Using Zoom for online meetings

Guide produced by John Howes in connection with use by Malvern U3A
April/June 2020, updated for Zoom version 5.1.

Part Two - Hosting meetings

Contents: Introduction, shortcut keys; Starting and scheduling;
Running meetings, security, managing participants, screen share options.

Introduction

For the basics of **setting up** the software on your computer, and terminology used, see Quick Start in **Part One user guide**. Also see its 'Getting more from Zoom' section, particularly on **tweaking settings (web portal options)**. The Part Three guide is on **Presenting and Screen Share**.

Make sure you have the current version of Zoom installed, for security and optimum control. You do need to sign up for a Zoom account. If you only want a simple **one-to-one** session, though, simply use 'Meet' option under 'Contacts' and ignore this guide.

In Zoom, the person running a meeting is the host. Usually the host arranges the meeting in advance and manages it when it is live, although it is possible to **hand over hosting** at this point. No need to hand over just to allow someone to show a slide or other presentation, though, as long as 'Allow participants to: Share Screen' is ticked (see page 3).

Use the **largest screen available** - while it is possible to host from a handheld, some features will be limited (although iPad capabilities may be better than other such devices).

Keyboard Shortcuts on Windows

- F6: navigate among Zoom popup windows
- Alt: always show meeting controls   Alt + F: enter/exit **F**ull Screen mode
- Alt + F1: switch to Speaker View   Alt + F2: switch to Gallery View
- Alt + I: open the **I**nvite window   Alt + H: toggle Chat panel
- Alt + S: start/stop screen **S**haring   Alt + T: pause/resume screen sharing
- Alt + V: start/stop **V**ideo   Alt + A: mute/unmute **A**udio
- Alt + M: **M**ute/unmute everyone's audio, except host (host only)

Scheduling and starting meetings

Normally for group meetings you will be **creating a Scheduled Meeting**. You can begin the process from the home screen 'Schedule' button, or go to the Meetings screen (from Home screen toolbar) to see already available meetings and on PCs use ⊕ button to add new.

Schedule Meeting

Topic

JAH U3A Malvern's Zoom Meeting

Start: Thu April 30, 2020   ∨   18:00 ⇅

Duration: 0 hour ∨   30 minutes ∨

☐ Recurring meeting   Time Zone: London ∨

Meeting ID

◉ Generate Automatically   ○ Personal Meeting ID 5˙ -031-2˙ ˙

Password

☑ Require meeting password   2t5ESu   ⑦

Video

Host: ◉ On ○ Off   Participants: ◉ On ○ Off

Audio

○ Telephone   ◉ Computer Audio   ○ Telephone and Computer Audio

Calendar

○ Outlook   ○ Google Calendar   ◉ Other Calendars

Advanced Options ∧

☐ Enable Waiting Room

☑ Enable join before host

☐ Mute participants on entry

☐ Automatically record meeting on the local computer

[Schedule]   [Cancel]

Meeting options

'Require meeting password' is the default for security. Unless you want to discourage others from speaking during the session, set Video 'On' for host and participants. Set Audio to 'Computer Audio'.

'Enable join before host' (under Advanced Options) will allow participants to test their set up before the meeting begins. 'Automatically record' (last item under Advanced) should only be used if this has already been agreed with participants.

Image left (Windows): 'Schedule meeting'. Below: part of 'Edit Meeting' on Android smartphone - further options: video/audio, Advanced, add to calendar.

Cancel	**Edit Meeting**	Done

more Zooming|

Date	08/04/2020 >
From	11:00 >
To	11:30 >
Time Zone	GMT+1:00, Greenwich Mean Time >
Repeat	Never >
Use Personal Meeting ID (PMI) 5˙ -031-2˙ ˙)	⬤

If this option is enabled, any meeting options that you change here will be applied to all meetings that use your personal meeting ID.

PASSWORD

Meeting Password	⬤
Password	022294

Calendar options may vary, depending on device. Recurring meetings can be used for 'ongoing' sessions, with or without a definite schedule set - this means you don't need to keep circulating a new link/password, unless unwanted people get hold of the original link. **Be careful how you give out the meeting link**, preferably not displaying it on any social media or very public website.

What happens on **saving (or editing) scheduled meeting details** will depend on what software is on your device - and for PCs, what calendar option you have set. Normally choose **email to send out invites** - you may need to save as a draft first and later insert the email address list, in the bcc field for privacy.

You can also create an 'Invite' from within a meeting - option on the bottom of the Participants list.

Start/End

Go to the Meeting screen to Start a scheduled meeting. You can do this beforehand to check everything is OK, then 'End Meeting'. Select Start again a few minutes before due time. It is possible to hand over hosting to another attendee - see under 'Managing Participants', and also see 'Share Screen options' for alternative approaches (Part Three of this guide).

A 'confirm' box pops up when ending a meeting, it could carry on without you if ignored! Note that the 40 minutes limit for free use is calculated from when the first person joins the meeting, which can make quite a difference if 'Enable join before host' is on.

On PCs, **reminders** can be set up under your personal Settings (cog on home page, then see General). On handhelds use 'add to calendar'. To have a record of who attends the meeting, it might be easiest for someone to be delegated to make a note.
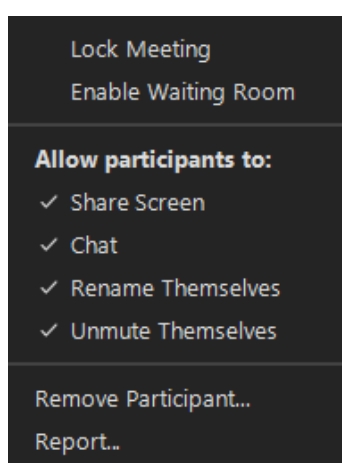
Running meetings

Security Options: Use 'Lock Meeting' and 'Enable waiting room' to control entry - new meetings default to having a waiting room. Other participant options default to allowing: Share Screen, Chat, Rename, Unmute - switching these off might reduce the scope for accidental distractions. Unwelcome visitors can be removed, and even reported to Zoom. Note: default settings can be changed via the web portal.

*Images below/left: controls toolbar on Windows (cropped), security settings showing. See image **next page for Android smartphone version (Meeting Settings for hosts)**.*
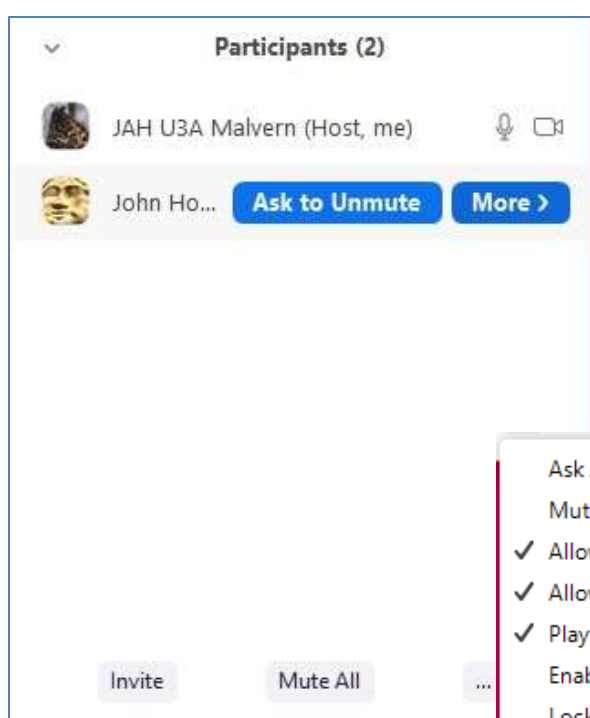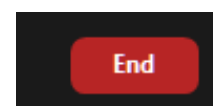
Managing participants

Click/tap on 'Participants' to see the list of those currently attending the meeting, *Windows image left.* Note the options to Invite more to join, or to Mute All (handy if there is too much background noise) - *insert below of '...' options.*

With a user selected, *as John Howes is here*, select 'More >', or on handhelds just tap the name, and get **management options:** Chat, Stop their Video, Make them Host, Rename, allow Recording, Remove from the meeting. Perhaps use 'Put in Waiting Room' if you need to sort something with a participant.
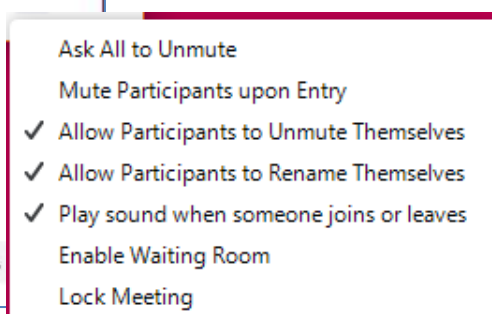
Image below: Meeting Settings on Android.

When recording a meeting

Free accounts can only record locally (on PC). Note:

- At the end of the meeting, automatic conversion to mp4 format can take a while to process.
- Recording itself consumes processor power, so you may need to reduce what else is running.
- Minimising participant thumbnail videos will protect privacy and reduce processor load a bit.
- It is worth checking Recording settings for things like optimum format, or switching off 'video' (= thumbnails) when screen sharing.
- PCs (& some tablets?) have an 'on the fly' record button on the main toolbar.
 Please respect privacy when recording.

In **gallery view** the number of people shown at once will depend on screen size - use left/right arrows to navigate. The current speaker's video thumbnail should automatically be highlighted, but there can be a time lag.

Breakout rooms - see Part Three: Presenting guide.

Chat: On PCs, from the Chat window select '…' (More) - *image right* - to limit chat options for participants.

Share Screen options

For **what can be shared, and how**, see Part Three of the guide: Presenting and Share Screen. As host, note that Share Screen's auto-hidden toolbar should have extra buttons, as per main toolbar.

To change **Sharing options** for the meeting, click on the up arrow ^ by the side of the green 'Share Screen' button on PCs. *Basic options in image on right, below Advanced Sharing Options (on Windows).*

As you can see, other participants can be prevented from screen sharing, but by allowing this they can present material while you still keep overall contro**l.**