Indivisible Berkeley

ZOOM TIPS & TRICKS

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I. Installing Zoom on Windows

1. Visit https://zoom.us/download
2. Download the Zoom Client for Meetings.

3. This will download a file called ZoomInstaller.exe
4. Click on that file (you may have to double-click), and follow the instructions to install Zoom. You will likely be asked "Do you want to allow Zoom to make changes to your computer?" You should answer "Yes".
5. After installation, Zoom might begin automatically. Otherwise, click the Start Menu, type in the word "Zoom", and the Zoom software should appear. Click on it to start Zoom.
   a. Note that the entry in the Start Menu might be named "Start Zoom" instead of "Zoom". They are the same.

II. Installing Zoom on Mac

Install Zoom on your Mac by going to this link, downloading "Zoom Client for Meetings", running the file, and following the instructions to install it. Then, you'll call in with your computer, and you can use your computer's microphone and audio.

If, for whatever reason, you can't do that, you can also call in with your phone. But the computer is preferred, because we can do something called "screen sharing" where we can all view what is on one person's computer screen.

Detailed instructions for Mac:
1. Visit https://zoom.us/download
2. Download the Zoom Client for Meetings
3. There will be a screen that asks if you want to download, click "allow"
4. Go to the downloads section of your mac bar and click on the zoom download (Zoom.pkg)
5. Follow the instructions to install zoom - a screen will appear asking. "This package will run a program to determine if the software can be installed." - Click "Continue"
   a. **If you encounter challenges you may need to update your security and privacy settings. For details on how to do this visit https://support.zoom.us/hc/en-us/articles/203020795-How-To-Install-on-Mac***
6. After installation, Zoom might begin automatically. Otherwise go to the search icon at the top right hand corner of your screen and search for Zoom.

III. Creating a Zoom Account (optional, but recommended)

1. Go to https://zoom.us/
2. Click the blue button at the top-right of the screen that says "Sign up, it's free"
3. You can choose a few methods to create an account; they're all equivalent and just a point of personal preference:
   a. You can create an account directly with Zoom by entering your email address in the box and clicking "Sign Up".
   b.

c. You can create an account that will be connected to your existing Google account. To do this, click "Sign in with Google". This will take you to a Google page that will ask you to either sign in to your Google account, or to verify which account you want to use.

d. You can create an account that will be connected to your existing Facebook account. To do this, click "Sign in with Facebook". This will take you to a Facebook page that will ask you to either sign in to your Facebook account, or to verify which account you want to use.

4. Once you create and sign in to your account, you can set up your profile. Click on "Profile" at top-left.

a. You can add a profile picture that people will see during Zoom Meetings if your webcam is turned off.

b. You can set your language, time zone, and date and time format.

c. You can view your Personal Meeting ID that you can use to host your own meetings.

5. When you are satisfied with your profile, you should connect your Zoom account to the Zoom software on your computer. (Currently, they are separate.)

a. Start Zoom on your computer. In Windows, this is done by going to the Start Menu and selecting "Zoom" or "Start Zoom". In Mac, click on the search button on the top right hand corner of your screen and search "Zoom". Alternatively, you can also click on the "Launchpad" icon and find the "Zoom" icon on that screen.

b. Click "Sign In".

c. If you created an account directly with Zoom (i.e. Step 3a in this section):

i. Enter your email and password and click "Sign In"

d. If you created an account with Google or Facebook (i.e. Step 3b or 3c in this section):

i. Click the appropriate button for Google or Facebook.

ii. Zoom will open your web browser and take you to either a Google or Facebook account page. Google or Facebook will ask for permission to use your account; they may also ask you to log in to your Google or Facebook account. Follow the prompts.

iii. You should get to a browser page that says: "Zoom should launch in a few seconds. If not, please click button below." The Zoom software will probably have started by itself and logged you in properly. If not, click the blue "Launch Zoom" button.

iv. Once you have logged in to the Zoom software, you can close your browser window.

IV. Zoom Usage for Participants (No sign-in required)

A. How to Join and Leave a Zoom Meeting

1. Start the Zoom software. If you don't know how to do this, see Step 5a in **Creating a Zoom Account**.
2. If you are logged in to an account:
    a. Click the Join button; it is blue with a white box and a blue "+" sign.
    b. In the box "Enter meeting ID or personal link name", enter the meeting ID. This is probably a 9- or 10-digit number, although in rare cases it can be a word. If you don't have a meeting ID, talk to your event organizer.
        i. If you don't have your meeting ID handy, but you have used the meeting ID in the past, you can look for it by clicking the arrow in the right side of the box. That will show past calls you have attended.
    c. In the box "Enter your name", enter your name. This name will be shown to everyone in the conference, so please make it descriptive.
    d. Do not check "Do not connect to audio" unless you are <u>absolutely</u> certain that is what you want; if it is already checked, uncheck it.
        i. Checking this box means that no audio will come out of your speakers, and no audio will go in through your microphone.
        ii. The purpose of this functionality is: rarely, people may choose to join the video part of the meeting through the software, but will join the audio via telephone.
    e. You can choose whether to check "Turn off my video". This depends on whether you want your audience to see a live video of you.
3. If you are not logged in to an account:
    a. Click "Join a Meeting".
    b. In the box "Enter meeting ID or personal link name", enter the meeting ID. This is probably a 9- or 10-digit number, although in rare cases it can be a word. If you don't have a meeting ID, talk to your event organizer.
        i. If you don't have your meeting ID handy, but you have used the meeting ID in the past, you can look for it by clicking the arrow in the right side of the box. That will show past calls you have attended.
    c. In the box "Enter your name", enter your name. This name will be shown to everyone in the conference, so please make it descriptive.
    d. You can choose whether to check "Remember my name for future meetings." It is just a shortcut that will remember your name.
    e. Do not check "Do not connect to audio" unless you are <u>absolutely</u> certain that is what you want; if it is already checked, uncheck it.
        i. Checking this box means that no audio will come out of your speakers, and no audio will go in through your microphone.
        ii. The purpose of this functionality is: rarely, people may choose to join the video part of the meeting through the software, but will join the audio via telephone.
    f. You can choose whether to check "Turn off my video". This depends on whether you want your audience to see a live video of you.
4. Now, you should be in the Zoom Meeting!

5. To leave the meeting, click "Leave Meeting" at bottom-right.

B. *Basic Zoom Features During a Zoom Meeting*

1. Audio input and output
    a. While you are in the Zoom software, you can mute/unmute your own voice by clicking the "Mute" button at bottom-left. You can also click "Alt-A" to achieve the same effect.
    b. To lower/raise the audio coming out of your speakers or headphones, you should use the same method that you use to control the audio for Youtube, Netflix, or other similar services on your computer.
2. Video input
    a. While you are in the Zoom software, you can turn on/off your video by clicking "Stop Video" or "Start Video" at bottom-left. You can also click "Alt-V" to achieve the same effect.
3. Zoom chat
    a. While you are in the Zoom software, there is a text chat feature. Enter it by clicking "Chat" at bottom-center.
    b. You should be able to start typing immediately. If not, click on the box that says "Type message here."
    c. Type any message you want, and click "Enter" to send.
    d. By default, messages will be sent to everyone in the Zoom channel. If you need to send a message to one other person privately, you can do this. At the bottom-right of the Zoom screen, right above the chat text box, there should be a menu with the selection "Everyone". Click that menu. Click someone's name. Then, any text you send will be sent to only that person. If you would like to go back to chatting with everyone, simply select "Everyone" again.
4. Toggling between Zoom and other applications (Windows)
    a. Sometimes, you might have difficulty going between Zoom and other applications on your computer (namely, a web browser like Firefox or Chrome). This is especially true if someone is sharing their screen.
    b. On Windows, you can view all the applications running on your machine by the following procedure:
        i. Hold down the "Alt" button on your keyboard. Either "Alt" button is fine.
        ii. While holding down "Alt", tap the "Tab" button. This will show you all the windows that are currently open. One of the windows will have a white rectangle bordering it.
        iii. If you tap "Tab" again (while still holding "Alt"), you will see another window be highlighted by the white rectangle. If you click "Tab" yet again, you will continue to see the white rectangle move through the open windows.
        iv. When you land on a window you wish to see, simply release the "Alt" button and you will arrive there.

c. Using this procedure, you should be able to navigate between your web browser and Zoom, and any other applications you might have open.
   i. Zoom might be open in two windows, with one of them showing the video conference and the other showing account features. Make sure to navigate to the correct window, i.e. the one showing the video conference.
5. Toggling between Zoom and other applications (Mac)
   a. Sometimes, you might have difficulty going between Zoom and other applications on your computer (namely, a web browser like Firefox, Safari or Chrome). This is especially true if someone is sharing their screen. (Sometimes the shared screen view takes up your entire monitor. It helps if you resize and make the window smaller.
   b. While a screen is being shared with you, you can double-click on it to minimize it or resize.
   c. On a Mac, you can view all the open windows on your desktop by hitting **f3** in the top row of your keyboard. You'll see what's open on your desktop, including the window with Zoom, your browser and any document you may have open.
      i. Notice that one of the windows is highlighted with a border around it. (Mine is blue.) You can click on that window to open it. Using this procedure,you can navigate between your web browser and Zoom, and any other applications you might have open.
      ii. Zoom might be open in two windows, with one of them showing the video conference itself and the other showing account features (like the app home page). Make sure to navigate to the correct window, i.e. the one showing the video conference.
6. Toggling between Zoom and other applications (ipad):
   a. How to split your screen between zoom and another app (probably your browser)

C. Advanced Zoom Features During a Zoom Meeting

1. Screen share
   a. Any Zoom participant can broadcast their screen to the rest of the conference. Only one screen can be shared at a time. (Technically, this is not true, but multiple simultaneous shared screens is too confusing, in my opinion.)
   b. To start screen sharing:
      i. Click the green "Share" button at the bottom-center of the Zoom window.
      ii. You will see a few options. Unless you are an advanced user who knows what you are doing, you should select "Screen" or "Desktop" or "Desktop 1".
      iii. Click the blue "Share" button at bottom-right.
      iv. Now, everything that you see on your screen will also be seen by everyone you are talking to.

    c. The feature that many users find confusing is that when you are in screen-share mode, the Zoom software itself changes its appearance. (None of your other windows are affected.) Here, I will go through some of the key changes.
        i. The "Mute/Unmute" and "Start/Stop Video" buttons are still present, but they are at the top of the screen. You need to move your cursor to the top of the screen, and the icons will appear.
        ii. The Chat can be accessed by moving your cursor to the icons at the top of the screen, then clicking the three dots for "More". Then, you can click "Chat" to access the Chat.
        iii. You can stop sharing your screen by clicking the red "Stop Share" screen at the top of the screen.
        iv. When a participant starts sharing their screen, Zoom will go into full screen for all the other participants. This can be confusing to many users, because they will not know how to leave Zoom to view another window (such as a web browser). For instructions on toggling between Zoom and other applications, see the section *Toggling between Zoom and other applications* above.

2. Recording
    a. You can record your Zoom meeting at any time. If you are not signed in, however, you will need permission from the Zoom host.
    b. Click the "Record" button at the bottom-center of the Zoom screen.
    c. If you are signed in to a Zoom account, you will be given two options for where to save the recording: "on the cloud" or "on this computer".
        i. The "cloud" option will save the recording online. To view the recording, you should go to https://zoom.us and log in; your recording will be available there.
        ii. The "on this computer" option will save your recording to your computer's hard drive. After the Zoom meeting is over, you will have to wait for Zoom to convert your recording to a video file. This can be quite slow; for an hour-long recording, this can take 10-15 minutes.
    d. While recording, a "recording" logo will appear for all participants at top-left.
    e. To stop recording, click "Stop Recording" at the bottom of the Zoom screen.
    f. If you are sharing your screen while recording, you can start/stop your recording by moving your cursor to the top of the screen and finding the Record button. You might need to click "More" and then click "Start/Stop Recording."
    g. If you chose to save the recording locally, it will be converted to an .mp4 file after your conference call is over. This could take some time.

V. Zoom Usage for Hosts (Sign-in required)

A. How to Set Up a Meeting

1. Open the Zoom software.
2. You will first need to decide what type of Zoom Meeting you wish to have. You can use your Personal Zoom Room, or you can schedule a meeting in advance. I prefer the latter, so I will focus on that in these instructions. However, I will present some quick directions to using your Personal Room in the sub-items below:
   a. I use the terms "Personal Meeting ID" and "Personal Zoom Room" interchangeably here.
   b. Your Personal Meeting ID is always available for a meeting.
   c. To start a meeting with your Personal Meeting ID, you can simply click "New Meeting" from the Zoom software home menu.
      i. Before doing that, click the small arrow to the right of "New Meeting" and make sure "Use my Personal Meeting ID" is checked.
   d. To change the settings of your Personal Room, click the small arrow to the right of "New Meeting", move your cursor over the Meeting ID, and click "PMI Settings". For details on those settings, see Sections 3-11 below.
3. Schedule a meeting for some time in the future by clicking "Schedule".
4. Enter a meeting topic/name, the start time and duration of the meeting, and the time zone. If your meeting is recurring, you can select that, and it will allow you to start/stop the meeting whenever you want.
   a. As far as I can tell, even if you don't select "recurring meeting", Zoom does not strictly hold you to the start/end time of the meeting. You can start a meeting early or go over time. They just use it as an estimate.
5. You should select "Generate automatically" for the Meeting ID, in my opinion. You could select "Personal Meeting ID", but I like to keep my personal meeting clean.
6. I recommend not requiring a meeting password--it does not add security beyond the Meeting ID, in my opinion--but you could set a password if you like.
7. You can choose whether the host/participant video is turned on by default when someone enters the meeting. They always have the ability to turn off their video; this just sets the default behavior.
8. You should always have "Telephone and Computer Audio" checked to allow people to call in however they prefer.
9. I don't use the Zoom calendar interface, but you could set that up if you choose.
10. Under "Advanced Options", there are several useful settings.
    a. "Enable join before host" is a critical question; do you want to allow participants to join the meeting before the host does? I think you should check it if you have a Zoom Pro account, but leave it unchecked if you have a Basic account. If you have a Basic account, you are limited to a 40-minute call, and that time starts as soon as anyone calls in.
    b. "Mute participants on entry" is another important question. In my opinion it's unnecessary unless you have a particularly large meeting.
    c. "Record the meeting automatically" allows you to record the meeting without having to remember during the meeting.

      d. "Alternative hosts" allows you to set multiple hosts in case you are not able to join the meeting. This is especially useful if an organization has a shared Zoom account to set up the Meeting, but the leader of the event is calling in with their personal account.

11. Click "Schedule" when you are done.
12. To invite a person to your meeting, navigate to "Meetings" at the top of your Zoom home screen. Click on the upcoming meeting on the left; it should be highlighted in blue. Then click "Copy invitation" in the main window. Or, you could simply copy the Meeting ID.

B. Breakout Rooms

1. Zoom has an incredibly useful tool called Breakout Rooms. This allows you to split your Zoom conference into several sub-channels where participants can be funneled. Each participant can only be assigned to one Breakout Room at a time, but they are not required to be added to any Breakout Room. Also, each Breakout Room can have any number of participants. Only the Host can access all of them.
2. You must be the Meeting Host during an ongoing meeting to start using this feature. To begin, click "Breakout Rooms" at the bottom of the screen. It will ask you how many rooms to create; you can select as few as 1 or as many as the number of participants. I recommend assigning people manually.
3. When you have finished assigning everyone, click "Open All Rooms."
4. The participants will get a message "The host has invited you to join a Breakout Room." They should select "Join".
5. Participants within a Breakout Room can use Zoom as normal, but their conference will be only with other participants within that Breakout Room.
6. If the participant(s) of a Breakout Room need help, they can click "Ask for Help", which will give a notification to the Host. The Host can then choose to enter the Breakout Room or save it for later.
7. Participants can also leave the Breakout Room and re-enter the main conference by clicking "Leave" and then selecting "Leave Breakout Room."
8. The Host can join any Breakout Room at any time.
9. The Host can also broadcast a message to all Breakout Rooms by clicking on "Broadcast a message to all" within the Breakout Rooms menu.
10. Finally, the Host can "Close All Rooms", which will close the rooms and return all participants to the main channel. The default Zoom behavior is that Breakout Rooms will be given 60 seconds before they are killed, but this can be changed in the Options before starting the Breakout Rooms.