

Virtual Meeting Facilitation & Distance Learning Technology

NOTE: This cheat sheet was created as part of the Island Institute's What Works Solutions Library. This guide is intended to encourage the use of distance learning technology (in this case, the video conferencing platform Zoom) and virtually facilitated meetings to solve the challenge of isolation of small rural schools by increasing collaborative work for teachers and students.

Zoom Video Conferencing Cheat Sheet

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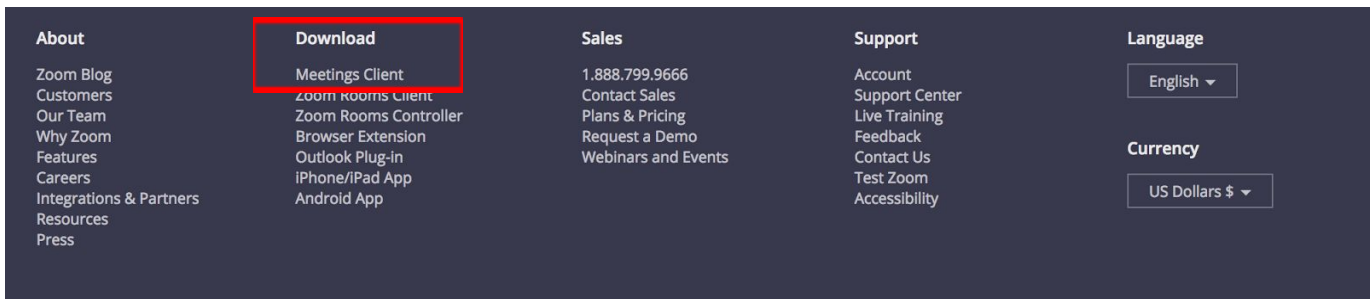
Setting up the Zoom App

Create an account:

- Go to the Zoom website: <https://zoom.us/>.
- In the upper righthand corner of the webpage, click “Sign up, It’s Free.”
- Enter a valid email to be associated with the Zoom account. A confirmation email will be sent to that address with an “Activate Account” link. Follow the steps to finalize the account.
- PRO TIP: the confirmation email may take a while to be sent, so be sure to create an account well in advance of the first meeting. As host/facilitator of the meeting, advise new participants to do so as well.

Download the app to a computer:

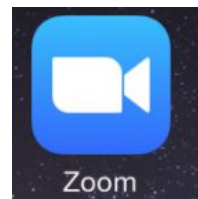
- On the Zoom website (<https://zoom.us/>) scroll to the very bottom of the webpage.
- In the “Downloads” column, click the “Meetings Client” link (outlined in red below).



- Under the “Zoom Client for Meetings” heading, click “Download.”
- In the computer’s “Downloads” folder, open the “zoomusInstaller.pkg” file to launch the Zoom app. Sign in using the previously created account information.
- PRO TIP: When signing in, select the “Keep me logged in” option for future ease of use.

Download the app to a smartphone:

- In the App Store (for iPhones) or Google Play Apps (for Android) search “Zoom.” The results may call it “Zoom” or “Zoom Cloud Meeting.”
- Download the app. (The app icon can be seen to the right.)
- Tap the Zoom icon on your device to launch the app.
- You will be given the option to “Sign In” or “Join a Meeting.”

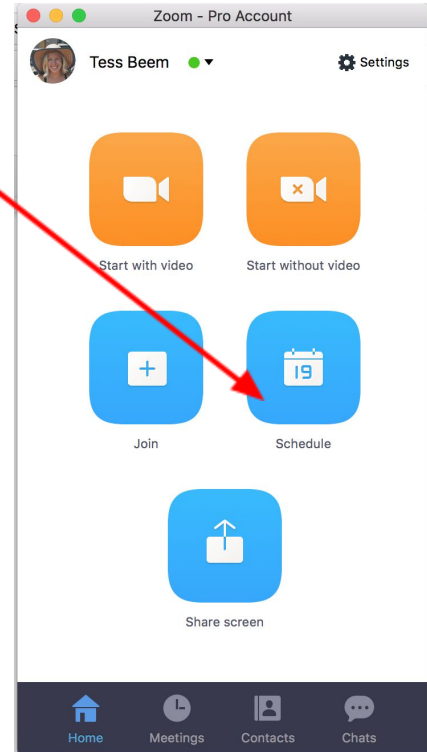
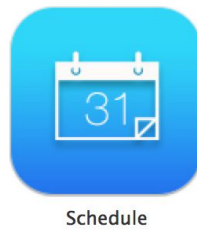


- Selecting “Sign In” will allow you to host, schedule and join a meeting.
- Selecting “Join a Meeting” will prompt you to enter a Meeting ID number for the meeting you are trying to join.
- PRO TIP: It will be easier in the long run to Sign in to your account.

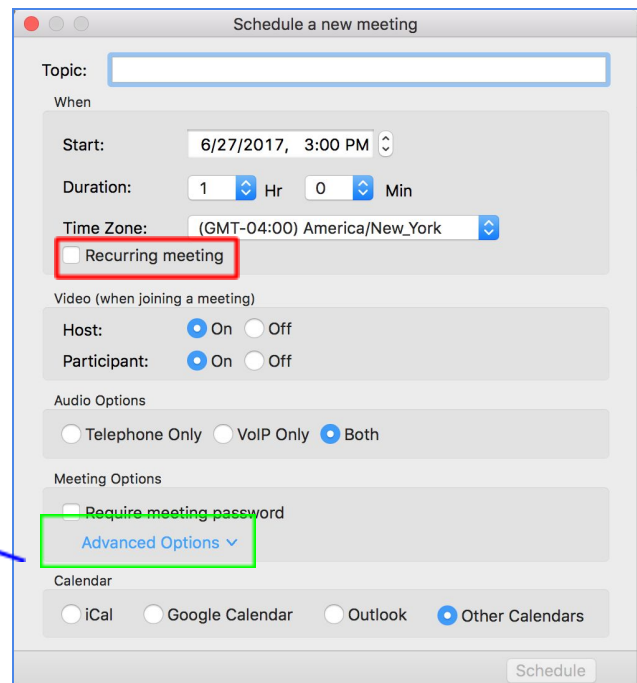
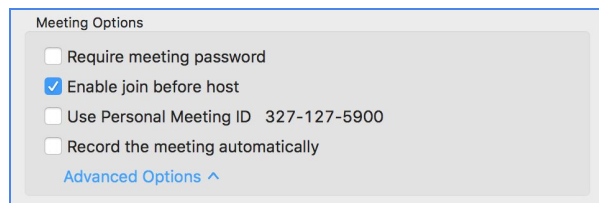
Creating a meeting

Schedule a meeting (from a computer):

- Open the Zoom app and log in.
- On the Zoom home window, click on the “Schedule” calendar icon (seen at right).



- A scheduling window will pop up (seen below in grey).
- In the “Topic” line enter the meeting name.
- If the meeting is *recurring*, select the “Recurring meeting” box (outlined in red). (This will allow you to save the meeting and use the same meeting invitation link repeatedly without it expiring.)
- If the meeting is a *one time event*, enter the date and the time in the appropriate drop-down menus. (After that date and time have elapsed, the meeting will erase itself from your saved meetings and the meeting invitation link will expire.)
- PRO TIP: In the “Meeting Options” section, select the “Advanced Options” drop-down menu (outlined in green). Check the “Enable join before host” option. This will allow any participant to begin the virtual meeting before you (the host) have signed in. This is very important for allowing participants ample time to get their technology situated and comfortable before a meeting.

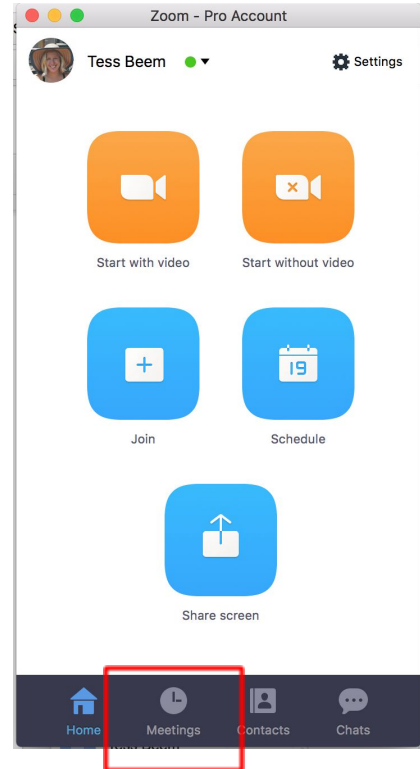
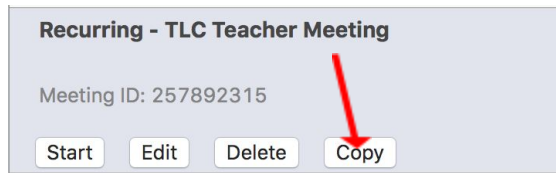


- Click “Schedule” when finished.

Inviting participants to a meeting

Send a meeting invitation link to participants:

- On the Zoom home window, in the bottom row, click on the “Meetings” clock icon (outlined below in red) to view all your scheduled meetings.
- In the meetings screen, hover your cursor over the meeting you want to send an invitation for and click the “Copy” button. This will automatically copy the content of the Zoom invitation.



- Paste the invitation contents where you want to share them with participants. It will look like this:

Hi there,

Tess Beem is inviting you to a scheduled Zoom meeting.

Topic: TLC Book Group Tutorial #2
Time: Nov 3, 2016 3:00 PM (GMT-4:00) Eastern Time (US and Canada)

Join from PC, Mac, Linux, iOS or Android:
<https://islandinstitute.zoom.us/j/311938713>

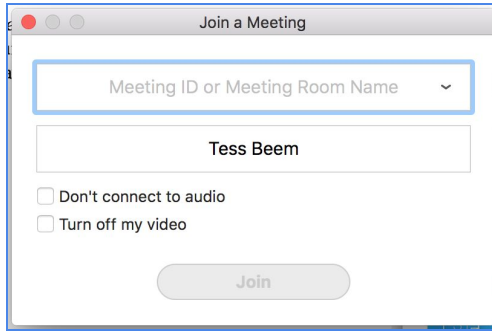
Or iPhone one-tap (US Toll): +14086380968,311938713# or +16465588656,311938713#

Or Telephone:
Dial: +1 408 638 0968 (US Toll) or +1 646 558 8656 (US Toll)
Meeting ID: 311 938 713
International numbers available:
<https://islandinstitute.zoom.us/join?m=bWiddGHm5Jfk7MdiNjPpxDuqU7TZaCov>

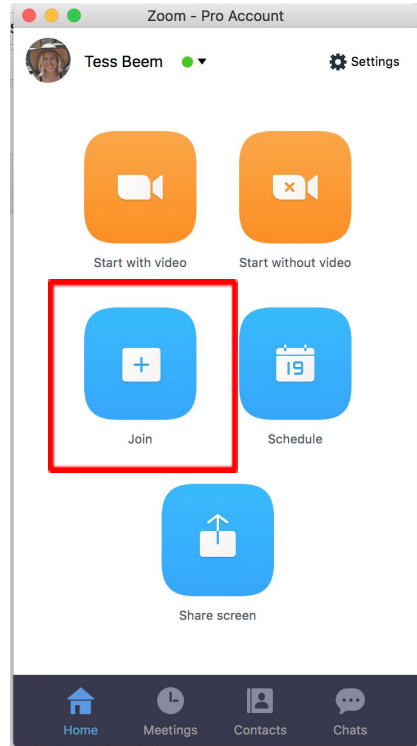
- The **bolded section** above is the active link to connect participants into a virtual meeting using video. Participants can click on this link at the time of the meeting to join.
- If a participant needs to be on the phone, they can dial the phone number listed in the “Or Telephone” section above and enter the Meeting ID using their keypad. Telephone participants will have audio *but not* video capabilities. If participants have the Zoom App on their smartphone, they can enter the meeting using the link.
- **PRO TIP:** Some people can be confused by the amount of text in the Zoom invitation. Deleting irrelevant information can make it more user friendly.

Join a meeting using a Meeting ID:

- From the home window of the Zoom app, click on the “Join” icon (outlined in red on the right).
- A screen that looks like this will open:



- Enter the Meeting ID number provided by the host.
- Click “Join” to enter the meeting.



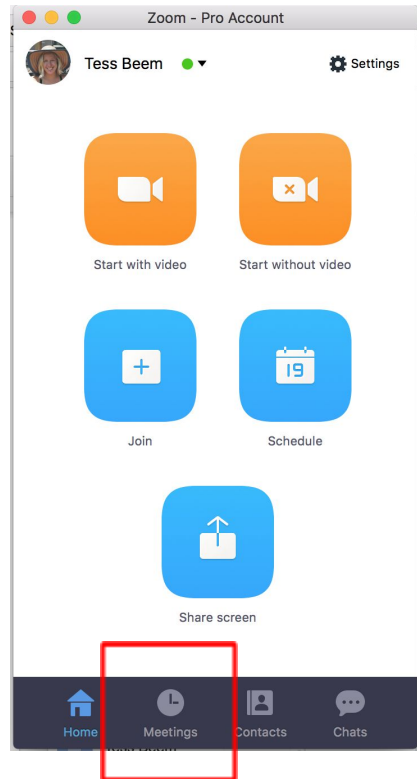
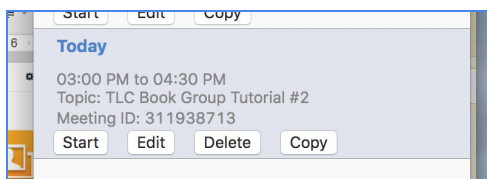
Join a meeting without the Zoom app or account:

- Go to the Zoom website (<https://zoom.us/>)
- In the upper right hand corner of the webpage, click on the “Join a Meeting” button.
- Enter the Meeting ID number generated by the host of the meeting. (This ID number can be found in the full content of the Zoom invitation.)

Starting a meeting

Start a meeting:

- At the bottom of the Zoom home window, click on the “Meetings” clock icon at the bottom (outlined in red below).
- There will be a list of all scheduled meetings.
- Find the meeting of interest, hover the cursor over the meeting title and click on the “Start” button. The virtual meeting will begin.

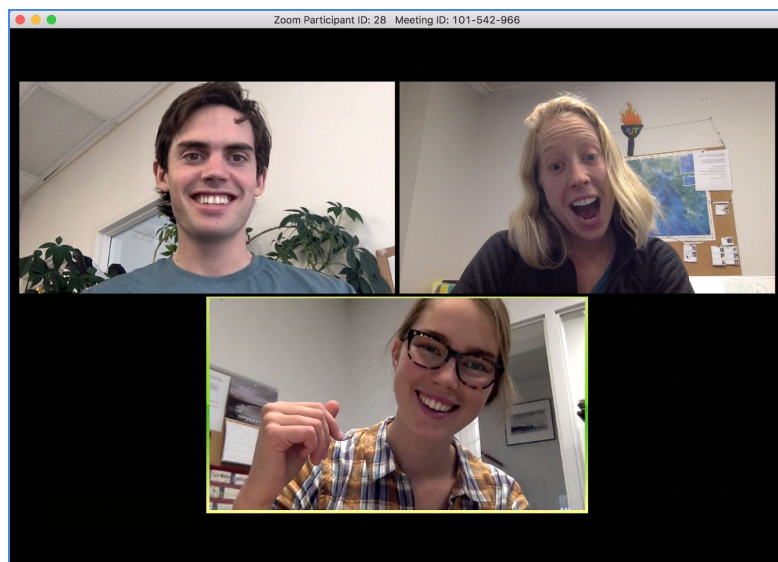


Managing a meeting

(NOTE: all of the following control options are found on the Zoom meeting window once a meeting is underway. These control options will disappear after a minute of inactivity, so you may need to move your cursor over the video window for them to reappear.)

Change view settings:

- There are three view options: Gallery, Speaker, and Minimize.
- To change between Gallery and Speaker views, move the cursor over the upper right corner of the meeting window. (The view option named there is the *opposite* of the view option showing on the meeting screen - the view you could change to if you click on it.)
- “Gallery view” will make all participant tiles equal sizes (seen below).

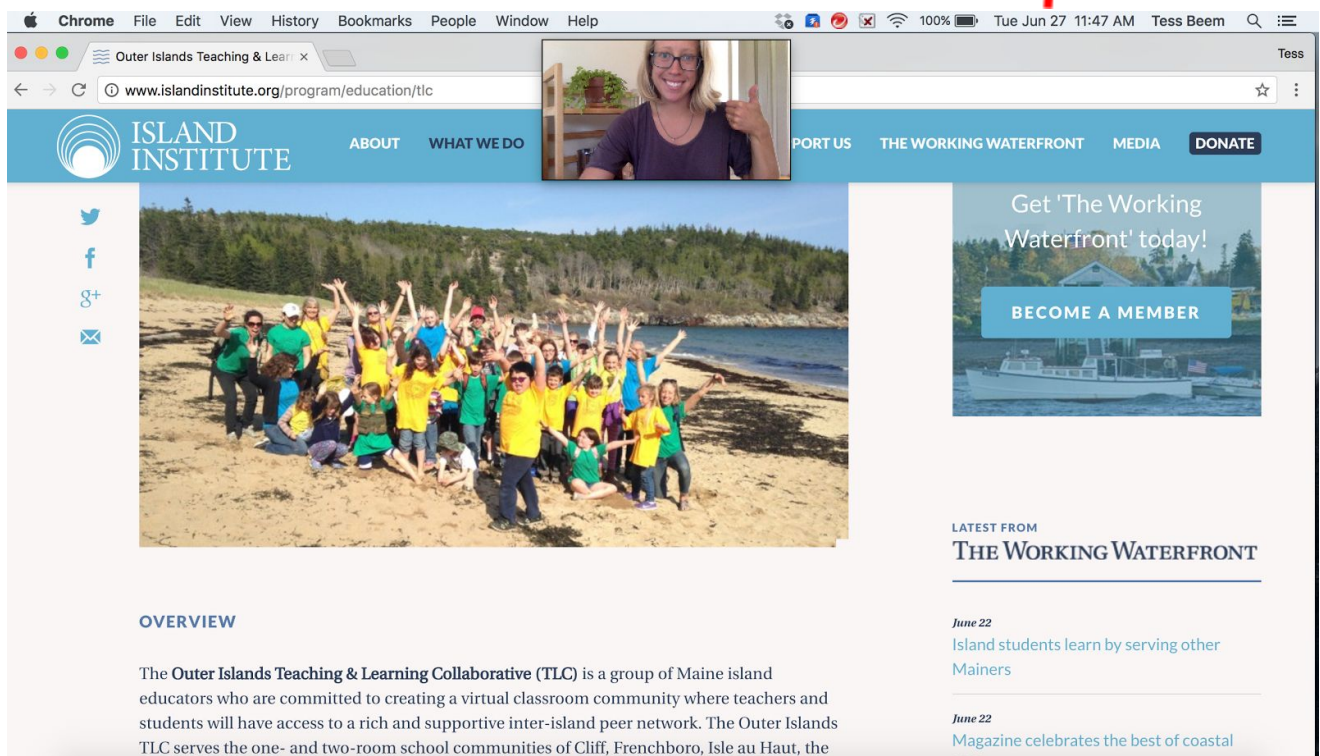
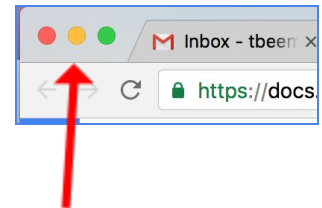


- “Speaker view” will minimize all tiles except that of the person currently speaking (see below).

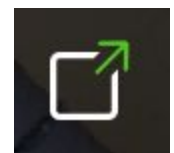


- PRO TIP: As the facilitator, Speaker view can be distracting as the screen is constantly changing with the speaker. It can also make it hard to read body language of participants not speaking as their video tiles are much smaller.
- PRO TIP: Depending on the number of participants, you may need to adjust the size of the meeting window to fit all video tiles. Hovering the cursor over the meeting window, there will be neon yellow, right or left arrows to indicate if there are more participants than those showing. Attempt to have all tiles showing at once, so no one is forgotten.

- Clicking the Minimize button of the meeting window (orange here) will create a single speaker window that floats in front of all other open windows (outlined in red below). You can drag the floating video anywhere on your screen.

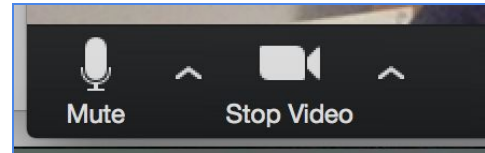


- To escape the Minimized view, click the “Expand view” icon on the video window (seen at right).
- PRO TIP: Minimized view allows you to take notes and work in other documents while maintaining video. However, it only allows you to see one speaker at a time, so is best for one-on-one meetings.
- PRO TIP: Unlike the Minimized view window, Speaker and Gallery view windows will not float in front of other windows when you click on them; they will fall behind. In order to observe all participants while also working on a document, it can be best to adjust window sizes into a “split screen” configuration top-to-bottom.



Control video and audio settings:

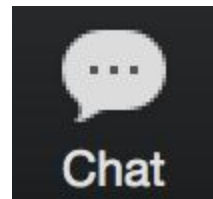
- “Mute” and “Stop Video” controls are located along the bottom left of the meeting window.
- Clicking on the feature once will disable it; clicking it again will turn it back on.



- PRO TIP: If there is a lot of background noise in your environment, turning on the mute button until you want to speak can decrease distracting noises for other participants. As the host of a Zoom meeting, you can control these functions for all participants (just inform them you are muting them beforehand and don't forget to return to them).
- PRO TIP: If the internet is bad, disabling video can help maintain a better overall internet connection using just audio.

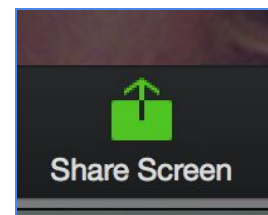
Chat

- The “Chat” function is found on the bottom right of the meeting window.
- Clicking the Chat icon will open a side window where participants can type messages to the whole group or facilitator.
- PRO TIP: This can be a useful tool when technology acts up, as participants can communicate about sound and video quality.



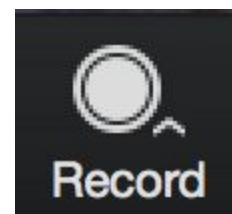
Screen share

- The “Share screen” function is located on the bottom center of the meeting window.
- When done sharing, click the red button to “Stop sharing.”
- PRO TIP: Sharing your screen with participants is an easy way for others to watch you go through a process or view a presentation on your screen.



Record

- The “Record” function is located on the bottom right of the meeting window.
- Controls to pause and stop a recording in progress, gives the option to selectively record during a meeting.
- Recording files will be saved to your computer at the end of a meeting.



Ending a meeting

Ending a meeting for host & participants

- A meeting can be ended by closing the meeting window or selecting “End meeting” on the bottom right of the meeting window.
- You can either “Leave Meeting” or “End meeting for all.”
- “Leave Meeting” allows other participants to stay on after you have left; “End meeting for all” does not.