

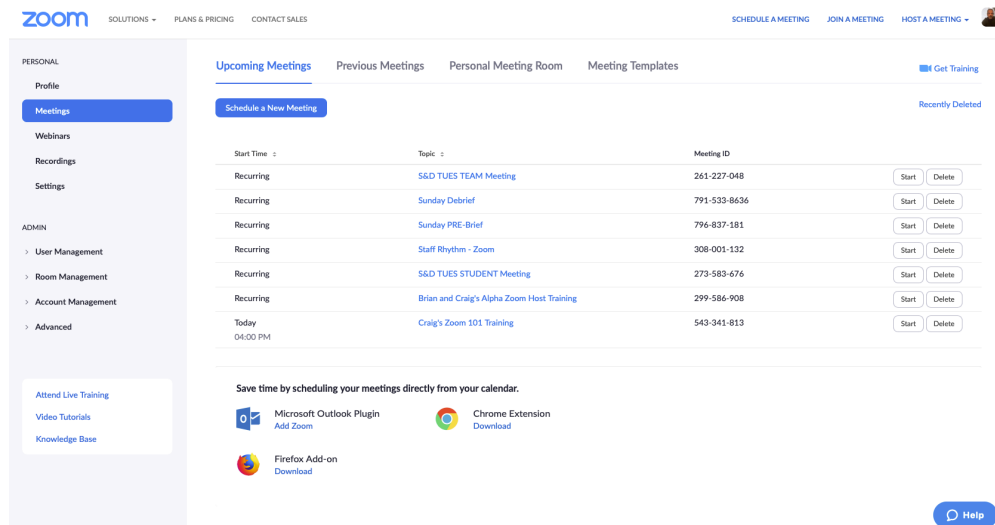
Virtual Meeting Training & Etiquette

Group Leaders/Hosts:

Signing Up for a Zoom Account

1. Go to Zoom.us and Click Sign Up.
2. Complete all required information and select the Zoom Pro Account (\$14.99/month)
3. You are now ready to start Zooming.

The Zoom Account Web Portal



PERSONAL (items in **BOLD** are the ones you will use most frequently)

1. **Profile** – Your personal information, including your personal meeting ID
2. **Meetings**
 - a. Upcoming Meetings
 - b. Previous Meetings
 - c. Personal Meeting Room settings
 - d. Meeting Templates
 - e. Schedule New Meeting
3. Webinars (disregard)
4. **Recordings** – where cloud recordings can be found and shared
5. **Settings** – Here is where you will view and edit your baseline (default) parameters for all meetings you will schedule, as well as setting for recording and telephone.

ADMIN

1. Account Management (the only one we will need to look at)
 - a. Account Profile
 - b. Account Settings (same as Personal Settings, but for all Users)
 - c. **Billing** (Where to view/edit your subscription, billing info and download invoices)
 - d. Recordings (same as Personal Settings, but for all Users)
 - e. IM Management (disregard)
 - f. Reports (views various data reports)

Scheduling Your Alpha Group Meeting

1. Sign into your Zoom account (zoom.us) from your web browser.
2. From the Zoom portal, Under "PERSONAL" select "Meetings" on the left hand side of the page.
3. Click the large blue button titled "Schedule a New Meeting".
4. Set your topic. Be specific so your participants can clearly know that this meeting is for.
 - a. Ex. "Craig Eakright's Monday Alpha Group"
 - b. You can also include more detailed info in the description.
5. Set the date, time and approximate duration.
 - a. Check "Recurring" if your group will meet at the same time/day every week.
 - b. Set Recurrence as "Weekly."
 - c. Repeat every "1" week.
 - d. Select the day of the week.
 - e. Choose either the End date or the number of occurrences for this meeting
6. Check require registration. This way you will have accurate names and emails for each of your participants. Participants will only need to register for the first meeting in the series.
7. Enable Meeting ID to "Generate Automatically"
8. "Require Meeting Password" (this should already be set)
 - a. Leave the randomly generated password
9. Enable Host and Participant video "ON"
10. Set Audio to "Both"
11. Leave "Join Before Host" unchecked.
12. **Check** "Mute Participants Upon entry" is recommended. This way, you can instruct each participant where to find their "Mute Mic" buttons and to use them frequently to cut down on ambient noise.
13. **Check** Enable waiting room.
14. Leave "Only authenticated users..." unchecked.
15. **Check** "Breakout Room Preassign". If this is not an option, you will need to turn this on under "Settings" in the web portal. (See "***Breakout Rooms**" below)
16. Leave "Record the meeting automatically unchecked.
17. Click "Save" and you are now ready to invite your group member to the meeting.

***Breakout Rooms:**

Enabling breakout rooms

Login to Zoom account

- From "PERSONAL" menu on the right
- go to "Settings"
- From "Meeting" tab
- Go to "In Meeting (Advanced)"
- First item in the list is "Breakout Rooms"
 - o Toggle that "ON" (Blue)
 - o Click the Checkbox for "Allow host to assign participants..."

Virtual Meeting Training & Etiquette

Invite Participants

On this next screen you will find all the pertinent information for this meeting.

1. Scroll down to where it says, "Invite Attendees."
2. On the right side of the page you will see "Copy the Invitation"
3. Click that link to view the text of the invitation.
4. Click the blue button "Copy Meeting Invitation" and the text will be copied to your clipboard.
5. Open you preferred Email program.
6. Compose a new email to be sent to all of your group members.
7. Paste the meeting invitation text into the body of the email.
8. Include any other pertinent information and...
9. Email the invitations to your group!

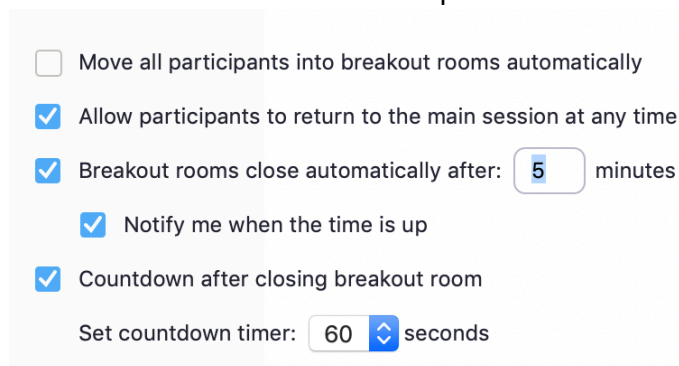
Everyone in your group will now have a link whereby they can register for the first meeting and will then be given the necessary information to join the meeting on day one.

NOTE: In order to be recognized as the host of this meeting, you will need to be signed into your zoom account (either on the web or on the app) before you join the meeting yourself. *If you start the meeting and notice you are not the host, you can go to the menu bar (under "zoom.us") and choose sign in. You will then gain control of the hosting rights.*

Managing Breakout Rooms:

Breakout Rooms are only available if they are first enabled (see above). Managing breakouts are only accessible to Hosts.

- Press the Breakout Rooms button
- Deciding how many participants you would like in your breakout rooms will determine the number of rooms you will need.
- Select “Automatically” or “Manually”
 - o If you choose “Automatically,” Zoom will split participants into random groups.
 - o If you choose “Manually,” You can then divide your participants into specific rooms
 - Either selection will still allow you to move participants around if necessary.
- Create Breakout Rooms to see how the participants are *going to be* divided.
- Make any necessary changes using
 - o “Move To...” simply moves one person to another room, or
 - o “Exchange” allows you to swap room assignments between participants
- There are several features available under the “Options” button



A screenshot of the Zoom Breakout Room Options dialog box. It contains the following settings:

- Move all participants into breakout rooms automatically
- Allow participants to return to the main session at any time
- Breakout rooms close automatically after: minutes
- Notify me when the time is up
- Countdown after closing breakout room
- Set countdown timer: seconds

- The “Countdown” feature informs all participants how long before their breakout rooms will close.
 - o This time can be set from 10 seconds to 2 minutes and gives them time to wrap up whatever is in process.
- When satisfied with arrangements, select “Open All Rooms”
- Participants will get a pop-up directing them to Join their Breakout Room, unless you’ve checked “Move all participants ... automatically.”
 - o Hosts and Co-hosts can now join and leave any room as necessary.
 - o Hosts and Co-hosts can also broadcast a message to all rooms at one time as needed.
 - o Rooms can be close at any point or automatically close after the preset time limit.
- All participants will then return to the main room.
- The option to re-open the same rooms and arrangements will be available as long as the current meeting runs.
- *You also have the ability, when creating or edit the meeting, to pre-arrange your breakout rooms. This can be done by manually entering Room Titles and emails of participants or by uploading a .csv file containing your participants Room Titles and email addresses. This option is found under “Meeting Options” for your specific meeting.*

Virtual Meeting Training & Etiquette

Before the meeting:

- *Practice zooming.* Zoom is very easy to use, but you will get more and more comfortable with it as you use it. Make video appointments with friends and family to get used to Zoom. Practice scheduling and inviting people to meetings. Learn how to mute and unmute audience members and re-assign the host role. Maybe even have a simple test meeting with all of your small group participants to “get to know” each other and Zoom before the official start date of your small group.
- *Invitations.* Ensure all meeting participants have the meeting invitation link and any necessary materials for each session before the meeting date.
- *Be prepared.*
 - Make sure any videos are ready to show. Test it before you start the call.
 - Have any screen you wish to share during the meeting open and ready, i.e. YouTube videos, graphic images, pdf file, etc.
 - Have any questions or text prompts open and ready so you can either share them to your screen or copy and paste them into the chat.
- *Bandwidth and signal.* If you can afford it, increase your bandwidth. If you are wireless, try to remain close to the wireless router. When you have the option, choose wired (instead of wireless) for video conferencing.

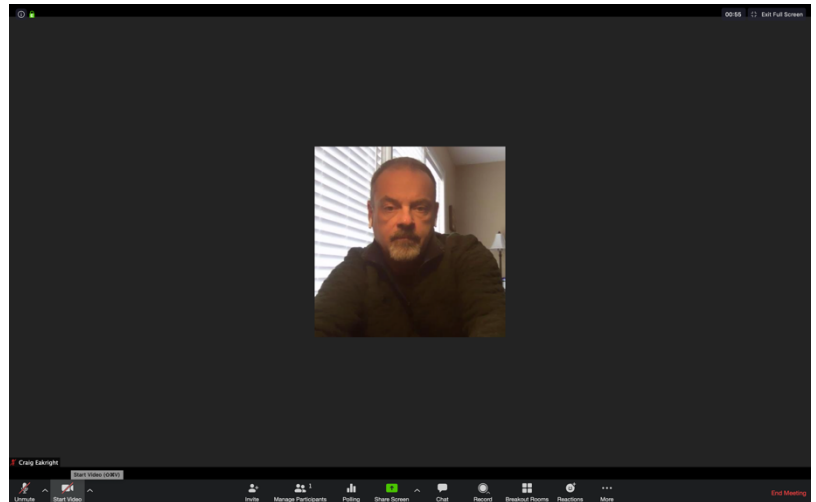
When you begin the meeting:

- *Arrive early* to allow time to troubleshoot and resolve any potential issues with equipment.
- *Audio check.* Doing a quick round of introductions is an effective way to have everyone check their audio. Introductions break the ice and ensure that everyone can hear each other properly.
- *Reach out* to phone in participants periodically to see if they have a question or something to contribute. Having phone-in participants means that you must remember they are in the meeting.

Virtual Meeting Training & Etiquette

Meeting Controls (Host)

- Mute/Unmute
- Stop Video
- Audio/Video Settings
- Manage Participants
 - Transfer hosting (Co-hosting)
 - Unmuted Participants snap to top
 - Options when hovering over names
 - Mute all
 - Unmute all
 - More...
- Sharing Screen
 - White board
 - iPad/iPhone
 - Other apps, desktop, etc.
 - Video sharing enable audio/optimize
- Chat
 - Full screen (pop out) vs Non Full Screen (side panel)
 - Private and Public Chat
- Record
 - On this computer
 - To the Cloud
- * Breakout Rooms
- Ending vs Leaving the Meeting



Virtual Meeting Training & Etiquette

Participants:

How to Join a meeting

Helpful 2 ½ minute video: <https://youtu.be/NIYudDeULlw>

From an Email invitation:

You should receive an email or text message with an invitation to join a meeting (similar to the one below):

Craig Eakright is inviting you to a scheduled Zoom meeting.

Topic: Craig Eakright's Personal Meeting Room

Join Zoom Meeting

<https://zoom.us/j/7915338636>

Meeting ID: 791 533 8636

One tap mobile

+12133388477,,7915338636# US (Los Angeles)

+12532158782,,7915338636# US

Dial by your location

+1 213 338 8477 US (Los Angeles)

+1 253 215 8782 US

Meeting ID: 791 533 8636

Find your local number: <https://zoom.us/u/acQEJoo8Dg>

If joining from a computer or mobile device,

- Click the “Join Zoom Meeting” link from your invitation email.
- You will then be prompted to download/run zoom.
 - o Zoom will begin downloading .
 - o When the download is complete, run the installer.
 - o Follow the onscreen prompts to complete the installation.
 - o If it does not immediately open your meeting after installation,
 - return to your email and click “Join Zoom Meeting” link again.
 - o You will automatically enter the room, unless your host has decided to enable a “waiting room,” which simply means they will come “open the door” for you when they begin the meeting.
 - Check your audio and video settings to be sure all is working well.
- Each week that your group meets, you should get an email reminder. In most cases you should also be able to join from your original email invitation.

If you would like to call in to the meeting from a phone,

- Find “One tap mobile” in your email invitation
- Simply tap the number to call in and wait for an answer.
- Follow on speaker prompts to join the meeting.
- You may need to ask your group leader for the unique 6-digit password to join your meeting.

Virtual Meeting Training & Etiquette

Directly from the Zoom Application:

- Open the Zoom application

Recurring Meetings to which you have been invited, should be available from the “Meetings” button at the top of your app window.

- Select the appropriate meeting from the left
- Click the Join button on the right

If you do not see your meeting listed:

- From the “Home” screen, select “Join”
- Enter the Meeting ID and Your Name
- Click Join
- If necessary, enter your Meeting Password (found on your email invitation)

From the Website <https://Zoom.us>:

- Click “Join a Meeting” at the top of the screen.
- Enter the Meeting ID
- Click “Join”
- If necessary, enter your Meeting Password (found on your email invitation)

Virtual Meeting Training & Etiquette

Meeting Controls

- Mute/Unmute
- Audio Settings
- Stop/Start Video
- Video Settings
- Invite
- Participants
- Sharing Screen
 - White board
 - iPad/iPhone
 - Other apps, desktop, etc.
 - Video sharing enable audio/optimize
- Chat
 - Private and Public Chat
- Record (will need permission from host)
 - On this computer
 - To the Cloud
- Reactions
- Leave the Meeting
- Views
 - Enter/Exit Full screen
 - Variations with chat
 - Gallery View
 - Speaker View
 - Pin a window



Meeting Tips

Follow these meeting etiquette and tips to make your video conferences more productive and enjoyable for all participants.

#1) Have lots of grace for yourself and others.

Even if everyone on the call is an expert, sometimes things can go wrong. Mics stay muted, internet slows down, we talk over each other by accident... there's not better time than on a Zoom call to show patience, grace, and kindness with one another.

- *Make your best effort to **be on time*** or early for your meeting.
- *Plug into wall power*, if you are connecting from a laptop or your digital device battery gets low. Battery use alone can adversely affect video quality.
- Have a solid, fast internet connection.
 - WiFi should work fine, but cable will be more stable.

Video & Audio

- **Test your audio & video** before your meeting at zoom.us/test.
- **Adjust your camera** angle or seating position to ensure you are on camera. Your camera should be at eye level. The image here should give you a good idea.
- **Adjust your lighting.** Position yourself so that most of the light is coming from in front of you (behind your monitor), instead of behind you. If you have a window behind you, shut the blinds. Otherwise, you will be a shadowy figure.
- **Try to provide a nice, plain background.** You can't control everything in a mobile environment, but you should give some thought to background prior to your meeting. The idea is to eliminate as many potential distractions as possible.
- **Leave your video camera on.** This really does provide a more personal experience for everyone in the meeting. If you need to answer a phone call or doorbell, etc. You're your video off temporarily.
- **Use Headphones** with a built-in microphone. A good headset, over the ear or in-ear, not only helps you hear better, but will also provide a clearer audio signal for your voice.
- **Find as quiet a space** as possible with minimal to no background noise.
- **Mute your microphone.** It cuts down on ambient sounds and will prevent inadvertent noises from interrupting others. During discussions you will want your mic on, but you should mute yourself when listening to a presenter or video.
- **Allow time for delayed** responses, when you ask a question or request information, because the system may experience slight transmission delays.
- **Avoid interrupting** others, when possible, as they are speaking.
- **Use Zoom's chat function.** You can send a question or statement to everyone or privately to a participant.

