

5CLIR Moderators Guide To Using Zoom

What is Zoom?

Zoom unifies cloud video conferencing, simple online meetings, and group messaging into one easy-to-use platform. It offers a good video, audio, and wireless screen-sharing experience across multiple platforms. Before you jump into using Zoom, here are a few helpful things to know.

Zoom is, primarily, an internet-based service. However, it is possible to attend meetings using a traditional landline telephone. Although obviously without the video and screen share facilities.

Zoom will work as a web-based application that works in most web browsers; or you can install the Zoom application.

Zoom is platform independent. This means you can use it with Windows, Mac, Linux, Apple phones, Android phones and even Blackberry phones.

Zoom offer several online resources to provide help and insights about their tools and features. Check out the searchable Zoom Help Centre if you want to learn how something works, or if you run into any trouble. <https://support.zoom.us/hc/en-us>

System Requirements and Prerequisites

As previously stated, Zoom works across a very wide range of platforms. In the following sections you will see the supported systems. Do not be too concerned as most computers should be able to use Zoom.

Hardware Requirements

An internet connection – broadband wired or wireless (3G or 4G/LTE)

Speakers and a microphone – built-in or USB plug-in or wireless Bluetooth

A computer device with a supported operating system

Optional Items

A webcam or HD webcam – built-in or USB plug-in (if you wish to use the video feature) Or, a HD cam or HD camcorder with video capture card (if you wish to use the video feature)

Supported Operating Systems

MacOS X with MacOS 10.7 or later

Windows

Ubuntu, Mint, Red Hat and most Linux systems

Supported Tablet and Mobile Devices

Surface PRO

iOS and Android devices
Blackberry devices

Supported Browsers

Windows: IE, Edge 12+, Firefox 27+, Chrome 30+
Mac: Safari 7+, Firefox 27+, Chrome 30+
Linux: Firefox 27+, Chrome 30+

Software

If you are only ever going to join an online conference call then you do not have to install any software. However, if you are going to host (plan) meetings or want to get the full benefit of the Zoom platform then we recommend installing the Zoom software.

Desktop/Laptops

Web-based -The Zoom web client allows joining a Zoom meeting or webinar without downloading any plugins or software. However, the web client has limited features and functions best on Google Chrome.

Software-based – The Zoom desktop client can be downloaded from the following link. <https://zoom.us/support/download>. Once downloaded run the installer application.

Tablets

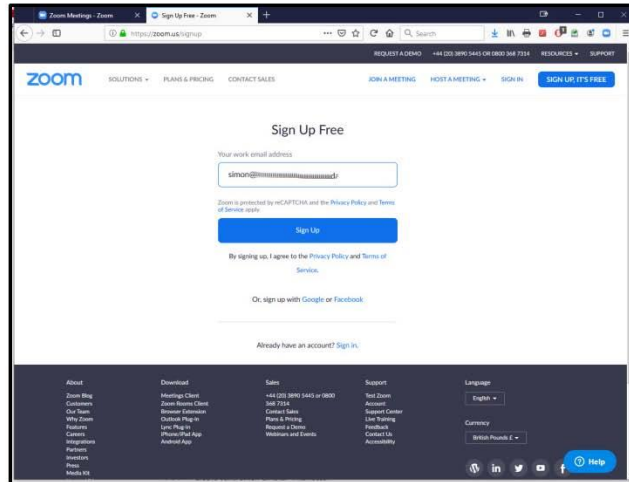
iOS (Apple)
iPhone4 or later, iPad most
Operating System – iOS 7.0 or later
Web Browser – Safari5+, Chrome
Zoom Cloud Meetings app (available on the [App Store](#))

Android (nearly everyone who is not Apple)
Operating System – Android 4.0x or later
Web Browser –Chrome
Zoom Cloud Meetings app (available on [Google Play](#))

Set Up Your Account

Zoom is a commercial organization and as such charges for a number of the services it offers. But there is a free version for individuals and small organizations. The basic functionality is the same as the paid plans, but there are limits on the length of a meeting (call) and the number of people in the meeting.

These restrictions should not cause issues to your personal usage. 5Clir will provide paid versions for moderators.



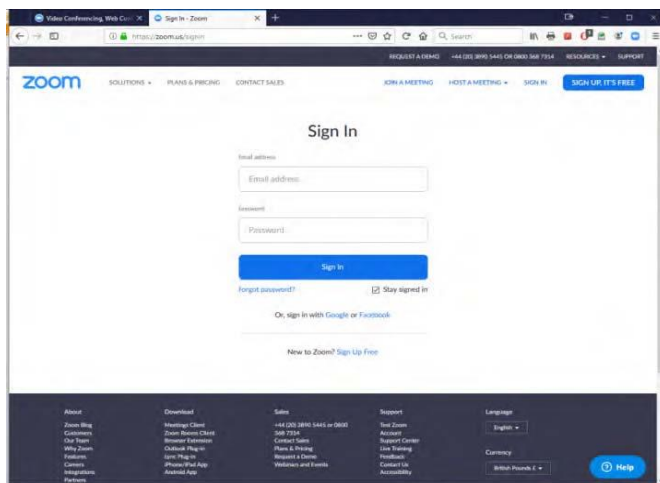
When you sign up for a Zoom account, you will enter email address, and Zoom will send you an activation email. When you receive the activation email, click the link to activate your account.

It is possible to create a Zoom account using your Facebook or Google accounts, if you have them, however we would not recommend this option.

Logging On

Web Browser

To use Zoom, open your web browser and enter the address zoom.us/signin.



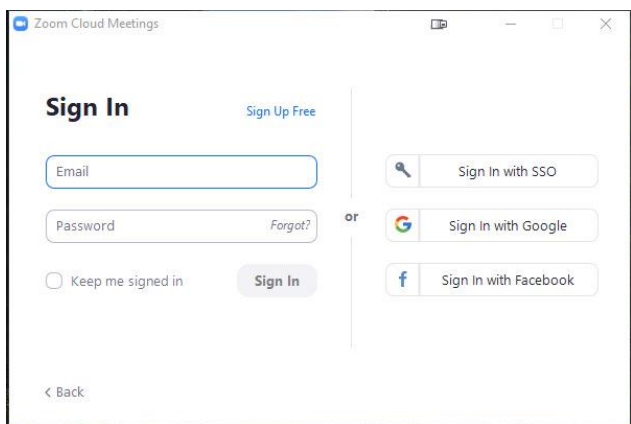
Enter your email address and password, and then press the Sign In button.

Zoom Application

To use the Zoom application, launch the app. This should then display the opening screen.



Select the Sign In option.



Enter your email address and password, and then press the Sign In button.

Joining a Meeting

In this section, we will look at how to join a meeting through an email invite; an instant messaging invite; from the browser; from the Zoom desktop and mobile application; and from a landline or mobile phone.

Before joining a Zoom meeting on a computer or mobile device, you can download the Zoom app from the Zoom Download Centre. Otherwise, you will be prompted to download and install Zoom when you click a join link.

Each meeting has a unique 9, 10, or 11-digit number called a meeting ID that will be required to join a Zoom meeting. If you are joining via telephone, you will need the teleconferencing number that should have been provided in the invite.

Desktop/Laptop Email

Click the join link in your email or calendar invitation.

Zoom Application

inviting you to a scheduled Zoom meeting.

Topic: 5CLIR Council Meeting

Time: May 14, 2020 02:00 PM Eastern Time (US and Canada)

Join Zoom Meeting

<https://us02web.zoom.us/j/3231420955?pwd=dCs2dWIKb1InUUINWkp0bkqwdExzdz09>

Meeting ID: 323 142 0955

Password: thursday14

One tap mobile

+19292056099,,3231420955#,,1#,567143# US (New York)

+13017158592,,3231420955#,,1#,567143# US (Germantown)

Dial by your location

+1 929 205 6099 US (New York)

+1 301 715 8592 US (Germantown)

+1 312 626 6799 US (Chicago)

+1 669 900 6833 US (San Jose)

+1 253 215 8782 US (Tacoma)

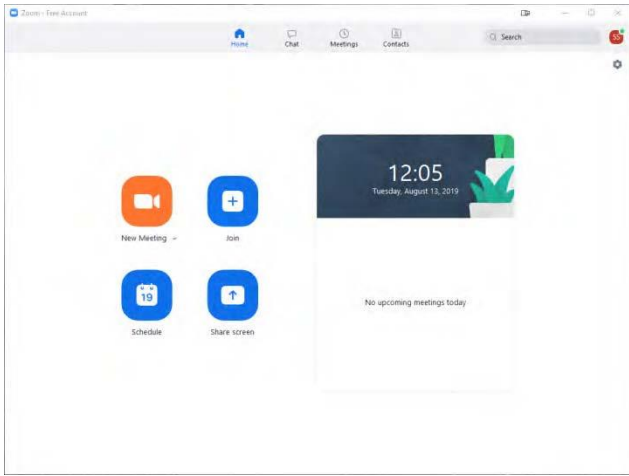
+1 346 248 7799 US (Houston)

Open the Zoom desktop client.

- Join a meeting using one of these methods:
- Click Join a Meeting if you want to join without signing in.



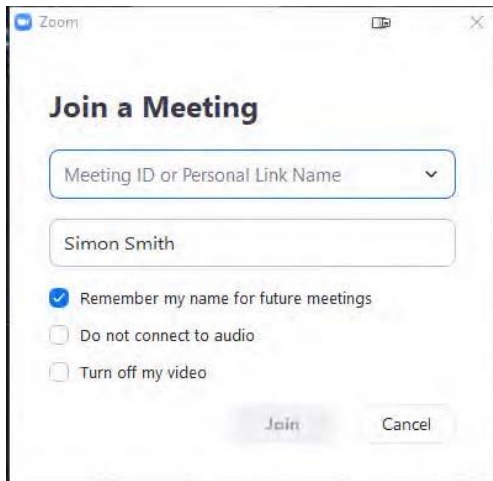
- Sign in to Zoom and then click Join



Enter the meeting ID number and your display name.

If you're signed in, you will have a default identity, but you can change your name if you don't want your default name to appear.

If you're not signed in, enter a display name.



Select if you would like to connect audio and/or video and click Join.

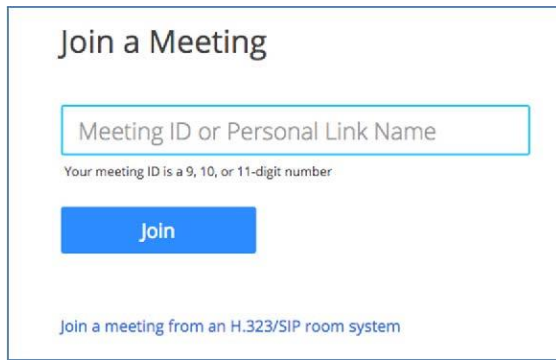
Web Browser

Open your internet browser (Edge, Internet Explorer, Firefox etc.)

Depending on your default web browser, you may be prompted to open the Zoom web browser.

Go to <https://join.zoom.us>.

Enter your meeting ID provided by the host/organizer.



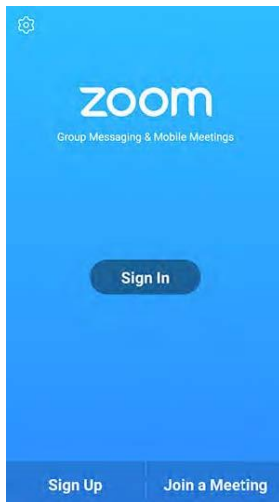
Click Join.

SmartPhone

Android

Open the Zoom mobile app. If you have not downloaded the Zoom mobile app yet, you can download it from the Google Play Store.

- Join a meeting using one of these methods:
 - o Tap Join a Meeting if you want to join without signing in

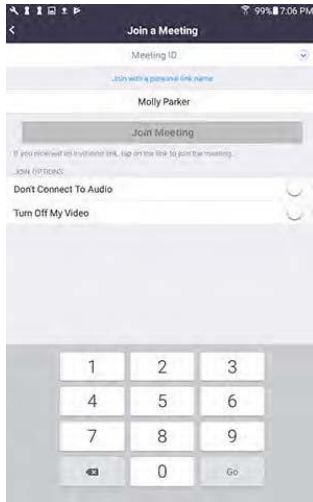


Sign in to Zoom then tap Join.



Enter the meeting ID number and your display name.

If you're signed in, change your name if you don't want your default name to appear. If you're not signed in, enter a display name. Select if you would like to connect audio and/or video and tap Join Meeting.



Apple

Open the Zoom mobile app. If you have not downloaded the Zoom mobile app yet, you can download it from the App Store.

Join a meeting using one of these methods:

- o Tap Join a Meeting if you want to join without signing in.



Sign in to Zoom then tap Join



Enter the meeting ID number and your display name.

If you're signed in, change your name if you don't want your default name to appear.

If you're not signed in, enter a display name.

- Select if you would like to connect audio and/or video and select Join.

Telephone

On your phone, dial the teleconferencing number provided in your invite. Enter the meeting ID number when prompted using your dial pad.



Note: If you have already joined the meeting via computer, you will have the option to enter your 2digit participant ID to be associated with your computer. If you have not joined on your computer, simply press # again when prompted to enter in your participant ID.

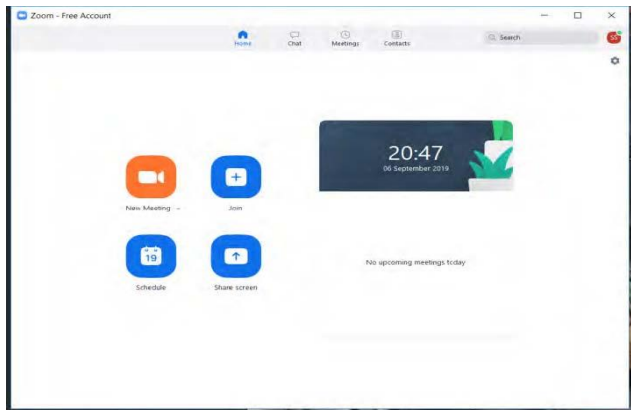
Organizing a Meeting

If you are the meeting host and need to start or join a scheduled meeting, there are several ways that you can join the meeting. As the host, you can start the meeting from the Zoom desktop client for Mac, PC or Linux, the Zoom app for Android or iOS, or your web browser.

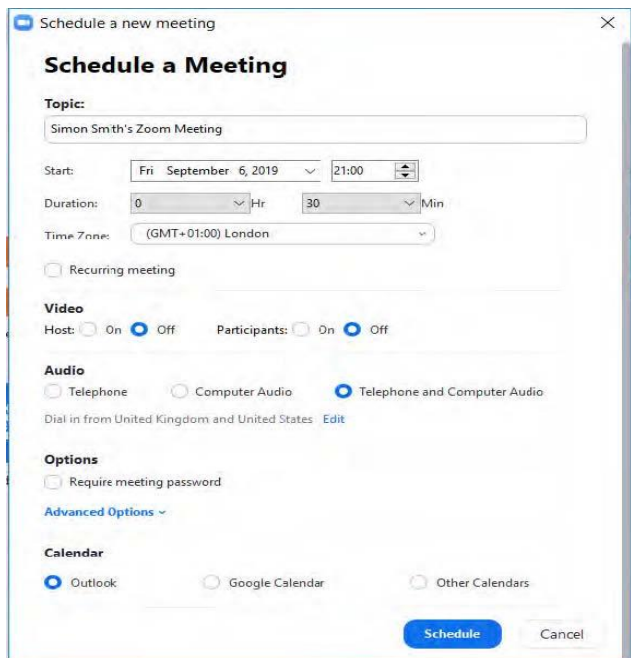
Overview

Zoom offers multiple methods to schedule a meeting. A host has control over the options for their scheduled meetings except for settings that an administrator has locked for all users in the account or for all members of a specific group. The simplest way is through the Zoom application, so this is the method we will use.

Open your Zoom client and sign in to Zoom.



- Click on the Schedule icon.
- This will open the scheduler window.



- **Select your meeting settings.**
 - o **Topic:** Enter a topic or name for your meeting.
 - o **Start:** Select a date and time for your meeting. You can start your meeting at any time before the scheduled time.
 - o **Duration:** Choose the approximate duration of the meeting. This is only for scheduling purposes. The meeting will not end after this length of time.
 - o **Time Zone:** By default, Zoom will use your computer's time zone. Click the drop-down menu to select a different time zone.
 - o **Recurring meeting:** Choose if you would like a recurring meeting (the meeting ID will remain the same for each session).
 - o **Video**
 - Host: Choose if you would like the host video on or off when joining the meeting. Even if you choose off, the host will have the option to start their video.

Participant: Choose if you would like the participants' videos on or off when joining the meeting. Even if you turn off, the participants will have the option to start their video.

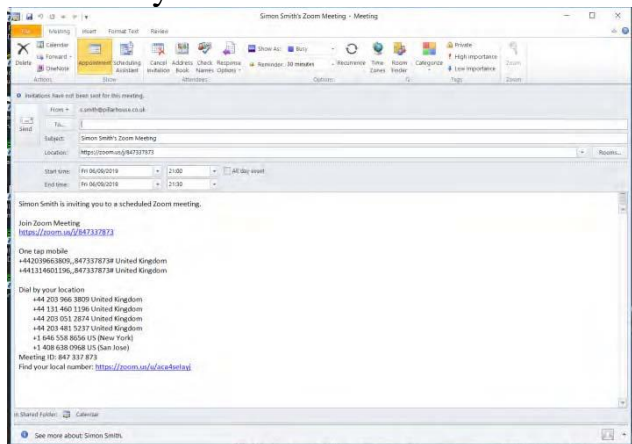
o **Audio:** Choose whether to allow users to call in via Telephone only, Computer Audio only, or Both.

o **Calendar:** Select a calendar service to add the meeting to and send out invites to participants.

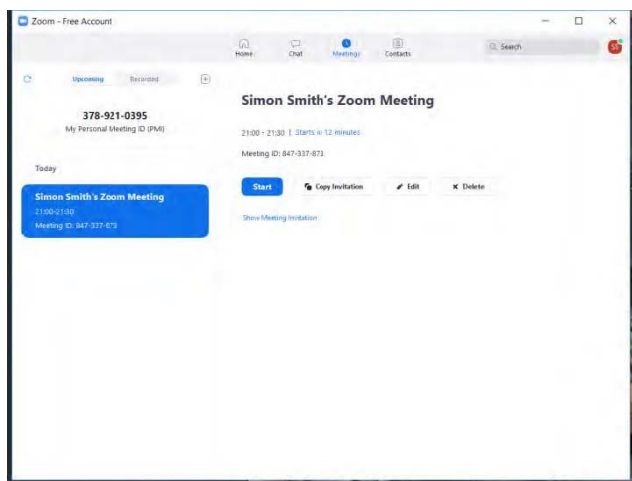
Click Schedule to finish, and open the selected calendar service to add the meeting. If you are scheduling a recurring meeting, you will need to set the recurrence in your calendar service.

Choosing Other Calendars will allow you to copy and paste the scheduled meeting information such as date, time, and meeting URL.

If you have a suitable email client on the computer then Zoom will auto-create an email for you.



To review all meetings that you have scheduled select Meetings from the Zoom home screen.



From this list you can see and review all of your scheduled meetings.

While In a Meeting

When you have started or joined a meeting, you can access the meeting controls located at the bottom of the meeting window (move your mouse in the Zoom window to display meeting controls). Host controls allow you, as the host, to control various aspects of the Zoom Meeting, such as managing the participants. Hosts have access to the following controls during a meeting:

Start closed captioning and assign someone or a third-party to provide closed captioning

Start live streaming

End meeting for all participants

Make another participant a co-host

Start breakout rooms or move participants from one breakout room to another

Start waiting room (co-hosts can place participants in waiting room or admit/remove participants from the waiting room)

Host and co-host controls in a meeting

Overview

Host controls allow you as the host to control various aspects of a Zoom meeting, such as managing the participants.

The co-host feature allows the host to share hosting privileges with another user, allowing the co-host to manage the administrative side of the meeting, such as managing participants or starting/stopping the recording. The host must assign a co-host. There is no limitation on the number of co-hosts you can have in a meeting or webinar.

Co-hosts do not have access to the following controls as they are only available as host controls in a meeting:

Start closed captioning and assign someone or a third-party to provide closed captioning

Start live streaming

End meeting for all participants

Make another participant a co-host

Start breakout rooms or move participants from one breakout room to another

Start waiting room (co-hosts can place participants in waiting room or admit/remove participants from the waiting room)

Co-hosts also cannot start a meeting. If a host needs someone else to be able to start the meeting, they can assign an alternative host.

The host controls will appear at the bottom of your screen if you are not currently screen sharing.



Mute/Unmute: This allows you to mute or unmute your microphone.

Audio controls (click ^ next to Mute/Unmute): The audio controls allow you to change the microphone and speaker that Zoom is currently using on your computer, leave computer audio, and access the full audio options in the Zoom settings.

Start/Stop Video: This allows you to start or stop your own video.

Video controls (click ^ next to Start/Stop Video): If you have multiple cameras on your computer, you can select which Zoom is using, access the full video controls, and select a Virtual Background.

Security: Access in-meeting security options.

Manage Participants: Opens the window to manage participants and invite others to join the meeting.

Polling: Allows you to create, edit, and launch your polls. The options to create or launch polls will open up the Zoom web portal in your default browser.

Share Screen: Start sharing your screen. You will be able to select the desktop or application you want to share. When you are screen sharing, the controls will appear at the top of your screen, but you can drag it to another location.

Screen Share controls (click ^ next to Share Screen): Select who can share in your meeting and if you want only the host or any participant to be able to start a new share when someone is sharing.

How many participants can share at the same time?

- One participant can share at a time
- Multiple participants can share simultaneously (dual monitors recommended)

Who can share?

- Only Host
- All Participants

Who can start sharing when someone else is sharing?

- Only Host
- All Participants

Chat: Access the chat window to chat with the participants.

Record: Start or stop a cloud or local recording.

Closed Caption (only available to the host): If you have enabled closed captioning for your account, click here to access the closed caption options.

Breakout Rooms (only available to the host): Start breakout rooms.

More: Clicking on More will give you access to additional options.

End (only available to the host): Display the following two options.

End Meeting for All: End the meeting for yourself and all participants.

Leave Meeting: Leave the meeting. You will be prompted to assign a host so that the meeting can continue.



The host controls will appear at the bottom of your screen if you are not currently screen sharing.



Mute/Unmute: This allows you to mute or unmute your microphone.

Audio controls (click ^ next to Mute/Unmute): The audio controls allow you to change the microphone and speaker that Zoom is currently using on your computer, leave computer audio, and access the full audio options in the Zoom settings.

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Screen Share controls (click ^ next to Share Screen): Select who can share in your meeting and if you want only the host or any participant to be able to start a

new share when someone is sharing.

How many participants can share at the same time?

- One participant can share at a time
 Multiple participants can share simultaneously (dual monitors recommended)

Who can share?

- Only Host All Participants

Who can start sharing when someone else is sharing?

- Only Host All Participants

Chat: Access the chat window to chat with the participants.

Record: Start or stop a cloud or local recording.

Closed Caption (only available to the host): If you have enabled closed captioning for your account, click here to access the closed caption options.

Breakout Rooms (only available to the host): Start breakout rooms.

More: Clicking on More will give you access to additional options.

End (only available to the host): Display the following two options.

End Meeting for All: End the meeting for yourself and all participants.

Leave Meeting: Leave the meeting. You will be prompted to assign a host so that the meeting can continue.



The host controls will appear at the bottom of your screen.



Join Audio: Open the options to join the audio portion of the meeting.

Invite: Invite by copying the invitation, the join link, or by phone or room system (if available for your account).

Manage: View the participants list and manage participants.

Record: Start a cloud recording.

Leave Meeting: Leave the meeting. If you leave the meeting without designating another host, the meeting will end.



On an iPhone, the host controls will appear at the bottom of your screen, except for End Meeting. On an iPad, they will appear at the top of your screen.



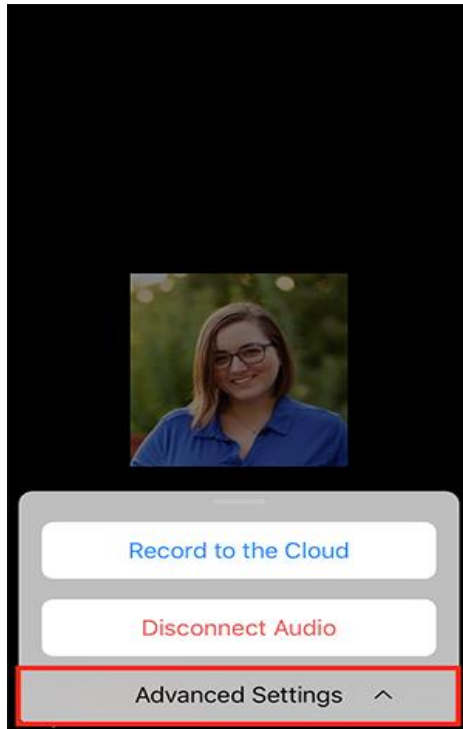
Mute/Unmute: Mute or unmute your microphone.

Start/Stop Video: Start or stop your own video.

Share Content: Start sharing your screen or a file.

Participants: View the participants list and manage participants.

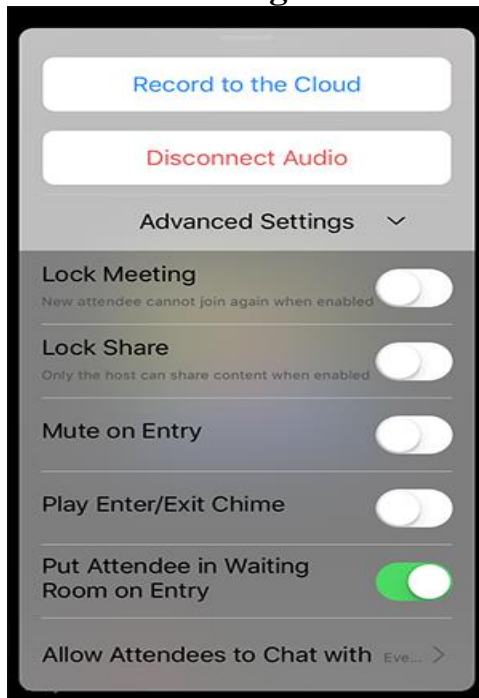
More: There are additional settings available under More.



Record to the Cloud: Start a cloud recording.

Disconnect Audio: Disconnect your audio to join the audio a different way.

Advanced Settings: View the following advanced settings.



Lock Meeting: Prevent any new participants from joining the meeting.

Lock Share: Prevent anyone except the host from sharing content.

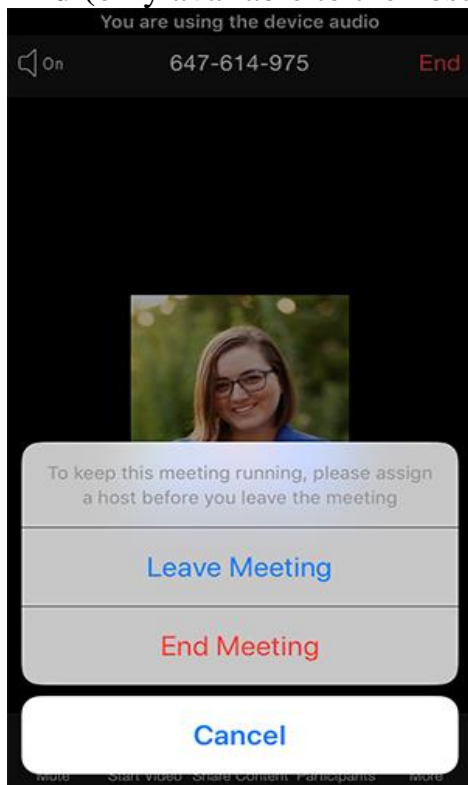
Mute on Entry: Mute all participants when they join.

Play Enter/Exit Chime: Choose if you would like to play a chime when new participants join.

Put Attendee in Waiting Room on Entry (only available to the host): Have participants enter a waiting room where you can then admit them.

Allow Attendees to Chat with: Control who attendees can chat with. Read more about chat control.

End (only available to the host): End or leave the meeting.



Android

The host controls will appear at the bottom of your screen, except for End Meeting which appears at the top of your screen, next to the Meeting ID.



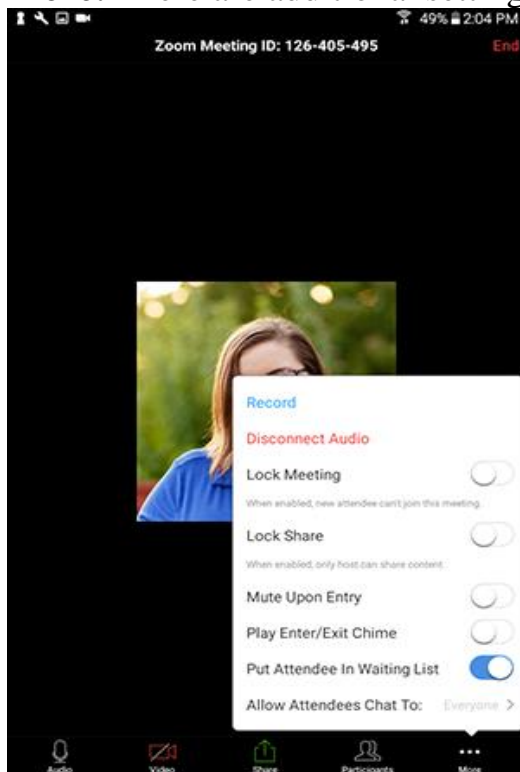
Mute/Unmute: Mute or unmute your microphone.

Start/Stop Video: Start or stop your own video.

Share Content: Start sharing your screen or a file.

Participants: View the participants list and manage participants.

More: There are additional settings available under More.



Record to the Cloud: Start a cloud recording.

Disconnect Audio: Disconnect your audio to join the audio a different way.

Lock Meeting: Prevent any new participants from joining the meeting.

Lock Share: Prevent anyone except the host from sharing content.

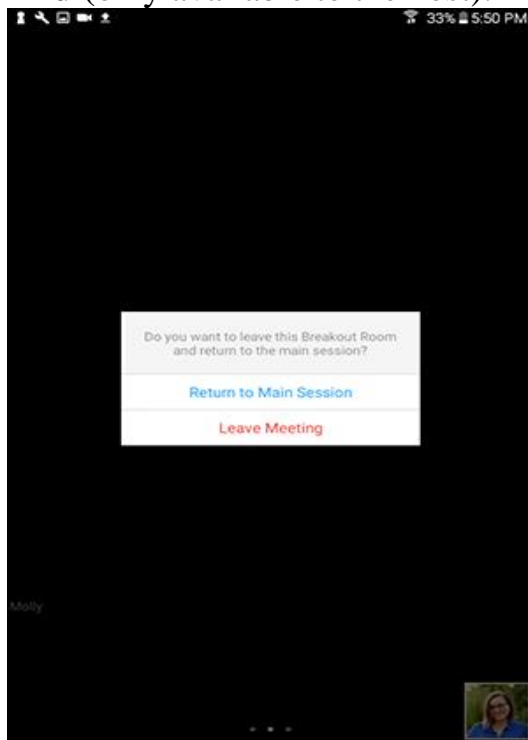
Mute on Entry: Mute all participants when they join.

Play Enter/Exit Chime: Choose if you would like to play a chime when new participants join.

Put Attendee in Waiting List (only available to the host): Have participants enter a waiting room where you can then admit them.


Allow Attendees to Chat with: Control who attendees can chat with.

End (only available to the host): End or leave the meeting.



When you are screen sharing, the controls will appear at the top of your screen, but you can drag it to another location.

Screen Sharing

Zoom allows for screen sharing on desktop, tablet and mobile devices running Zoom. The host and attendee can screen share by clicking the Share Screen icon . The host does not need to grant screen share access for another participant to share their screen. The host can prevent participants from accessing screen share.

Prerequisites

Zoom Desktop Client

Zoom Mobile App

 Windows |  Mac

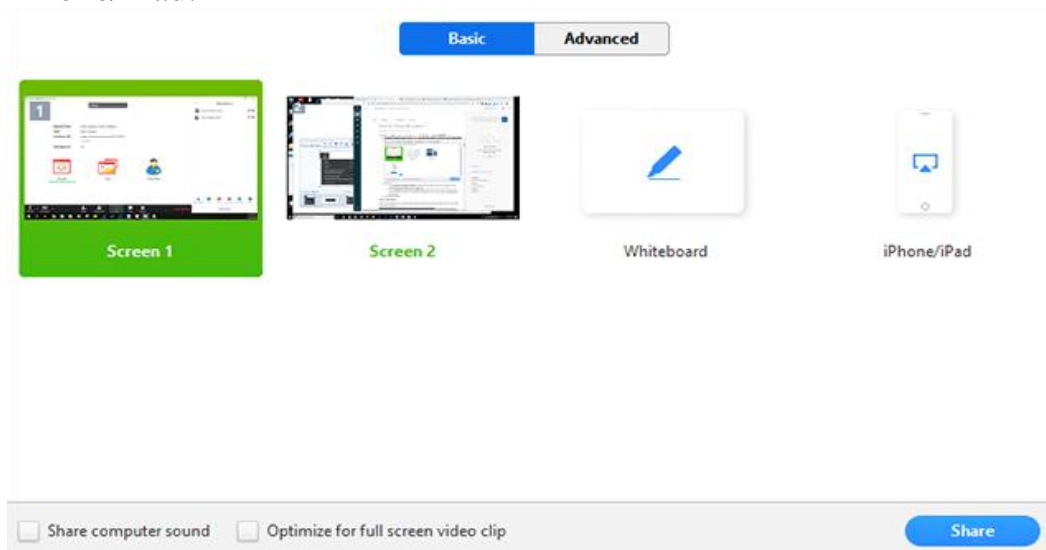
Sharing your screen

Click the Share Screen button located in your meeting controls.



Select the screen you want to share. You can also choose an individual application that is already open on your computer, the desktop, a whiteboard, or an

iPhone/iPad.



(Optional) Enable these features:

Check Share Computer Sound: If you check this option, any sound played by your computer will be shared in the meeting.

Check Optimize for full screen video clip: Check this if you will be sharing a video clip in full screen mode. Do not check this otherwise, as it may cause the shared screen to be blurry.

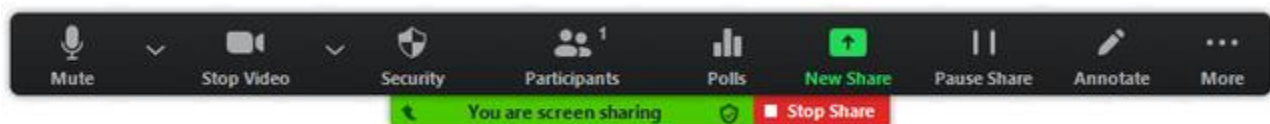
Click Share.

Zoom will automatically switch to full screen to optimize the shared screen view. To exit full-screen, click Exit Full Screen in the top-right corner or press the Esc key.

To disable automatic full screen when viewing a shared screen, disable this option in your desktop client settings: Enter full screen automatically when a participant shares screen.

Share screen menu

When you start sharing your screen, the meeting controls will move into a menu that you can drag around your screen.



Mute/Unmute: Mute or unmute your microphone.

Start/Stop Video: Start or stop your in-meeting video.

Participants/Manage Participants: View or manage the participants (if the host).

New Share: Start a new screen share. You will be prompted to select which screen you want to share again.

Pause Share: Pause your current shared screen.

Annotate / Whiteboard: Display annotation tools for drawing, adding text, etc.

More: Hover over more for additional options.

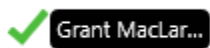
Chat: Open the chat window.

Invite: Invite others to join the meeting.

Record: Start recording locally or to the cloud.

Allow/Disable participants annotation: Allow or prevent the participants from annotating on your shared screen.

Show/Hide Names of Annotators: Show or hide the participants' name when they are annotating on a screen share. If set to show, the participant's name will briefly display beside their annotation.

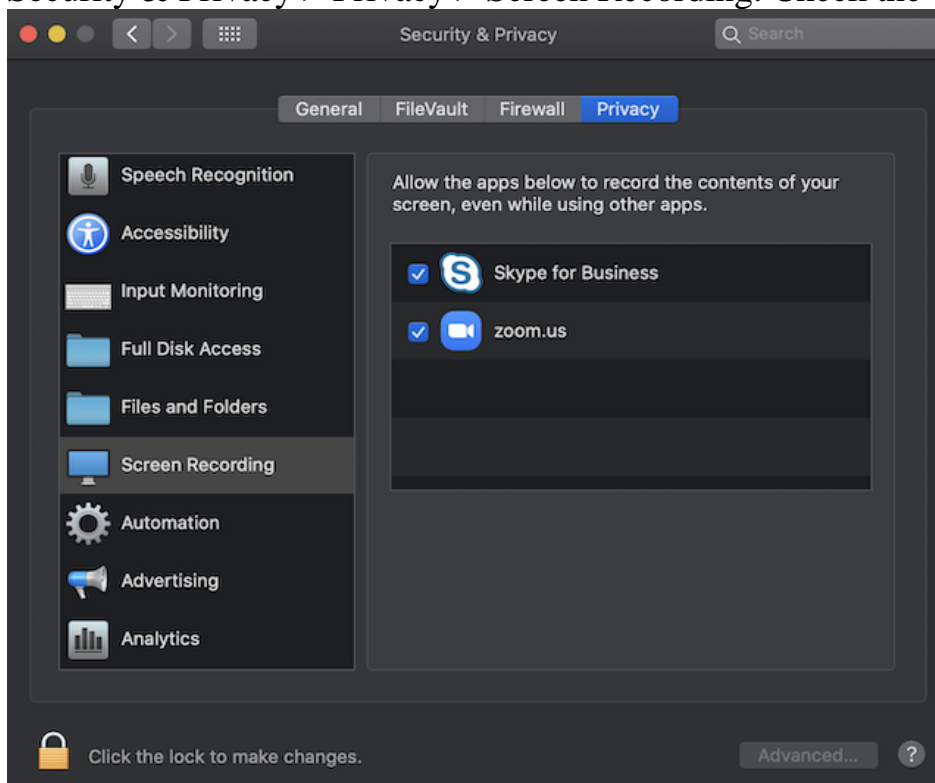


Optimize Share for Full-screen Video Clip: Start optimizing for a video clip in full screen mode.

Note: Do not enable this setting if you are not sharing a full screen video clip, as it will blur your screen share.

End Meeting: Leave the meeting or end the meeting for all participants.

Note: On Mac OS 10.15 Catalina, you need to allow Zoom access to screen recording to share your screen. You can do this in your System Preferences > Security & Privacy > Privacy > Screen Recording. Check the option for zoom.us.



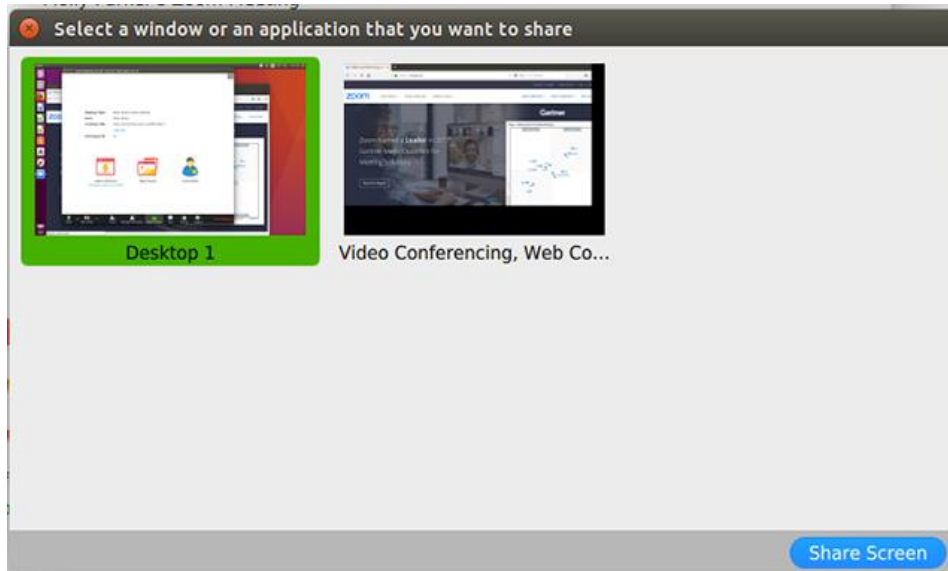


Sharing your screen

Click the Share Screen button located in your meeting tool bar.



Select the screen you want to share. You can also choose an individual application that is already open on your computer, the desktop, or a whiteboard.



Click Share Screen.

Zoom will automatically switch to full screen to optimize the shared screen view. To exit full-screen, click Exit Full Screen in the top-right corner or press the Esc key.

To disable automatic full screen when viewing a shared screen, disable this option in your desktop client settings: Enter full screen automatically when a participant shares screen.

Screen share menu

When you start sharing your screen, the meeting controls will move into a menu that you can drag around your screen.



Mute/Unmute: Mute or unmute your microphone.

Start/Stop Video: Start or stop your in-meeting video.

Participants/Manage Participants: View or manage the participants (if the host).

New Share: Start a new screen share. You will be prompted to select which screen you want to share again.

Pause Share: Pause your current shared screen.

Annotate: Display annotation tools for drawing, adding text, etc.

More: Hover over more for additional options.

Chat: Open the chat window.

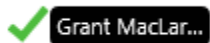
Invite: Invite others to join the meeting.

Record on this Computer: Start a local recording.

Record to the Cloud: Start a cloud recording.

Allow/Disable participants annotation: Allow or prevent the participants from annotating on your shared screen.

Show/Hide Names of Annotators: Show or hide the participants' name when they are annotating on a screen share. If set to show, the participant's name will briefly display beside their annotation.



Audio Settings: Open the audio settings in the client.

Video Settings: Open the video options in the client.

End Meeting: Leave the meeting or end the meeting for all participants.



On Android, you can share content of your screen.

Note: Some of these options can be disabled in your account settings, under Integrations.

Device audio will not be shared. For example, if you are playing a video on your device and share your screen, the video's audio will not be shared.

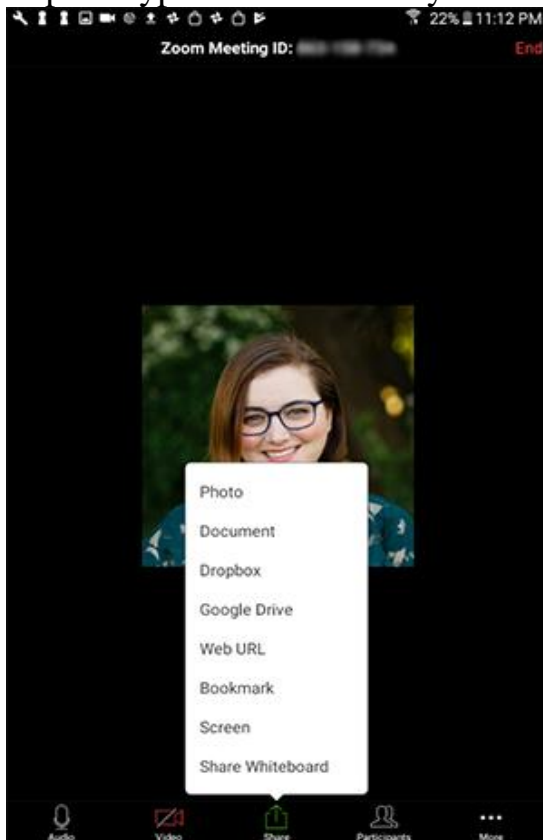
Screen sharing requires Android 5.0 or above

Sharing content

Tap Share in the meeting controls.



Tap the type of content that you want to share.



Tap one of the following options.

Photos: Share a photo from your file manager or photo apps (e.g. Google Photos). Depending on the apps installed on your Android device, you may see different share options.

Documents: Select a locally stored PDF or image to share it.

Box, Dropbox, Google Drive, Microsoft OneDrive, or Microsoft OneDrive for Business: Select a file to share from the selected file sharing service. You will need to grant Zoom access to your account. Only PDFs and images are supported.

Website URL: Enter a URL to open a browser and share the website.

Bookmarks: Share bookmarks stored in the Zoom app.

Share Whiteboard: Share a whiteboard you can annotate on.

Sharing your screen

You can share your entire screen including any application on your Android device. Sharing your entire requires Android 5.0 or higher.

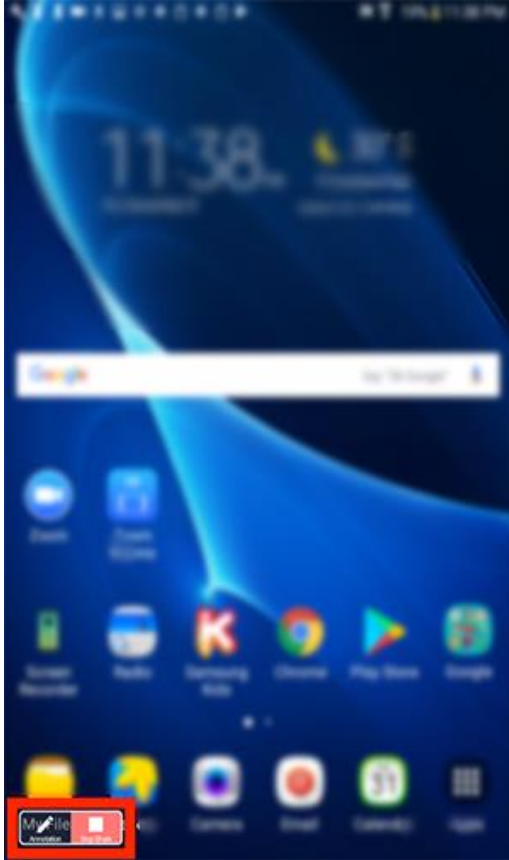
Tap Share in the meeting controls.

Tap Screen.

Tap Start Now.



The screen share will start and Zoom will continue to run in the background. You can now chose the app that you would like to share.



At the bottom of your screen, tap Annotate to open the annotation tools or tap Stop Share to stop sharing and go back to meeting controls.



On iOS, you can share:

Screen - requires iOS 11 or later and Zoom version 4.1.18611.1228 or higher.

Photos

iCloud Drive

Dropbox

Google Drive

Microsoft OneDrive for Business

Microsoft OneDrive

Website URLs

Bookmark

Whiteboard - iPad only

Note that some of these options can be disabled in your Account settings, under Integrations.

Sharing content

Tap Share Content in the meeting controls.

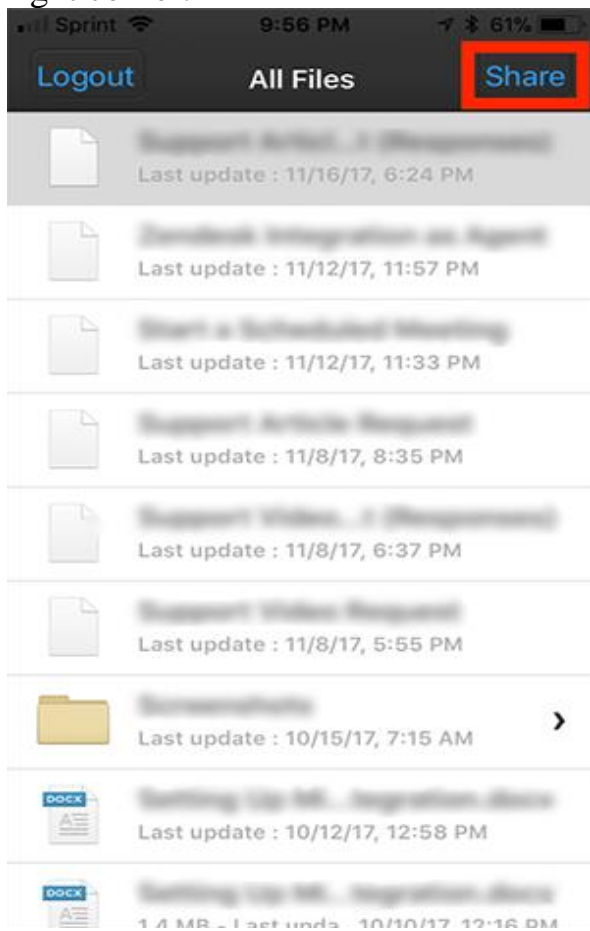


Tap the type of content that you want to share.



For example, if you select Google Drive, this will bring up a series of documents that can be shared. Select the document you want to share and then Share in the top

right corner.



The content is now shared into the meeting.

Note: You cannot annotate when sharing your entire screen into the meeting via iOS device. If you need to annotate when sharing an entire iOS screen.