

ZOOM TRAINING 101

OCTOBER 21, 2020
JOINT PETS1



Why Zoom?

- The primary answer is that it is FREE and easy to use.
- Why pay for Zoom? It increases the amount of time you can have for a meeting from 45 minutes to unlimited and it can increase the number of people within your meeting or type of meeting.
- With millions of people being forced to stay home to help stop the spread of COVID-19, many have found creative ways to virtually stay connected.
- Zoom has been widely adopted by many Rotary Clubs but is in no way mandated or indorsed as the only tool to use.
- Since we don't know when we will be able to meet in person, it is important that all of us feel comfortable with this platform of communication and do not be afraid to expand this to other online meeting platforms
- **Disclaimer: *These are guidelines based upon personal experience and not official Zoom Training material***

Virtual Meeting Etiquette

“ZoomEtiquette”

- Minimize using your keyboard other than Zoom hot keys
- Dress appropriately - Wear appropriate clothing for virtual conference

No Pajamas – Stay Professional

- Be aware of your surroundings -Pay attention to the background. It should be neutral and uncluttered if possible
- Be aware of other people walking in your background.
- DO NOT face an area where someone can walk behind you and do something you may not know like change their cloths without knowing you are on Zoom.
- Mute your microphone when not talking (Simple rustling of paper or type on keyboard can be heard and is very distracting)
- Be completely aware when you are muted and NOT muted
- Speak up and Speak Clearly and look into the camera
- No food allowed – will vary depending on virtual activity
- Stay seated and stay present (if you have to get up turn off video)

The Commandments of Zoom

1. Thou shalt Mute thy self when not speaking
2. Thou shalt not replace professionalism with comfort
3. Keep distractions to a minimum during a meeting
4. Thou shalt not eat on Zoom
5. Thou shalt not drive and Zoom
6. Thou shalt not send distracting private messages
7. Thou shalt not have a busy background behind you
8. Thou shalt start the meeting on time and end the meeting on time
9. Place thy self with good lighting with good camera placement
10. Thou shalt Participate

Meeting Area Management

- Lighting is important. Avoid fluorescent and overhead lights
- Light source should be coming from behind the camera onto your face
- If light is behind you, your face will be shadowed and there will be a halo effect
- Use Virtual Backgrounds that are appropriate if you are in a poor area that will distract to the other participants
- Be mindful of what is behind you (Everyone can see that)

Zoom Meetings

- You do not have to have a Zoom account to attend a Zoom meeting
- You will be prompted to download the software, once you click on the link provided.
- You may also wish to create an account, but that is not required to participate in a Zoom meeting.
- Make a free account <https://zoom.us/signup>
- Once your free account is created you can hold your own Zoom meetings for free but they have a time limit of 45 minutes.

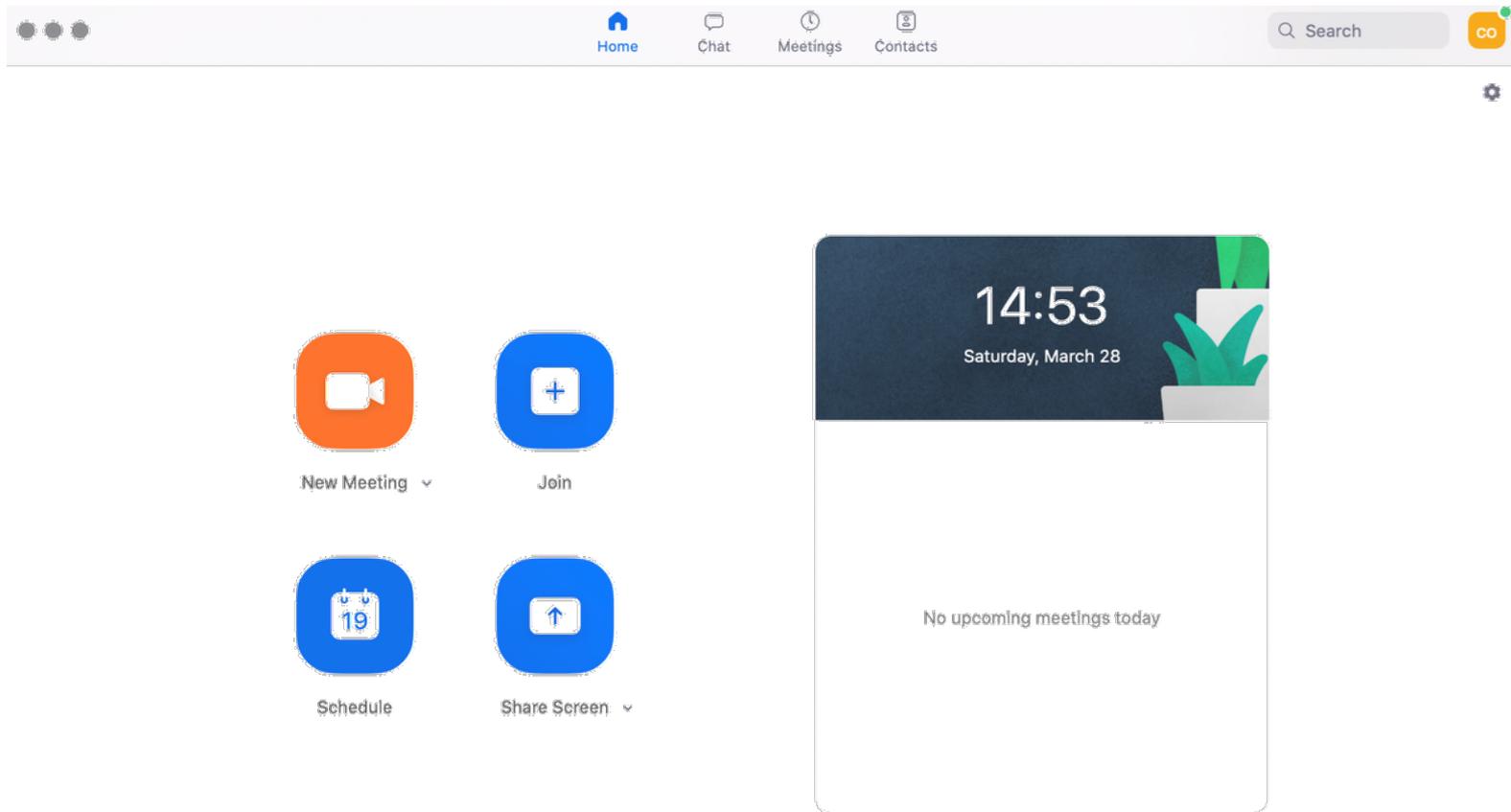
Keyboard Short Cuts

- **Alt +M:** Mute/unmute audio for everyone except host
- **Alt +Shift+S:** Start/stop new screen share
- **Alt +T:** Pause or resume screen share
- **Alt +R:** Start/stop local recording
- **Alt +P:** Pause or resume recording
- **Alt +Y:** Raise/lower hand
- **Alt + Shift + T:** Screenshot

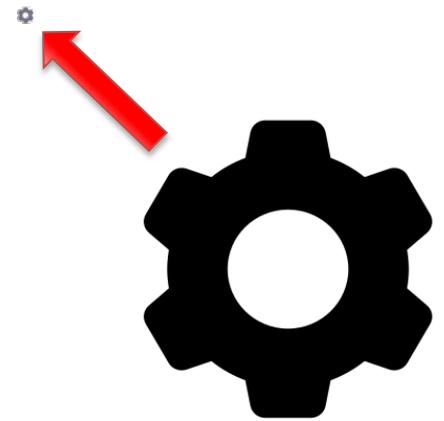
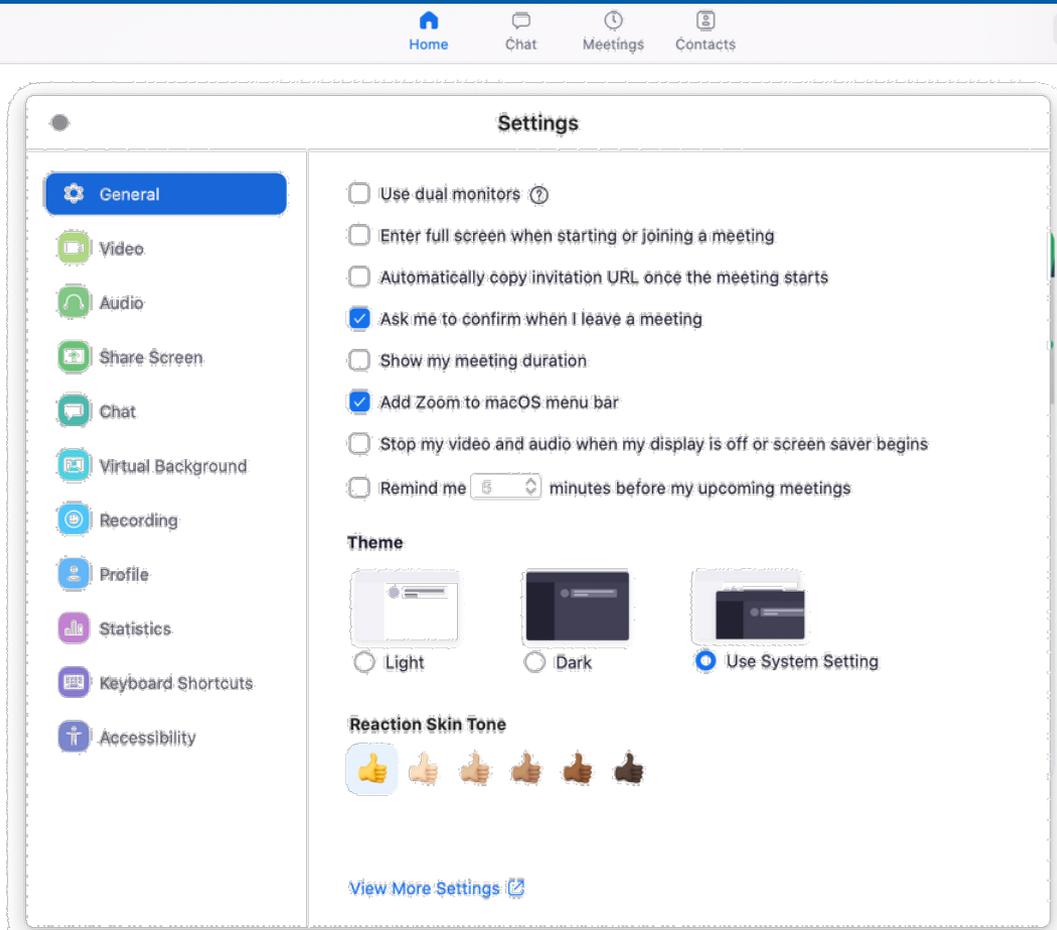
How to Download Zoom – Smart Phones, Tablets, & iPads

- If you are using a laptop or desktop computer, you will need to download Zoom from the website in order to join meetings. If you are using a smart phone, tablet or iPad, you will need to download Zoom from the App Store or Google Play Store.
 - <https://zoom.us/download>

What does Zoom Desktop Client Look Like?



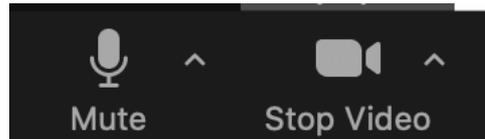
Zoom Settings



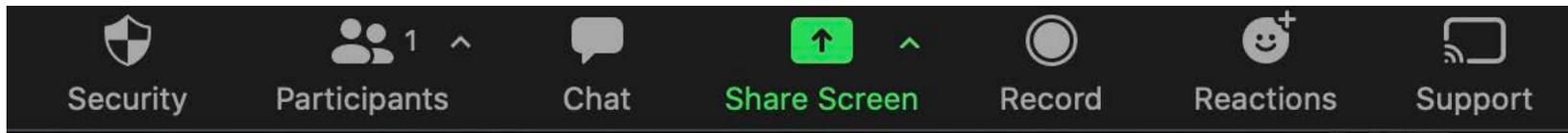
**Look For This
Symbol To Get To
Settings**

Core Zoom Meeting Functions – Bottom of Zoom Meeting Screen

- Mute/Unmute (Alt+A or hold the spacebar): click on the microphone icon to mute/unmute yourself in meetings.
- Start/Stop Video (Alt+V): click on the video camera icon to turn your video on/off during meetings.

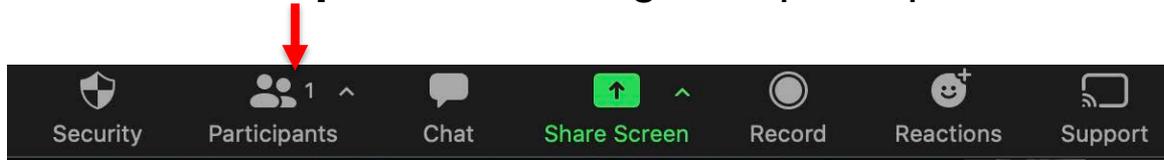


- Chat: click on the Chat icon to type messages to other meeting attendees



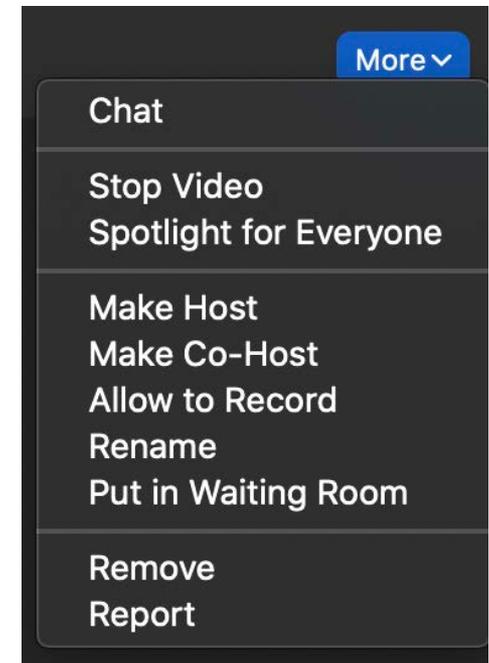
Manage Participants

Click **Participants** to manage the participants.



Hover over a participant's name and click **More** for this box below to appear additional options:

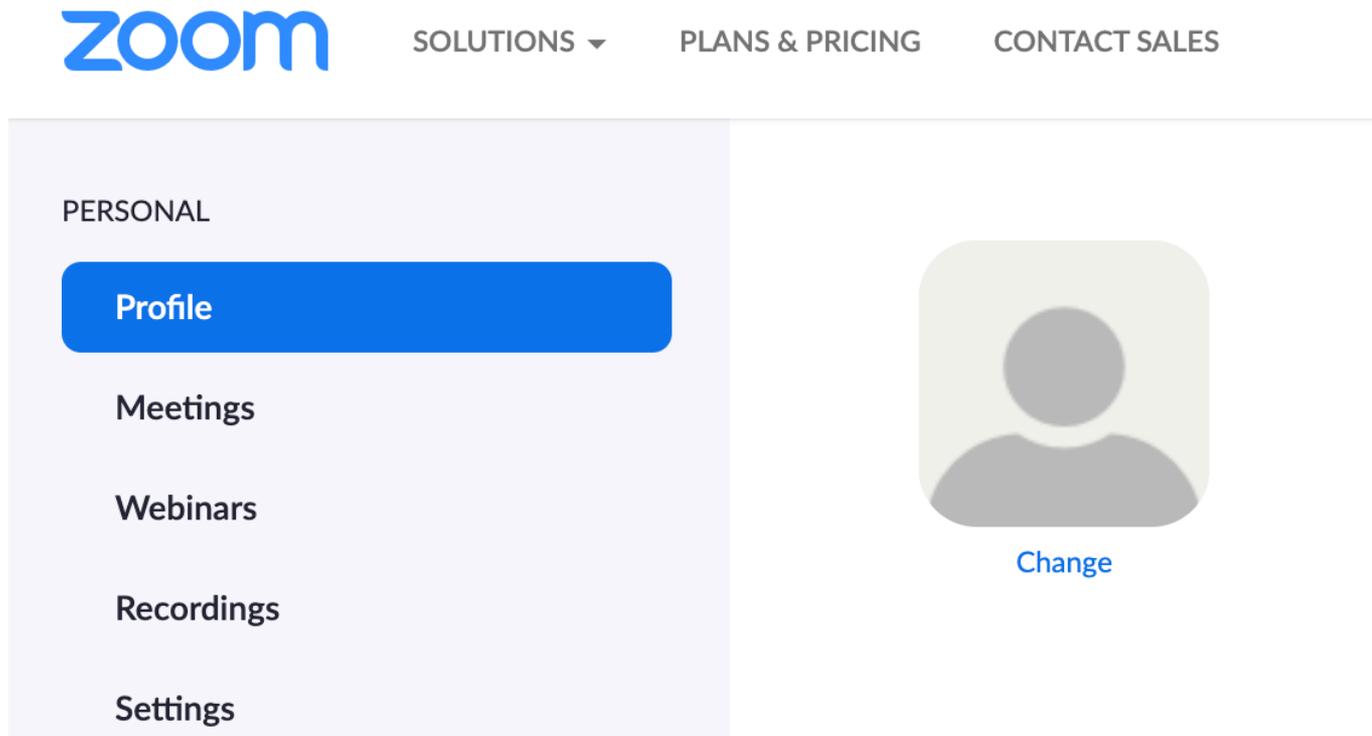
- **Chat:** Will let you Chat directly to attendee
- **Stop Video:** Will Stop Video of attendee
- **Spotlight for Everyone:** Will take the Video of that person and bring to the Speaker View if Viewers have Speaker View on
- **Make Host:** Will make that Attendee Host of the meeting
- **Make Co-Host:** Will make that Attendee a Co-Host of the meeting(You can and should have multi Co-Host's which is great for your **Zoom Sargent's**)
- **Allow to Record:** Will allow the attendee to record meeting.
- **Rename:** Change the participant's name in the meeting(Host and Co-Host Can Perform This Function).
- **Put in Waiting Room:** Remove this participant to the waiting room. You will then have the option to readmit them.
- **Remove:** Remove this participant from the meeting.
- **Report:** This will report attendee directly to Zoom because of some abuse.



Add or Change Your Zoom Profile Picture

<https://zoom.us/profile>

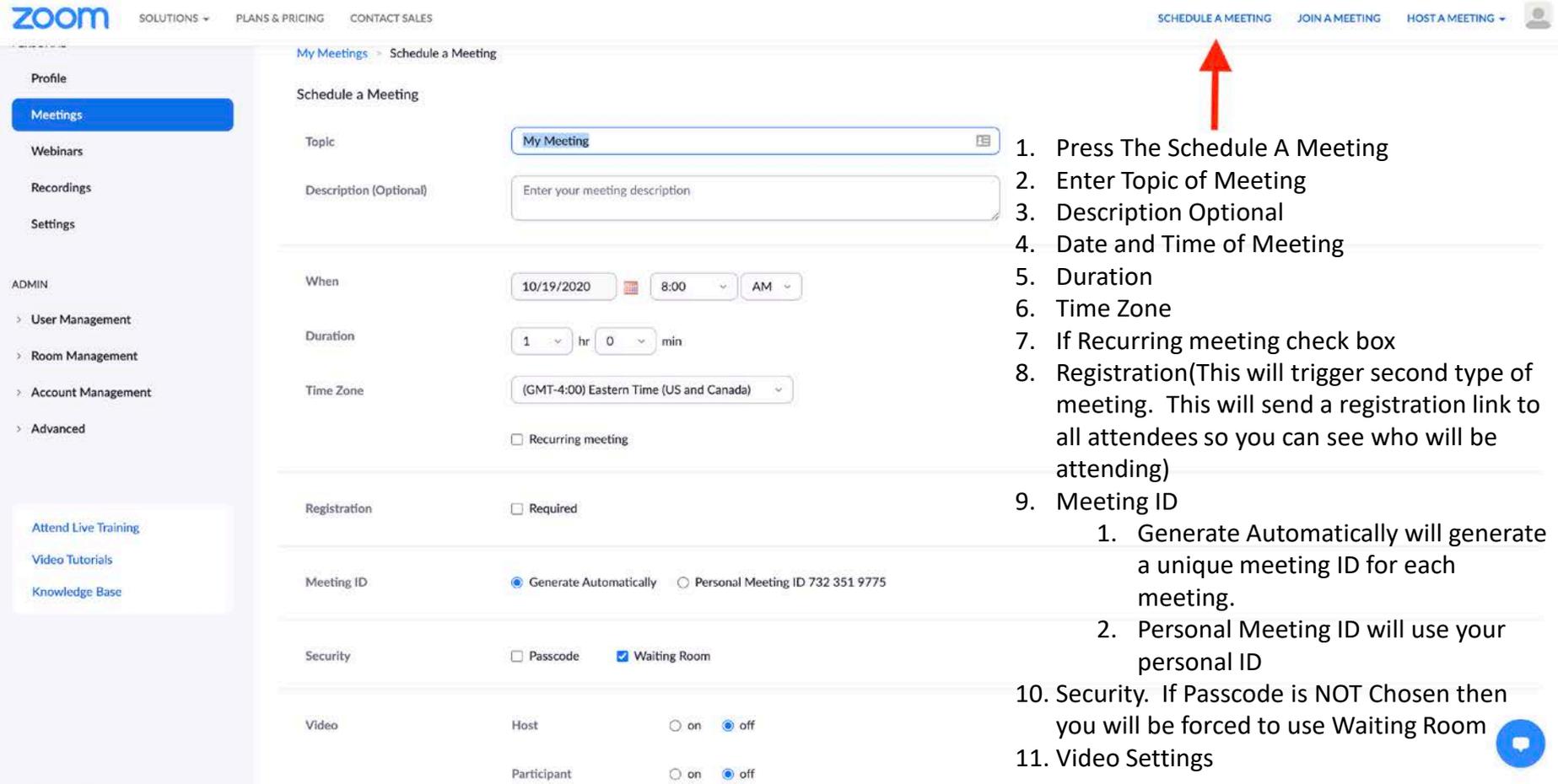
Visit the above link and choose Profile once you have signed up for a Zoom Account. You can press Change under the picture and choose a picture you would like to show when you pause your Video



Two Types of Zoom Meetings

- **Scheduled Meetings**
 - These Are Open Meetings To Those With The Meeting Link OR Passcode
- **Meetings With Registration**
 - Only Available To Attendees That Are Registered
- *Remember Zoom Is Updating Settings Often So Be Prepared To Keep Up With Recent Feature Changes With Zoom*

How To Create/Schedule A Meeting First Page



The screenshot shows the Zoom 'Schedule a Meeting' interface. The top navigation bar includes 'SCHEDULE A MEETING', 'JOIN A MEETING', and 'HOST A MEETING'. A red arrow points to the 'SCHEDULE A MEETING' link. The main form is titled 'Schedule a Meeting' and contains the following fields and options:

- Topic:** My Meeting
- Description (Optional):** Enter your meeting description
- When:** 10/19/2020, 8:00 AM
- Duration:** 1 hr, 0 min
- Time Zone:** (GMT-4:00) Eastern Time (US and Canada)
- Recurring meeting
- Registration:** Required
- Meeting ID:** Generate Automatically, Personal Meeting ID 732 351 9775
- Security:** Passcode, Waiting Room
- Video:** Host (on/off), Participant (on/off)

1. Press The Schedule A Meeting
2. Enter Topic of Meeting
3. Description Optional
4. Date and Time of Meeting
5. Duration
6. Time Zone
7. If Recurring meeting check box
8. Registration(This will trigger second type of meeting. This will send a registration link to all attendees so you can see who will be attending)
9. Meeting ID
 1. Generate Automatically will generate a unique meeting ID for each meeting.
 2. Personal Meeting ID will use your personal ID
10. Security. If Passcode is NOT Chosen then you will be forced to use Waiting Room
11. Video Settings

How To Create/Schedule A Meeting Second Page

zoom SOLUTIONS ▾ PLANS & PRICING CONTACT SALES

SCHEDULE A MEETING JOIN A MEETING HOST A MEETING ▾

Video

Host on off

Participant on off

Audio

Telephone Computer Audio Both

Dial from United States of America [Edit](#)

Meeting Options

Allow participants to join anytime

Mute participants upon entry [x](#)

Require authentication to join

Automatically record meeting

Alternative Hosts

Example: mary@company.com, peter@school.edu

[Save](#) [Cancel](#)

1. Video (When you Join Meeting Whether Host/Participant Video is On/Off)
2. Audio (Usually want to allow Both)
3. Meeting Options
 1. Most Common is to Allow participants to join anytime
4. Alternative Hosts – Great setting for you Zoom Sergants so they have the features to Mute and Un-Mute Attendees

How To Let People Know About Your Meeting

The screenshot shows the Zoom web interface for managing a meeting. The left sidebar contains navigation options: PERSONAL (Profile, Meetings, Webinars, Recordings, Settings) and ADMIN (User Management, Room Management, Account Management, Advanced). The main content area is titled 'My Meetings > Manage "Test Meeting"'. It displays meeting details: Topic (Test Meeting), Time (Oct 19, 2020 08:00 AM Eastern Time (US and Canada)), Meeting ID (859 7336 1979), Security (Passcode, Waiting Room), and Invite Link (https://us02web.zoom.us/j/85973361979). A 'Copy Invitation' link is highlighted with a red arrow. Other options include 'Start this Meeting', 'Add to' (Google Calendar, Outlook Calendar (.ics), Yahoo Calendar), and 'Meeting Options' (Allow participants to join anytime, Mute participants upon entry, Require authentication to join, Automatically record meeting).

PERSONAL

- Profile
- Meetings
- Webinars
- Recordings
- Settings

ADMIN

- > User Management
- > Room Management
- > Account Management
- > Advanced

Attend Live Training

Video Tutorials

Knowledge Base

My Meetings > Manage "Test Meeting"

Start this Meeting

Topic: Test Meeting

Time: Oct 19, 2020 08:00 AM Eastern Time (US and Canada)

Add to: [Google Calendar](#) [Outlook Calendar \(.ics\)](#) [Yahoo Calendar](#)

Meeting ID: 859 7336 1979

Security: Passcode Waiting Room

Invite Link: <https://us02web.zoom.us/j/85973361979> [Copy Invitation](#)

Video: Host Off, Participant Off

Audio: Telephone and Computer Audio, Dial from United States of America

Meeting Options: Allow participants to join anytime, Mute participants upon entry, Require authentication to join, Automatically record meeting

Once your meeting is created press the Copy Invitation Link

AVAILABLE SECURITY SETTINGS

<https://us02web.zoom.us/profile/setting>

BE FAMILIAR WITH THESE SETTINGS-YOU **DON'T HAVE TO USE THEM ALL**

- **Lock Meeting:** Locks the meeting, keeping new participants from joining the meeting. (You probably do not want this setting set for a Rotary Club meeting)
- **Enable Waiting Room** for incoming new participants or to move current participants into the Waiting Room. (If you enable this setting have Zoom Sargent's on point to Admit attendees)
- Allow participants to:
 - **Share Screen:** Allows participants to start Screen Shares
 - **Chat:** Allows participants to use the chat function.
 - **Rename Themselves:** Allows participants to rename themselves from the Participants panel.
 - **Unmute Themselves:** Allows participants to unmute themselves without the host's permission.
- **Remove Participant** from a meeting. The participant can not re-join unless **Allow removed participants to rejoin** is enabled in Meeting settings. (Have your Zoom Sargent's aware of how to do this)
- **Report** allows you to report a user to Zoom's Trust and Safety team. You will be able to select which user to report and provide details about the problem. You can also upload evidence, such as screenshots.



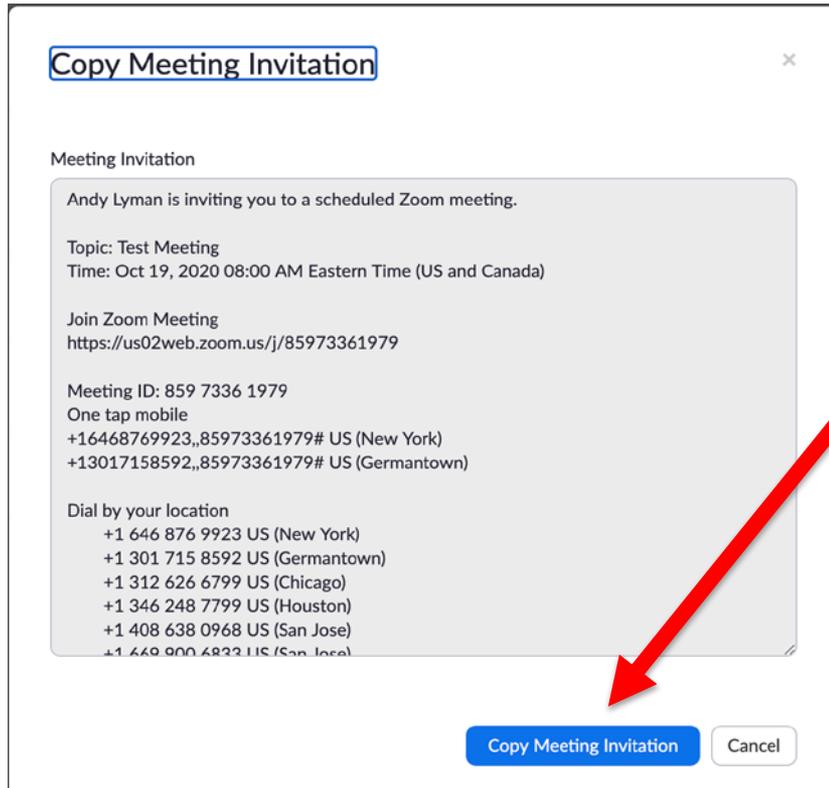
Rotary

Districts 6890 & 6960

More On Meeting Security

- It is a balance between not enough Security and too much Security
- Have your Zoom Sergeants be **Reactive** and **Prepared**
- Locking a meeting down to tight can be frustrate your participants
- Do we lock the doors after we start a physical Rotary Club meeting?
- Why would we lock the doors on a Virtual Rotary Club meeting?
- There is no one answer fits all. Plan, Plan, Plan.
- Be prepared to take action if needed (Mute, Un-Mute, Remove)

How To Let People Know About Your Meeting - Continued



After you press the Copy Invitation Link – You will see this screen appear and you can press the Copy Meeting Invitation which will put the invite in your Clip Board and let you Paste it to an Email.

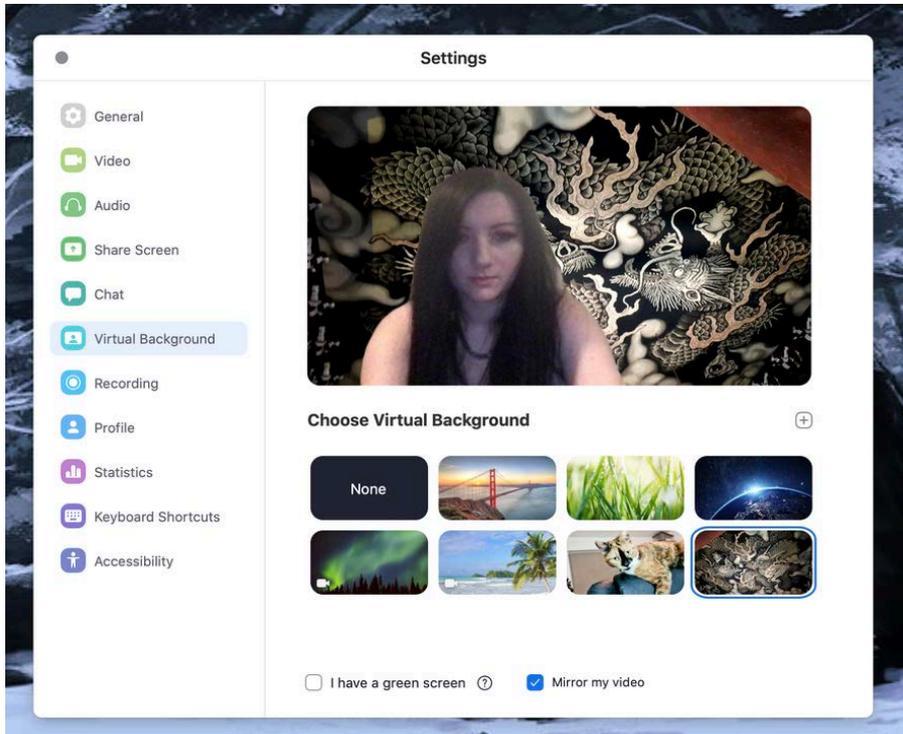
If you are scheduling meetings it we advise you to start using one of the Calendar Applications such as Outlook or Google Calendar to keep track of your schedule

Meetings With Registration

- Be aware that using Registration for a meeting should only be used for meetings that are appropriate for Registration.
- Registration adds a certain level of friction to your Participants and it is NOT recommended for the normal Rotary Club meeting.
- Our goal for a Rotary Club meeting is to be open to ALL and encourage visitors whether registered or not.
- **USE YOUR Zoom Sergeants** if someone or something disrupts your meeting. Mute or Un-Mute or Be Prepared to Remove the participant.

VIRTUAL BACKGROUNDS

[Virtual backgrounds can be used](#) to hide the chaos and clutter of your home. Test your computer capabilities some older computers are not compatible with Virtual Backgrounds.



What is a green screen?

Virtual Backgrounds can work effectively without a green screen behind you but for maximum usage if you put a solid green physical background the camera can enhance the use of Virtual Backgrounds. A green screen can eliminate that fuzziness you see sometimes between the image of the person and the Virtual Background. Green screens can be found to purchase easily on Amazon or other sources.

ADDITIONAL POINTS

- Zoom is constantly enhancing the software
- Keep your Zoom App and Desktop software updated to the latest release
- There is large amounts of Tutorial Videos available and go to the [Video Tutorials](#) link when you sign in to your Zoom account
- Be in a learning mode and stay reactive to the changes to the Zoom software updates

Preparing Your V/IP Meeting



Preparing Your V/IP Meeting

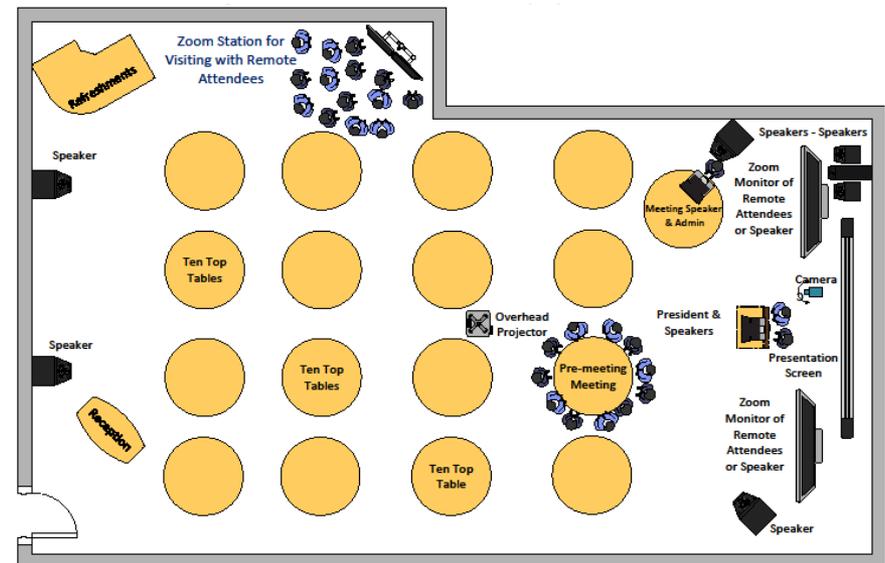
V/IP Meeting Type	V/IP Size	V/IP Examples
Simple	Small Club Size (up to 25 people)	 
Intermediate	Medium Club (25 to 75 people)	
Advanced	Large Club (75+ people)	 
Custom	Events (1,000 to 10K people)	  

Advanced V/IP Meeting



Example minimum configuration

- One laptop for the Presenter
- One laptop for the Zoom Master
- Two projector screen/monitors
- One camera facing the room audience
- Connected to the room audio
- Multiple room microphones used
- Media controller
- Optional – Smartphone Zoom to roam



Custom Events V/IP Meeting

Larger Space
More People
Added Complexity



V/IP Meeting Checklist

- 1. Survey the room. Have a map where the President, Speakers and audience are positioned; where the screens/monitors, speakers, microphones, cameras are placed; the entrance, exit, and walkway.
- 2. Make a list of equipment - cables, platforms, tables, podiums, microphones, PCs, projectors, speakers, screens. If an integrated webcam is used, we recommend having an extra USB plug in web-cam.
- 3. Determine if an auxiliary camera, is needed for the Zoom audience to see and hear the in-person meeting, and vice versa.
- 4. Determine if an audio microphone and/or speaker is needed between the physical room and the Zoom meeting, and vice versa. There can be one active audio device on at one time.
- 5. Verify and test Wi-Fi and internet connectivity, speed and capacity. Minimum 5 Mbps upload speed.
- 6. Review “run of show”- script of the meeting agenda, flow, and speakers (i.e., stand up or sit down, TEDx/panelists), queuing the media (i.e., PowerPoint presentations, videos, pictures, sound), showing items in the room or online (i.e., The 4-Way Test banners, other banners, flag, or posters).
- 7. Procure all needed components or equipment. Check batteries, AC adapters, and certain spares.
- 8. Prepare one PC or MAC as the main Zoom Host controller for audio and video for the Zoom meeting. All slides, video, pictures and host controls should be on this unit. The audio for the Zoom audience is on this unit. This is the Zoom production unit, the main Zoom control point.
- 9. Prepare another PC or MAC as the presenter presentation platform for the President and Presenters. The internal camera projects the presenter to the Zoom audience. A monitor in the room meeting leaders and presenters (think almost a teleprompter). This could be a back-up unit.

V/IP Meeting Checklist

Continued

- 10. Test video and sound with the projectors screens/monitors, microphones and speakers in the room and through zoom onsite and online. Make sure zoom attendees hear the microphone used in the room. Make sure video and the audio from video can be heard over the room speakers and heard by the Zoom attendees. Make sure the Zoom attendees can be heard in the room. Test for feedback.
- 11. Identify the participants, their roles, and locations online or onsite in the production:
 - a. President, Presenters, Other speakers – Guests, Announcers, Flag salute, Invocation, Reports,...
 - b. Production crew – includes the following roles – 1 or more people:
 - i. Zoom Master - Main controller for the physical and Zoom interface
 - ii. Zoom Sergeant – monitors the attendees on zoom and in the room
 - iii. Operator of the Speaker, Presenter, Presidents interface
 - iv. Operator of the room microphone, camera, speakers
- 12. Communicate to all involved in the meeting program, specific expectations, behavior, and materials needed well in advance of the day of show.
- 13. Make sure all software (i.e., Zoom Pro) and hardware drivers are up-to-date, the cloud recording has enough space, and ready to go.
- 14. Obtain all presentation materials to be used and test with the set-up days in advance. Embedded audio/video. Shorten transition time between presenters, presentations, and audio and video.
- 15. Dry run – before the meeting, test and retest. Mark and fix position layouts, gauges, settings.
- 16. Name all Zoom windows clearly and accurately - name “Zoom Meeting Host” and “Presenter” or their name. Encourage everyone to have their videos on. Spotlight, rearrange windows. And have fun!

V/IP Resources



The Global Impact Group
Team@tgig.org
Pleasant Hill, CA
Alpharetta, GA
628-222-7739



Zoom.us



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