Basic Steps for Conducting Zoom Meetings Part 1

Presented by Marian Kile and Sarah Ryan-Roberts
July 2022 – Zoom Version 5.11.1

Renaissance Society's Online Learning Resource page has additional guides:
   Online Learning Resources | Sacramento State (csus.edu)
   Basic Steps for Conducting Zoom Meeting Part 2
      RS Online Learning Basic Part 2
   Scheduling & Reporting in Zoom Meetings
      RS Online Learning Basic Sch Rpt Meetings.
   Navigating the Zoom Learning Center
      Navigating the Zoom Learning Center (csus.edu)
   Recommended Courses for the Zoom Learning Center
      Recommended Courses ZLC (csus.edu)
   Access and use the Program Registration System for enrollees' data
      manageprogramdata.pdf (csus.edu)
   Setup Classroom On Campus for Hybrid instructions
      Setup Classroom for Hybrid Instruction (csus.edu)
   And more . . .

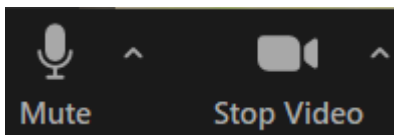## Contents

Understanding the Meeting Controls

Below are short descriptions of what the icon allows you to do.
Some of this depends on your device. On a tablet, iPad and cell phone, the icons might be found in different locations.

These are grouped by: Personal Icons, Meeting Icons, Other Icons, and Hosts Only Icons.

For further information for host/co-host, go to https://support.zoom.us/hc/en-us/articles/201362603-Host-and-co-host-controls-in-a-meeting.
For more information for attendees, go to https://support.zoom.us/hc/en-us/articles/200941109-Attendee-controls-in-a-meeting.

Personal Icons

Next to the microphone and video icon, you can click on the little up arrows to view their setting. When these are on, it allows the other participants to hear and see you.
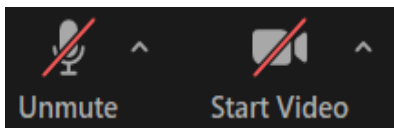
If there is a red line on them, it means they are turned off. You can click on either of them to turn them on. Click again to turn them off.

On most keyboards, you can hold the space bar down to keep the mic unmuted. As soon as you release the space bar, you will be muted again. But be careful, if you click on something out of Zoom, like your email, when you come back, the space bar will not work.

Next to both of these icons are little up arrows. You can click on them and see the different Audio Settings and Video Settings. You should check them out and become more familiar with what is available.
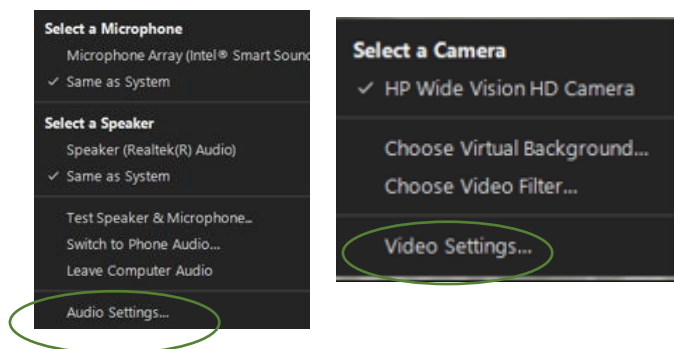
Views

If you click on the View icon, usually in the top right corner, everyone can select Speaker View or Galley View. This is how <u>you</u> see the other participants.
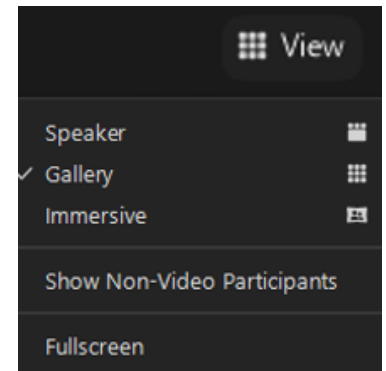
- **Speaker view** shows you the person that is speaking. If you are the person speaking, it does not show you.
- **Gallery view** shows the participants and the one highlighted in yellow is speaking.
- Most devices let you see up to 25 and some up to 49 at a time. If there are more videos than can be shown on your screen, you can swipe and move to the next screen.
- You can only see a limited number of videos with a cell phone or iPad or some tablets.
- **Immersive view** allows the host to arrange the participants into one single virtual background.
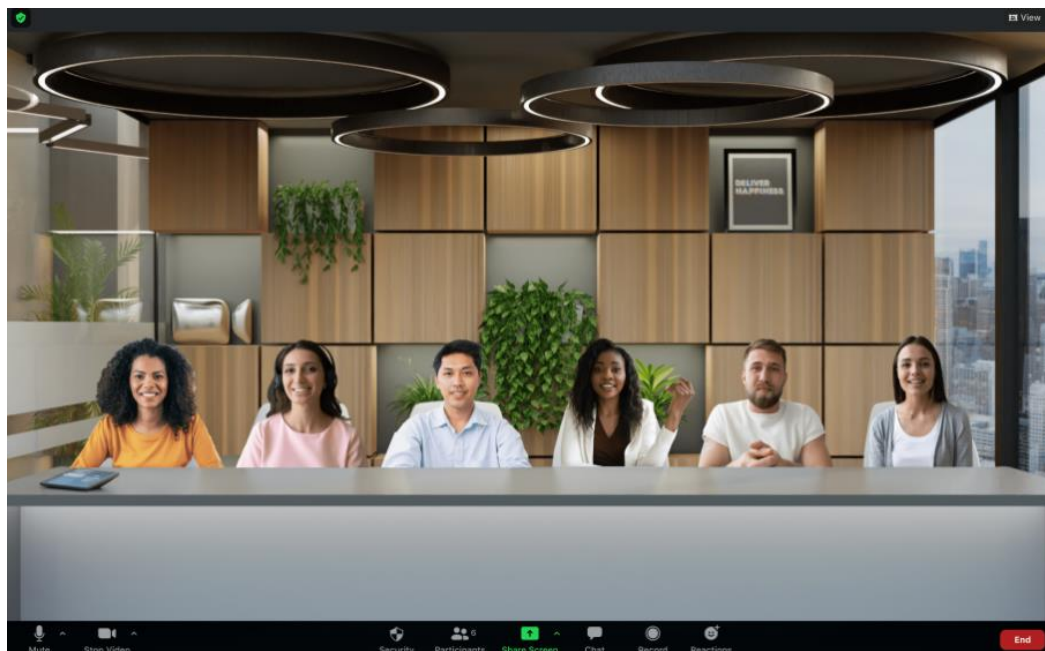
Show non-video participants can be used by anyone. If there are a number of video images showing, and some of them don't have their videos on, you can put your cursor on one of them and right click and click on Hide non-video participants. This might allow you to see more of the video images or larger video images when the others are removed. To show them again, click on the view icon and select to show them.

Meeting Icons
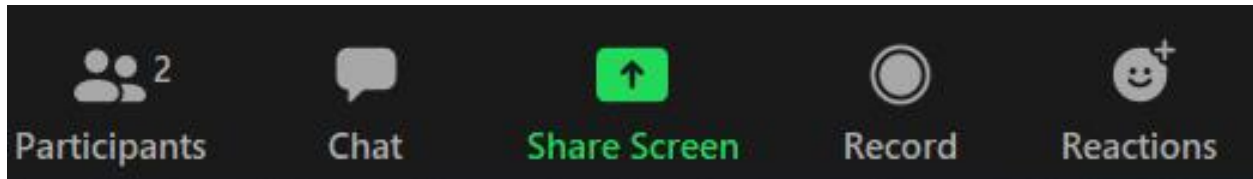
Participants Icon

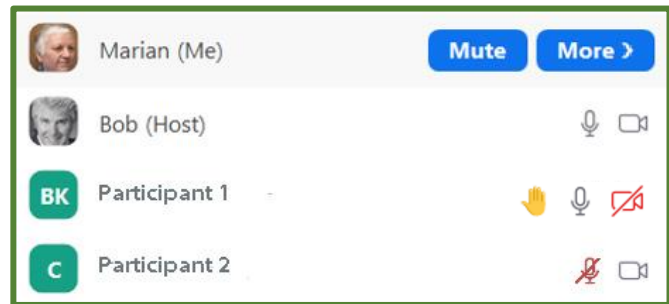- This shows the list of participants on a side bar where anyone can see the status of their mics, cameras, and reactions. Everyone can see this list. As a host or co-host, you can:

  - turn a participant's mic or video off but only they can turn them back on.
  - click to the right of the participants name in the participants panel and click to send an un-mute message to that participant.
  - watch the participants list to see if anyone given any non-verbal feedback. You can also see these on their video tiles, but if it is a raised hand, they will be in the order of when they were raised.
  - on the bottom, see the total of when the participants vote yes or no in the reactions.
  - on the bottom, you can mute all the participants.
    When the Host mutes all, it also mutes the co-host so the co-host needs to turn theirs back on if they wish to speak.
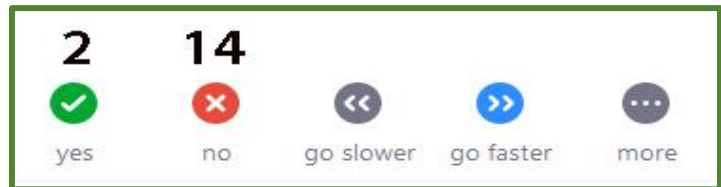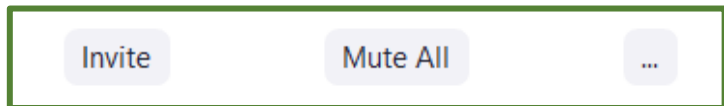
o also, on the bottom your either have three little dots (ellipsis) that indicate more options. This is where you can see or adjust some of the settings for this meeting.

The host can also click on the more button next to a participant's name and make them a co-host or host. A co-host cannot make a participant a co-host.

Chat Icon

- Anyone can click this icon and message others in the meeting. The default is to allow participants to message the host or everyone. The host can set it to also allow one participant to message another participant privately.
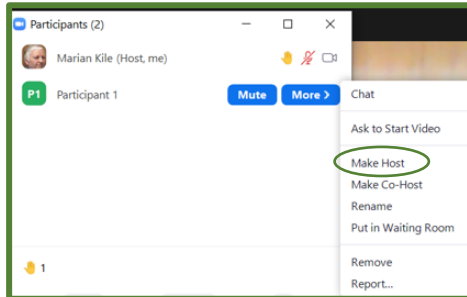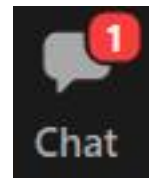- Click on the Chat icon and in the chat box and select Everyone or one person's name, type in the message and hit enter.
- If the icon has an orange talking bubble, it means there is a message waiting for us.
- You can allow participants to save the chat if they want.
- If chats are saved, other participants private chats are not included.

Share Screen Icon

- Zoom share screen allows the host to share on the screen any of the other applications that are open on their device. They can choose to share a slideshow, document, image, video, or website.
- All of the participants will see what is being shared on their devices.
- The host has the option to allow the participations to also be able to share their screen. When they do, it will be shown to the host and the rest of the participants.
- There is more information in this guide on how to use the share screen function. Zoom Share Screens below.

Record Icon

- The host can record the meeting on their local device or in the CSUS cloud.
- The host can allow others to record the meeting but they can only record on their device.

- If it is being recorded by anyone, the participants get a message on the screen that indicates it is being recorded and they can leave the meeting if they do not want to be recorded.
- If it is being recorded, this image appears at the top
- Also, this circle with the red dot will appear next to the person recording on the participants list.
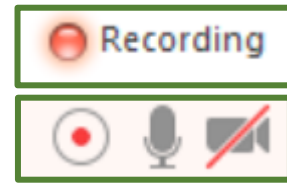
Note: Local recording is not supported on iOS and Android.

Reactions Icon
- The first line allows the participants to react to what they hear or see in the meeting.
   - Click on the three dots (ellipisis) to find more emojis.
    - The reactions on the first line stay up for about ten seconds.
- The second line are non-verbal symbols. Yes, No, Go Slower, Go Faster, I've Stepped Away
    - They will show on our video image until we change it.
    - We can undo it by click on that bubble right above the Reactions icon
- The Raised hand is used to indicate you have a question. After your question is answered, you should lower the hand by clicking on the bubble right above the Reactions icon.
    - It can be lowered by the host, but the participates should learn lower it themselves.
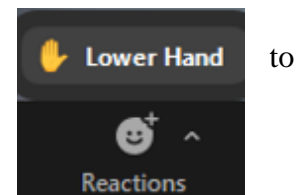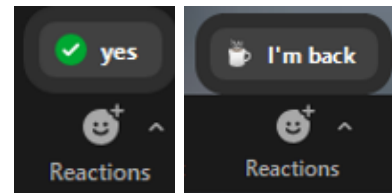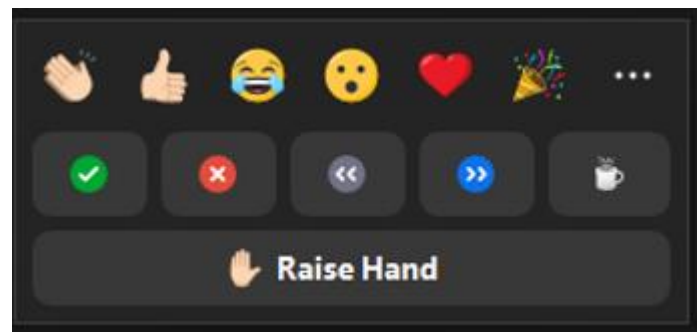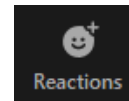
Closed Captioning Icon
- If this icon is not showing, it means it was not selected in the setting in our CSUS portal.
- The Host can click on the **CC icon** and click on the bottom to **Enable Auto-Transcription**.
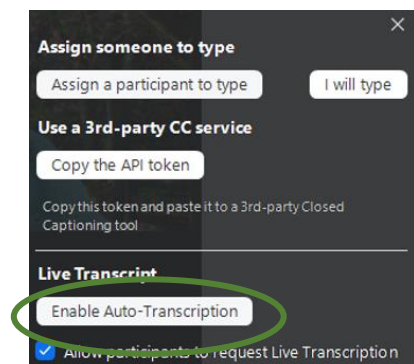
- Once it is enabled, each participant can click on their CC icon and:
  - Hide the subtitle
  - View Full Transcript (will show on a side panel)
  - Click on Subtitle Setting to change the font size for their viewing.
- Everyone can move the text around on their screen.
- The participants can send a request to the host and for the live transcription to be enabled.
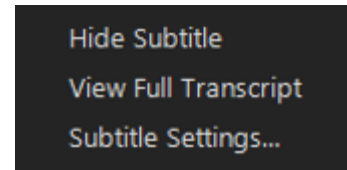
Other Icons

Shield Icon
- This shield is usually in the top left corner of your screen. It shows you the meeting information.
- Everyone in the meeting can also click on the green shield.
- Anyone can share the meeting ID and Passcode, or they can copy the link and email it to someone else that needs to attend the meeting.

Setting/Statistics
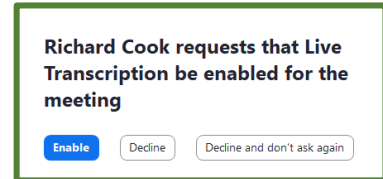- While you are in the Meeting Information screen above, you can click on the **Gear** icon on the far right and you will get the **Statistics** screen for your setting.
- Here you can see the version of your Zoom and also check other settings.
- You might want to check out the **Keyboard Shortcuts** and see if you want to enable any of those.
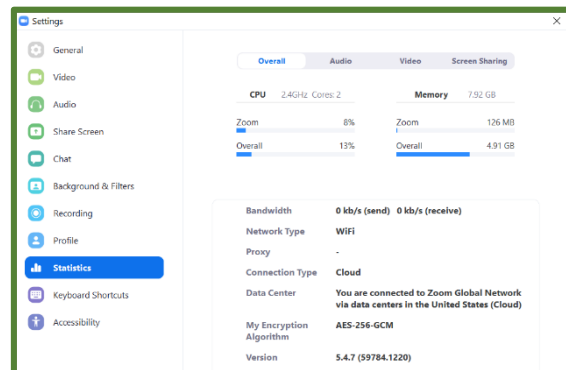
Leave Button
- When the participants want to leave the meeting, they can click on the Leave meeting button that is usually in the bottom right corner.
- The host can end the meeting for everyone by clicking on the End button.
- If the host needs to leave but not end the meeting, they need to assign that role to another participant using the Participants List.

Host Only Icons

Security Icon

- If the host clicks on the Security Shield on their toolbar, they can access a list of settings to ensure they have the controls set the way they want.
- This includes:
  - Lock Meeting (no one else can enter even with id and passcode)
  - Enable Waiting Room
  - Hide Profile Pictures (participants that have turned off their videos will not show on the screen for everyone)
  - allow participants to:
    - Share Screen
    - Chat
    - Rename Themselves
    - Unmute Themselves
    - Start Video
    - Remove Participant (this can also be done in the participants list)
    - Suspend Participant Activities (everyone's video and audio will be turned off, screen sharing will stop, and the meeting will be locked)
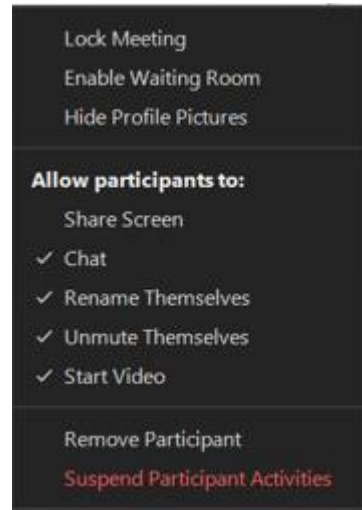
> There might be more or less items depending on the setting for this meeting.

Polling Icon

- Only the host or co-host can launch and end the poll.
- See more information regarding polls in the RS Online Learning Basic Part 2
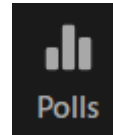
Zoom Breakout Rooms Icon

- Zoom Breakout Rooms allows a host to break the primary meeting group into multiple subgroups for brainstorming, small group activities, one-to one training, socializing and more. Some participants can stay in the primary meeting or all participants can be sent to a breakout room.
- See more information regarding Breakout Rooms in the RS Online Learning Basic Part 2
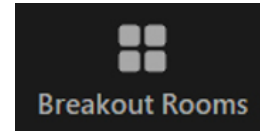
Support Icon

This typically is not used in Renaissance Society. This allows the host to ask a participant if they want them to have access to the participants desktop, application, or to restart their computer. This has to be enabled in the settings prior to the meeting. If you don't have the Support icon, it is not enabled. The participant can deny the request.
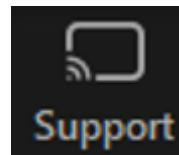
Whiteboards

This is still part of the Share Screen feature but it has its own icon at this level so it is easier to access. This is mainly used for committee meetings or other brainstorming sessions. There is a video in the Zoom Learning Center titled Welcome to Zoom Whiteboard that you might want to check out.
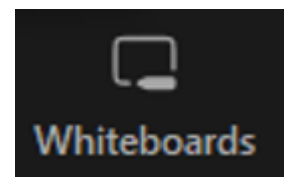
Set Up for a Meeting Check List

So, you scheduled your meeting and sent out the invitations. You should have made a note of the meeting ID and password. Maybe you want a list of the invited participants.

About 15 or 20 minutes before the scheduled meeting, you should get set so you can ensure everything works and you can greet the invitees as they join.

1. Select appropriate top for the camera. Solid bright colors are said to be the best. Solid white washes out on camera and sometimes cause a reflection. Dark tops absorb the light and can come across as blurry. They also show you as a *floating head*. Most articles agree you don't want collared shirts buttoned all the way up, turtlenecks, mock necks, bow-neck blouses, and anything else that hides your neck.
2. Go to the bathroom, get a glass of water, have paper, pencil and tissues handy and shut off cell phone and TV. Get settled in a comfortable chair with your computer in front of you.
3. Make sure all notifications are turned off on the devise you are using. It is done differently on the different devices.
4. Ensure all devices that you are using in the meeting are charged.
5. Go to the CSUS portal and open Zoom and start your meeting.
6. Position yourself in front of the monitor so invitees can see you. You want to look directly into the camera. While you are presenting, you need to sit up straight and not lean back or rest your head on the hand.
7. Set room lights so your image comes across on the monitor effectively. It is best to have the primary light directly behind the camera. If possible you want to face the window if there is a lot of light coming in. Or you can try to block the light from the window and have a lamp or even a ring light in front of you.
8. You want to keep your background simple so the focus is on you. Some people use a virtual background but they don't always work effectively on the 32-bit computers. Even when they work, people have found them distracting. Determine what works best for you.
9. If you are going to use other applications, like PowerPoint or the Internet, they should be opened to where you want them. All of the other applications should be closed.
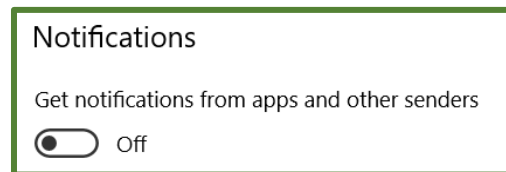
10. Open up the manage **Participants** on the bottom of the screen.
    This allows you to see who is joining and ensures their mic and camera are working.
11. Click on Security icon and review the setting to make sure they are what you want for that meeting.
12. Decide if you want to record the meeting, even if it is just for you to review later.
13. If the meeting is set to "Waiting room," you will need to let the attendees in either one at a time or by groups. You will have to monitor the Participants feature.
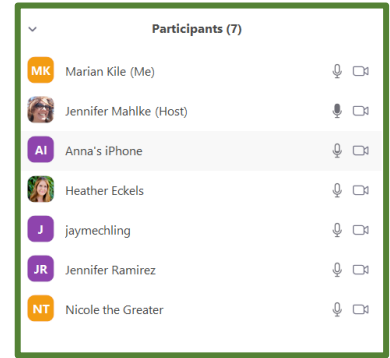
Roles in a Meeting

In a Zoom meeting, there can only be one Host but there can be many co-hosts assigned by the host within the meeting.

Below is a list of terms that Zoom uses to describe roles in a meeting with the actions each can perform. Overall, the Host can do everything. In Renaissance Society sessions, we also use the term Technical Host (TH) to define this role so they can perform these actions. Typically, in Renaissance the Zoom co-host is the person presenting the content of the meeting or class.

The actions with an asterisk * can be granted by the host during the meeting or set prior to the meeting. They might not be available in all meetings.

	Host/ Technical Host	Co-Host/ (Leader or Speaker)	Participant
Schedule a Meeting	X		
Invite Participants	X		
Create Breakout Rooms	X		
Create Polls	X		
Launch Polls	X	X	
Take Polls			X
Share Poll results	X	X	
See Poll results	X	X*	X*
Enable Waiting Rooms	X		
Assign to Wait Room	X		
Lock Meeting	X	X	
Start/Stop a Meeting	X		
Share Screen	X	X*	X*
Make Host or Co-Host	X	X*	

	Host/ Technical Host	Co-Host/ (Leader or Speaker)	Participant
Chat	X	X	X
Mute and Mute All	X	X	
Mute/Unmute Your Own Microphone	X	X	X
Turn Video off	X	X	X
Start Video – only the individual can start their own video			X
Spotlight Video for all	X	X	
Pin Video (only affects your own screen)	X	X	X
Reactions (e.g., Raised hands/ Yes/No/heart)	X	X	X
See Counts for above reactions	X		
Transfer Files Through Chat	X*	X*	X*
Turn Close Caption on	X		
If close caption, is on everyone controls if they have it displayed	X	X	X
Record Meeting	X	X	X*

Agreement Between Leader and TH

Each Seminar/Shared Interest Group (SIG) Leader needs to work with the TH to determine who will be performing which function.

- Schedule the meeting – this can be the Leader or the TH. Typically, the CSUS account is issued to the Leader but they can have an agreement that the TH handles the CSUS account. This is accessed via the CSUS portal.
- Monitor the enrollees on the Program Registration System (PRS) to send out the welcome email from the leader – again, can be either Leader or TH. Keep in mind to access the PRS you need to use the email account that is in our catalog. This is part of the College of Continuing Education (CCE) system.

- Sending the invitation - starting Spring 2021, the meeting link will be available to the enrollees through the PRS system. They will get that link in a confirmation email from the system.

⭐ But it is a good practice to also email the invitation to the enrollees so they can add that information directly into their calendars if they want. See how to send invitation in the Scheduling & Reporting Guidelines. [RS Online Learning Basic Sch Rpt Meetings](#)

- Maybe have a "meet & greet" meeting one week prior to the first day of class – usually these are done on the same time and same day of the week as the session.

⭐ If you have the meet & greet the same day time, you can just adjust the meeting schedule to start one week earlier.
Or, you can have the meet & greet whenever you want and just let the enrollees know. You do not need to change the Zoom schedule to do this.
Neither of these will affect the Zoom link that is in the PRS system.

- Once the meeting has started, typically, the TH should have the role of Host and the Leader the role of co-host. The leader conducts the meeting and the TH monitors the participants to ensure everything is running smoothly throughout the meeting.

Sample Partnership Agreement

This sample has all of the needed information about the program at the top, followed by the rolls.

Partnership Agreement for Leader and Tech Host

Leader	**Tech Host**
Matt XXX	**Marian XXXe**
916-111-2222 Cell Phone	916-222-1111 Cell phone
916-222-3333 home phone	916-555-4444 Home phone
MattXXX@gmail.com	MarianXXX@yahoo.com

US Presidents   (title of program)
Tues 10:00 11:30   (time of program)
September 6th through November 29th (duration)
Ren-XX@CSUS.edu   (SacLink account)
Passcode Fall1234/Fall1234   (passcode for that account)
Claim host for this account "123456"   (claim host for the SacLink account meeting)
https://csus.zoom.us/j/87386604040?pwd=cHdxaENZMMZVFvY1d2NFlYVnVWS1hmdz09
ID 960 1338 4638 Passcode "Writing"   (ID and passcode for the Zoom meeting)
PRS passcode rensoc@2022   (passcode to get to PRS enrollment)

Task	Leader	Tech Host	Not needed
Before Meeting			
Email weekly reminder?	X		
For the Meeting			
Start meeting		X	
Check name on screen	X	X	
Check waiting room settings			X
Enable CC for participants		X	
Ensure participants setting		X	
Make Leader host		X	
Make Tech Host co-host	X		
Present upcoming Forum & ASI Slides		X	
Explain Zoom etiquette		X	
Record meeting	X		
Monitor raised hands		X	
Monitor participants audio		X	
End Meeting	X		
After Meeting			
Trim recording – copy link and send to Leader		X	
Send out group email with link to recording and note for next week	X		

When to Use Technical Host

It is recommended that all seminars and special interest groups using Zoom have a technical host to manage the environment so the leader can focus on the content.

If there is a technical host, that person's name and phone number should be given to all the invitees so they can call if they are having problems joining the meeting.

The technical host should have a list of the participants with their phone number and email address in case the host needs to call or email them information to join the meeting.

Assign Host or Co-Host During Meeting

At the start of the meeting, the Host of the meeting should click on **Participants**. They can then hover over the person's name and click on **More** and click **Make Host**.

If needed, the new host can make the leader a co-host the same way. There can be many co-hosts if there are additional speakers or co-leads for the seminar.
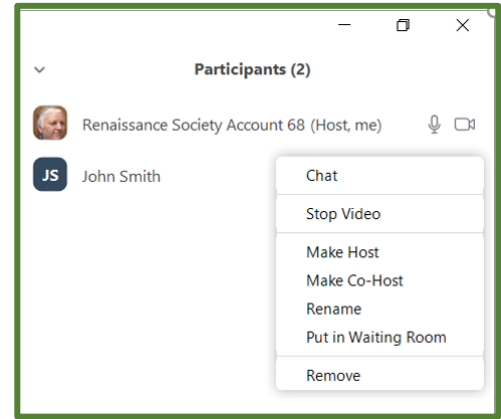
Monitor Chat

The technical host should watch to see if someone has sent a message to them (the host) via the Chat feature. The talking bubble icon on the bottom of the screen will turn from a black background to a reddish-orange background indicating there is a message there for that person.

This is one of the reasons the technical person needs to be the host, not the co-host. When a message is sent from a participant to the host, the technical host will look at it and see if they can respond or let the leader/coordinator know what is going on.

Monitor Participants

Everybody's name appears first on their own Participants list. The host will be the second person followed by the co-host then the participants.

The technical host should keep the participants screen open and watch for any activity.

Muting Participants

The technical host should be watching the participants to see if participants unmute themselves. They should try to determine if it was in error or might they be waiting to talk.

Note: As host or co-host, if you want a participant to unmute themselves, you can hover over their name on the Participants list and click Ask to Unmute and a message will be sent to them.

Indicates background d noise

If the session has discussions going on but someone has background noise, the technical host can mute that person. You can tell where the noise is coming from because that person's square will have a highlighted yellow line or a full box around their image and their microphone image in the participants list will show activity.

Zoom Share Screens

Zoom share screen allows you as a host to share on the screen any of the other applications that are open on your device. You can choose to share a slideshow, document, image, video, or website. All of the participants will see what you selected to show on their device.

As the host, you also have the option to allow the participations to also be able to share. When they do it will be shown to the host and the rest of the participants.

There is a video in the Zoom Learning Center titled: Zoom In: Sharing and Annotation. The same video is also in the course: In-Meeting Chat, Reactions, and Screen Sharing.

The website below has links to many aspects of Screen Sharing
https://support.zoom.us/hc/en-us/sections/201740106-Screen-Sharing

The ones with the **arrows** are important for everyone.
The **PP** is for PowerPoint – most people will want to use the 3rd option on the website, "Single-monitor setup with slide show in full screen."
The **KN** is for Keynote.

Before Meeting

- Have apps open that you want to share
- Close unneeded apps
- You might be able to look at your toolbar and see which applications you have open
- You should also turn off your notifications (like email)

Screen Sharing

- Sharing your screen, content, or second camera ⬅
- Sharing slides as a Virtual Background
- Video layout options while screen sharing
- Switching Windows During Screen Sharing
- Optimizing a shared video clip in full screen
- Sharing computer sound during screen sharing
- Screen sharing a PowerPoint presentation **PP**
- Screen sharing a Keynote presentation **KN**
- Requesting or giving remote control
- Sharing a whiteboard ⬅
- Side-by-side Mode for screen sharing
- Sharing multiple screens simultaneously
- Using annotation tools on a shared screen or whiteboard
- iOS screen sharing
- Sharing your screen (iOS) with the Zoom desktop client
- Share an iOS device screen using a cable
- Adding a watermark
- Follow presenter's pointer during screen sharing
- Black screen during screen sharing
- Protocols for Apple screen mirroring (AirPlay)

Begin Sharing

- Click Share Screen button.
- Here you select what you want to share.
- If you want to share your desk top, select the image in the top right corner. It might be different if you are using dual monitors.
- Some people don't want to share this because something personal might show up.
- If you want to share a single application, click that application.
- Usually, the last item open will be on the second row on the left.
- You can also have internet sites open to share.

Note: Share screen does not work in table mode.

- If sharing the sound from the device, like a video or song, click Share Computer sound. (Note: if this is on, they will not hear you speak on your microphone while you are sharing a sound from your device.)
- Click Optimize for Video if you are showing a video.
- Click the Share button in the bottom right after you have made all of you selections
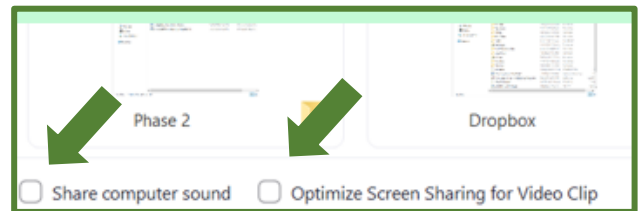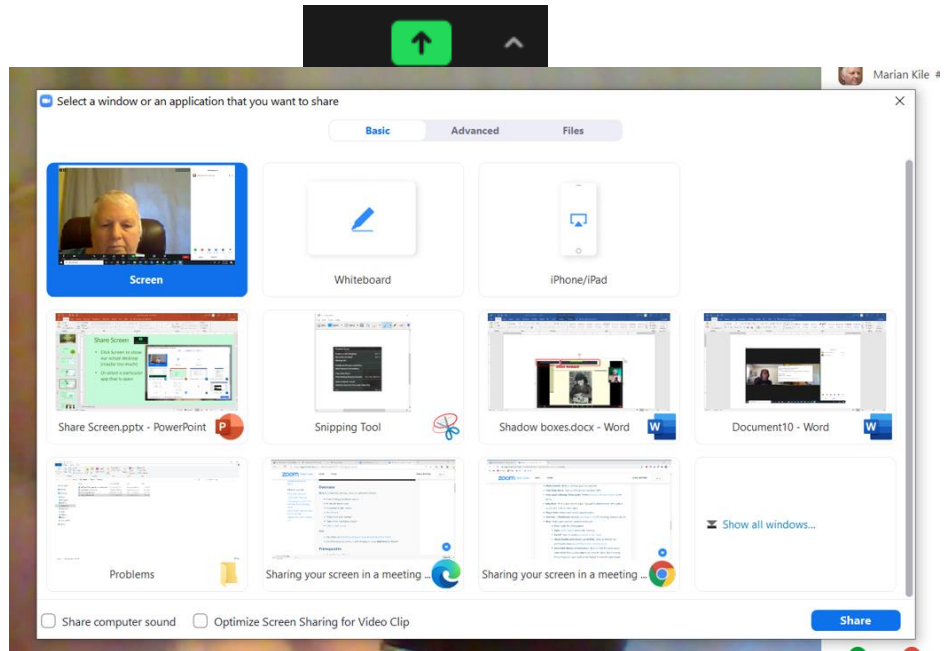
Share Screen Toolbar
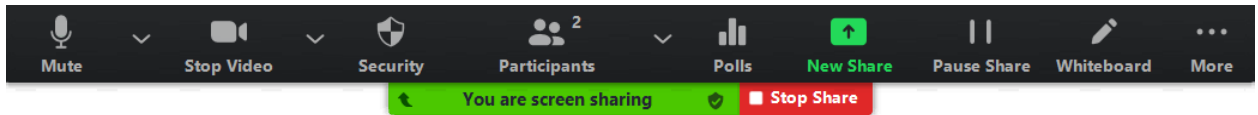
- When the Share Screen Toolbar comes up, you can still access your other Zoom tools for it.
- If you click on the far right on the More button, you have access to additional Zoom tools. Depending on your setting, you might have more options.
- If you forgot to turn on the audio setting when you got into Share Screen, you can do that here instead of having to end the session.
- After a little while the tool bar shrinks, but you can

hover over the top of it and all of the tools become available again.
- You can also drag the toolbar around on your screen.
- If you want to share something else, you can click on the green, New Share and make your selection.
- When you are done, you can click on the red Stop Share.
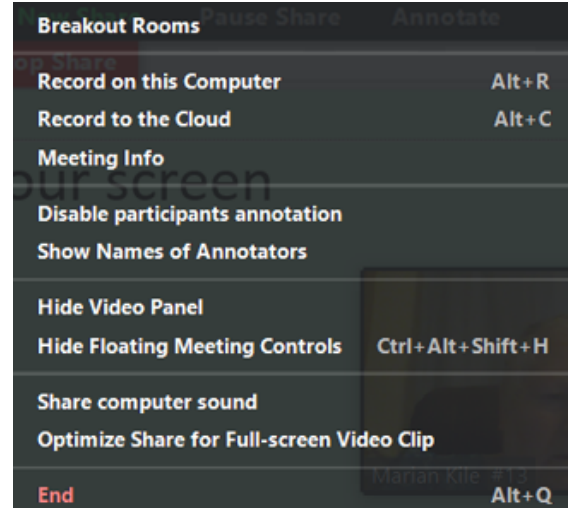
Share New

- You can easily jump from one applicate to another in Share Screen without having to exit.
- Hover over the Stop Share (it is red) and either below it or above it you will see the green New Share icon.
- Click on that and select what you want to share.
- You can then go back to the original application if you want.
- Keep in mind that all of the applications you want to share must be open prior to the Share Screening.
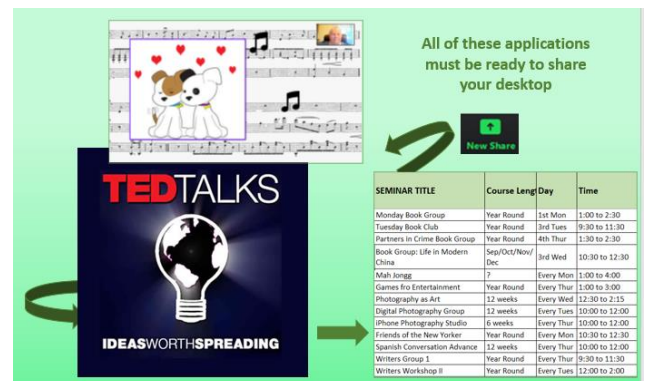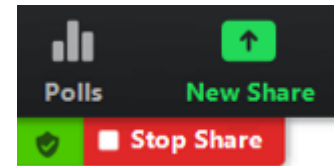
Showing a Portion of the Screen

Before the meeting:
- Click on the item you want to share
- Go back over to Zoom
- Click on Share Screen
- Click on Advanced
- Click on Portion of Screen
- Click Share button
- Adjust the green box to fit by dragging corner or side
- Stop sharing till you are ready to share in the meeting
- By adjusting it ahead of time, they don't see you lining this all up.
- When you share screen new, click back to Basic first.
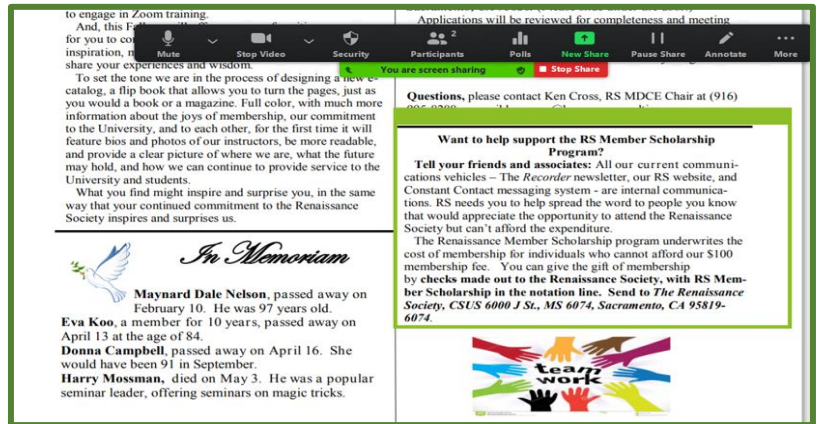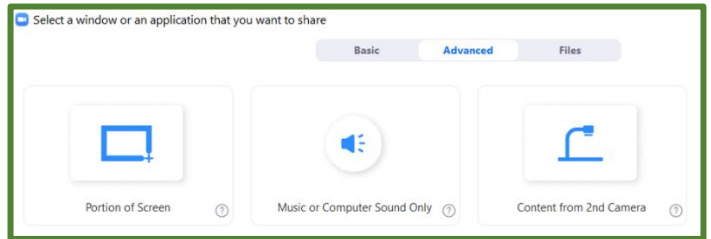
Problems with Optimize

- When we show share a it has to be Optimized, but then the person sharing the screen cannot see the participants.
- Also, o-n some devices, some of the time, the participants will see gray boxes around the other items on the host's screen if we have optimized.
- If the host has the Chat or Participants open, they might have gray boxes as well.
- The host should try to move them from in front of the screen that is being shared. The best way to test this for the host to also join the meeting on another device, tablet or phone, and watch for the gray shadow boxes.

Work Around for Shadow Boxes
(Does not always work)
- Use the Showing a Portion of the screen on the prior page
- Before the meeting, get it set up with the green box around your video or other item
- When you are in the meeting, it will just show that portion of the that screen
  It does not show gray boxes from opening Chat, Participants, etc.
- When you share new, click back to Basic tab first.

White Board

Note: This icon is now available on the main tool bar for the Host.

- Click on Share Screen than click on White Board in the top middle
- Host and participants can make notes to share
- There are a variety of annotation tool
- Saved as one JPG file.
- Some folks prefer to use a document.
- It is fun to play around with.
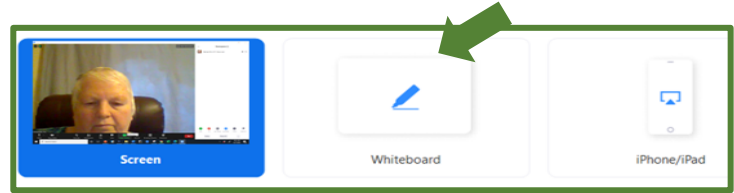
Using iPad or iPhone

- Click on Share Screen than click on iPad/iPhone in the top right
- First time, need to install a plug in
- Each time, need to set Mirroring on device
- Can then show anything that is on your device that is tethered
- Can also use as camera
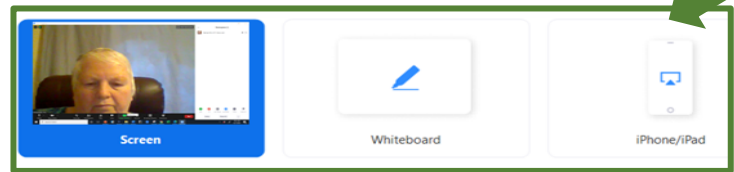
You might have other options

Settings for Share Screen

- The settings default to what is in the setting at the CSUS portal
- To see the setting, the host can click the up **arrow** next to the icon and click on **Advanced Sharing Options**
- Usually, you want **One Participant can share at a time.**
- Depending on your meeting, you can have **Only Host** (which includes co-hosts) or you can allow **All Participants** can share
- If you leave the last one as **Only Host**, it includes co-host. If you want **All Participants** to share over someone else, you need to click the one above and this one as well
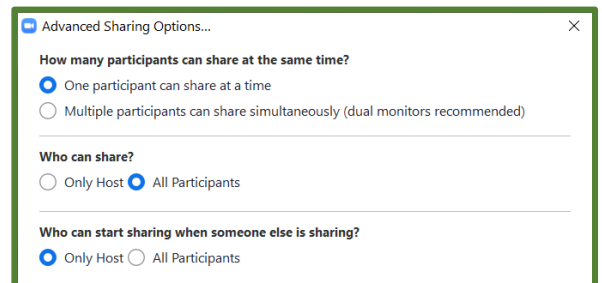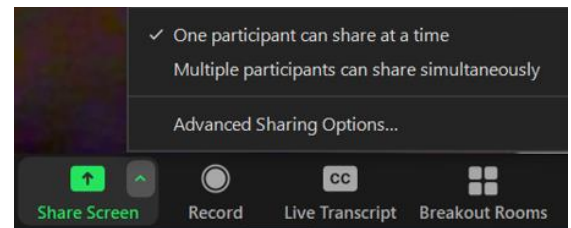
Share Screen Side-by-Side

- Participants set their own view
- They click on their View button, and select Side-by side Speaker or Side-by-side Gallery
- They can also drag the little bar between the screen and the speaker and move it to the right to see a bigger screen
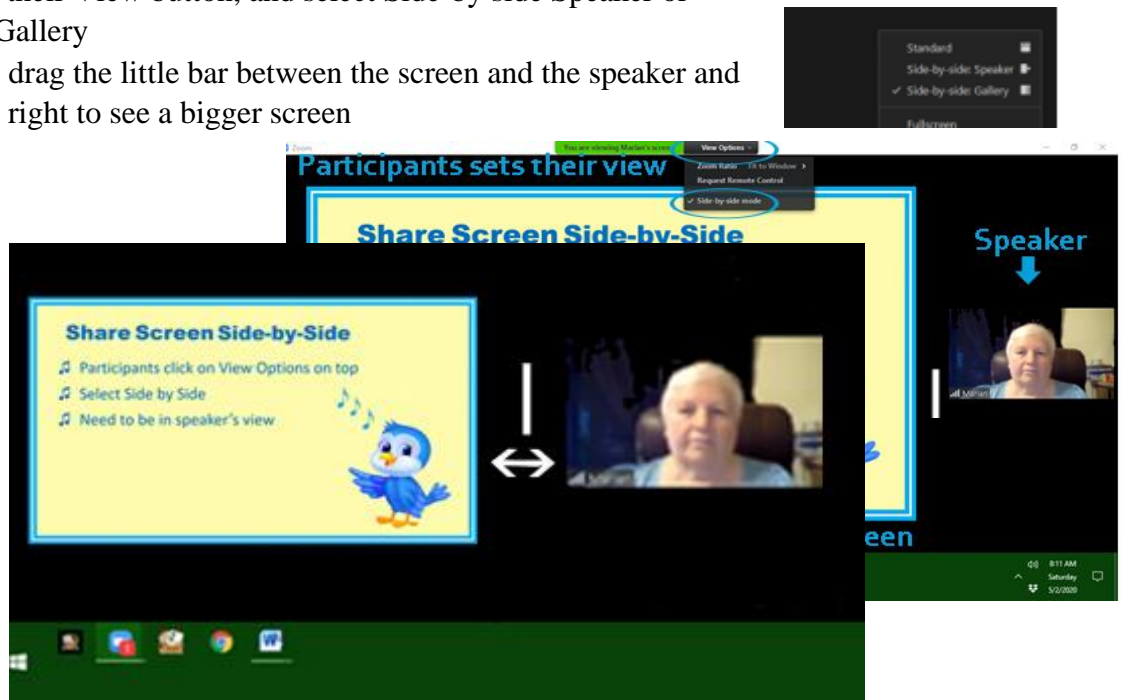
Tips for Share Screen

1. When you share screen videos in high definition, what the participants will see depends on their bandwidth.
2. If you are in a slideshow and click anywhere else, like chat, when you get back to your slideshow, you need to click twice.
3. It is best to have your slideshow in widescreen size (16:9)
4. It is easier to see your pointer/mouse if you change the size.
5. Additionally, it can be distracting if you move your mouse around a lot for no purpose.

Breakout Rooms

- As of July 2020, we can now Share Screen from the primary room to the breakout rooms.
- If you Share Screen in a breakout room, it only shows in that room.
- See more information regarding Breakout Rooms in the RS Online Learning Basic Part 2