in their account, if any. Fill in the details and click "Add".

A screenshot of the 'Add Users' form in the Zoom Admin console. The form has a title 'Add Users' and a subtitle 'Add users with their email addresses'. Below the subtitle is a note: 'If you are adding an account owner include multiple users, the user type and features assigned in their current account will import.' There is a text input field for an email address, which contains 'jlt@gmail.com'. Below the email field are three radio buttons for 'User Type': 'Basic' (selected), 'Licensed', and 'On-Prem'. Below the radio buttons are four text input fields: 'Department' (containing 'Project Management'), 'Job Title' (containing 'Project Director'), 'Location' (containing 'Mount Eliza'), and a blank field. At the bottom right of the form are two buttons: 'Add' and 'Cancel'.

This action places the user in "**Pending**" and an email is sent to their email address. If they accept within 30 days, they will be added to your account. They accept by clicking on "**Approve the Request**"

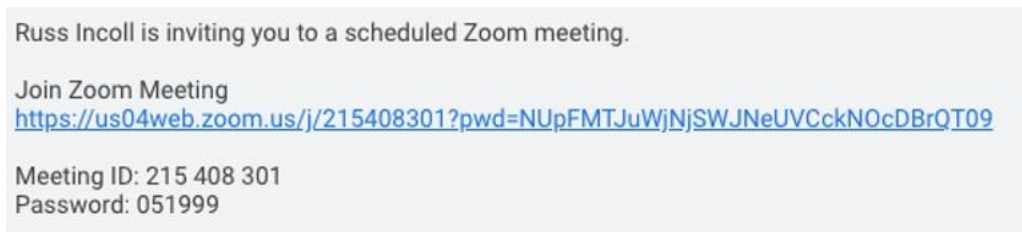




To use alternative hosts all you do is enter the person's email address in the Alternative Host field while scheduling a meeting. When you click on **"Schedule"** to finish the scheduling process the alternative host will receive an email advising them of the meeting and giving them a link to the meeting. They just have to use this link to enter the meeting and they can copy this link and email it to the people they want to attend the meeting.

Scheduling Continued

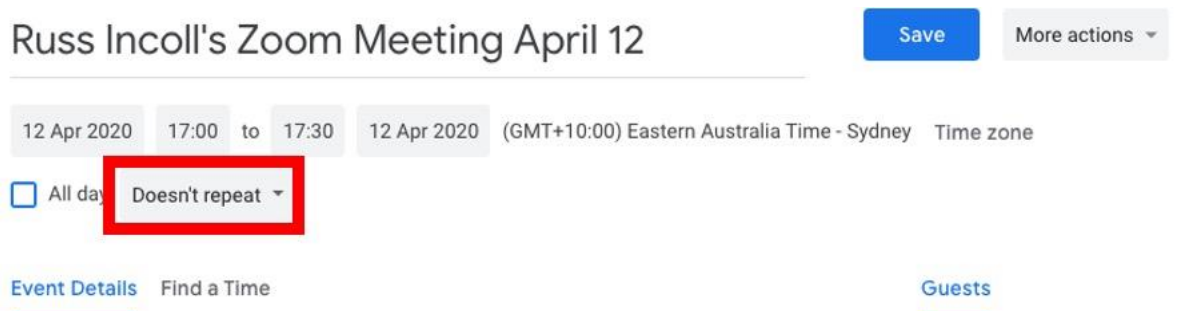
- If the meeting is a recurring one, click **"Recurring meeting"**, then, once the meeting is scheduled, a new screen will open allowing you to enter the recurring meeting details as explained below.
- When you have entered all of the detail, click **"Schedule"** to schedule the meeting. The meeting details will then be displayed in your calendar, where you can make changes if you want. While in this screen, for a one-off meeting, copy the invitation so you can email it to your invitees.



- The email Zoom generates incorporates the meeting link, which includes the meeting ID and the password. When people get this email, they will be able to join your meeting.
- If you are a tutor at U3A, you can use the email function in UMAS to send the invitation email to your class without having to enter all their email addresses. How to do this is described above.

Recurring Meetings

After scheduling the meeting, you will be taken to your chosen calendar and you will see this screen (your meeting details and invitation will be below this part of the screen):



- If your meeting is not recurring and you have come to this screen by mistake, click on **"Doesn't repeat"** and click on **"Save"** to cancel the repeat meetings.
- If your meeting is recurring, click on the down arrow next to **"Doesn't repeat"** to see more options on this screen to view the choices you have on the recurring frequency:



Doesn't repeat

Daily

Weekly on Sunday

Monthly on the second Sunday

Annually on April 12

Every weekday (Monday to Friday)

Custom...

- If the choices shown do not suit, which is most likely, click **"Custom"** to move to this screen:

Custom recurrence

Repeat every week

Repeat on

M T W T F S **S**

Ends

☒ Never

☐ On 12 Jul 2020

☐ After 13 occurrences

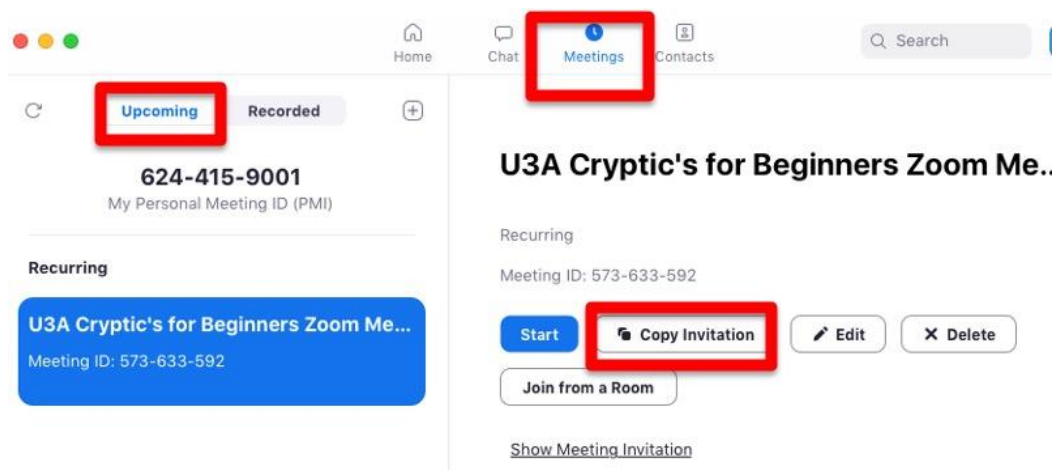
Cancel Done

- Select the options that match your recurring meeting and click **"Done"** and your meeting will be scheduled and added to the calendar.
- Your calendar will now open to allow you to make further changes, should you want.

What if I forgot to Copy the invitation?

If you exit Zoom without making a copy of the invitation:

- Open the **"Meetings"** tab in Zoom and **"Upcoming"**
- Select the meeting for which you need the invitation by clicking on it, then click on **"Copy Invitation"**.
- This will copy the invitation onto the clipboard which you can then paste into an email to participants.



What if I Make a Mistake?

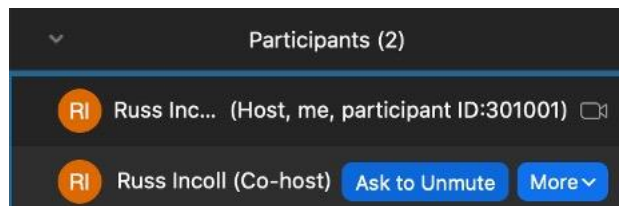
If you have made a mistake, open Zoom and click on the **"Meetings"** tab and make changes by clicking on the **"Edit"** button or delete the meeting by clicking on the **"Delete"** button. If you delete the meeting, you will also have to go into your calendar and separately delete the meeting from your calendar.

Running the Meeting

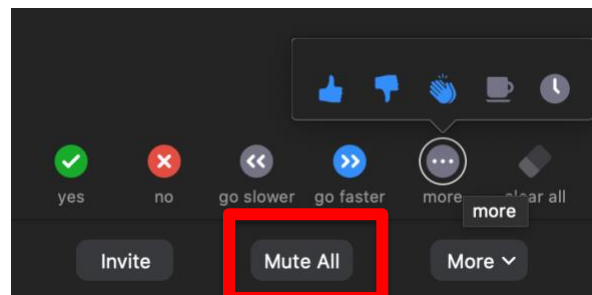
Muting Participants

Zoom is poor at handling multiple participants speaking at once. We suggest, for a large meeting, that you encourage all participants to mute their microphones except when they are speaking. As host you have the ability to mute participants microphones.

When you hover over a participant's name, alongside each participant name on the participants display there is a blue mute button, click on that to silence that person. Their **"Mute"** button now becomes **"Ask to Unmute"** to allow you to request that they unmute themselves. Zoom used to allow hosts to unmute participants but has now prevented that, so all you can do as host is to make that request.

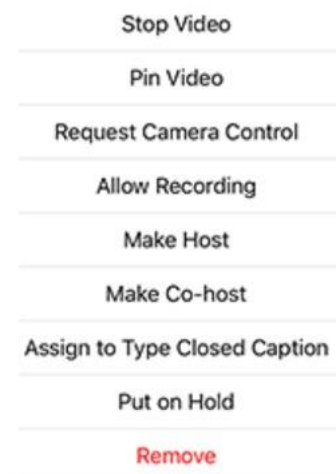


As host you can also mute everyone. Click on the participant icon on the Zoom menu bar to open the list of participants. At the bottom you will see these controls:



Click on **"Mute All"** to mute everyone.

There is also a **"More"** button alongside each participant, click on that to get additional controls. The options you get vary with what is or has been happening in the meeting:



Setting Choices for Individual Participants

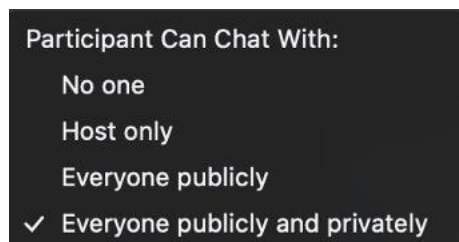
Click on:

- **Stop Video:** Turns the participant's camera off

- **Pin Video:** Click on "**Pin Video**" to lock your speaker screen on this participant. To cancel open this menu again and click on "**Cancel Pin Video**"
- **Request Camera Control:** Only the host can activate this feature which allows the selected participant to control the tilt and pan of the hosts webcam, provided the camera has these capabilities. This must also be enabled in meeting settings when the meeting is scheduled
- **Allow Recording:** Allows that person to start recording the meeting, not used very often for U3A meetings
- **Make Host:** Makes that person the host of the meeting (useful if you have to leave early), then they can close the meeting
- **Make Co-Host:** Gives another person the same powers as you hold, except to close the meeting.
This is good thing to do in a big meeting because you can assign specific roles to the co-hosts, for example admitting people to the meeting, or monitoring their non-verbal signals, or monitoring and answering participant's chats
- **Assign to type Closed Caption:** Allows that person to type closed captions
- **Rename:** Opens a window to let you change the person's name
- **Put on Hold:** You can take this person out of the meeting into limbo (if you have something sensitive to discuss). The participant gets this message on a blank screen "**Please wait, the meeting host will let you in soon.**" To re-admit the person to the meeting, hover over their name and click on "**Take off Hold**"
- **Remove:** Use this to remove the person from the meeting

Chat Settings

As host you get more options to control how chat works in your meeting. When you open chat, your chat menu will have three dots, click on these to open more menu choices.



These choices are self-explanatory; the last option is the most usual to select.

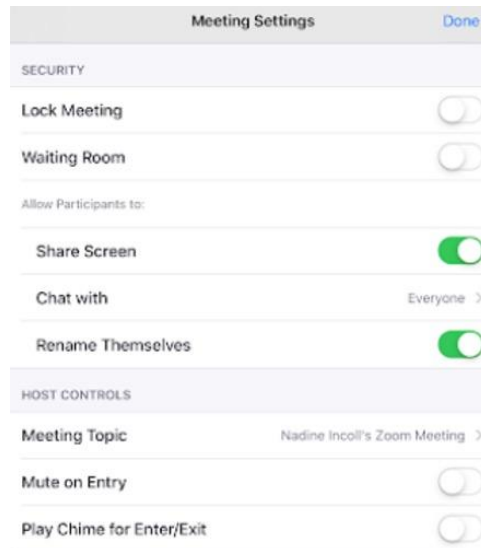
Share Screen

- Unless there is a particular reason that you want participants to be able to share their screens, it is recommended that you do **NOT** allow them to do so. Inexperienced users sometimes "share screen" unwittingly, causing disruption to the meeting.

Meeting Settings - Mobile Device

Clicking on "**More**" at the end of the menu bar brings up a sub menu, click on "**Meeting Settings**" to bring up this menu:

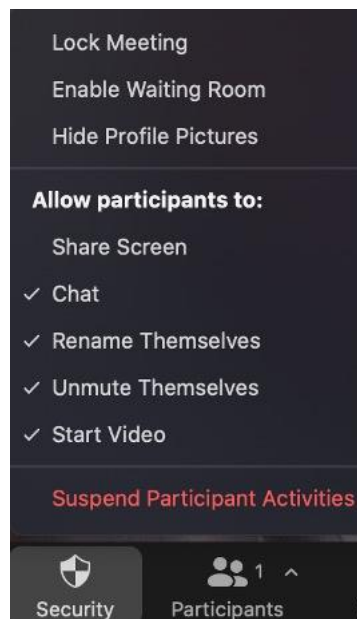




All these settings are mostly self-evident and have been discussed elsewhere in this document.

Security Icon

Zoom have a security icon, shaped as a shield, available to the host and co-host only. It has replaced the **"Invite"** button, which has been shifted to the bottom of the participant display. The Security icon allows the host to set variables on the fly, even if their personal Zoom settings are different. The menu options for security are:



The security button allows the host to:

- Lock/Unlock a meeting
- Enable/disable a waiting room
- Hide Profile Pictures
- Enable/disable participants to share screen
- Enable/disable participant to rename themselves
- Allow participants to unmute themselves
- Allow participants to start their video
- Suspend all participant activities

Most of these are obvious or have been covered elsewhere, but a couple need explanation and are important in controlling access to a meeting and regaining control when problems arise:



Locking Meeting

Lock/Unlock a meeting allows the host to stop any more people joining the meeting, that is, to lock people out. Zoom recommends that you lock a meeting when everyone you expect to attend is in the meeting. This reduces the chance of the meeting being bombed.

Bombing is the action of nefarious people, who get enjoyment from joining meetings uninvited, and then share content, that may be inappropriate. As well as locking a meeting, not allowing participants to share also reduces the chances of being bombed by inappropriate content.

The only way at present to set a limit on the number of participants in a Zoom meeting is to lock the meeting when you get to the desired number. Use the security button on a computer or laptop and **"Meeting Settings"** on an iPad or tablet.

Suspend Participant Activities

If activated this option mutes all participants, stops videos, ends screen share, closes Breakout Rooms, and pauses recording. This drastic action could be used if a meeting has been bombed or become uncontrollable.

Running the Meeting Continued

Entering the meeting

You enter the meeting by clicking on the link in an invitation email or by clicking on the "Join" button on the Zoom home screen, we suggest joining a meeting 15 minutes before the scheduled start time.

Choose a View

Once you have joined the meeting, check in with the participants and help sort out any issues. **"Gallery View"** is a good option for the host because you can see who is in the meeting and greet people as they join. The green frame around the video of the person speaking shows who is speaking. There is more information on the view choices in the guide for participants.

Sound Issues

If a participant has an issue with sound on their computer that isn't easily sorted you could suggest they may like to log into the meeting on their phone (the invitation email should be in the emails on their phone and that will enable them to click on the link to get into the meeting). They will then be able to watch the meeting on their computer and listen and speak via their phone.

Prepare Beforehand

Before you start the meeting, make sure you have all the documents, spreadsheets, slide shows, etc. open on the desktop before the meeting starts. All the open applications will display on the share screen in Zoom, so you can click on the one you want to share without having to search through your folders. Minimising them to the dock also enables you to click and open them. You can also share your computer screen which also enables you to search through folders. If you do this you may lose the participant videos, so it is best to search and open files before you share.

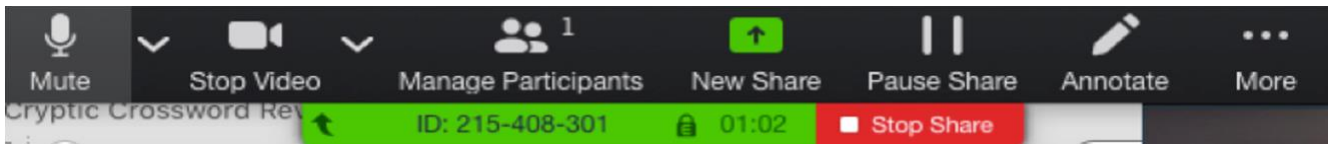
Participant Sharing

We recommend not allowing participants to share their screen, as some participants will do this be mistake and upset the meeting. You allow participant sharing in Zoom settings. However, if you have not setup the meeting settings to stop participants sharing, you can still prevent participants from screen sharing during a meeting. Use the controls in the bottom menu, click the arrow next to **"Share Screen"** and then **"Advanced Sharing Options"**. Under **"Who can share?"** choose **"Only Host"** and close the window. Alternatively, you can click on the security icon and prevent sharing there.

Share Screen

When you want to run a PowerPoint slide show or other content such as a document, you click on **"Share Screen"** to access the content you want to share.

Immediately you share content, the menu moves to the top of the screen and is different to the normal menu and it provides you some new options:



New Share: Allows you to change to sharing different content.

- This control has to be used when you are showing a PowerPoint show and want to use a link that is embedded in a PowerPoint slide to start a YouTube video or other Internet content.
- For a YouTube video, get it running on your screen by clicking the link, and then quickly click on pause on YouTube to stop the video running.
- Now click on **"New Share"** and then start the video, which will now be visible to participants. Do the same for other Internet content.
- If you fail to click **"New Share"** participants will not see your video or Internet content, but rather a black square on their screen. This happens because the link automatically opens a new window that then has to be shared.
- This applies to all links that are not already open on your computer.

Stop Share: Use this button to end sharing

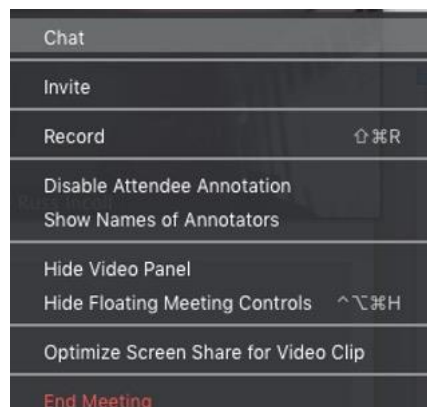
Pause Share: This button pauses the share. Your screen looks the same, but the participants will not be able to see the shared content anymore. This enables you to make changes to the shared content or to move onto a new part of the shared content without being seen.

Annotate: This button enables you to write on the screen. You can use **"Annotate"** to draw arrows to highlight things, or circle content, etc. on any shared content. Zoom also provides a whiteboard as an option in **"Share Screen"** so you can share the whiteboard and use **"Annotate"** tools to write on that whiteboard, just as you would on a physical whiteboard.

More details are provided in the section "Whiteboard Sharing"

Additional Meeting Controls

More: Click on this button to get additional options as below:



Chat, Invite, Record, and End Meeting functions are as explained previously.

Disable Attendee Annotation: Click this to prevent participants writing on the screen.

Show Names of Annotators: Click this to display the names of the people writing on the screen.

Hide Video Panel: Removes the participants video panel from the screen to allow you to see all your shared content.

Hide Floating Meeting Controls: Takes the meeting menu off the screen, pressing "Escape" key will return this menu to the screen. This allows you to remove the menu that may be hiding part of your shared screen.

Optimise Screen Share for Video Clip: Clicking this button will increase the frame rate of the video to give a smoother display (will use more bandwidth).



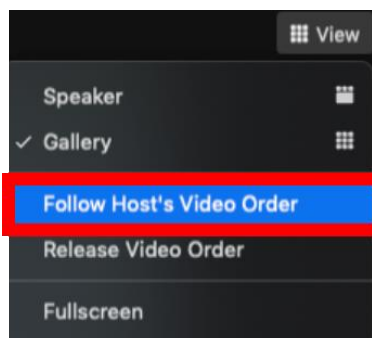
Custom Gallery View Arrangement

The view choices are discussed in our guide Understanding and Using Zoom as is the facility in Gallery View to click and drag the video images to create a custom organization. After the first change, all other participant tiles will remain in place until moved. New participants will be added to the bottom-right of the screen. Normally your custom order will be seen only by you but, as host, you can deploy your custom view to all participants. This arranged order can be released and gallery view will return to the normal arrangement.

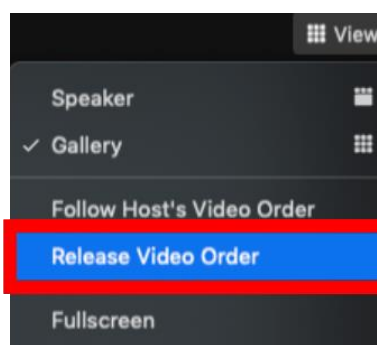
- Click and drag any participant video to the location on screen you want.



- Continue as needed to achieve your desired on-screen order.
- As the host you can apply your video screen arrangement to all participants, so everyone has the same Gallery View. To do this, click **"View"**, then **"Follow Host's Video Order"**, to deploy your custom view to all participants.



- To return the Gallery View to the normal arrangement, click **"View"**, then **"Release Video Order"**, to release the custom order.



Locking Speaker View to Prevent Highlighted Speaker Changing

Zoom has the facility for each participant to lock their speaker view on one participant. This is very useful when there is one person presenting, or a keynote speaker. Doing this will keep the speaker in the main screen of Speaker View. This feature stops the speaker screen swapping to a participant whose dog barks or when they move their chair, etc.

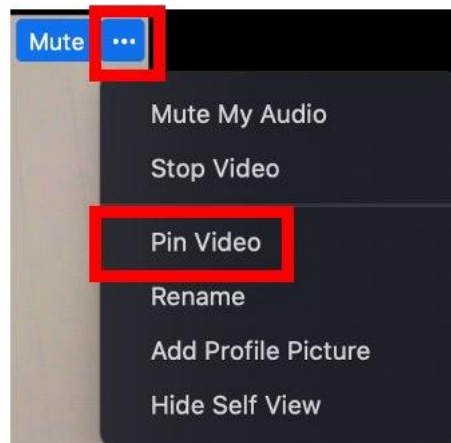


There is also the facility to pin or spotlight up to nine participants, which could be useful when you have several people leading the discussion. These **"Pinned"** or **"Spotlighted"** participants appear in the main section of your screen with the other participants in a row of small video pictures across the top of the screen.

Participants can lock their view by using **"Pin Video"** which locks the view only for them. The host can do this for all participants by using **"Spotlight Video"** which locks the view for all participants. To use **"Spotlight Video"** there must be at least three participants in the meeting.

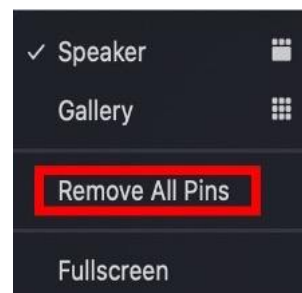
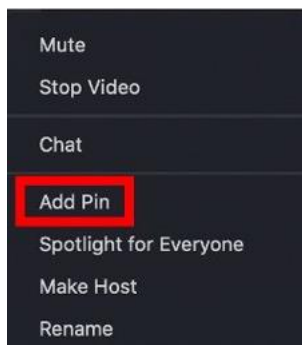
Pin Video – Computers & Laptops

To do this, you should hover over the speaker's thumbnail video image in gallery view then click on the three dots in the corner of the speaker's video screen to open a new menu or just click on their screen.

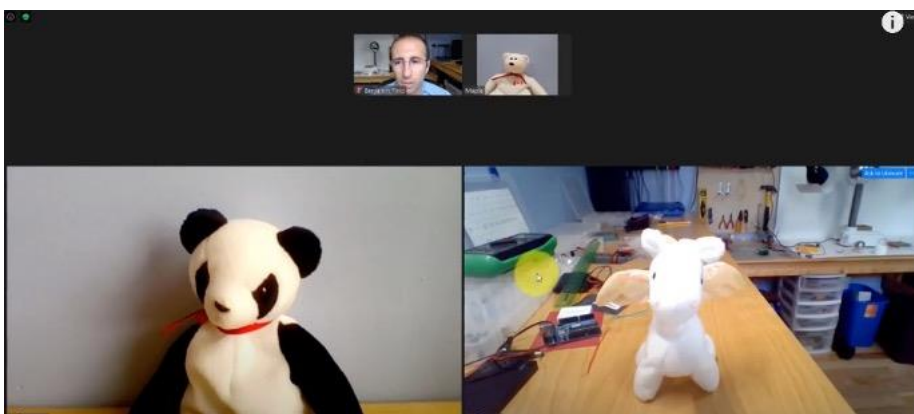


Click on **"Pin Video"** to fix the speaker view on your speaker.

To change back to Active Speaker View, click on the **"View"** icon on the top right of screen which will display in the top left corner of the main speaker screen and click on **"Remove all Pins"**. The main speaker screen will now swap to whomever is speaking. Alternatively, click on the video screen of the Pinned participant and click **"Unpin"**



As mentioned, Zoom now has the facility to **"Pin"** up to nine participants. The process to **"Pin"** additional participant's is the same as described above, you click on the participant's video image and click **"Add Pin"** to add that person. **The people you have pinned will show on your screen as bigger images in the main part of your screen.** The other unpinned participants will appear in a row of small video images across the top of your screen



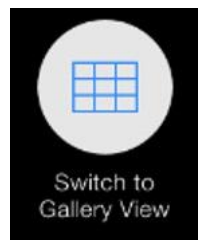
To unpin a participant, click on their video screen and click **"Unpin Video"**. To stop all pinning, click on the **"View"** Icon in the top right corner of your screen and then click on **"Remove all Pins"**

Pin Video – Mobile Devices – Android and iPhone

Locking the speaker view is even easier on a phone, but you have to be in **Gallery View** (four participants on screen). If you are on **Speaker View** (one large speaker on screen) swipe left to change to **Gallery View**. Now just double tap on the video of the chosen speaker to lock onto that participant/speaker. Continue swiping left to see more participant's videos. To return to **Active Speaker View** swipe right until you get back to **Speaker View** which will now be **Active Speaker View**.

Pin Video – Mobile Devices – iPads

The process on an iPad is the same as for other mobile devices except that to change to **Gallery View** you click on the change view icon on the top left of screen. Then double tap on the speaker's video to lock the view onto the speaker.



To return to **Active Speaker View** you click on the change view icon again.

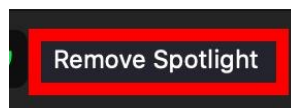
Spotlight Video – Computers & Laptops

This is a great feature that enables you to lock the view for everyone on the main speaker or class leader, so the video does not swap to anyone who makes a noise. Only hosts can access **Spotlight Video**. Once this is activated, the **Speaker View** for all participants will be locked on the chosen speaker rather than swapping to the active speaker. To do this you must be host and have at least three participants with video on.

To activate, hover over the video of the participant you want to spotlight and click on the three dots ... , or just click on the screen. From the menu that opens, choose **"Spotlight Video"** or **"Spotlight Everybody"**.



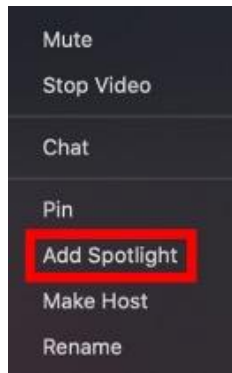
To cancel Spotlight Video, click on **"View"** in the top right corner of the screen and then on **"Remove Spotlight"** icon to return to **Active Speaker Screen**.



As mentioned, Zoom now has the facility to **"Spotlight"** up to nine participants. The process to **"Spotlight"** additional participant's is the same as described above, you click on the participant's video image and click **"Add Spotlight"** to add that person. To Remove a Spotlight from a person, click on their screen and click on **"Cancel Spotlight Video"**.

To cancel all Spotlight Video, click on **"View"** in the top right corner of the screen and then on **"Remove Spotlight"** icon to return to **Active Speaker Screen**.





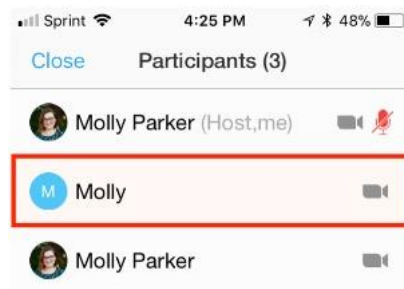
The people you have spotlighted will show on your screen as bigger images in the main part of your screen. The other unspotlighted participants will appear in a row of small video images across the top of your screen as shown above under Pin Video.

Spotlight Video – Mobile Devices

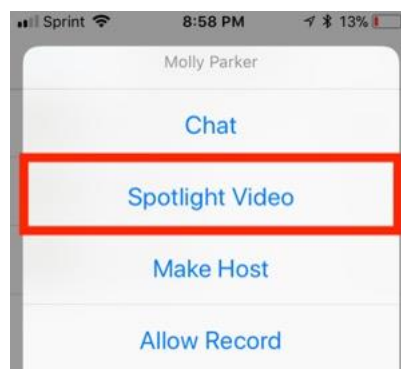
The host can fix speaker view on the main speaker for all participants by using **Spotlight Video** on a mobile device as well. To do this you must be host and have at least three participants with video on. Tap the **Participants** icon, this icon will be at the top of your screen on a tablet and the bottom of your screen on an iPhone.



This opens a list of participants, in this list, tap on the name of the participant that you want to hold the speaker screen (spotlight).

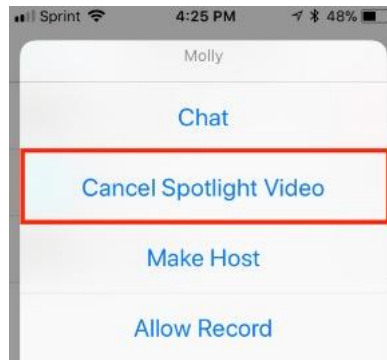


On the menu that opens tap on **"Spotlight Video"**



To cancel **Spotlight Video**, tap on **Participants** icon. This will be at the top of your screen on an iPad and the bottom of your screen on an iPhone. On the menu that opens, tap on the participants name and then on the menu that opens tap on **"Cancel Spotlight Video"**.

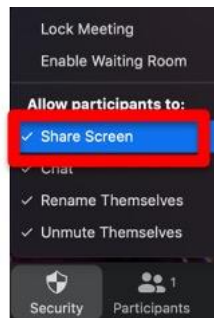




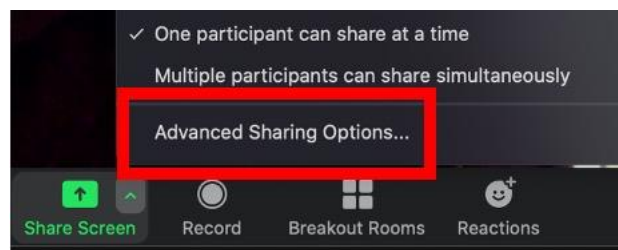
Sharing Content – Enabling Participant Sharing

Computers & Laptops

The normal setting for Zoom meetings is to have participant sharing disabled. A host can change this setting during the meeting to enable everyone to share. This can be done by clicking on the security icon and checking against **"Share Screen"**.



For more options, click on the up-arrow next to the **"Share Screen"** icon which gives you some additional choices:



Click on **"Advanced Sharing Options"** to open this menu:



Now click on **"All Participants"** to enable everyone to share. Set that **"Only Host"** can share when someone else is sharing **"on"**. Also have only one participant can share at the same time set to **"on"**.

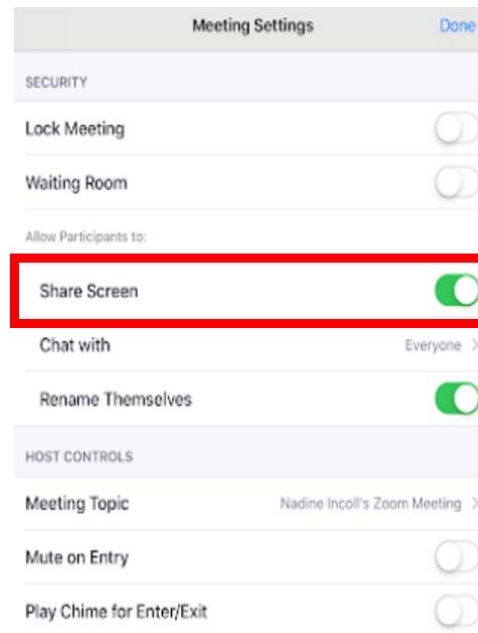
Mobile Devices

To enable participant sharing on a mobile device, click on the **"More"** at the end of the menu bar to bring up this menu:





Click on **"Meeting Settings"**, which opens this menu:



Click on the slider against **"Share Screen"** to turn sharing **"on"**

Sharing Content - PowerPoint

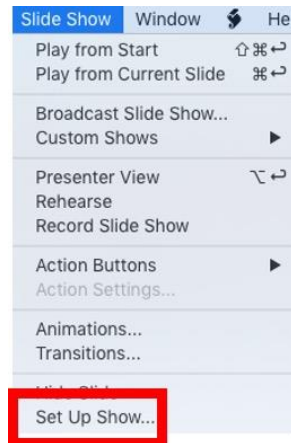
PowerPoint Settings

When setting up your Zoom meeting you need to also check your PowerPoint settings if you plan to use PowerPoint in your meeting.

- Open PowerPoint and click on "Slide Show" in the menu at the top of the PowerPoint screen:

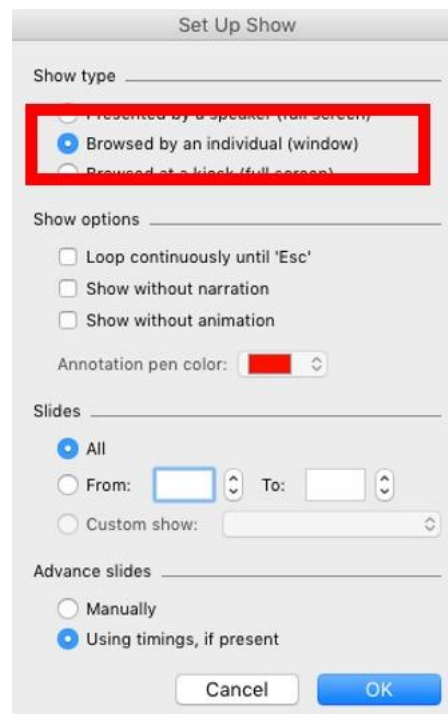


- Now click on "Set up Show" at the bottom of this menu:



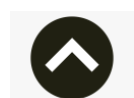
- This brings up another menu as shown below. Click on the check box next to **"Browsed by Individual Window"**.

Making these settings will keep the PowerPoint display within Zoom to less than full screen, so your other controls are still accessible (this should be checked for every slide show as it is not a PowerPoint universal setting for earlier versions of PowerPoint).



Have your live Image in your PowerPoint Slide Show

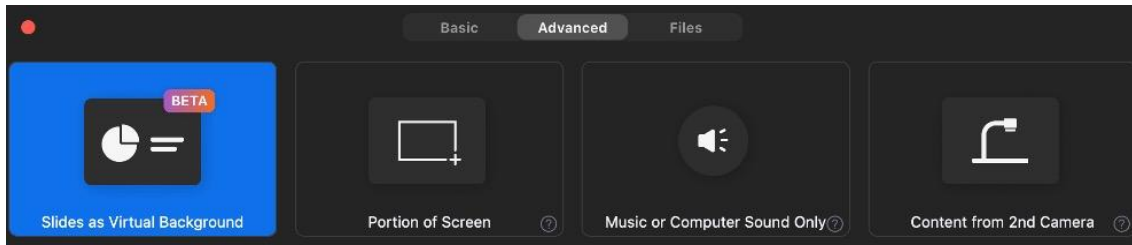
Zoom now has the facility to include your live video image on every slide of your PowerPoint presentation.



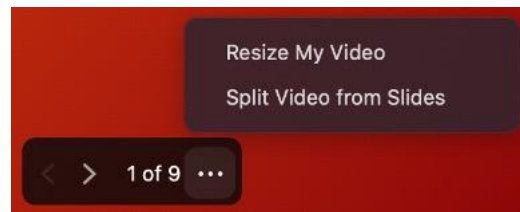
This feature will help to keep people centred on you and what you are saying. You have to lay out your slide show to allow an area in the same place on each slide for your image or be prepared to move the image around the slide as you go.

Using Share Screen to put you Image on Every Slide

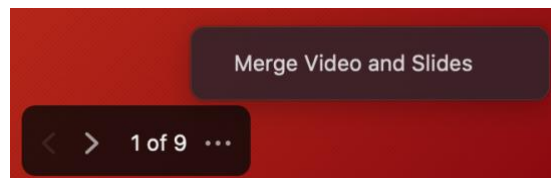
- Click "Share Screen" then "Advanced" at top of the Share Screen window
- Now click on "Slides as Virtual background"
- Zoom opens your computer files so you can select the Slide Show you want
- Click on the file and the Slide Show commences
- As at August 2020 the Beta version does not activate slide animations



The bottom of the slide features a slide number and "...". To open a menu that allows you to resize your image or remove it from the slide by clicking "**Split Video from Slides**".



If you remove your image from the slides you can bring it back onto the slide by opening the menu "...". and clicking on "**Merge Video and Slides**".



PowerPoint Inserting Zoom

PowerPoint now has an insert Zoom function on the Insert menu which enables the seamless display of one slide, a number of selected slides or complete sections of your PowerPoint presentation. You can summarise the entire presentation on one slide, with the option to scroll through the individual slides that follow each of the slides showing in the summary, by choosing **Summary Zoom**, to show selected slides only, choose **Slide Zoom**, and to show a single section or a number of sections, choose **Section Zoom**.

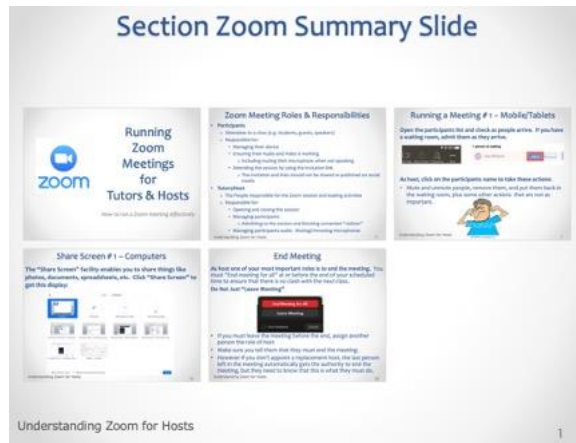
Using **Summary Zoom** or **Section Zoom** allows you to break your slide shows into sessions that you deliver each day or week without having to create separate slide shows for each session.

To get PowerPoint to display correctly, open PowerPoint and start your slide show on the first slide you want to show. Now click on the Zoom icon on the Dock or Task Bar to bring back the Zoom control bar menu. Now click on "**Share Screen**" and share the PowerPoint app, not your computer or the desktop (if you share the desktop you will lose the participants video screens). You can now work through your slide show.

Section Zoom

An example of a **Zoom Section** Slide:





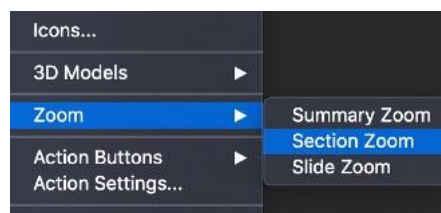
In this graphic you can see that I have divided my presentation into five sections, but you can set up as many or as few sections as you want. You can also achieve the same result in **Summary Zoom** without creating sections.

To show a section, start the slide show and then click on the slide and run through that section. At the end the section the show automatically returns to this Zoom master slide for you to run another section or to end the show. Using this facility enables you to set up your show into sessions and run the appropriate section at each session.

If your slide show does not have sections, to create a section, click on the first slide in what will be the new section and on the **"Insert"** menu select **"Section"** and name the section. Repeat for as many sections as you want.



To create a **Section Zoom**, insert a slide at the start of the show, delete the placeholders on the slide, then you use **"Zoom"** on the PowerPoint **"Insert"** menu and select **"Section Zoom"**. Arrange the slides to suit your needs. You can add or delete sections to/from the summary slide.



Slide Zoom

Slide Zoom allows you to select slides and place them on a master slide. Clicking on the slide then takes you to that slide. When you have set up a **Slide Zoom** slide there will be a Zoom tab on the format bar. Click on this and set select **"Return to Zoom Slide"** so that your show will return to the Zoom slide at the end of the current slide, ready for you to choose another slide. Some versions of PowerPoint do not have the Zoom Format option which makes the **Slide Zoom** less useful.

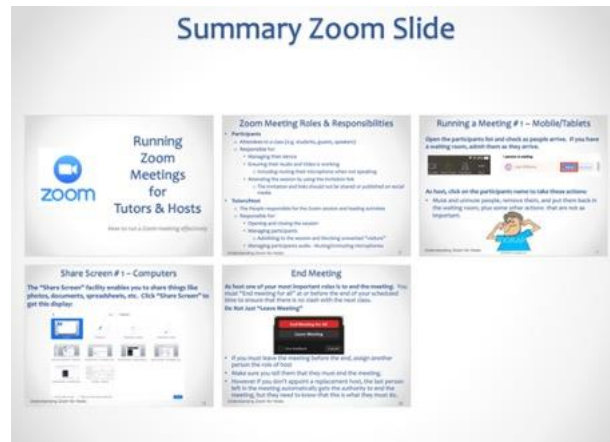
To create a **Slide Zoom**, insert a slide at the start of the show, delete the placeholders on the slide, then you use **"Zoom"** on the PowerPoint **"Insert"** menu and select **"Slide Zoom"**. Arrange the slides to suit your needs. You can add or delete slides to the summary slide.

Summary Zoom

Summary Zoom works well with or without sections set in your slide show. Insert a blank slide at the start of your show and delete the placeholders on the slide. Now open **"Summary Zoom"** in the insert menu and a screen opens with all the slides in your show ready to select. If you have created sections, the first slide in each section will be selected. Click on the slides you want

in the summary and deselect those you don't want, if any, by clicking on the selected ones you don't want included.

To use **Summary Zoom**, start the show with the **Summary Zoom** slide first. Now click on the slide that you want to start with. PowerPoint takes you to that slide allowing you to run through the following slides until you reach the next selected slide. PowerPoint now returns to the **Summary Zoom** slide ready for you to select the next section you wish to work through.



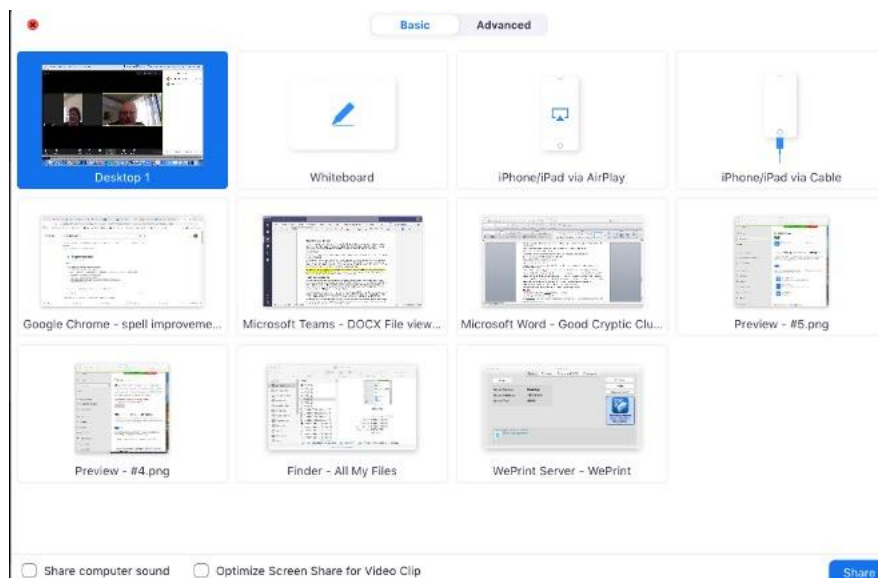
Sharing Content – Computers & Laptops

Screen Sharing

When preparing for the meeting, it is useful to open, on your computer, everything you wish to use in the meeting: all the documents, spreadsheets, slide shows, etc. This means that when you click on **"Share Screen"** all these open items will be displayed for you to select, then you will be able to choose the one you want to use. Otherwise you will have to select your computer icon and then search through folders to find and open the one you want.

It is better to have the applications open than to click on the computer screen and search for the file you want to open. If you choose the latter option, the participants video screens may not display down the right of the screen. For PowerPoint it is better to have the slide show open and ready to run on the start slide than to have to start the show while sharing.

The display of **"Share Screen"** that you will see has the open programs, some Zoom options (Whiteboard, connections to an iPhone/iPad, second camera) and your computer screen (in a blue box):



You can also choose to display your computer screen (top left of Share Content screen). Selecting your computer to display enables you to navigate your way around your computer folders to find the content you want to display. If the program is open already and minimised on the Task Bar or Dock, you can just click on the program icon to open and share it.

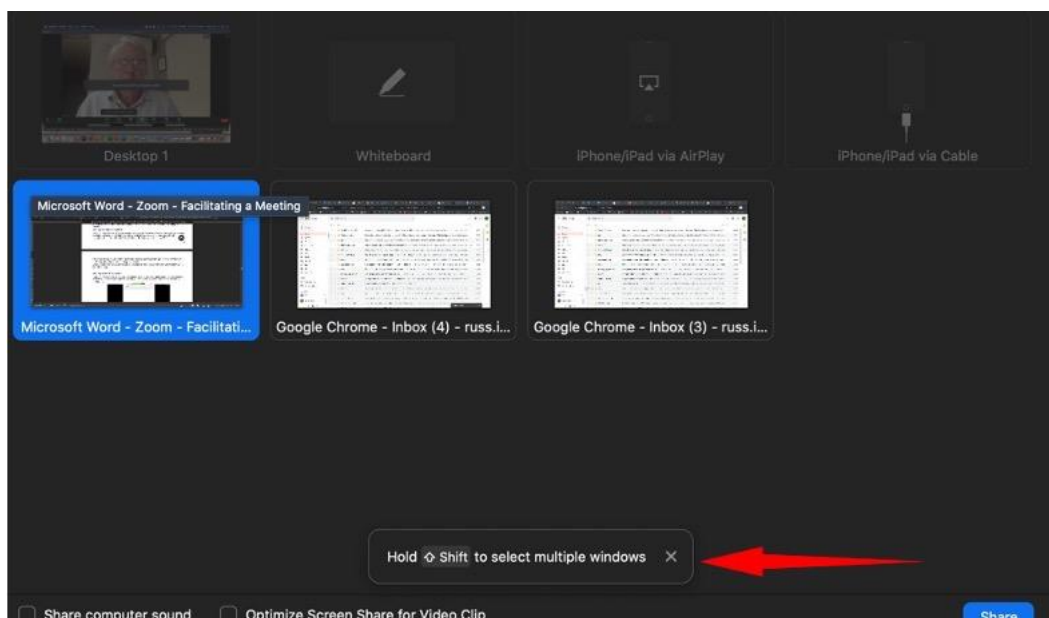


You can share YouTube and other videos, and this is discussed in the section on running a meeting.

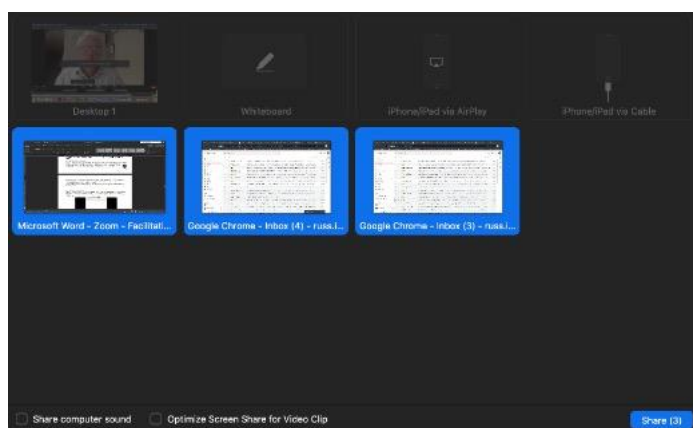
Sharing a Multiple Programs

Zoom includes a facility to display several programs at the same time, which enables you to swap between programs, or between documents, slide shows, groups of photos, etc. without having to stop share and then re-share the next item you wish to display. It is no longer necessary to share your computer screen and then search through Folders/Directories to find the program you want to display.

When you open the share screen window and click on the first program you wish to share you will see this screen and message **"Hold ↑ Shift to select multiple windows"**:



By holding down the shift key you can click on each additional window to select it so that it opens after you click on **"Share"**. Each window you select will show as selected by being surrounded by a blue box:

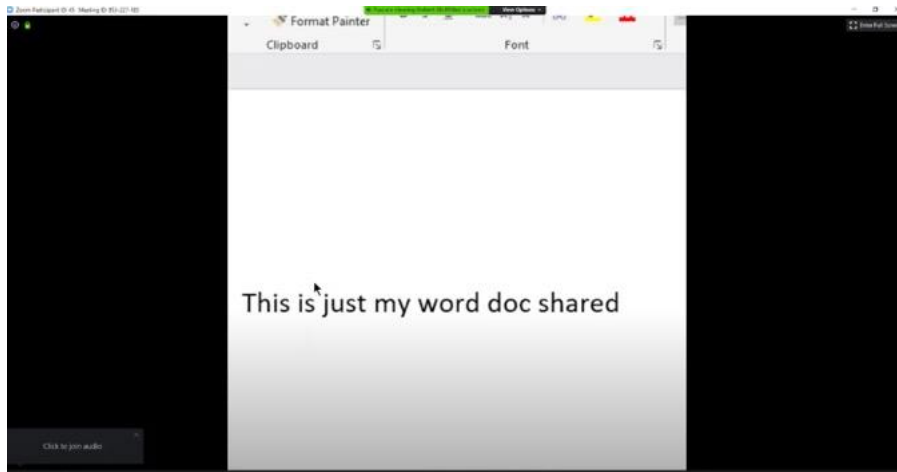


The open programs will all display together on your screen when you share screen, but you can minimise the ones you don't want straight away. They will be available on the Task Bar or Dock to open when you want to refer to them. You can also swap back and forth between programs.

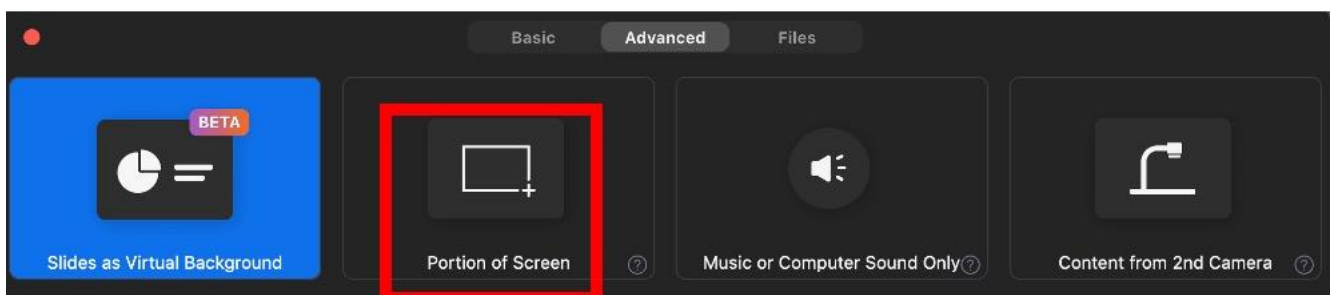
Sharing a Portion of Screen

Zoom includes a facility to display just a section of your screen to participants. Zoom provides a re-sizable window that participants can see, all other areas of your screen cannot be seen by participants.





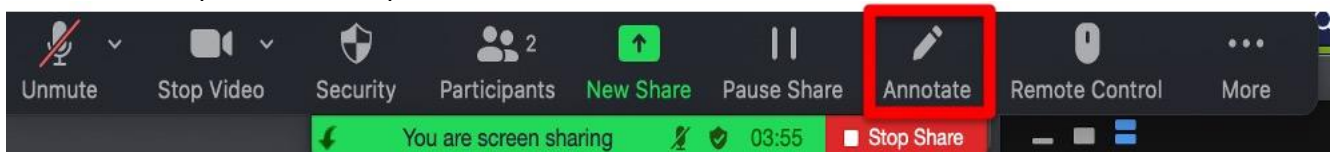
To share just a portion of your screen, click on **"Share Screen"** and then **"Advanced"** at the top of the share screen window. Now click on **"Portion of Screen"** and then **"Share"** and your window will be shared with your participants. Click on the edges of the window to resize the portion displayed.



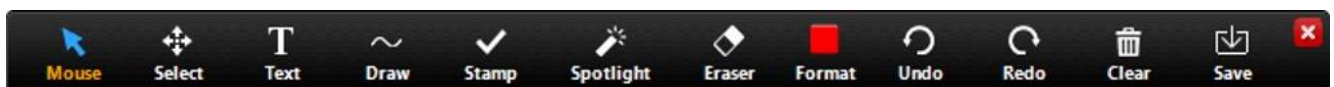
Whiteboard Sharing

Zoom also provides a whiteboard in **"Share Screen"**, on which can you use the annotation tool to write on the whiteboard. When you open **"Share Screen"**, choose the whiteboard.

A new menu opens at the top of the screen.



On this menu click on "Annotate" to get a new menu that gives you choices of the tools you can use on the white board. This is the menu:



Note: The Select, Spotlight, and Save options are only available if you started the shared screen or whiteboard.

Mouse: Deactivates annotation tools and switches to your mouse pointer. This button is blue if annotation tools are deactivated.

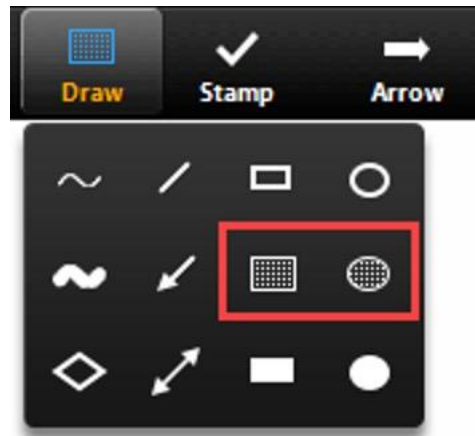
Select (only available if you started the shared screen or whiteboard): Select, move, or resize your annotations. To select several annotations at once, click and drag your mouse to display a selection area.

Text: Insert text, use the keyboard to type text.

Draw: Insert lines, arrows, and shapes.

Note: To highlight an area of the shared screen or whiteboard, select the square or circle icon to insert a semi-transparent square or circle as shown below.





Stamp: Insert predefined icons like a check mark or star.

Spotlight / Arrow: Turn your cursor into a spotlight or arrow.

Spotlight (only available if you started the shared screen or whiteboard): Displays your mouse pointer to all participants when your mouse is within the area being shared. Use this to point out parts of the screen to other participants.

Arrow: Displays a small arrow instead of your mouse pointer. Click to insert an arrow that displays your name. Each subsequent click will remove the previous arrow placed. You can use this feature to point out your annotations to other participants.



Eraser: Click and drag to erase parts of your annotation.

Format: Change the formatting options of annotations tools like colour, line width, and font.

Undo: Undo your latest annotation.

Redo: Redo your latest annotation that you undid.

Clear: Delete all annotations.

Save (only available if you started the shared screen or whiteboard): Save all annotations on the screen as a screenshot. The screenshot is saved to the local recording location.

In the bottom right corner of the whiteboard is a "+" symbol. Click on this and you will get a second whiteboard, clicking again will give you another, etc. Once you have set up more than one whiteboard you can scroll through them using the right and left arrows next to the "+" to change which whiteboard is visible.

Participant Annotation

On U3A scheduled meetings, participants are allowed to annotate. You can check this by clicking on the security icon, if not allowed, click on **"Allow Annotation on Shared Content"** to allow.

Participants must enable the annotation pen before they can annotate. They can do this any-time after you have shared your screen and/or whiteboard by clicking on the annotate icon on the drop-down menu under **"View Options"** on the menu at the top of the share screen.



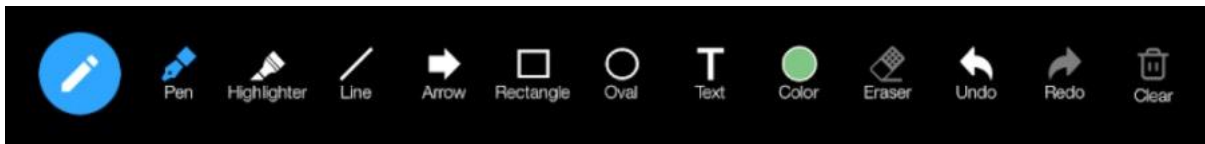
Click on **"View Options"** and then click on **"Annotate"** to bring up the annotate menu so that you are able to write on the whiteboard or any other shared content.

On a mobile device there will be a pen icon displayed on screen, tap on this to open the annotation menu.



A menu will open giving a selection of tools similar to the one available on computers and laptops.

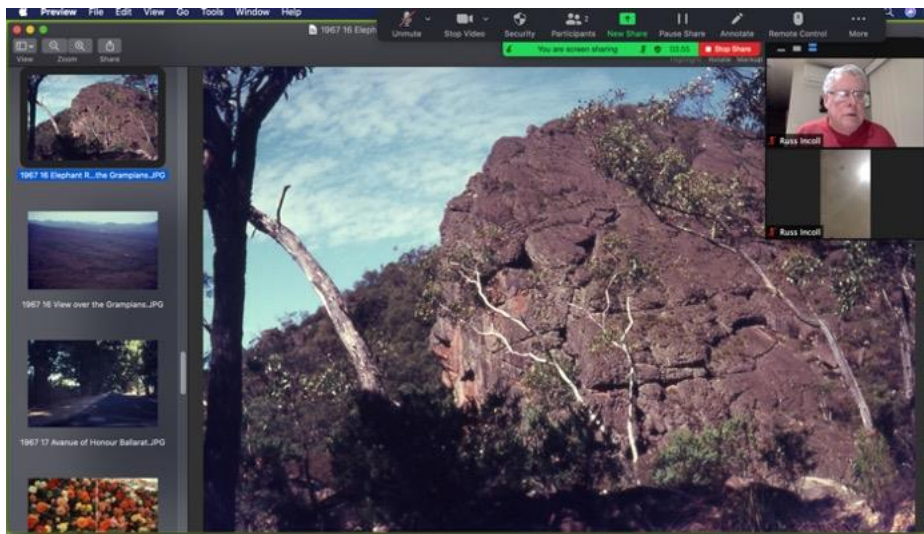




Displaying Photos

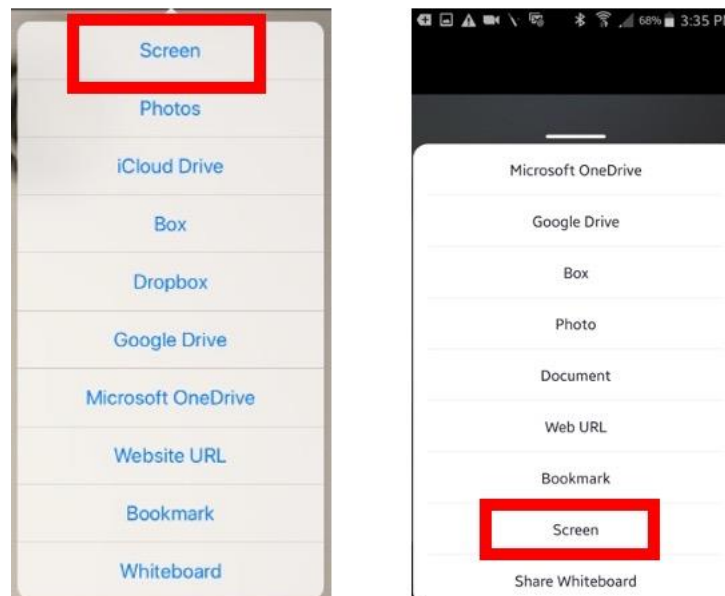
Before the meeting or **before you share** while in the meeting, open Finder or Explorer and open the directory that holds the photos you want. Use the shift, command or control key to select all the photos you want to display then double click to open the photos onto the computer screen, **do not minimise the photo display**. If you do minimise the photos or if you search directories or folders by sharing your computer, you will not have the videos of participants down the side of the shared screen.

When you are ready to share the photos, select **"Share Screen"** and then select the open photo display on the shared screen. The selected photo will display in $\frac{3}{4}$ screen with thumbnails of the other photos available on the left of screen and the videos of participants on the right.



Screen Sharing - Mobile Devices

The options on what you can share are different. Click on "Share Content" to get the share menu



The Apple menu is on the left and the Android menu is on the right. Most of this menu is self-explanatory, but there are a couple that could use clarification

Sharing Mobile Screen & Apps

Screen sharing of the actual screen display that is on your mobile device is a good way to demonstrate software in actual operation on a mobile device.

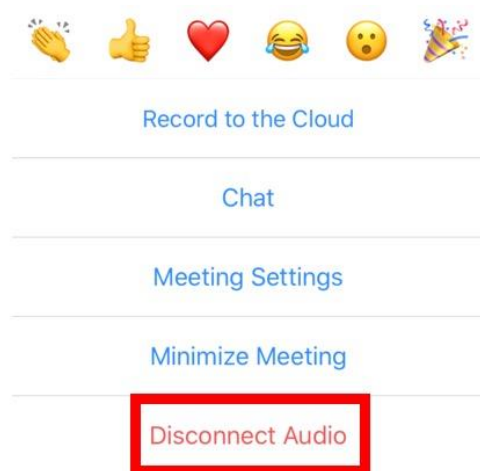
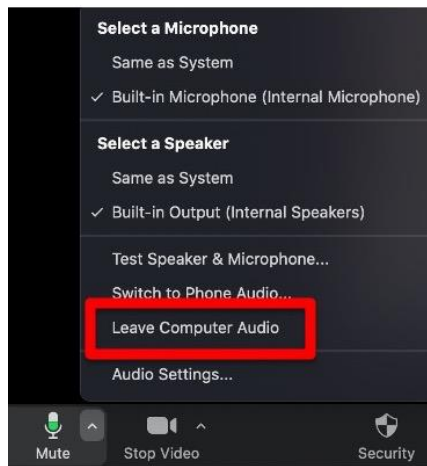


You can do this while you are hosting a Zoom meeting on your mobile device, but you will lose the view of the videos of the participants while you are sharing.

A more effective method is to host the meeting on your laptop or desktop and log into the meeting as a second participant on your mobile device. If you want to demonstrate apps on both a tablet and a phone, log them both in as participants.

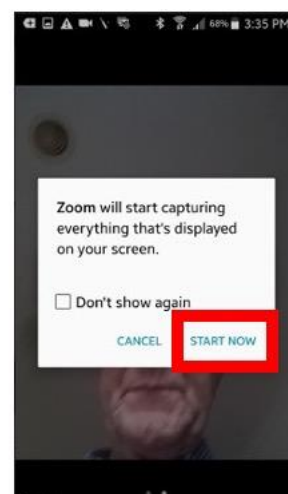
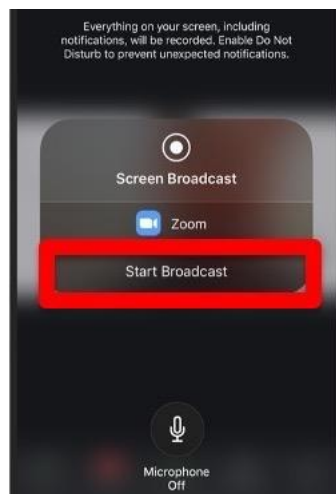
Whichever way you go you must disconnect the audio on all the devices except for one, otherwise you will get audio feedback. It is best, in our opinion, to use your phone for audio if your phone is connected. If not, use the tablet for audio.

To disconnect audio on your laptop/desktop, click on the up-arrow next to the microphone icon and click on **"Leave Computer Audio"**, shown on the left below.



To disconnect audio on your tablet or phone, tap on the three dots at the end of the Zoom menu to open the menu shown above, now tap on **"Disconnect Audio"**, shown above on the right.

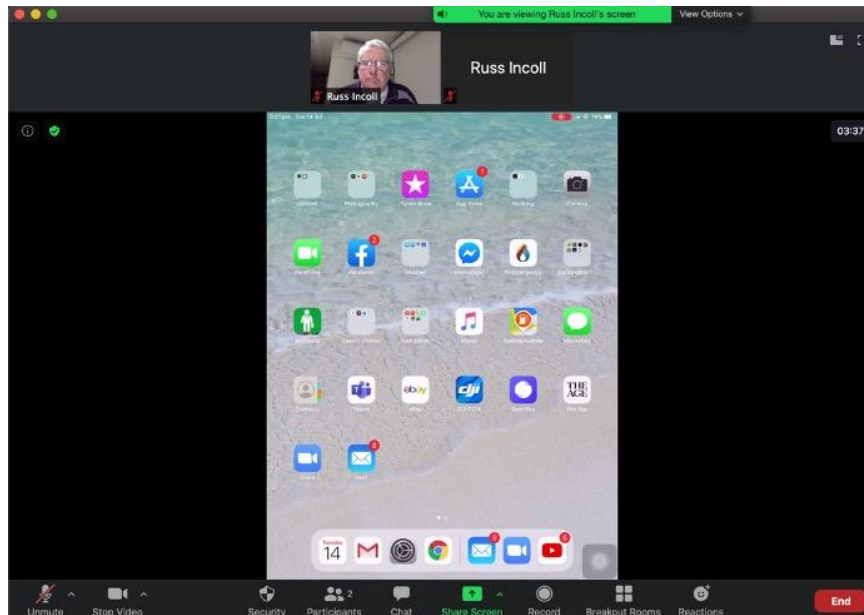
To share your mobile screen, tap **"Screen"** on the menu that opens when you tap **"Share Content"** (see menus above). A new menu will open to indicate where to share your screen. Tap **"Zoom"** then tap **"Start Broadcast"** on an Apple device or on an Android device just tap **"Start Now"**.



After a brief countdown, a message will let you know that you are successfully sharing your screen.

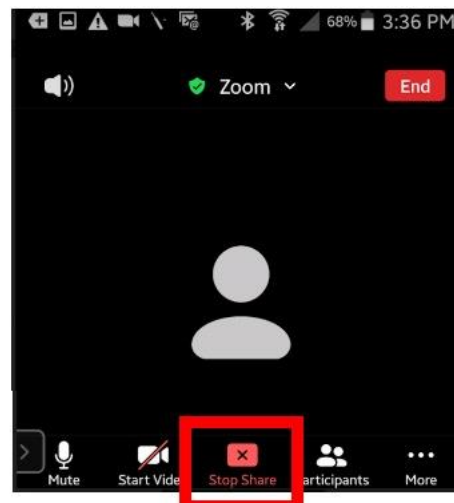
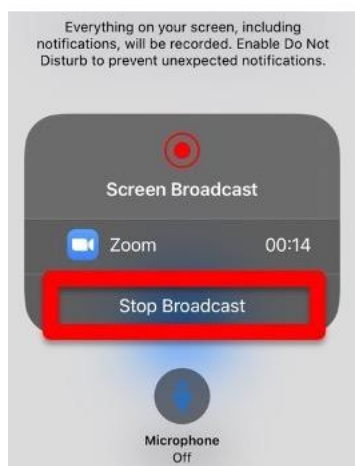
You won't be able to see other meeting participants on your mobile device screen, but other participants will be able to see your mobile screen as shown below:





Tap the mobile device home button to minimise the Zoom screen on your mobile device to return you to the mobile device home screen. You will now be able to use your mobile device as normal and open the apps you want to use and show to the other participants.

To end screen share, tap on the Zoom app icon on the home screen and then tap **"Stop Broadcast"** on an Apple device. On an Android device tap on **"Stop Share"**.



Tap above or below the white share content screen on the mobile device to get back to the normal Zoom display.

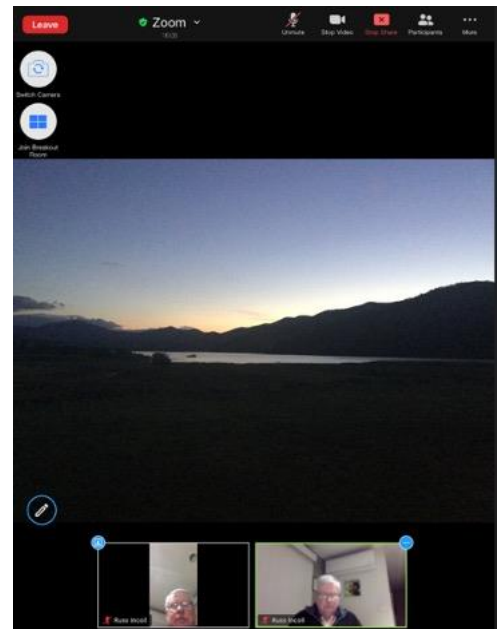
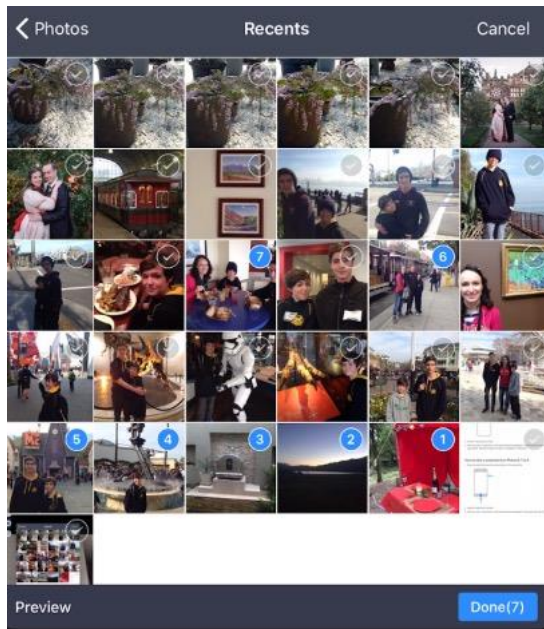
Sharing Photos on a Mobile Screen

Tap on **"Photos"** to open your photos which allows you to select the album and then to scroll through the photos and select the ones you want to show. You select the required photos by clicking on the arrow in the top right corner of the photo. The arrow changes to a number when you tap on it. This selection screen is shown below.

When your selection is complete tap on **"Done"** at the bottom of the window. The first photo selected will display in full screen. Swipe left to scroll through the photos or right to go back.

Stop share and then start share again to make a new selection of photos. The annotation pen is displayed in the bottom left of screen, click on this icon to display all the annotation tools: use these to highlight aspects of the photo.





Sharing Whiteboard on a Mobile Screen

The whiteboard option opens a white board for you to write on. There is a menu at the bottom of the white board where you can change the colour of the pen, select the pen or eraser, type with keyboard and more, plus redo and undo buttons.

Zoom White Board



When you share content on a mobile device, the share button changes to this icon, which you click on to **"Stop Share"**:



Annotation for Participants

On a mobile device tap on the screen of the shared white board to get the annotation pen. A second tap gives you a choice of tools.

Sharing Video Content

You may wish to show a film, video or YouTube to your meeting and by following a couple of steps you can do this fairly easily:

Share Sound

First click on share screen and in the bottom left click on **"Share computer sound"** to allow people to hear the sound.



Activating this will enable participants to hear the sound of what you are showing more clearly (the sound goes to the audience directly rather than out of your speaker and back via your microphone). You may like to have a practice session with a friend or family to check that the sound level is OK before going live. Otherwise play a small amount and then pause and ask the audience if the sound level is OK.



If you are using YouTube it is better to adjust the sound on the YouTube volume slider so that your computer sound will still be at the correct level when you exit the video.

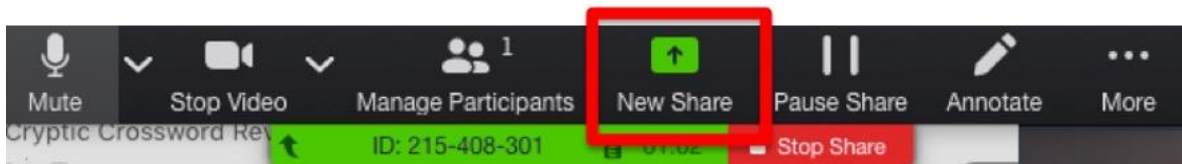
Choosing the Video or Film

Before the meeting you need to get the YouTube video or other film set up to run and then minimise them so that when you **"Share Screen"** they will be displayed ready to go. If you don't do this, you will have to go through your folders to find the film clip or search the Internet to find what you want to show. Once you have the video or film on screen just run it as you would outside a Zoom meeting. When you have finished just **"Stop Share"**

YouTube Sharing

If you want to use a link to open a YouTube video or an Internet page, you have two choices:

- Open the content before the meeting and minimise it so that you just need to click on it on your computer when in **"Share Screen"** to open it.
- Alternatively, you can imbed the link to the content you want to use, in a document, spreadsheet or slide show, to click on the link when wanted.
- Now you must click on **"New Share"** on the menu to display the content.
- If it is a YouTube video, click on the link to start the video, then pause the video, click **"New Share"**, and then start the video again. **"New Share"** is shown on the share screen menu below.



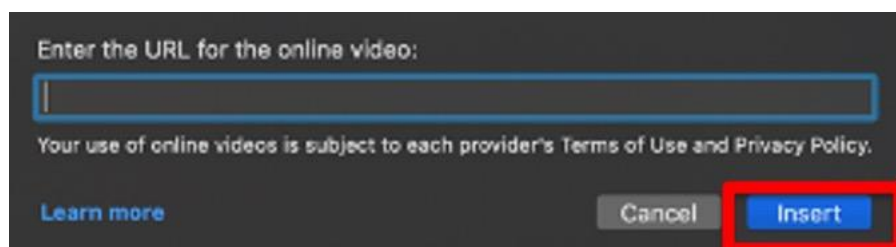
YouTube Sharing using PowerPoint

PowerPoint handles showing YouTube videos effectively without having to do a new share. Set this up by:

- Go to the YouTube website, or the site you use, open the video you want to show, copy the URL of that video
- Open PowerPoint and select the slide where you want to insert the video
- Click on Insert tab, then on the insert menu click on Video, and then Online Film



- This opens a window in which to enter the video URL



- In this new window, paste the copied video URL into the address bar and click **"Insert"**



- Start the video and then immediately pause it. Leave the slide show open on screen at the slide from which you want to start the presentation
- Share the PowerPoint show in **"Share Screen"** and work through the slide show until you get to the video slide
- Now click on play and it should start immediately
- If participants complain that the video is not showing, pause the video
- Now click on **"New Share"** and then start the video, which will now be visible to participants. Embedding the video rather than clicking on a link should prevent this happening

How to Play Music over your Live Stream

Our strong recommendation is to only do this using a Desktop or Laptop device.

Playing music during live stream is an important requirement for exercise, Tai Chi and meditation classes. Playing the music from an external music source such as a CD player does not work as well.

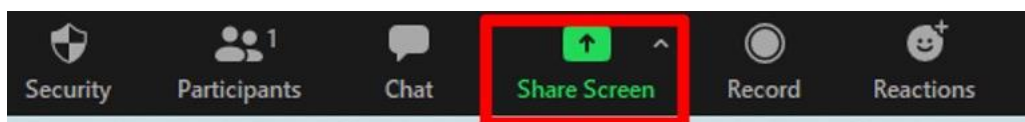
Zoom appears to treat the extra sound source as noise rather than music and tries to minimise the "noise" causing distortion and variable volume of the music. Using a music source within your computer, such as iTunes or YouTube is far more effective, provided you share computer sound as described below.

Preparation before Meeting

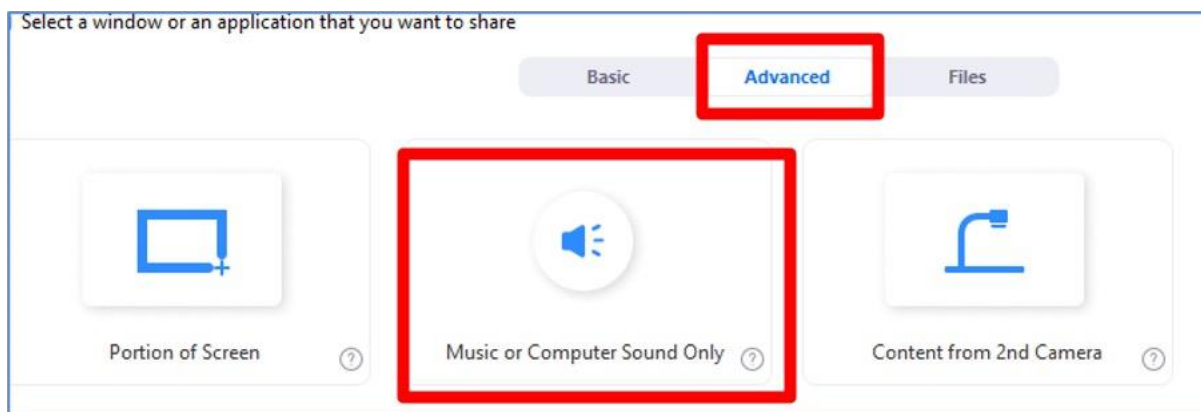
To have your music playing when joining the meeting, first open iTunes or YouTube, or other music source within your PC. Set up a play list and then minimize the app to the task bar/dock at bottom of screen. If you need to adjust volume, do so from within the music app so that your voice volume setting for the meeting will remain at the correct level. Our experience is that the volume on the music source may have to be set as low as 10%. It would be a good idea to set up a trial meeting with a colleague to enable you to set the correct levels.

Playing Music in the Meeting

Go into Zoom and **"Start"** your meeting. When you are in the meeting, click on **"Share Screen"**.

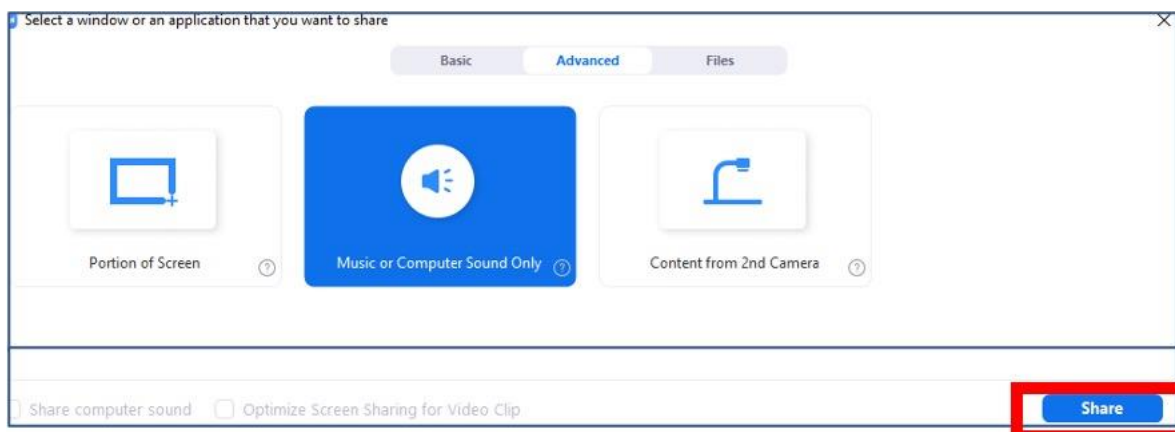


Select **Advanced** option tab at top of Share screen that opens.



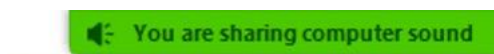
Select middle box **"Music or Computer Sound Only"** then click **"Share"** on bottom right of screen.





Click on iTunes or other Music app on your computer task bar and select the music you wish to play, and press **"Play"**. If you have set it up before the meeting Alt+Tab on a PC or Windows laptop, or Command+Tab on a Mac will swap you to the minimised music app. Now select the tune you want to play and click on play. To stop the music use Alt+Tab on a PC or Windows laptop, or Command+Tab on a Mac then click on stop.

The green bar underneath the menu bar at the top of the screen will show that you are sharing sound.



If you want to stop participants from hearing the music, click on **"Stop Share"** at top of screen. This will stop music share for participants, but you will still be able to hear the music.



If you want to stop the music completely, stop the music in iTunes, YouTube, or your music app. If you leave the music running, when you are finished the class, don't forget to stop music on your computer and sign out of iTunes.

Streaming Host Activities (Exercises, Dancing, Tai Chi, etc.)

The simplest way to do this is to point your computer camera to the area in which you are doing the activity. The Zoom display will show your activities just as it does when you are sitting down hosting the meeting. How effectively this is will depend on the camera in your device.

A better way to show activities is to use a second camera, and that can be a phone, that is set up and positioned correctly before you start the meeting.

Using Your Phone to Film Activities

A simple way to demonstrate activities like painting, craft, cooking, etc. is to use your phone to film and broadcast those activities. You do this by joining the meeting using the phone as a second participant. Your phone may also be an easy way to film other class demonstrations such as exercises, yoga, Thai Chi, dancing, etc. To do this, you first need to start your meeting on the device you normally use to host a meeting, a laptop or desktop are recommended rather than a tablet.

Before you join the meeting on your phone, you have to isolate computer audio to prevent feedback, **muting your microphone is not enough**. You can do this in Zoom settings, but if you are using a U3A shared licence you will have to do this after you have started or joined the meeting.

If you have started the meeting on your laptop/desktop, click on the up-arrow next to the microphone icon and click on **"Leave Computer Audio"**, shown on the left below.



The image consists of two side-by-side screenshots from the Zoom mobile application interface.

The left screenshot displays the 'Audio' settings menu. At the top, it says 'Select a Microphone' with the option 'Same as System'. Below that, 'Built-in Microphone (Internal Microphone)' is selected with a checkmark. Under 'Select a Speaker', 'Same as System' is selected, and 'Built-in Output (Internal Speakers)' is also selected with a checkmark. Further down, there are options for 'Test Speaker & Microphone...', 'Switch to Phone Audio...', and 'Leave Computer Audio'. The 'Leave Computer Audio' option is highlighted with a red rectangular box. At the bottom of the menu is 'Audio Settings...'. The bottom status bar of the app shows icons for 'Mute', 'Stop Video', and 'Security'.

The right screenshot shows the 'More' menu, which is accessed by tapping the three dots icon at the top right. The menu items are: 'Record to the Cloud', 'Chat', 'Claim Host', 'Meeting Settings', 'Minimize Meeting', and 'Disconnect Audio'. The 'Disconnect Audio' option at the bottom is highlighted with a red rectangular box. The top status bar of the app shows icons for 'Mute', 'Stop Video', 'Share Content', 'Participants', and 'More'.

To hear others
please join audio

Call Over Internet

Dial in

Cancel

[illegible]

Setting up and Using a Second Camera (Webcam)

With a second camera connected to your computer and set to film the view you want; it is very easy to show what this camera is filming over Zoom. This second camera is a **"Webcam"**.

The integrated webcams that come with laptops are generally OK for a single tutor hosting a Zoom meeting. If your webcam produces quite a poor-quality image of your face and background, you can improve this by adding an external webcam, expect pay anything from \$80 to \$150.

External Webcams for Tutors

Some tutors find their online class much easier to manage if they have a separately detached external webcam, in addition to the normal front-facing camera, to better demonstrate the physical aspects of their class. The use of a webcam suits such classes as any exercise classes (tai chi, yoga, dancing, etc), art and crafts (so that the webcam can be set up to "look over your shoulder at what you are doing"), cooking classes, etc.

For these situations it is best to select a webcam that has a few features:

Selection Criteria for External webcams for Tutors

- USB connection
- Reasonable image resolution, i.e. true HD image quality (1080p)
- Auto-focus, to cope with the subject being a varying distance from the camera (if your subject is moving around)
- The ability to handle low light conditions, if you are in a dim area
- If you want to mount the webcam on a separate small tripod, pick a webcam that has a tripod support fitting. Otherwise all webcams can be clamped to anything convenient.

Alternatively, you could use a Bluetooth connected camera, which you would then have to **"Pair"** with your computer in its Bluetooth settings. This is not too difficult but is another step in the process. The absence of a cable on a Bluetooth camera may have advantages, as there is no cable to get in the way, if you are moving the Webcam around.

The Logitech C920 HD Pro webcam (approximately \$190) is an excellent webcam that handles most situations well. Other models and other brands in this quality range will also be fine.

Note of caution:

With webcams being hard to come by in these COVID days, there are a quite a few unbranded models appearing on the marketplace. Some of these are fine, some are adequate, and some are just not up to the claimed specification. A good reliable webcam with the features listed above will generally cost \$100- \$200.

Be careful with "no-brand" webcams with the spec above. We have tried one (\$70) which claimed to be HD (1080p), but when we ran a software assessment tool on it, it turned out to be 640 (VGA quality, probably 15 years old). Another webcam came from Kogan (\$99) and was fully 1080p, but the lens showed distinct barrelling of the image at the outer edges, nowhere as good as the Logitech webcams. But in the normal use it would be adequate. One small issue with the Kogan webcam is that it uses UVC drivers so you may have to update your drivers on Windows machines.

Webcam and other Equipment for Hybrid Classes

In the future, when the U3A's are able to return to the classroom, it is likely that social distancing will mean that the maximum number who can attend classes in person will be quite small. The remaining class members, and those who are reluctant to come in for health reasons, should be able to join the class via Zoom, that is a hybrid class.

The equipment required to facilitate this will usually be supplied by the U3A, but inevitably will require some form of video conferencing facilities. We are yet to trial this, but hybrid classes will require a much higher specification external webcam mounted under the room TV, and an additional external microphone to pick up the sounds of a number of people sitting in a U-shaped configuration facing the TV.

Running a hybrid class from a classroom will not be much different to running it at home, using a U3A supplied laptop, or bringing in your own.



Because of COVID-19 restrictions we have not been able to run full trials of hybrid classes but offer these suggestions:

- Use a webcam with minimum specification as detailed above, but in addition, have as wide a field of view as possible, preferably over 100°
- The microphone needs to be a specialist microphone; in this situation the webcam microphone is usually unable to pick up clear sound from all around the room. The Blue Yeti Nano (\$168) tested very well, and with a standard USB connection it is very easy to set up and use
- For the webcam we would choose the Logitech c930e (\$228), if available, or close equivalent, used with the Blue Yeti Nano microphone

Alternative Ways to Use a Webcam

You can use a Webcam over shared screen. This will keep your video image visible to other participants as well as showing the activity you are filming on the shared screen.

Alternatively, you can just switch between the two cameras without sharing, so what participants see will be either

- Vision of you as filmed by your device camera as normal

OR

- Vision of the activity filmed by the Webcam without you being visible, unless you move into the range of that camera

This second method of using the Webcam is well suited to exercise and art classes where the tutor moves into the activity area and is filmed by the second camera (with a short lapse as the tutor moves into the shot).

Setting up and using a Webcam without Screen Sharing

Apart from pointing your device camera at the area of activity to film what you do as tutor, this is the next simplest way of filming demonstrations (exercises, artwork, cooking, craft, etc.). Sadly, it is not possible to connect a Webcam to a phone or tablet, well it is, but the connection process is very complicated.

To use a webcam without screen sharing:

- First connect a webcam to your computer or laptop and mount it on a tripod or suitable support
- Start you meeting as normal
- If your screen shows the second camera view, switch to your main camera by clicking the "^^" next to the video camera icon on the menu bar and selecting the computer camera on the menu that pops up



- Alternatively, a quicker way is to use hot keys to swap between cameras:
 - On a Mac – Command+Shift+N swaps cameras
 - On Windows – Alt+N swaps cameras
- Get the meeting going and swap to the second camera as you need, use the speed keys or the "^^" next to the video camera icon

Setting up and using a Webcam with Screen Sharing

Using a Webcam this way will keep your video image available when you finish the demonstration and return to your computer without having to stop share.

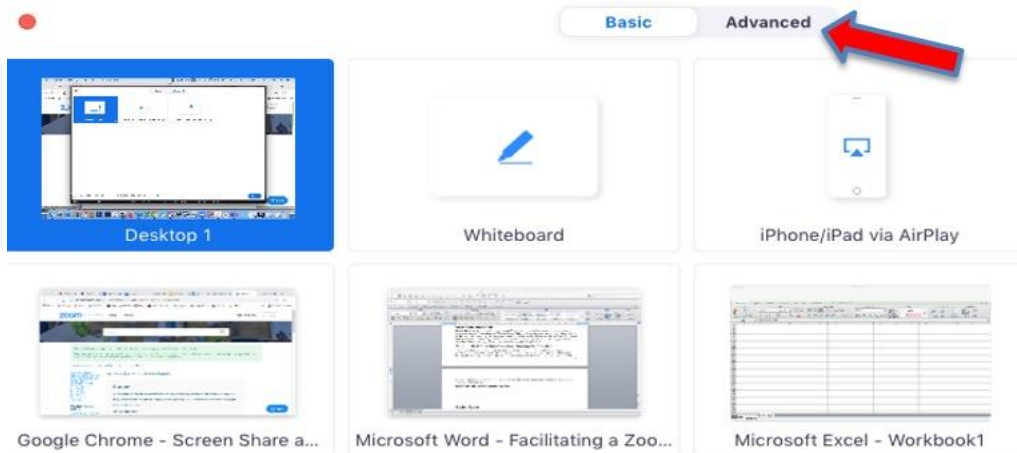
To use the second camera this way:

- Click on "**Share Screen**" which brings up a display of available content, in the bottom left of this display is:

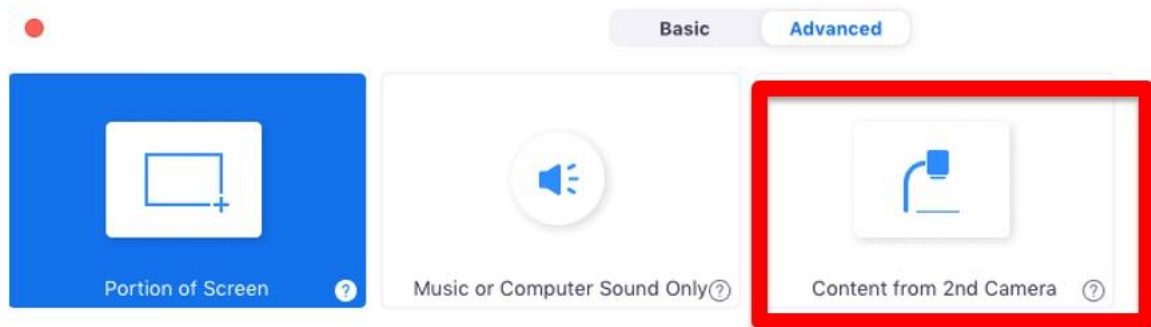


☐ Share computer sound ☐ Optimize Screen Share for Video Clip

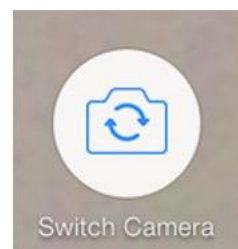
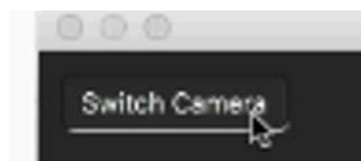
- Click on **"Share computer sound"** and **"Optimize Screen Share for Video Clip"**. The second option increases the speed of transmission of the video to improve display quality (this roughly doubles your data use).
- Now click on **"Advanced"** at the top of the screen:



- This opens the following screen:



- Click on **"Content from 2nd Camera"**, this is your Webcam
- Now click on **"Share"** in the bottom right of screen as is normal when you share
- If or when you want to switch cameras back to your normal camera click in the top left corner of the shared screen on **"Switch Camera"**. Use this button to toggle back and forth between cameras. The icon on the left is a computer, on the right is the mobile icon.



- When you have finished click on **"Stop Share"**.

Sharing your mobile screen (iOS) (Computers & Laptops)

Overview

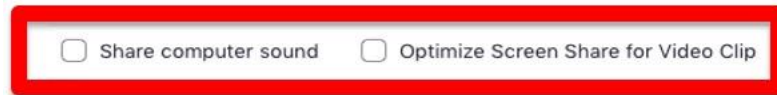
Zoom allows for iOS screen sharing from iPhone and iPad. You can share wirelessly for both Mac and PC, utilizing iOS Screen Mirroring, or you can connect your iOS device to your Mac computer with a cable to share.

You can also share your entire iOS device screen using Screen Recording on iOS 11 or later. However, some types of videos cannot be shared when using Screen Mirroring.

To mirror your mobile screen:



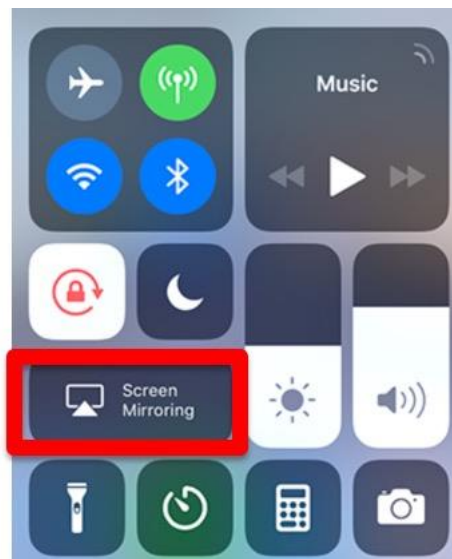
- Click on **"Share Screen"** which brings up a display of available content, in the bottom left of this display is:



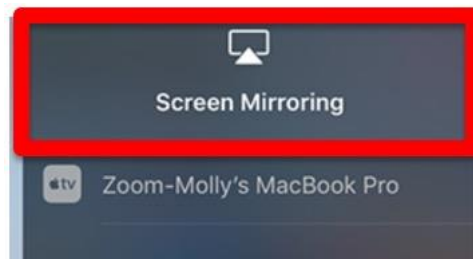
- Click on **"Share Computer Sound"** if you want to share sound
- Click **"Optimise Screen Share for Video Clip"** if you want to show a video
- Now click on **"iPhone/iPad via AirPlay"** or **"iPhone/iPad via cable"** depending on how you are connecting to the mobile device. Click **"Share"**

Sharing your Screen with AirPlay Screen Mirroring

You may be prompted to install the plug-in, so choose that. Follow the on-screen instructions to connect your iOS device. On your phone, swipe up to access the control centre.



Tap **"Screen Mirroring"**. Then choose the **"Zoom-your computer"** option.



Your phone is now shared into the meeting

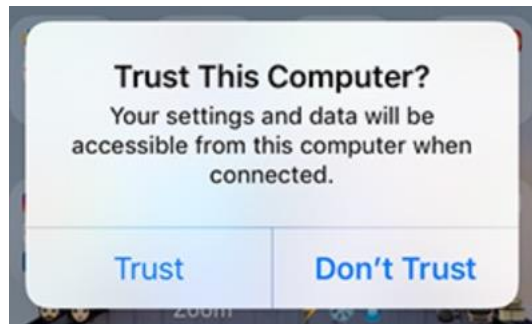
Sharing your Screen with a Wired Connection

Note: Sharing with a wired connection is only possible on Mac.

In your meeting, click **"Share Screen"** and choose **"iPhone/iPad via Cable"**. If you would like to share your phone audio into the meeting, check **"Share computer sound"**. Click **"Share"**.

Follow the on-screen instructions displayed. Connect your iPhone or iPad via cable. When prompted on the iOS device, select Trust.





Enter your iPhone or iPad passcode if required. Your iPhone or iPad is now shared into the meeting.

Zoom Meeting Breakout Rooms

Overview

Breakout Rooms are meeting sessions that are split off from the main Zoom meeting. They allow the participants to meet in smaller groups independent of each other. Breakout Rooms can be used for collaboration, different selected activities, Trivia competitions, or for individually focussed discussion. Participants can be pre-assigned to Breakout Rooms or allocated to Breakout Rooms when Breakout Rooms are created during the meeting. For large meetings pre-assignment is recommended.

To make it easier to manage Breakout Rooms with 20 or more participants it can be useful for the host to have another person willing to act as the co-host to assist in running the Breakout Rooms. A co-host, if appointed, has the same powers in running Breakout Rooms as the host, powers such as starting or ending Breakout Rooms, assigning participants, etc. In large meetings more than one co-host could be appointed, one to manage assignments, another to monitor waiting room and chat, and another to handle calls for assistance for example.

Requirements for Pre-assigning Participants

You can set up all your Breakout Rooms prior to your meeting and pre-assign your participants to their rooms. This will make things easy for you in your Zoom meeting.

Note: If you plan to do this on your own licence, make sure to enable **Breakout Rooms** and enable **Join before Host** in Zoom Settings. This pre-assigning option will not be available if you are using a shared U3A licence, but Breakout Rooms are enabled on the U3A Mornington shared licence so you will be able to assign people to Breakout Rooms during the meeting.

To pre-assign participants to Breakout Rooms, and have them assigned to their rooms correctly, participants must:

- Have a current Zoom account – free or paid
- Have a valid email address
- **Be signed into their Zoom account** when they join the Zoom and **use the same email address** to join the meeting

In addition:

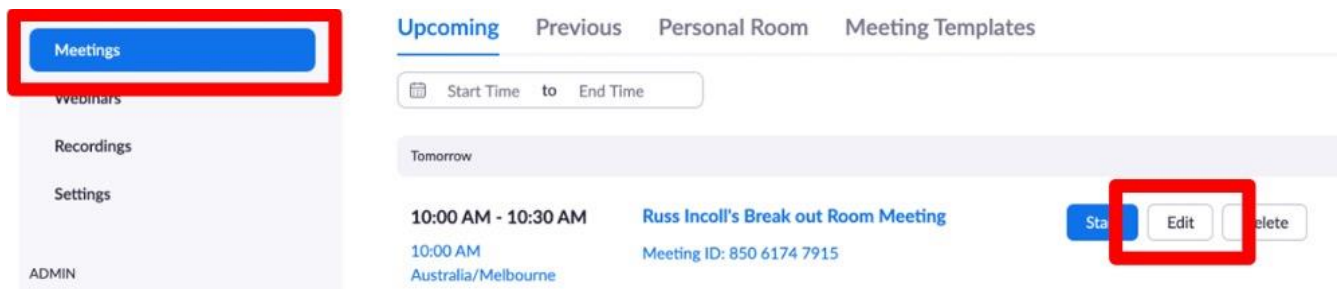
- You **must complete** this pre-assignment **before** you email the meeting link to participants

When you pre-assign participants to rooms, you use their email address to assign them to rooms. The first step in the process is to schedule the meeting and then edit the meeting to assign people to the Breakout Rooms. These assignments can be changed at any time, as more people enrol for the meeting or people drop out.

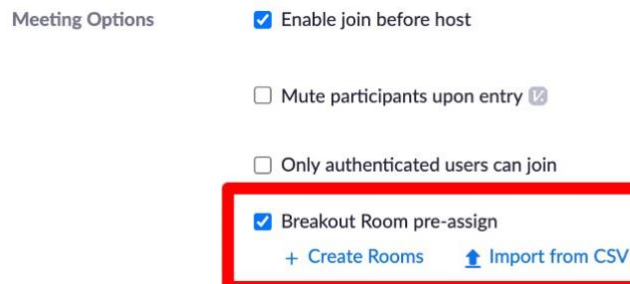
Per-assigning Participants

Open your Zoom settings portal and click on **“Meetings”** and then click on **“Edit”**.

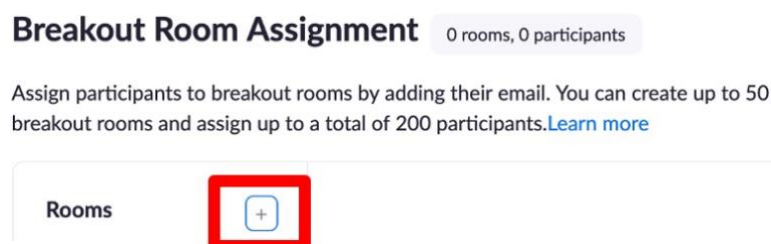




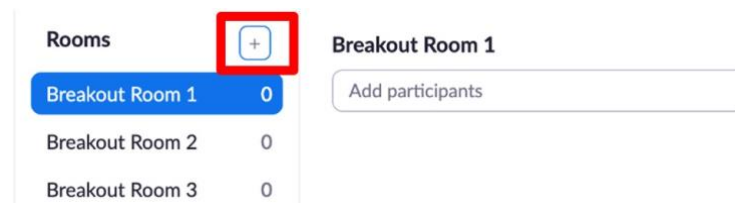
This will open a new menu, scroll down to **“Breakout Room pre-assign”**.



Now assign people to rooms by clicking on **“Create Rooms”** and then **“+”**. This is also the place where you go to make all changes to the rooms.



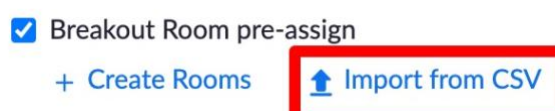
Clicking on the **“+”** creates the first room for you to add the email addresses of the people you want in that room. Clicking the **“+”** again adds more rooms”. Click in the **“Add Participants”** box to add people to the room.



You can also load people to Breakout Rooms using a CSV file. Set up an excel spreadsheet with the first column **“Pre-assign Room Name”**, and second column will be **“Email Address”** of participants, after entering participants save file as a CSV.

	A	B
1	Pre-assign Room Name	Email Address
2	roomA	Candace.Girard@tufts.edu
3	roomA	Elaine.Almeida@tufts.edu
4	roomB	Jonelle.Lonergan@tufts.edu
5	roomB	Neal.Hirsig@tufts.edu

Zoom has a template to download to enter the pre-assignments (you can still add additional people manually before or during the meeting). After entering the participants in the spreadsheet and saving as a CSV file, click on **“Import from CSV”** to import the pre-assignments.



Once the Breakout Rooms are created you can edit them. To edit Breakout Rooms names, hover over the room name and click the pen icon.



To delete a room, hover over the room and click on the bin icon.

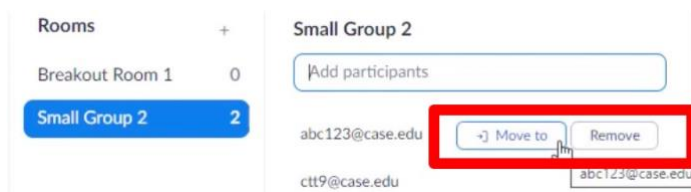


Whenever you make changes to the Breakout Rooms remember to save the changes by clicking **"Save"**. You also must click **"Save"** on the meeting page before exiting the Zoom web portal.

To make changes to the Breakout Rooms go back into the Zoom web portal, open **"Meetings"**, hover over the meeting name and click **"Edit"** alongside the meeting name, and then click on **"View Detail"**



You can remove a person from the room or move them to a new room by hovering over their name and clicking **"Remove"** or **"Move to"**.



To add participants, click on the Selected room to open the "Add Participants" box, click in this box and type their email address, then click enter.

When you open your Zoom meeting these pre-assignments will be active, click on Breakout Rooms icon to check the room assignments. If people arrive late to the meeting they will still be automatically assigned to rooms. If people join the meeting who have not been pre-assigned, they can be assigned to breakout Rooms during the meeting at any time. If the rooms have started, and you assign people to a room, they will be **immediately** moved to that room. Managing room assignments during the meeting are covered in the section below **"Assigning People to Rooms"**.

Creating Breakout Rooms during a Meeting

Breakout rooms can be implemented in a Zoom meeting without the pre-assignment of participants, to do this:

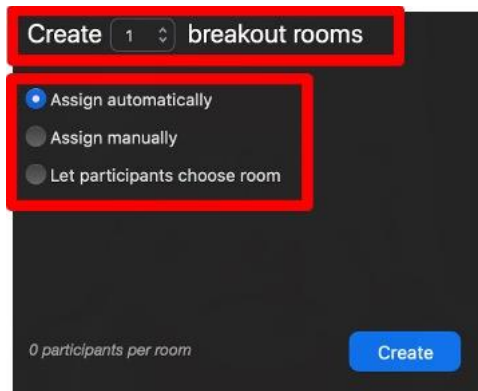
1. Start an instant or scheduled Zoom meeting.
2. Click **Breakout Rooms** icon on the menu bar.



Select the number of rooms you would like to create, and how you would like to assign your participants to those rooms:

- **Automatically:** Zoom splits your participants evenly into all of the rooms. This is certainly the easiest way to go
 - **Manually:** Choose which participants you would like in each room
Selecting Manually will open a menu in which you can allocate participants to rooms
 - **Random:** Participants choose what room they want to be in
3. Click **Create Breakout Rooms**.



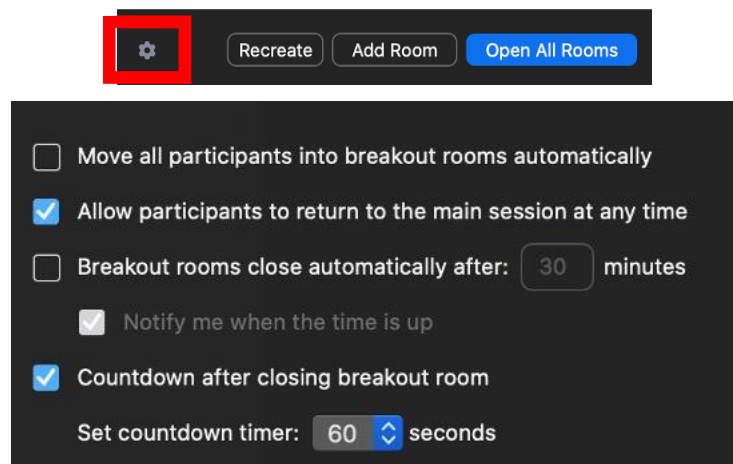


4. Your rooms will be created but will not start automatically. You can manage the rooms prior to opening them by following the instructions below.

If you allow people to choose their own room, they click on the Breakout Room icon on their menu bar to select their preferred room.

Options for Breakout Rooms

After creating the Breakout Rooms, click **"Options"** to view additional Breakout Rooms choices. **"Options"** can also be shown on the menu as a **"Settings"** cog.



Click to check any of the options that you would like to use for your Breakout Rooms.

Move all participants into Breakout Rooms automatically: Checking this option will move all participants into the Breakout Rooms automatically. If this option is unchecked, the participants will need to click **Join** to be added to the Breakout Room. Automatic assignment would seem to be a good choice for U3A classes.

Allow participants to return to the main session at any time: If this option is checked, the participants can move back to the main session using their meeting controls. If this is disabled, participants will need to wait for the host to end the Breakout Rooms.

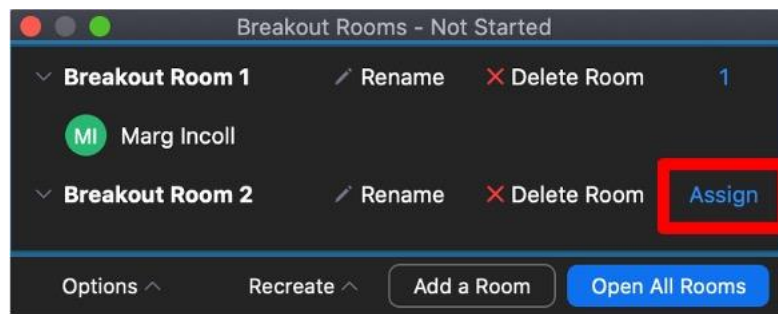
Breakout Rooms close automatically after x minutes: If this option is checked, the Zoom will automatically provide the host a message **"Close all Rooms"** after the time you set. The host clicks on this button to close all the rooms

Notify me when the time is up: If this option is checked, the host will be notified when the Breakout Room time is up.

Countdown after closing Breakout Rooms: If this option is checked, the participants will be returned to the main session when the set time expires and will be given a countdown of how much time they have left before the room closes. The host can use the broadcast facility described later to warn participants of impending closure of Breakout Rooms.

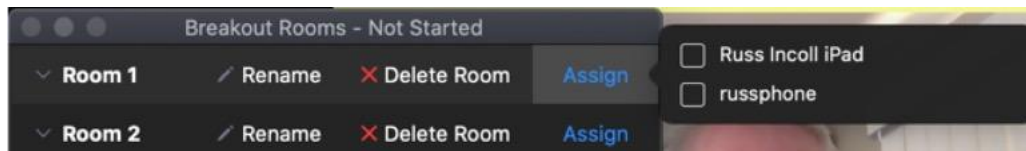
Follow the steps explained below to assign participants to rooms or click **Open All Rooms** to start the Breakout Rooms (if participants are to be assigned automatically).



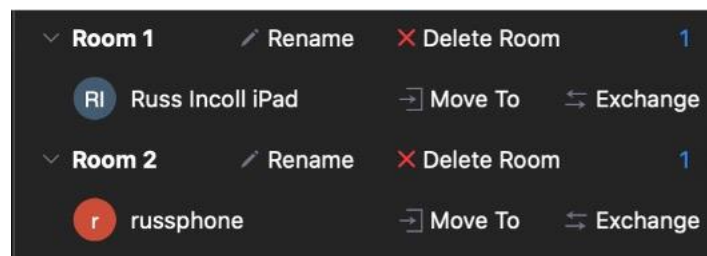


Assigning People to Rooms

To assign participants to your rooms, select **Assign** next to the room you wish to assign participants to, click on the participant's name to select the participant/s you want to assign to that room. Repeat this for each room.

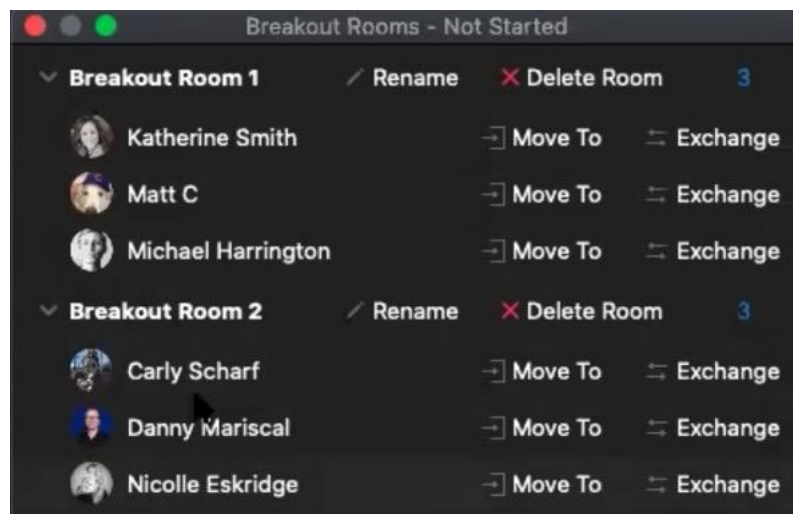


Once a participant has been assigned (manually or automatically), the number of participants will show in place of the Assign button, and you now click on this number to assign more people.



Rearranging Breakout Rooms

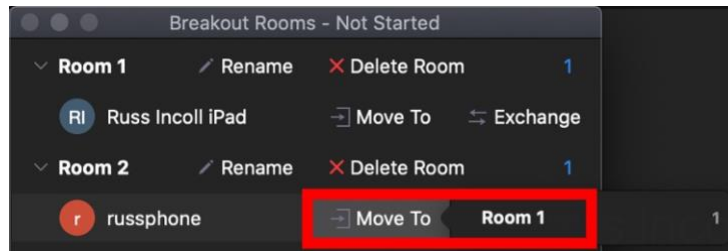
After manually or automatically assigning participants to rooms, you can rearrange the participants. The Breakout Room menu looks like this:



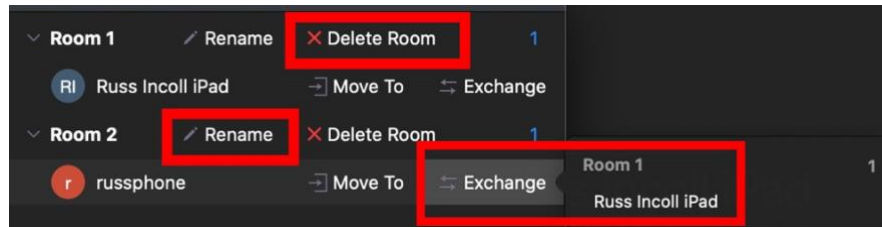
Participants who are not assigned to Breakout Rooms will remain in the main meeting when the Breakout Rooms are started. There are a number of controls you have to manage the Breakout Rooms.

- **Move to** (participant): Click on **"Move To"** which brings up a list of all rooms, now select a room to move the participant:



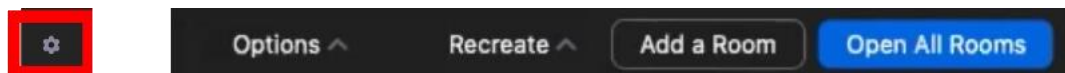


- **Exchange** (participant): Click on “**Exchange**” next to the first participant and then select and click a participant in another room to swap with the selected participant:

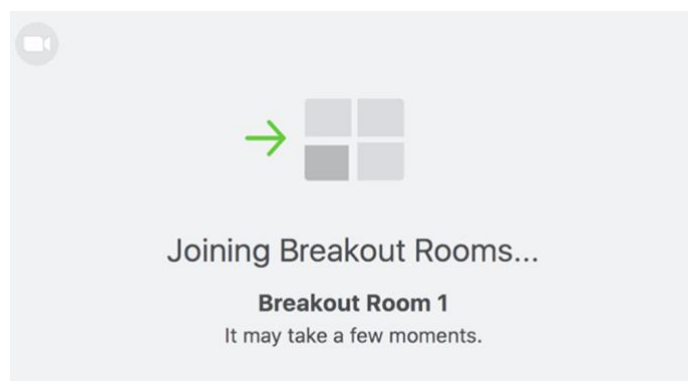


- **Delete Room:** Click on “**Delete**” next to the Breakout Room name to delete the selected room.
- **Rename Room:** Click on “**Rename**” to alter the name of the room

At the bottom of the Breakout Room menu you will see this menu bar which gives additional controls (the word “**Options**” may be replaced by the gear icon):



- **Recreate:** Deletes existing Breakout Rooms and creates new ones. If you have pre-assigned people to Breakout Rooms when you click recreate you are given the choice to make new assignments or to keep the pre-assignments.
- **Add a Room:** Adds another Breakout Room.
- **Open All Rooms:** Starts the Breakout Rooms.
 - All participants will be moved to their respective rooms after confirming the prompt to join the Breakout Room. If “**Automatically**” has been checked, they will be moved immediately into their rooms
 - The host (plus co-hosts, if any) will be left in the main meeting until manually joining one of the rooms.
 - All people manually joining a room will see the following message displayed when joining the Breakout Room



Managing Breakout Rooms in Progress

Once the Breakout Rooms have been started, the Breakout Room display changes (click on the Breakout Room icon to open this display).

- If a participant has not joined the session yet, it will be noted by “**Not Joined**” next to their name. Participants hover over

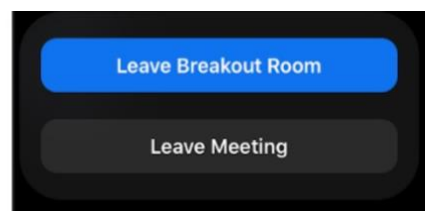
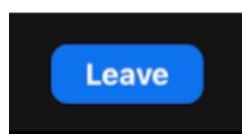


- Alongside each Breakout Room name is **"Join"** which the host clicks on to join that selected room
- If the option **"Later"**, rather than **"Join"** is chosen by participants when automatic joining is not activated, participants can join when they want to by clicking the **"Breakout Rooms"** icon on the Zoom menu bar and clicking on the room to which they are assigned



Join: Hosts clicks **"Join"** to join that Breakout Room.

Leave: In Breakout Rooms, the **"Leave"** icon is coloured blue. The host and participants click **"Leave"** to leave the room and return to the main meeting or to leave the meeting (only shows when in a Breakout Room). If the Breakout Room settings do not allow people to return to the main session, they will only be able to leave the meeting.



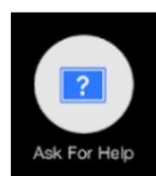
Close All Rooms: This is displayed at the bottom of the Breakout Room menu once rooms have opened. The host can click on this at any time to close all rooms, or at the end of the pre-set countdown time, if set.

This message is also displayed to the host at the end of the pre-set Breakout Room duration, so the host is reminded to close the Breakout Rooms. After the pre-set count-downtime all participants are returned back to the main meeting. The **Close All Rooms** option is at the bottom of the Breakout Room info panel:

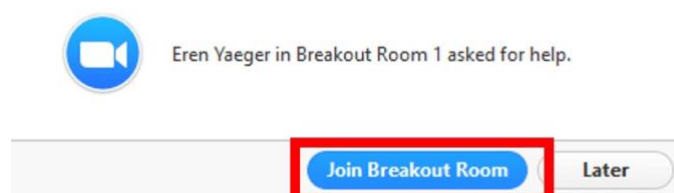


Responding to Requests for help

Participants in Breakout Rooms can request that the meeting host join their Breakout Room by clicking on the **"Ask for Help"** icon which is displayed on the menu bar when Breakout Rooms are active. On mobile devices it is displayed on the device screen.



If a participant clicks on **"Ask for Help"**, you, as host, will be prompted to join the room where the request originated. Click **"Join Breakout Room"** to join the room.



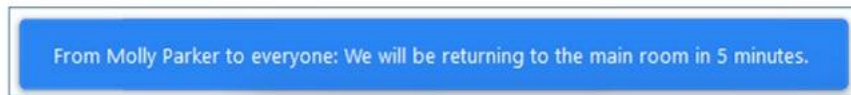
Broadcasting a Message to all Breakout Rooms

The host can broadcast a message to all Breakout Rooms to share information with all participants. The icon for this action is at the bottom of the Breakout Room info panel.





1. Click **"Breakout Rooms"** on the meeting controls menu bar.
2. Click **"Broadcast a message to all"**, enter your message and click **"Broadcast"**.
3. The message will now appear for all participants in Breakout Rooms.



Participating in Breakout Rooms

Joining a Breakout Room

The host may choose to move everyone to a Breakout Room automatically, in which case participants will be moved into the Breakout Room automatically when the hosts starts them. Should the host not have chosen automatic movement to Breakout Rooms, the host will invite participants to join a Breakout Room.

1. When the invitation is received, participants click **"Join"** or click **"Later"** to join at another time
 - **Note:** If participants choose the option **"Later"**, they can join when they want to by clicking on the **"Breakout Rooms"** icon on their meeting controls menu bar
2. To join click **"Join Breakout Room"**.



You have been assigned to Breakout Room:

Breakout Room 2

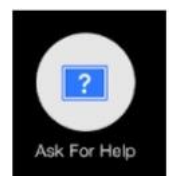


3. Participants will have access to full controls similar to the main meeting.

Asking for Help

Participants needing assistance should click the **"Ask for Help"** icon, it will notify the meeting host that assistance is needed and the host will be asked to join your Breakout Room.

1. Click **"Ask for Help"** on the menu bar.
2. Confirm that you would like assistance by clicking **"Invite Host"**.



You can invite the host to this Breakout Room for assistance.



Leaving the Breakout Room

The host has the option to allow participants to leave the Breakout Room at any time or to have participants wait until he/she closes the Breakout Rooms. In this latter case participants still have the option of leaving the meeting.

If the host makes the setting to allow participants to leave at any time, people can leave the Breakout Room and return to the main meeting session at any time, or they can leave the meeting entirely from the Breakout Room.

1. Click **"Leave"**



2. Choose if you want to just leave the Breakout Room or leave the entire meeting
3. When the host ends the Breakout Rooms, you will be notified and given the option to return to the main room immediately, or in the time pre-set by the host

Trivia Competitions using Breakout Rooms

Zoom Breakout Rooms work really well for Trivia Competitions. If there are a lot of participants, then preassigning people into Breakout Rooms in their teams would be preferred. For example, a Trivia session with 40 participants took 20 minutes to assign to rooms manually and participants have to wait while this is being done.

Setting up Breakout Rooms for Trivia

As host or organiser when you set up Breakout Rooms you should:

- Ask all participants to provide you their team, their name and the **email address they will be using to attend the meeting**. Having the correct email address is critical as Zoom uses this to match people to Rooms, Zoom does not use names. This email address **must be the same** as the one they use for their **Zoom Licence**
- Check that your Zoom licence settings to allow for Breakout Rooms and for people to enter before host, change the settings if necessary
- Set up the number of rooms to match the number of teams
- Pre-assign people to rooms, **do not** email the meeting link until this pre-assignment has been completed

Organising a Trivia Event

To ensure the Trivia event runs smoothly the following are the important requirements and suggestions to make things run smoothly.

Preparing for a Trivia Event

The following are suggestions that worked well and but they could be modified to suit the event

- Break the event into sections of around 10 questions
- Use email to send the questions to participants, participants reply to this email with the answers typed in below each question
- Enable Share Screen for all participants so that the team leaders can share their screen for people to read the questions. If the questions are short, people could choose to just read them out
- Allow 10 minutes for each set of questions
- Allow 30 seconds for the Breakout Room to close after the 10 minutes (participants get a warning that the rooms are closing)
- After each round, when everyone is in the main Zoom session, read out the answers
- Prepare scoring sheets for each team
- Prepare a Table or Spreadsheet on which to enter scores during the meeting

Running a Trivia Event using Zoom

The following are suggestions that worked well but could be modified to suit the event

- Have an MC to introduce the event, to read the answers and to wrap up the event
- Have one or two people assigned to marking the questions
- Have another person to be host to run the Breakout Rooms and sort out assignment issues
- After two or three rounds share progressive scores by screen sharing the Table/Spreadsheet

Host Responsibilities in Running a Trivia Event

- Open the **"Options"** for Breakout Rooms and make the following settings:
 - "Move all Participants to Breakout Rooms Automatically" – **ON**



- "Allow participants to return to main session at any time" – **OFF**
- "Breakout Rooms close Automatically after" – **10 Minutes**
- "Countdown after closing Breakout Rooms" – **ON**
- "Countdown time" – **30 Seconds**
- If Breakout Rooms have not been Pre-Assigned, open Breakout Rooms and click **"create"**
- Choose **"Manually"** for you to populate the rooms with the correct people
- Allocate people to rooms as they arrive to reduce time delay
- Start Breakout Rooms
- Respond to any requests for assistance

Participants Requirements to Enable Pre-Assignment

If you use pre-assignment of participants, they must (if you do not use pre-assignment ignore this section):

- Have a Zoom account/licence, which can be free or paid
- Advise the organiser or host the email address they use for their Zoom account
- They **must** be signed into that Zoom account **on the computer/mobile device** that **they use to join the meeting**. The **email address** they use to **sign into the Zoom must be the same** as the one they advised the organiser

Organiser Requirements for Pre-Assignment

- The organiser or host **must complete** all the pre-assignment **before** emailing the meeting link to participants

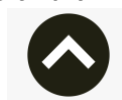
Hints & Suggestions for Participants, Team Leaders & the Organiser

To ensure the Trivia event runs smoothly the organiser should advise participants of the important requirements and hints for them to help make things run smoothly.

Hints & Suggestions for the Organiser

As the organiser of the Trivia event you have an important role in ensuring that the event runs smoothly. The things you have to do are:

- You must have access to the shared U3A Zoom licence, email address and password. Once you have this "Enable breakout rooms" and "Join before host" in Zoom settings. Now you can schedule the meeting. If you are going to pre-assign participants to Breakout Rooms do not copy the invitation yet, do this after pre-assigning participants to Breakout Rooms.
- Decide on the number of rounds of Trivia and the number of questions for each round
- Find a volunteer to compile the questions and answers and another person to QA them for correct expression and spelling, accuracy of the answers and the clarity of the questions
- Appoint a person to MC the event.
- Find a volunteer to score the answers
- Develop a spreadsheet for the scorer to use to record scores
- Develop a table in word or Excel in which to enter the total scores for each round. This will be used during the event to update teams on how they are going (display by Share Screen)
- Find a volunteer with good Zoom skills including Breakout Rooms to host the meeting. This person will claim host when they join the meeting and appoint the organiser a co-host
- Set up an Excel spreadsheet to record teams and email addresses to be used to upload for pre-assigning participants, if you are using pre-assignment
- Provide the host with a listing of all participants in alphabetical order by first name and a second listing split into teams again in alphabetical order by first names (Zoom sorts participants alphabetically by first name). It would assist the host if people sharing a computer and using the same email address be bolded so they



stand out. The host will need this list to assign late comers to rooms and in case pre-assignment does not work

- Organise prizes if applicable
- Your role during the meeting will be to monitor how things are going
- Organise and run a short training session for Team Leaders to explain how the day will run including (contact Russ Incoll at russ.incoll@gmail.com for a copy of a slide show that covers these topics):
 - Some useful Zoom settings
 - How to share screen
 - How the Breakout Rooms work
 - Timings and Breakout Room settings and constraints
 - Requirements for pre-assignment to work correctly
 - Seeking help in a Breakout Room
 - How the questions will be delivered
 - How to respond and return the answers
 - Leaving Breakout Rooms
- Email the invitation to participants and team leaders with the hint sheets and explain how the event will be run.

Hints & Suggestions for Participants

Provide this list to participants so they will behave appropriately during the Trivia event

Organisational Arrangements

- It would be helpful if you could join the meeting 10 minutes before the start to allow us to allocate you to your team breakout rooms in case there is an issue with pre-assignment to your Breakout room
- When answering the trivia questions, you will be moved to a Breakout Room where you will be with your team and isolated from the other teams
- During the event, when the MC or organisers are addressing the group, please mute your microphone unless you are asking a question
- Your team leader will all be emailed the questions at the beginning of each round
- The team leader will share their screen so everyone can see the questions
- The team leader is the **ONLY** team member to email the answers back (by replying to question email, filling in the answers, then clicking on send)

Zoom Hints

- Do **NOT** use full scene mode in zoom, if you do this accidentally, click **Esc** key
- If you cannot see the **Task Bar/Dock**, you may be in Full Screen Mode, click **Esc** key
- To see everyone on screen click **View** (top right), click on **Gallery View** to select
- To return to the **Zoom** screen at any time click on the **Zoom** icon on the **Task Bar/Dock**
- A red microphone icon with a line red through it means you are **muted**
- **Unmute** by clicking on the microphone icon or temporarily unmute by holding down the space bar (computer & Laptop) while you speak
- If **Menu Bar** disappears from screen:
 - Hover your mouse over the **Zoom** screen to bring the menu bar back
 - Tab the screen on a mobile device to bring the menu back
- Please do not open "Share Screen" unless you are the team leader and then only when in your Breakout Room



- Whilst in Breakout Rooms, there is an icon with a question mark labelled **"Ask for Help"**. Use this button if you or your team needs assistance

Hints & Suggestions for Team Leaders

Provide these hints and suggestions to assist in the smooth running of your Trivia Breakout Rooms:

Zoom

- Do **NOT** use full scene mode in zoom, if you do this accidentally, click **Esc** key
- If you cannot see the **Task Bar**, you are in Full Screen Mode, click **Esc** key
- To see everyone on screen click **View** (top right), click on **Gallery View** to select
- To return to the **Zoom** screen at any time click on the **Zoom** icon on the **Task Bar**
- A red microphone icon with a line red through it means a person is **muted**
- **Unmute** by clicking on the microphone icon or temporarily unmute by holding down the space bar (computer & Laptop) while you speak
- If **Menu Bar** disappears from screen, hover your mouse over the **Zoom** screen to bring the menu bar back

Breakout Room

- For **help** from the host in your breakout room, click the **"?"** icon to call for the host

Share Screen

- Click on the green **Share Screen** icon on the **Zoom** menu bar to select what you want to share
- Click on computer screen with the **blue surround** to select your computer screen when the share screen window opens
- To start sharing, after selecting your screen, click the blue **Share** button
- **Stop Share Screen** by clicking on the red **Stop Share** icon at the top of the **Zoom** screen

Email Questions/Answers

- Adjust your email display before the meeting to set the **font size** big enough to be easily read by your team
- Open the question email and share your computer screen
- When you open the question email, click **Reply**, then, in **the reply email** that opens:
 - Type your **team name** either on the **subject line** or at the **top of the reply**
 - Now move **your cursor** below where you normally type your reply, down into the trivia questions **to the space just below the first question**
 - **Type the answer** and move the cursor down to **just below the next question**, ready to type the next answer
- **Remember** – Whilst on Zoom, when you access your email, you will still be seen and heard by others, even though the screen settings may not allow you to see them!
- You do **not** have to answer the questions in any particular **order**
- **Don't worry about any niceties**, we just need the answers
- Click **Send** when all answers are complete
- If you **accidentally click send** before finished, click **reply** again, type **team name** in the **Subject** line, move cursor to the question you were up to and continue typing answers
- Even if not finished all answers, click **Send** when the warning for the end of the session is received, you **only** have **30 seconds** left to send it



Closing Zoom

Ending Meeting

Apart from all these functions, you have the responsibility, as host, of ending the meeting by clicking **"End"** on the Zoom menu bar, and then **"End Meeting"** on the menu that opens.

For U3A, not ending the meeting will create issues for the next class, which cannot start until your meeting is finished. **So, it is critical for you to click "End meeting"**.

Individual participants can leave the meeting at any time by clicking on **"Leave"** on the menu bar and then **"Leave Meeting"** on the menu that opens.

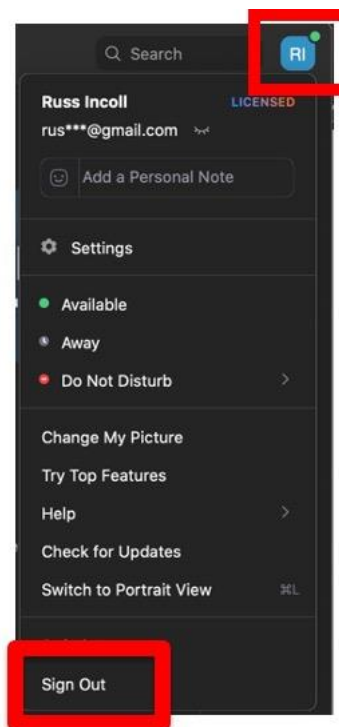
Establishing a Second Zoom Licence

Creating a Free Zoom Licence

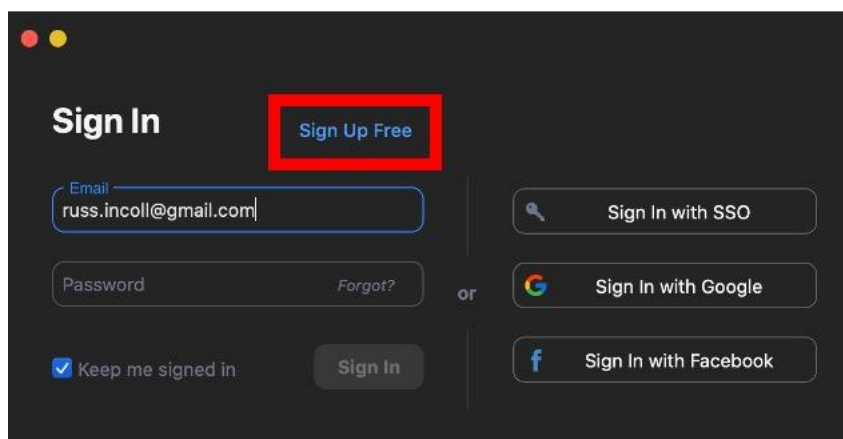
Some people have had issues with creating a second Zoom licence in addition to their existing first Zoom licence, but it is a straightforward process.

The first step is to create a second email address which will hold the new licence, once you have done that, follow this process:

1. Open Zoom and click on your photo or initials in the top right corner and sign out of Zoom



2. Now open the Zoom app to open the sign in screen.

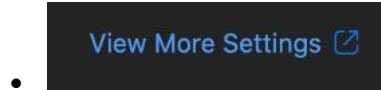


3. Click on **"Sign up Free"** enter your birthdate, the new email address and a password. Zoom will then send you an email to confirm the account, click on the link in this email and you have the free licence.

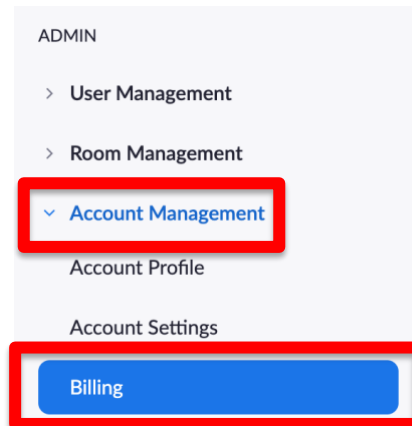
Converting to a Paid Zoom Licence



1. To convert to a paid licence, open Zoom and click on the settings icon at the top right of the screen.
2. Now click on **"View more Settings"** at the bottom of the screen that has opened.



3. Now click on **"Account Management"** and then **"Billing"**.



4. Now click on **"Upgrade Plan"** and follow the prompts to establish the paid account.

Additional Zoom Information

Zoom has online training (<https://support.zoom.us/hc/en-us/categories/200101697>) – and a support centre (<https://support.zoom.us/hc/en-us>). There is a lot of helpful information to be found on their website.

