Hosts Crib Sheets for Zoom

If you are using Zoom for connecting with just one or two other people then a lot of the detailed information in this document, such as things like 'Raise a hand', 'Mute/unmute' and 'Chat' won't really be necessary for you to use, so you might not want to take time reading them!

You can also watch a YouTube video on scheduling and joining a Zoom meeting by clicking or cutting and pasting this url into your web browser: https://www.youtube.com/watch?v=sJq_OM5VcDY - this is probably the easiest way of getting an idea of how to set up and manage zoom meetings but won't give you as much detail as these notes.

Setting up a Zoom account:
- I strongly advise using a computer to host Zoom meetings, rather than a tablet. You can see more things at one time that you need to be able to keep track of and alter. This becomes far harder on a tablet or phone where you have to keep accessing dropdown boxes. This can be far more complicated and time consuming and less easy to keep track of what is happening and put things right if they're not.
- Go to zoom./us and click the 'Sign up, it's free' blue button on the top right hand corner.
  You just need an email address and a password.
- Zoom is FREE to use for 40 minutes at a time with as many people as you're likely to want to. After 30 minutes you get a warning that you only have 10 minutes left and an option to upgrade your account. Alternatively, set up two or more meeting times of 40 minutes each running back to back (see below). But the downside is that you have to email participants all the web links and Meeting ID codes, disconnect, and then re-connect every 40 minutes. Fine for family/friends, maybe, but not if you want to use Zoom in any professional capacity.
- Costs to upgrade your account: £11.99 per month in a pay-as-you go format or £9.99 per month if you pay for a year in one go (this saves £24 a year. When you choose the upgrade option you only see the £9.99 option – which works out at £119.90 as an annual billing –after you've clicked 'Upgrade' on a couple of different screens. It does appear eventually!).

Setting up meetings and inviting participants:
*I have only done this from a computer. Buttons, their locations, and processes might be a little different if you are setting up a meeting from a tablet/ipad or a phone, as the on screen set up is different for these devices once you get into the Zoom meeting. (As a host, you'll need to know where the different buttons and menus are on both sets of devices, irrespective of what you are using, so that you can support your participants as they navigate the on line space.) However, if you are hosting a Zoom gathering/meeting with more than three participants, having seen the screens and drop-down menus that using a tablet/phone necessitates, **I would strongly advise hosting from a computer** if at all possible.*

You can set up a meeting for straight away, or schedule a meeting for later that day or another day.

However, it is better to schedule a meeting if possible as this allows you to give participants valuable instructions on what they will see as they try to join a meeting, how to do this, and on how you want them to participate or use the zoom meeting space (e.g. muting all participants most of the time and using the electronic 'Raise a hand' facility to ask to contribute. Although this does feel a bit controlled and not as free-flowing as normal interaction, it does make the meeting more orderly with larger numbers but probably isn't necessary with meetings of up to four or five.

To 'Host a meeting' instantly:
- To set up an instant meeting hover on 'Host a meeting' in the top right corner of the screen. On the drop down menu you will probably want to use the 'with video on' option. Click this.
- You will be taken to the Zoom 'Launching' screen. A small dialogue box may appear and you'll need to click the button saying 'Join Zoom meetings' to start or run and open Zoom.
- After a short pause – maybe up to 20 seconds – Zoom will open showing you on your own camera view. At the bottom of the screen is a toolbar. On a PC you may need to wiggle your mouse (or touch the screen if using a tablet/phone) to get the toolbar to appear.
- A prompt box asks you to invite participants, who can join instantly. Click the 'Invite' button.
  A box appears asking you to select an email package: click the one you want to use (Google, Yahoo or default).

This automatically creates an email with the information the participants need to access Zoom as soon as you click send. All you need to do is add the email addresses of the people you want to invite. If people are doing this for the first time, they will, of course, need simple instructions what to do when they receive the invite from you. Ahead of time, you might like to send them the 'Participants crib sheet' that comes along with this 'Hosts crib sheet' and ask them to read through it before they try to join the meeting.

- You can add the title of your Zoom meeting to the automatic email by editing the 'Please join zoom meeting in progress' message.

To schedule a future meeting:

- To set up a meeting for a future date click 'Schedule a meeting' in the middle of the top toolbar. This takes you to a scheduling page.
- A box marked 'Topic' allows you to name your meeting: This appears in the subject box of the email invite that participants will receive from you. Below this you can also add a description of the meeting, if you want. It only appears on the Meeting information page that only you will be able to see, as far as I can tell. It doesn't automatically appear on meeting invitations.
- Next, click the date on the calendar that you want to schedule a meeting on (the dates are given in American format, so 25ᵗʰ March 2020 appears as 3/25/20), and the meeting time, with am or pm (take care to check this!). Beneath this indicate the length of the meeting (possible in 15 minute increments). If you are using the free service, just leave it set at an hour: *sometimes, if you do this, after 40 minutes it will give you a free upgrade to an hour, but you can't rely on this happening. It seems to depend on how busy the system is!*
- If this is going to be a meeting at the same time every week, you can tick the little 'Recurring meeting' box, and then indicate the recurrence: daily; weekly, monthly etc on a set day. I haven't tried this, so don't know if it generates multiple meeting links and ID's or just the one which is used repeatedly.
- Beneath this you can tick or untick whether your meeting requires a password. If you leave it ticked participants will receive this along with the url link and the meeting ID. They will only need to use the Meeting ID and Password *if they connect to the meeting from the Zoom! website* rather than by clicking on the web url in the invitation email.
- Beneath this, you also need to set your Host and Participant video to 'ON' as it seems to default to off! And beneath this, set Audio. I'm unsure if this relates to enabling people to access via 3G and upwards phone, or maybe just via phones without video capability, so I always set to 'Both'.
- You then have some Meeting options.
- It's probably best to NOT tick to allow participants to join before the host. This will put them in a holding space where they see a 'Waiting for host to start the meeting' box if they try to access the meeting before you are there.
- If you don't tick 'Enable a waiting room', they will be able to come into the Zoom meeting as soon as you start the meeting. I advise ticking 'Enable waiting room' especially when you are using Zoom for the first few times. This gives you chance to have a look around and enable the Participant panel etc before you let participants in.
- If you tick 'Enable waiting room', once you have started the meeting and participants begin to link to Zoom they will see either a box saying that they are in a waiting room and asking them to wait till the host lets them in (if using a **PC**) or a little black box mid-screen that says 'Waiting' (for **Tablet/phone** users).You then click to allow them in from the Waiting room once you are in the Zoom meeting space.
- Beneath this you also have an option to 'Mute participants upon entry'. Although this might sound harsh, if you are anticipating more than four or five participants, this may be wise. (See more info about this under 'When you invite participants to a "Scheduled meeting"'.)
- When you've filled in all the boxes, click 'Save'. You will be taken to another screen which is the page for that meeting. If you gave it a name, you will see your meeting name in the top left of the page and a blue 'Start meeting' button in the top right. You probably won't be clicking this button as you're scheduling for a later time or date.
- Below these, you will see the scheduling and ID details of your meeting. You can add them to google, outlook or yahoo calendars by clicking a button.
- Scroll down to where it says 'Join URL' on the left hand side. On the right hand side of this row it says 'Copy the invitation' in blue text. Click on this. A large box headed 'Copy Meeting invitation' will appear with all your meeting info. Click the blue 'Copy meeting invitation' button at the bottom of this bx. It will automatically highlight all the info and copy it. Don't close this box at this point!

- Open the email programme you want to use to send invites to participants. Set up a blank email and paste the information you have just copied into the body of the email. Once you are sure this has copied, then you can go back and close the Copy Invitation box. If you do this before, and you haven't copied it successfully, then you can go back to Zoom and find the meeting to re-copy the invitation info again. (To do this, go back to the main Zoom screen. On the left hand side a box is headed 'PERSONAL' with five options beneath it. The second of these is 'Meetings. Click this. If you have only scheduled this one meeting you will be taken instantly to the meeting info. If you have scheduled more than one, click on the appropriate meeting from the list, which will take you to the meeting info page. In either case, you will then be able to re-click to 'Copy the invitation'.)
- Add to the email the names of people you want to invite in the usual way.
- You can add any additional info you want to into the main body of the email, as usual.
- Send your invites, with appropriate information to participants on what they do to access and join the meeting. It's best to suggest in the invite email that they use headphones or earphones. See the Participant crib sheets.

What invited participants receive and need to do:

Instant 'Host a meeting':

- Participants receive an instant email with a website url link that they click to take them to the meeting. They also receive a Meeting ID, and a password if you set this up.
- When they click on the website url a 'Launching' screen appears and soon after a small 'Open zoom meeting' box with a button on the left at the bottom that says the same. Participants need to click this button.
- If participants join the meeting via the Zoom website, rather than clicking the web url on the meeting invite, then a 'Join Zoom meeting' box may appear, asking them for the 'Meeting ID'. It will also ask for the password if you set this up when scheduling the meeting.
- A zoom meeting box for your meeting will appear.
- If you have ticked 'Enable waiting room' they will not be admitted into the Zoom meeting space until you click to 'Admit' them.
- Once admitted, depending on the device they use, they will need to wiggle their mouse (**PC's**) or touch the screen (**tablet/phones**) to see a toolbar. On the toolbar (bottom of screen for **PC's**; top for **tablet/phones**) they will need to enable 'Start video' by clicking this if the symbol is red and has a line through it. As soon as they click 'Start video' they will be able to be seen in the Zoom meeting space. It's therefore vital that you tell them to enable video, otherwise they won't be able to be seen in the meeting. Instead, everyone will see a black box with their name in it. They will, however, be able to hear you speaking if you can't see them and they can't see you, so you can tell them that they need to enable video by doing so on the toolbar.

Schedule a meeting:

- Participants will receive the email that you constructed and sent. All else should be the same as Instant 'Host a meeting', above.

When you invite participants to a 'Scheduled meeting':

- In your invitation email it is wise to strongly suggest that participants USE HEADPHONES or EARPHONES if at all possible. Without, there can be a lot of feedback, which is unpleasant for others to listen to.
- You might, therefore, want to suggest that if participants don't have access to head/earphones they will be restricted to contributing by using the 'Chat' facility. This is writing a message – like a text or email – in the chat box that will be accessible to everyone on screen. It can be tricky for the host to notice Chat messages appearing as if you are using a tablet/phone, they only appear on the screen for three or four seconds (they do stay visible for anyone using a computer). The same is true for participants seeing chat messages from others.
- If you have chosen to tick the 'Mute on entry' when participants arrive in the meeting set-up process it's sensible to tell participants this in their invite email and to explain why.

Starting Zoom meeting:

- Go to Zoom and sign in ahead of time.
- On the left hand side of the page, under PERSONAL, click the 'Meetings' button. A list of your scheduled meetings will appear. (If you only have one meeting scheduled, the information page for this meeting will automatically be displayed.) Find the meeting you want to start and click the 'Start' button associated with this on the right hand side of the page.

- Wiggle mouse & click 'Manage participants'. This will pull up a white panel on the right hand side of the screen, headed 'Participants'.
- If you are borrowing someone else's Zoom account, change the host name by hovering on their name and clicking the blue 'More' button that appears next to 'Unmute'. Click the white 'Rename' button. A box will appear allowing you to enter a new screen name. If you are using someone else's account, do *untick* the 'Remember my name' box, so that it will go back to their name after your meeting (they may never have had to change this and might not know how to, leaving their own account with your name on it!)
- As your participants begin to log in to the meeting you will see their name and initials appearing as a link in the white 'Participants' panel. If you clicked the 'Enable meeting room' option, as participants try to join you will see a message at the bottom middle of your video screen, just above the toolbar, with a 'Jane is waiting to join the meeting' message. You need to click to admit them into the meeting space. After a while, these messages disappear. You can then see if participants are still waiting to join in the white Participants panel. Click the blue 'Admit' button next to their name to let them join the meeting space.

Enabling 'Participants' Panel for others:
- Although the Participant Crib Sheet tells people how to pull up the white 'Participants' panel, when they arrive in the space they may not have managed to, or remembered to do this. They need access to this panel so that they can 'Raise a hand' (see below) if you have a lager meeting and are working with people muted.
- Remind them of the two ways to get the Participants panel, depending on their device:
    - **PC's:** Wiggle your mouse. The toolbar appears at the bottom.
      Click 'Participants' in the middle of the toolbar.
    - **Tablet/phone:** Touch the screen. The toolbar will appear at the top.
      Touch where it says 'Participants'.
      A drop-down box will appear on the on right hand side.
      Touch your own name. The options they need to participate will appear.
      These go off screen after a while, hence it's easier to use a computer.

Muting/unmuting and video link:
- Next to each name in the list you will see a microphone symbol and a video camera symbol. When that person is connected via these the symbol will be in black. If they are not connected by video and if their microphone is muted, then the symbol will be red and be crossed out with a line through it. This enables you to see if everyone is muted, or if someone's microphone is switched on when you want them all to be muted.
- You can mute and unmute people individually by clicking the appropriate blue button when you hover/click on their name. Or you can unmute or mute everyone using the blue buttons lower down the panel. At first these are at the bottom of the panel but if you click the 'Chat' feature (to enable someone without head/earphones to participate without creating feedback sound, by writing chat messages) they move to half way up the panel.
- If you enable 'Chat' (by clicking this in your toolbar at the bottom of the page) you then see far fewer of your participant names in the panel and have to scroll up and down to find them to individually mute/unmute and lower their hand to enable them to participate. This can be fiddly and time consuming. However, if you hover with your mouse on the line just below the blue 'Mute/Unmute' and 'Lower hand' buttons in the Participant panel and above the 'Chat' box, a two-ended arrow symbol appears. This will allow you to drag down the top of the 'Chat' box so that you can see a bigger list of your participant names. This makes it easier to manage muting/unmuting and lowering hands but can be fiddly to find just the right spot with your mouse's cursor! It's another reason why it's far better if everyone has headphones and you can then ignore the 'Chat' feature!

Explaining how to 'Raise a hand':
- **PC's:** Click blue 'Raise hand' button at bottom right of white Participant panel.
      Encourage them to remember to re-mute when they have finished contributing by clicking the blue 'Mute me' button on the left of this.
- **Tablet/phones:** Touch screen to get drop down box. Touch 'Participants' at top right of box.
      Another drop down box appears on the right hand side.
      Participants need to touch their own name.
      'Raise a hand' and 'Unmute' or 'Mute' audio appear in a list. Touch as appropriate.
- When a participant uses 'Raise a hand' everyone should be able to see a little blue hand appear next to that participant's name. Everyone can see that someone is waiting to be unmuted to contribute.
- When you see the blue 'Raised hand' icon - you have to keep your eyes peeled! - and when you are ready to,

verbally invite them to contribute. You will need to 'Unmute' them. You can then lower their hand by clicking the blue 'Lower hand' button. Everyone will then see the hand disappear.

- In the white 'Participants' panel, everyone should be able to see who is muted and whose mic is enabled. This is a good, quick place for you to be able to check who you forgot to re-mute if you're hearing lots of 'noises off' not from the speaker (sniffs, sleeves scraping over the mic etc).

Other functions:
Some other useful things you can use on zoom.

Speaker view & Gallery view:
- Everyone can change the way their screen appears. There are two choices:
  1) Speaker view: the person speaking is large sized in mid screen; everyone else small along top or sides.
     PC's: Top right, next to 'Participants' but on main coloured screen
     Table/phones: Top left, little white circle says Switch to Speaker view
  This can get a bit distracting as the person in the main box flicks from person to person. But it does mean that it's easier for the person speaking to feel as if you as the host are maintaining eye contact with them. In Gallery view, the person speaking might be in the bottom left of your screen and so your eyes will be looking in this direction (unless you're disciplined enough to keep looking at your camera come-what may!) when they see your video on their screen. So it looks to the person speaking as if you are visually distracted by something on your screen, rather than paying attention to them.
  2) Gallery view: keeps everyone as the same sized image. It puts a yellow margin around the person talking.
- You can toggle (move between) either view at any time.
- Everyone has control of their own screen, so you can invite participants to see which they prefer.

Chat feature and box:
- If someone doesn't have headphones its better in some ways (but harder and less inclusive) if instead they use writing a message in the chat box.
- To access the 'Chat' feature:
  PC's: Wiggle mouse to see the toolbar at bottom.
          Click the 'Chat' bubble (to right of 'participants').
          In the bottom half of the white participants box on right of screen, 'Zoom Group Chat' appears.
          This also moves 'Unmute me' & 'Raise hand' to the middle of the participant white box.
          Participants (and you) can write a message in the box at the bottom.
          Everyone can see this message if they have the 'Chat' facility enabled.
If you want to send a message that just one participant can read (eg if you need to ask them to turn down their volume control), next to 'To:' click on 'Everyone' and change to 'Private'. You can then send a discreet message, but say out loud 'X, I've sent you a message'. You might have to help them access this using the info above or below.
          Tablet/phones: Touch the screen anywhere to get the toolbar to appear.
                                At the top, far right of toolbox it says 'More'. Click this.
                                A dropdown menu appears, with 'Chat' at the top.
                                Clicking 'chat' allows you to write a message.
If participants are using a tablet/phone, when someone sends a message to 'Everyone' it appears as a text box at the top right of the screen.
- If you (or participants) enable 'Chat' on your own screen (by clicking this in your toolbar at the bottom of the page) you then see far fewer of your participant names in the panel and have to scroll up and down to find them to individually mute/unmute and lower their hand to enable them to participate. This can be fiddly and time consuming. However, if you hover with your mouse on the line just below the blue 'Mute/Unmute' and 'Lower hand' buttons in the Participant panel and above the 'Chat' box, a two-ended arrow symbol appears. This will allow you to drag down the top of the 'Chat' box so that you can see a bigger list of your participant names. This makes it easier to manage muting/unmuting and lowering hands but can be fiddly to find just the right spot with your mouse's cursor! It's another reason why it's far better if everyone has headphones and you can then ignore the 'Chat' feature!

Share screen:
You can share some files on screen with participants, which might well be useful at times. This could be an image, a diagram, a text etc.

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I am not quite sure how this works! It seemed a little tricky to set up and I'm not entirely sure how I did it in the end.

- On your computer open and then minimise the file that you want to share. I think this needs to be a single page or image at a time. You can open several to share at different times in the meeting. If you are going to do this open and then minimise the files in the order that you expect to need them during the meeting (I think!)
- Before the meeting time, log in to your meeting space. Wiggle your mouse to get your toolbar.
- In the middle is a bright green 'Share' button. Click this.
- A box appears with files that you can share. Hopefully, you will see images of the file(s) that you pre-opened.
- Click each file to check how it is appearing on screen. It should be a large image in the middle of the screen.
- Once you've checked that this is working, you will repeat this procedure (click 'Share' from the toolbox, then click the file you want to share) at the time you need it.
- When others are also in the zoom space your personal video screen will appear at the right of the image with the video feeds of *some* of the other participants, but not all. I haven't found a way yet to see them all. Maybe if you are in Gallery view or Speaker view this works differently.
- Sorry but I can't remember how to make the shared image go again, but it was very obvious, I think. Trial this before the meeting! It may be that you click 'Share' again and it unshares the file.

Leaving meeting:
- When they are ready to go, participants nee to click 'Leave meeting.
     PC's: wiggle mouse and click 'Leave meeting' in red text at bottom right of screen
     Tablet/phones: touch screen and touch 'Leave meeting' in red text in top left of screen

Ending meeting:
- After all the participants have left the meeting you need to click 'End meeting'. This closes and disconnects your Zoom meeting leaving bandwidth open for other meetings.
- 'End meeting' is a red text button in the bottom right corner of the video screen, right next to the Participant panel.

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