

EIPA Zoom Guide for Trainers/ Lecturers

When planning an online training seminar via Zoom there are a few things to keep in mind, which you may not have considered when teaching in a face-to-face capacity. This guide will cover the basics to equip you to give an effective Zoom training seminar, as well as specific Zoom features that can enhance your seminar.

It is important to note that while this guide refers to your 'Zoom seminar' - meaning the seminar you will be holding via Zoom, EIPA uses a version of Zoom known as **Zoom meetings**. If you are doing further research on the Zoom functionalities on the Zoom help page, you will need to be aware of this as soon features can differ between versions.

Equipment

You can use Zoom on a variety of devices however, we strongly recommend you download the software to your desktop/laptop device.

In addition to this, it is important to regularly update the software to the most recent version. This can be done by opening the Zoom software, and clicking on the initials of your username (right upper corner), then selecting 'Check for updates'.

We advise the use of an **external microphone** to minimize background noise and ensure you can be clearly heard throughout the seminar. While many headphones have a built-in microphone, it is important to test this equipment prior to the day of the seminar.

There are some basic rules of etiquette to consider on any video call. You Zoom seminar is no different. In short, you should try to position yourself facing a light source against a plain background. A plain wall is ideal here. Alternatively, if your computer processor allows you can also upload a **virtual background** for your Zoom seminar. You can find more information on this here1.

If available, it is a good idea to use a **minimum two screens for the seminar**. This will allow you to better monitor the different features of your Zoom seminar as you can move the different windows within your Zoom call to suit your preferences. For example, you can arrange your set up to have the chat box and the participants list on your left hand screen and the participants' videos on your right hand screen. If you are unable to access additional screens, another option would be to have a second person assisting you in your Zoom seminar as a moderator or assistant.

Moderator / Assistant

When planning your seminar, consider if **you will require assistance**. Managing the different aspects of a Zoom seminar, including the chat box and the participant list while giving a lecture may be a lot to handle. Including an assistant in your seminar plan could help things run smoothly, as you can delegate tasks to them, preventing you from getting overwhelmed during the session. An EIPA assistant can be arranged with your EIPA contact.

https://support.zoom.us/hc/en-us/articles/210707503-Virtual-Background#:~:text=The%20Virtual%20Background%20feature%20allows,videos%20as%20a%20virtual%20background

Roles

There are multiple roles available for a meeting: host, co-host, alternative hosts, and participants.

When you begin a Zoom call, the person who created the call is automatically made the host. If you do not create the meeting link for your Zoom seminar, you will not be made host. When you first enter the Zoom call, before the participants join, you should request that you are made host, but be careful as the host controls the entire meeting. Therefore, if you try to leave the meeting as host, you will end the call for everyone.

The differences between the different roles are outline below. When you are assigned a specific role, you will see this role after your name on the participants list. If you are not assigned a specific role, you will remain a participant and you will not see anything after your name.

Host	The user that scheduled the meeting. They have full permissions to
	manage the meeting. There can only be one host of a meeting.

Co-hosts Shares most of the controls that hosts have, allowing the co-host to manage the administrative side of the meeting, such as managing attendees. The host must assign a co-host during the meeting. Co-hosts cannot start a meeting. If a host needs someone else to start the meeting, they can assign an alternative host.

Note: If you are using an assistant, you should make them co-host as soon as they join the call.

Alternative	Shares the same controls as co-hosts, but can also start the meeting.
hosts	Hosts can assign alternative hosts when they schedule a meeting.

You can find a breakdown of the different controls available to each role here2.

² https://support.zoom.us/hc/en-us/articles/360040324512-Roles-in-a-meeting

Course Structure

Online trainings offer many different opportunities compared to a standard face-to-face sessions, while also offering the chance to simulate in-person activities via online platforms. Take the time to consider how you would like to structure your course. Then consult the *Online-Tools Dictionary* to see what tools are available to facilitate your aims. Zoom offers several features such as breakout rooms, polls and whiteboard that you may wish to employ. These tools are explained in detail further down.

It is important to consider **accessibility** when consulting the online-tools available. Some tools may increase the bandwidth needed to conduct the call. This means they will require more internet to use the software. If participants do not have a strong enough internet connection, they may struggle to fully engage with certain tools.

It is a good idea to include **short, frequent breaks** when planning your online course to ensure full attention can be maintained. Try to communicate with individual participants regularly, as the risk of distraction is higher in online learning environments. One suggestion is to **interact with participants at least every fifteen minutes** and be active in keeping them engaged.

Course Scheduling

If you are responsible for creating the Zoom link and scheduling your seminar, there are some meeting options to check before starting the session:

- Disable "Join before host"
- Enable "Mute participants upon entry"
- Enable "Waiting room"
- Enable "Only authenticated users can join: Sign in to Zoom
- Disable "Breakout room pre-assign"
- Disable "Record meeting automatically"



Pre-Course Checklist

In order to ensure a successful Zoom training session there are a few key things you need to check before the seminar begins. For this reason, we would always advise you to arrive to the session before the participants are scheduled to arrive to allow you time to test everything and correct any potential issues. It is good to run through this checklist with your EIPA contact/assistant.

Course Check List

1. Ensure you have a stable internet connection :

Recommended to use an Ethernet cable. If not available position yourself as close to the Wi-Fi emitter as possible.

2. Test your equipment.

Test audio equipment with initial pop-up when you join meeting / audio settings.

Test camera using video settings (arrow next to "stop video" button)

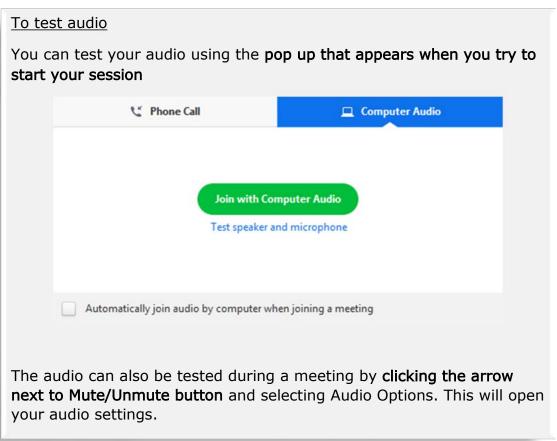
3. Run through your Presentation

Is everything visible and clear? Do you require audio/ additional videos? If so, test it now. Can any necessary documents be easily accessed?

4. Discuss course structure with EIPA assistant/moderator.

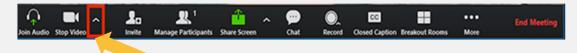
Be clear in what you require of them. What are your preferences regarding chat/questions etc.? Are there activities you want them to moderate during the breakout rooms?

- 1. Ensure <u>stable connection</u> by either directly connecting your device via an Ethernet cable (best) or position yourself close proximity to WIFI-emitter. It is advisable to also temporarily close other software that could use some of your internet bandwidth like e.g. Skype and Microsoft Teams.
- 2. Test your camera, microphone and speakers/headset.

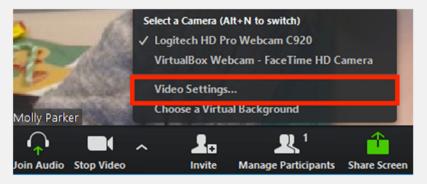




1. Click the arrow next to Start Video / Stop Video.



2. Select Video Settings.



3. Zoom will display your camera's video and settings.



- 4. If you do not see your camera's video, click the drop-down menu and select another camera.
- 3. If you plan to use a PowerPoint presentation or other materials, <u>test your</u> <u>screen share</u> to make sure everything will be clear for the participants.
- 4. Briefly <u>discuss the outline of your presentation with your assistant/co-host</u> to ensure clarity/agreement on transition periods and the <u>code of conduct</u> <u>regarding interaction with participants</u>. The <u>use of breakout rooms</u> should also be discussed if relevant to the course.

Zoom Tools

Participants List

As the host in a meeting, you can manage the participants via the participants list.



Names in the participants list appear in the following order:

- 1. You
- 2. The host (If you're not the host)
- 3. Phone numbers with no names
- 4. Unmuted participants (sorted alphabetically)
- 5. Muted participants (sorted alphabetically)

With meetings, hosts and co-hosts can control the following features:

- Mute participants
- Request that a participant unmutes
- Stop a participant's video
- Request that a participant starts their video
- Prevent participants from screen sharing
- Rename a participant
- Put a participant on hold if enabled
- Choose to play an enter or exit chime
- Lock the meeting to prevent anyone new from joining
- Place participants in waiting room or admit/remove participants from the waiting room (waiting room can only be enabled by the host)

Only hosts have access to these features:

- Give a participant the ability to record locally
- Make a participant host or co-host
- Enable waiting room



Chat

Using the **chat tool** can encourage engagement by allowing more participants to interact with the live activity, rather than just listening.

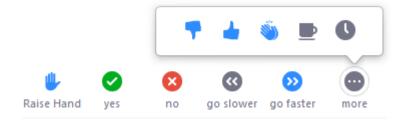
Advantages of the Chat function:

- Receiving a large number of responses to a question immediately, and use these responses in real-time or archive them for later.
- Seeing exactly where participants are on a particular issue or debate, informing whom to call on next.

Notes:

- Chat allows posts to the <u>whole class or privately to one other person</u>. This
 can be done by selecting the person's name right above the Textbox where
 you type your messages. This can be especially handy if you or your
 moderator want to discreetly assist participants who are experiencing
 technical difficulties.
- You can download the full chat history at the end of class, if you want to keep the record.
- Chat can be overwhelming for some participants. It is recommended you
 offer this type of interaction as an option, but do not require it from all
 participants.
- Think about how, when, and where you want to allow participants to engage
 in chat. For example, are you comfortable with comments in Chat throughout
 the seminar, or only at particular moments? If you have an assistant who can
 filter comments, you might allow participants to use Chat continuously; if you
 do not, you might encourage its use at discrete times or encourage
 participants to ask questions orally.

Non-Verbal Feedback



If the meeting organizer enables the Nonverbal feedback feature, **meeting** participants can place an icon beside their name to communicate with the host and other participants without disrupting the flow of the seminar. This is known as nonverbal feedback. For example, clicking **Raise Hand** places the raise hand icon beside your name to simulate a hand raise.

The participants can also indicate if they want the presenter to speak **slower/faster**, if they **need a break** or to simply answer **Yes or No**.

All participants can see the icons that everyone else has chosen. In addition, the host sees a summary of how many participants are displaying each icon, and has the option to remove all feedback.

It is a good idea to direct participants to this feature at the start of your seminar. They can access the non-verbal feedback by going to the participants list.

To remove an icon the participant, host or co-host must click on the icon. You can only display one icon at a time. More information on non-verbal feedback can be found here³.

³ https://support.zoom.us/hc/en-us/articles/115001286183

Screen Sharing

Screen sharing is one of the most important tools for your online seminar. This allows you to share what you see on your laptop/desktop screen with the participants via the Zoom session. It is an effective way to share your presentation with the participants, as well as other documents that may be important for the course.

Note: If you have not used this function before, we would strongly recommend arranging a test call with an EIPA colleague to allow you ample time to try out this function.

Sharing your Screen:





2. You will be asked to select one of the different screen share options. (These options are explained in detail further down).

Optional additional features include:

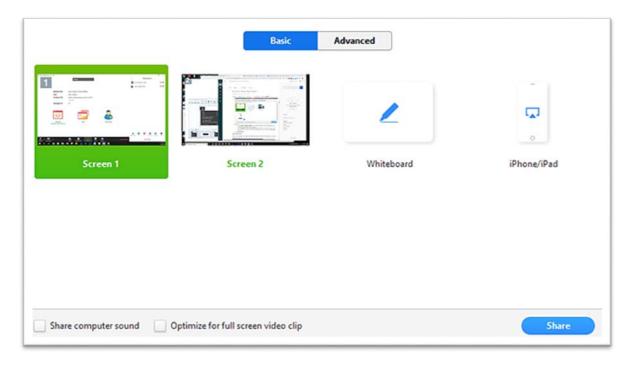
- Share Computer Sound: If you check this option, any sound played by your computer will be shared in the meeting.
- Optimize for full screen video clip: Check this if you will be sharing a video clip in full screen mode. Do not check this otherwise, as it may cause the shared screen to be blurry.

3. Click Share.

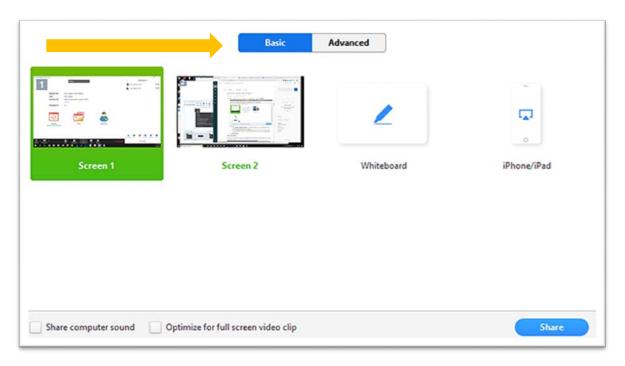
- Zoom will automatically switch to full screen to optimize the shared screen view. To exit full-screen, click Exit Full Screen in the topright corner or press the Esc key.
- If you selected **Portion of Screen**, customize the screen portion by dragging or resizing the green border.
- If you selected Content from 2nd Camera, click Switch Camera in the top-left corner to switch the shared camera.

Screen Sharing Options.

When you select **Share Screen** the following pop up will appear.



You can choose between Basic and Advanced options. You can toggle between the Basic and Advanced options using the buttons at the top of the screen.



Basic Option gives you the option to share your entire desktop, a specific application window, the Zoom whiteboard, or your iPhone/iPad screen (see table below).

Share Entire Desktop

Participants will see everything on your computer screen, just as you see it. This is useful for jumping between applications however as everything on your screen is visible, any unrelated/personal documents open during the share will also be seen by participants. This is true for desktop shortcuts and any notifications that go off during the screen share. Notifications should be muted and only the necessary files open when using this option.

Share Specific Application Window

Participants will only see the application you have preselected during this screen share. Please be aware that in order to select an application to share, it must already be open on your desktop. You will have to stop the screen share to change applications when selecting this option.

Sharing the Zoom Whiteboard

Allows host and participants to write/draw on a blank screen using annotation tools. Annotation tools will appear automatically or can be selected via the Whiteboard option in the meeting controls. The page controls in the bottomright corner of the whiteboard to create new pages and switch between pages. The person sharing the Whiteboard is the only person who can change pages. EIPA works also with other providers that have more responsive & diverse Whiteboard features, but their usage has to be arranged together with your EIPA contact.

Sharing your iPhone/iPad screen

In order to use this option additional software is required. You can find more information here.

The Advanced options include:

Sharing a portion of Screen	Share a portion of your screen represented by a green border.	
Sharing music or Computer Sound Only	Only share your computer's audio (your selected speaker in your <u>audio settings</u> ⁴).	4 €
Sharing content from 2nd Camera	Share a secondary camera connected to your computer, for example, a document camera.	
Sharing files	Share a file from a third-party sharing service like Google Drive or Microsoft OneDrive. Follow the on-screen prompts to sign in to the third-party service and grant Zoom access. Note: Alternatively, you can open the file in a web browser then share the browser window. For example, to share a Google doc, open the doc in Chrome, then share the Chrome window. The end result is the same as using the sharing options in the Files tab.	

Sharing PowerPoint Presentations

Zoom propose three different methods for sharing your PowerPoint presentations with participants using two monitors or using the PowerPoint presenter view. For more information on this, please consult the <u>Zoom Help Centre</u>⁵.

Presentations of all forms can be easily shared using the basic screen sharing function. Two monitors are preferential for this. For slide-show presentations it can be easier for the participants to read the slides if you convert the presentation to a PDF and present it from your PDF viewer, however this should be tested beforehand.

⁴ https://support.zoom.us/hc/en-us/articles/201362623

⁵ https://support.zoom.us/hc/en-us/articles/203395347-Screen-sharing-a-PowerPoint-presentation

Video layout options while screen sharing

While screen sharing, the videos of the other participants will move to an adjustable video panel.

By default the participants will be viewed in a vertical filmstrip, however if you drag the video panel to the top or bottom of your screen, they will be shown in a horizontal strip instead.

With the participants' videos in a vertical film strip, you can hover over the left hand side of the videos and drag the appearing arrow to expand or decrease the number of participants you can see. This is useful when working with one monitor. More information on this can be found here⁶.

Using Dual Monitors

If you are using a dual monitor set-up, you can turn on the <u>Use Dual Monitors</u>^Z feature to see the screen sharing on one monitor and participants on the second. This feature allows the video layout and screen share content to be placed on two separate monitors/screens. Gallery or speaker view can be displayed on one monitor while the other monitor displays a content share. This is useful for PPT presentations and hiding notes from the participants. This is especially helpful when you want to keep a general overview of the session while presenting your slides.

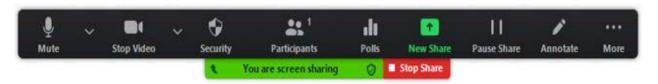
Note: On Mac OS 10.15 Catalina, you need to allow Zoom access to screen recording to share your screen. You can do this in your **System Preferences** > **Security & Privacy** > **Privacy** > **Screen Recording**.

⁶ https://support.zoom.us/hc/en-us/articles/360034188592-Video-layout-options-while-screen-sharing

⁷ https://support.zoom.us/hc/en-us/articles/201362583-How-To-Use-a-Dual-Monitor-Display

Screen Share Menu

When you start sharing your screen, the meeting controls will move into a menu signaling that you are currently sharing your screen. This menu can be repositioned 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 <u>manage the participants</u> ⁸ (if the host).
New Share	Start a new screen share. You will be prompted to select which screen you want to share again. This process will not be visible to your participants.
Pause Share	Pause your current shared screen.
Annotate / Whiteboard	Display <u>annotation tools</u> for drawing, adding text, etc.
More	 Hover over more for additional options, which include: Chat: Open the chat window. Record: Start recording locally¹⁰ or to the cloud¹¹. 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 session or end the session for all participants.

⁸ https://support.zoom.us/hc/en-us/articles/115005759423-Managing-Participants-in-a-Meeting

https://support.zoom.us/hc/en-us/articles/115005706806
 https://support.zoom.us/hc/en-us/articles/201362473

¹¹ https://support.zoom.us/hc/en-us/articles/203741855

Screen annotation

Zoom has basic annotation tools (text box, free form draw/pen, shapes, and highlighter) that you can use to guide participants or explain a concept. Access these tools by selecting the Annotate option when you are sharing your screen.



Note: Screen annotations are not accessible for screen reader users. If you use this feature, be sure to use accessible presentation best practices: say what you are doing while you are doing it, e.g., "I'm drawing a big red circle around the login button on this web page."

Click more in the screen share controls for these annotation settings:

- 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. If set to show, the participant's name will briefly display beside their annotation.



Breakout Rooms

Breakout rooms allow you to split your Zoom seminar in up to **50 separate groups** for a limited time to ease team based **collaborative work/discussion**. These Breakout rooms look identical to the main room (from the participants view) and offer the same features, just with fewer members.

The meeting host can choose to split the participants of the seminar into these separate groups automatically or manually and can switch between groups at any time. Only the host can assign participants to breakout rooms. If you have an assistant, you need to be mindful of this when discussing the roles.

You can also <u>pre-assign participants to breakout rooms</u>¹² when you schedule the meeting instead of managing them during the meeting. This is a useful tool but it is also good to keep in mind that the participant numbers on the day may vary from what was anticipated.

Limitations

Only the <u>host</u> can manage breakout rooms.

Users joined using Chromebooks/Chrome OS or Zoom Rooms are unable to join breakout rooms, but the main room can be used as an alternative session for these users. To ensure your Zoom seminar runs efficiently we recommend using the desktop application on you PC.

If the meeting is being cloud recorded, it will only record the main room, regardless of what room the meeting host is in. If local recording is being used, it will record the room the participant who is recording is in. Multiple participants can record locally.

You can create up to 50 breakout rooms. The maximum number of participants in a single breakout room depends on the meeting capacity, number of breakout rooms created, and if participants are assigned during the meeting or before the meeting.

These numbers only apply to breakout rooms created during a meeting. Up to 200 participants can be <u>pre-assigned</u> to breakout rooms.

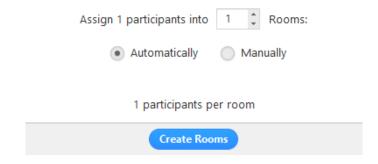
¹² https://support.zoom.us/hc/en-us/articles/360032752671

Creating breakout rooms

1. Click on the **breakout rooms** button in the toolbar at the bottom of your screen.



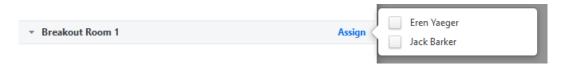
- 2. Select the number of rooms you would like to create, and how you would like to assign your participants to those rooms:
 - Automatically: Let Zoom split your participants up evenly into each of the rooms.
 - Manually: Choose which participants you would like in each room.
- 3. Click Create breakout rooms.



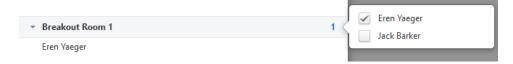
4. Your rooms will be created but will not start automatically. You can manage the rooms prior to starting them by following the instructions below.

Assigning participants to rooms

To assign participants to your rooms, select **Assign** next to the room you wish to assign participants to and select participants you want to assign to that room. Repeat this for each room.



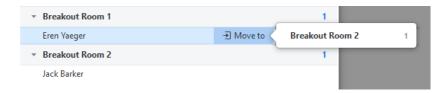
Once a participant has been assigned (manually or automatically), the number of participants will show in place of the **Assign** button.



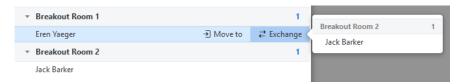
Preparing breakout rooms

After assigning participants to rooms, you can rearrange the participants. Participants who are not assigned to breakout sessions will remain in the main meeting when the rooms are started.

Move to (participant): Select a room to move the participant to.



Exchange (participant): Select a participant in another room to swap the selected participant with.



Delete Room: Delete the selected room.

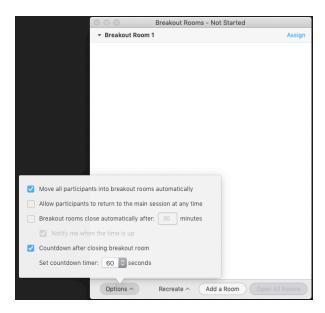
Recreate: Deletes existing breakout rooms and creates new ones.

Open All Rooms: <u>Start the rooms</u>. All participants will be moved to their respective rooms after confirming the prompt to join the breakout room. The host will be left in the main meeting until manually joining one of the rooms. The participants (and the host when manually joining a room) will see the following message shown when joining the breakout room.



Options for breakout rooms

After creating the breakout rooms, you can view additional breakout room options by clicking on **Options**.

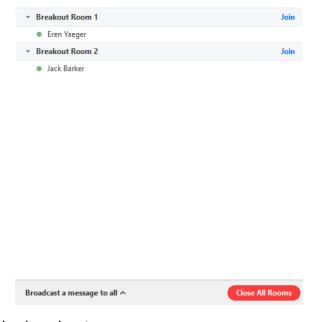


Check any options that you would like to use for your breakout rooms.

Move all participants into breakout rooms automatically	Checking this option will move all participants into the breakout rooms automatically. If this option is unchecked, the participants will need to click Join to be added to the breakout room.
Allow participants to return to the main session at any time	If this option is checked, the participants can move back to the main session from their meeting controls. If this is disabled, they need to wait for the host to end the breakout rooms.
Breakout rooms close automatically after x minutes	If this option is checked, the breakout rooms will automatically end after the configured time.
Notify me when the time is up	If this option is checked, the host will be notified when the breakout room time is up.
Countdown after closing breakout rooms	If this option is checked, the participants will be given a countdown of how much time they have left before being returned to the main room.

Managing breakout rooms in progress

Once the breakout rooms have been started, the participants will be asked to join the Breakout Session. The host will stay in the main meeting until joining a session manually. If a participant has not joined the session yet, it will be noted by **(not joined)** next to their name.

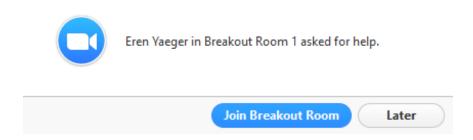


Join	Join the breakout room.
Leave	Leave the room and return to the main meeting (only shows when
	in a breakout room).
Close All	Stops all rooms after a 60 second countdown, shown to the host
Rooms	and participants, and returns all participants back to the main
	meeting

Responding to requests for help

Participants in breakout rooms can request that the meeting host join their meeting by clicking **Ask for Help.**

You will be prompted to join the room where the request originated. Click **Join breakout room** to join the room.

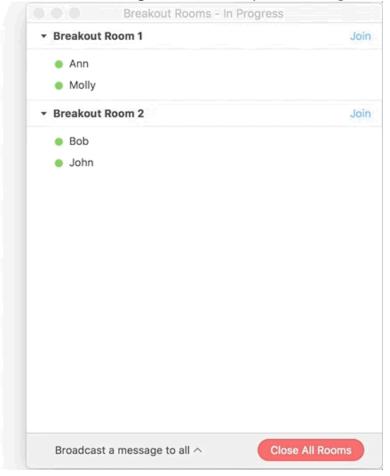




Broadcasting a message to all breakout rooms

The host can broadcast a message to all breakout rooms to share information with all participants.

- 1. Click **breakout rooms** in the meeting controls. \blacksquare
- 2. Click Broadcast a message to all, enter your message and click Broadcast.



The message will now appear for all participants in Breakout Rooms.

From Molly Parker to everyone: We will be returning to the main room in 5 minutes.

Polling

The polling feature for meetings allows you to create single choice or multiple choice polling questions for your meetings. You will be able to launch the poll during your meeting and gather the responses from your attendees.

This can be a great way to increase the engagement level of participants and as a tool to break up your presentation. You also have the ability to download a report of polling after the meeting.

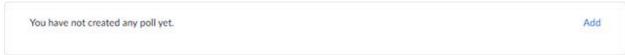
Polls can also be conducted anonymously. If you do not need to collect participant information with the poll results it is recommended you use this open as it will encouraged increased participation.

Requirements

- To launch polling, the host must be using the Zoom desktop application on PC, Mac, or Linux
- The meeting or webinar must be scheduled you cannot use polling in Instant Meetings
- Only the original meeting or webinar host can use polling. If host control is transferred to another participant, the new host will not have polling ability
- Attendees using the desktop application or the Zoom mobile app will be able to participate in polling, but those using a web browser (such as Chrome or Firefox) are unable to view or participate in polls.

Creating a poll

- 1. Go to the **Meetings** page and click on your scheduled meeting. If you do not have a scheduled meeting, schedule a meeting now.
- 2. From the meeting management page, scroll to the bottom to find the **Poll** option. Click **Add** to begin creating the poll.



- 3. Enter a title and your first question.
 - (Optional) Check the box to make the poll anonymous, which will keep the participant's polling information anonymous in the meeting and in the reports.
 - Select whether you want the question to be single choice (participants can only choose one answer) or multiple-choice question (participants can choose multiple answers).
- 4. Type in the answers to your question and click **Save** at the bottom.

5. If you would like to add a new question, click **Add a Question** to create a new question for that particular poll.



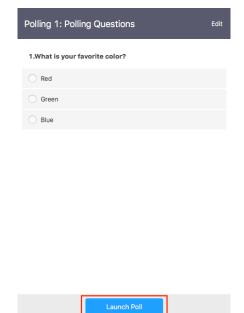
6. You can add more polls by repeating Step 2.

You can also create a poll by clicking **Polling** during the meeting. This will open up your default web browser where you can add additional polls or questions.

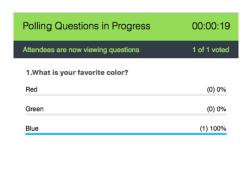
Note: You can only create a max of 25 polls for a single meeting.

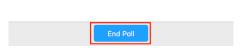
Launching a poll

- 1. Click **Polls** in the meeting controls.
- 2. Select the poll you would like to launch.
- 3. Click Launch Poll.



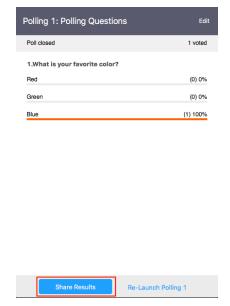
4. The participants in the meeting will now be prompted to answer the polling questions. The host will be able to see the results live. Co-host will not be able to see the responses or respond to the poll themselves.





5. Once you would like to stop the poll, click **End Poll**.

6. If you would like to share the results to the participants in the meeting, click **Share Results**.



7. Participants will then see the results of the polling questions.

Downloading a report of poll results

You can download a report of the poll results after the meeting. When viewing a report of the poll results, take note of these things:

- If registration was turned on and the poll was not anonymous, it will list the participants' names and email addresses.
- If registration was not on, the polling report will show the profile names of authenticated users in the same account.
- If the poll was anonymous, it will show "anonymous" for the participants' names and email addresses.