

# A Guide to Zoom!

Princeton Alumni Council  
Committee on Communications & Technology (CAT)



# Zoom as a Participant



# Two Types of Zoom Calls

## Meetings

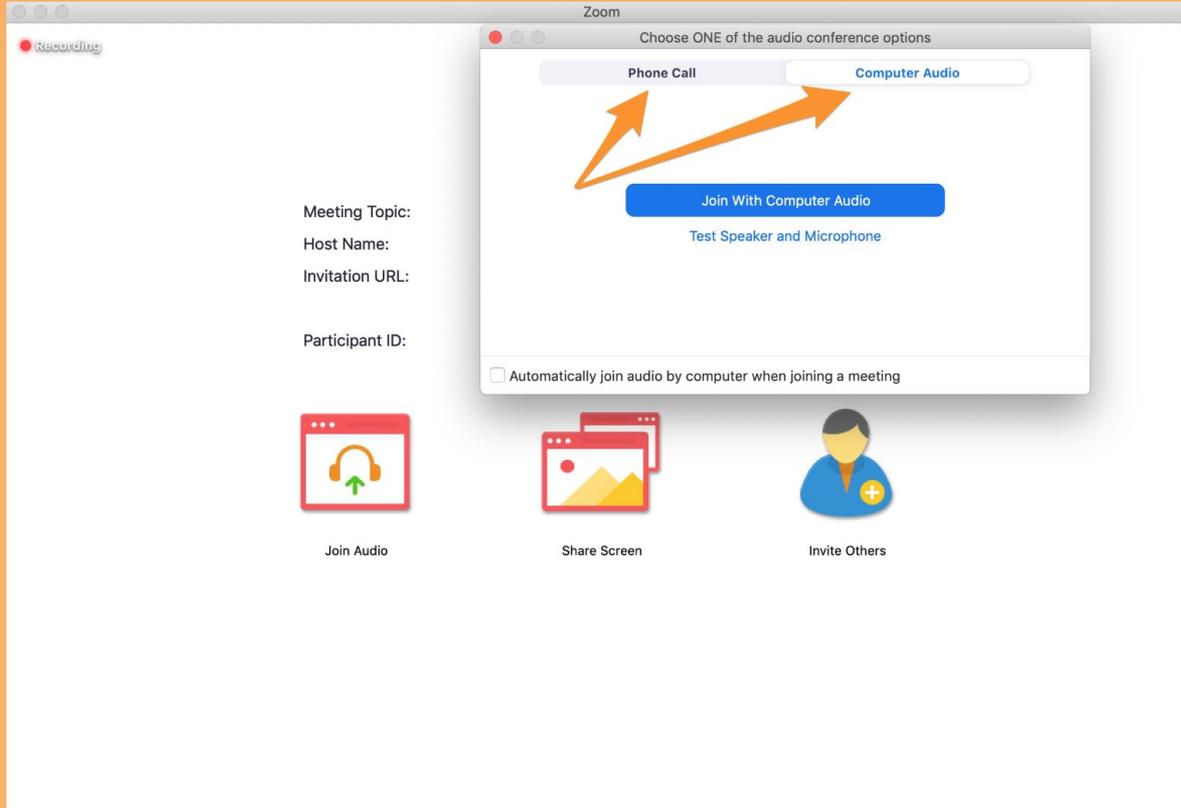
- Meetings are a type of Zoom call where you can view and hear all participants on a call.
- The person hosting a meeting can choose to mute everyone upon joining or, for more casual chats and smaller meetings, everyone can be unmuted to be able to chime in at any time.

## Webinars

- A webinar is a type of zoom call where the host(s) will be presenting something so only the host can speak
- When you join a webinar as a participant, your video and audio are automatically be turned off.



# Joining a Webinar: while your video is off, you choose how you want to hear audio.



When you have received an invite to join a Zoom call, you will need to click the link to join the meeting.

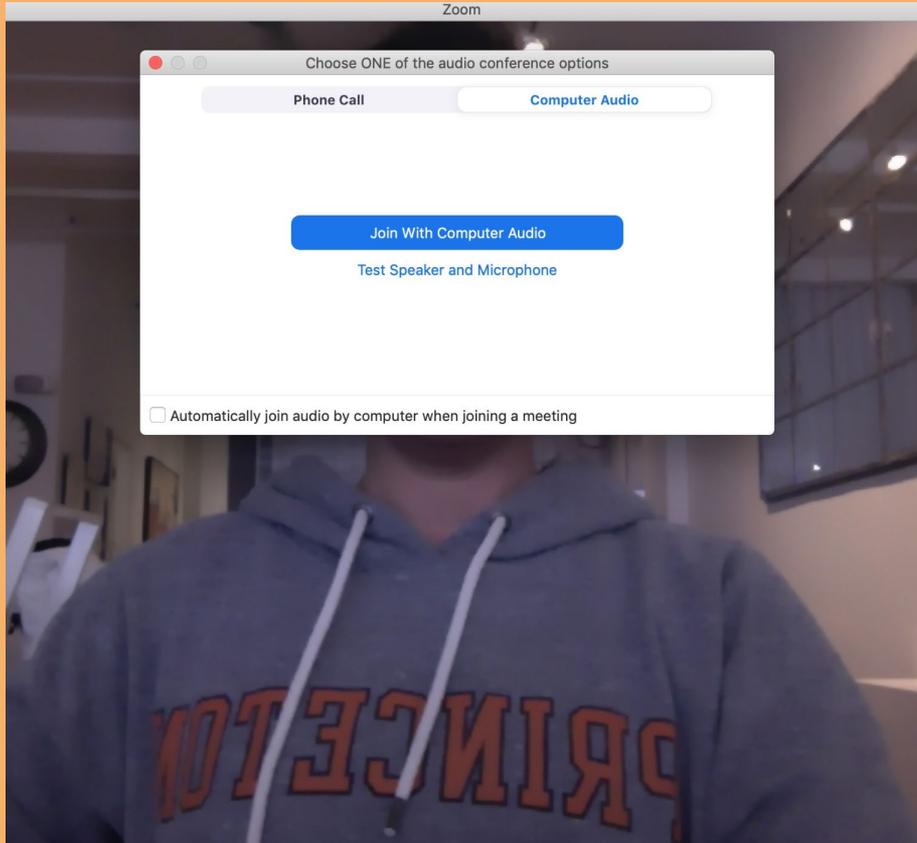
The other option is to go to [www.zoom.us](http://www.zoom.us) and type in your meeting ID (and password if your meeting has one).

After Zoom loads in your browser/on your computer, you'll receive this prompt at the left.

You'll need to decide whether you want to use your computer's audio or a phone call.



# Joining a meeting - your video is on by default.



Your video will automatically be turned on - see image.

You'll then want to select how you want to hear/speak - either via your computer or phone.

Next, we'll review several other preferences.



# Changing Settings During a Call

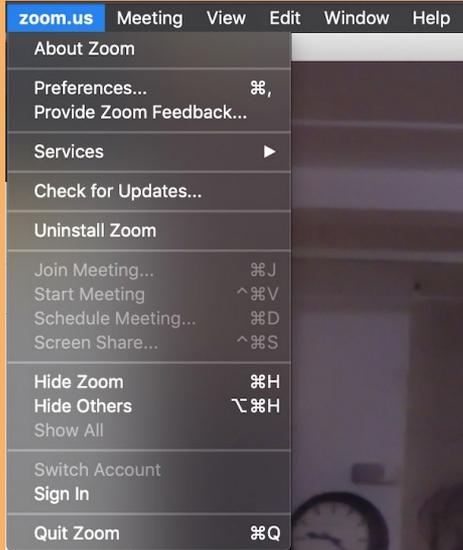


Most of the actions you take during a call are on the bottom menu bar.

This gets hidden so if you don't see it just wave your mouse towards the bottom of your video and the above menu should appear!



# Setting Your Preferences

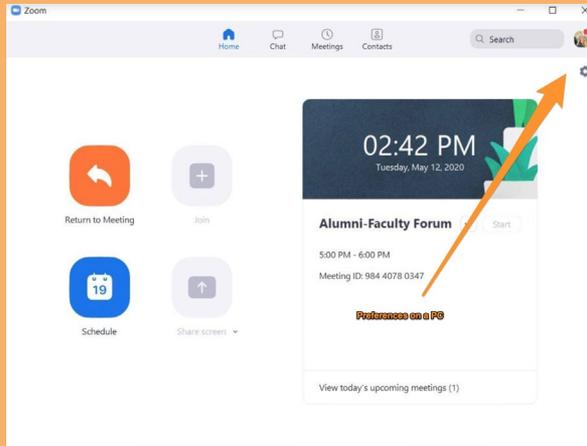


On a Mac, you Preferences are located in the top left corner of your screen.

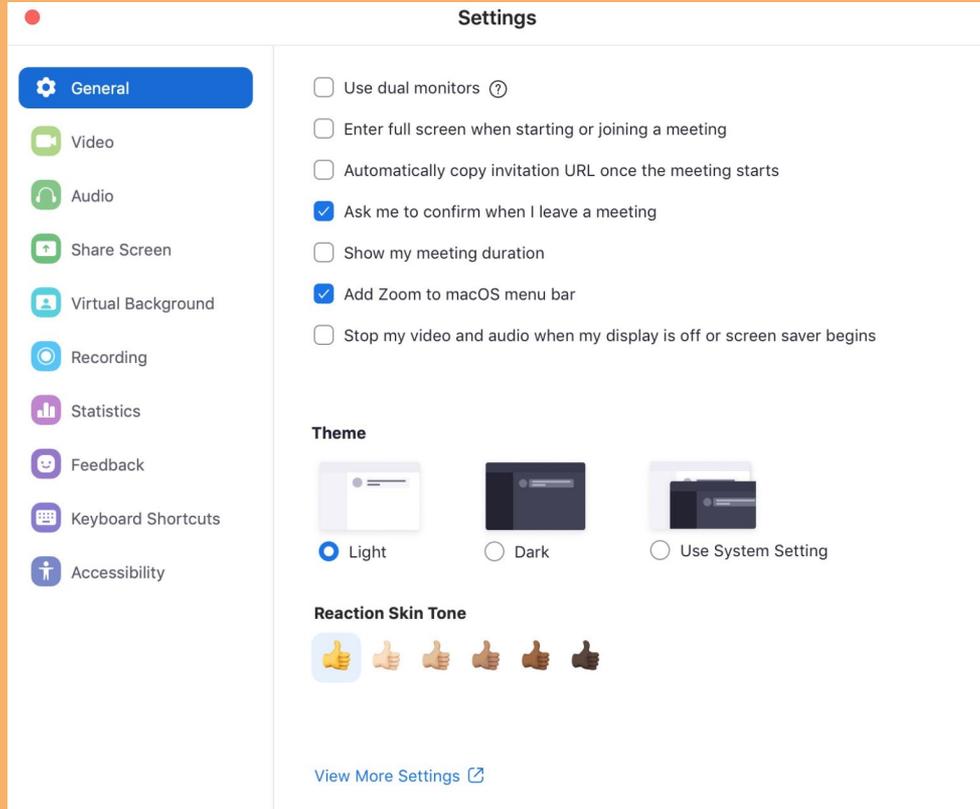
If you click on “zoom.us” the drop down should appear.

You’ll want to click on “Preferences.”

On a PC, preferences are located in the top right corner - see below:



# Preferences



All preferences live in the preferences tab; go through all of them to determine anything you want to change.

For example, you can determine whether you want to enter full screen upon joining, change the color theme to light or dark, add a prompt to ask you to confirm when leaving a meeting, etc.

You should then toggle through each of the preference tabs - i.e. video, audio, share screen, virtual background, etc - to review your selections.



# Video Preferences

- Camera:** FaceTime HD Camera (Built-in) 
- 16:9 (Widescreen)  Original ratio **Pro tip for anyone not getting enough sleep ;)**
- My Video:**
- Enable HD
  - Mirror my video
  - Touch up my appearance 
- Meetings:**
- Always display participant name on their videos
  - Turn off my video when joining a meeting
  - Always show video preview dialog when joining a video meeting
  - Hide non-video participants
  - Spotlight my video when speaking
  - Display up to 49 participants per screen in Gallery View

In video preferences you can choose whether to enable HD, turn off video when joining a meeting to give you time to settle, display your name on your video (this is a good courtesy for larger meetings or meetings with people who might not remember everyone's name).

You can also touch up your appearance ;) Think of it like a nice Instagram filter on your video!



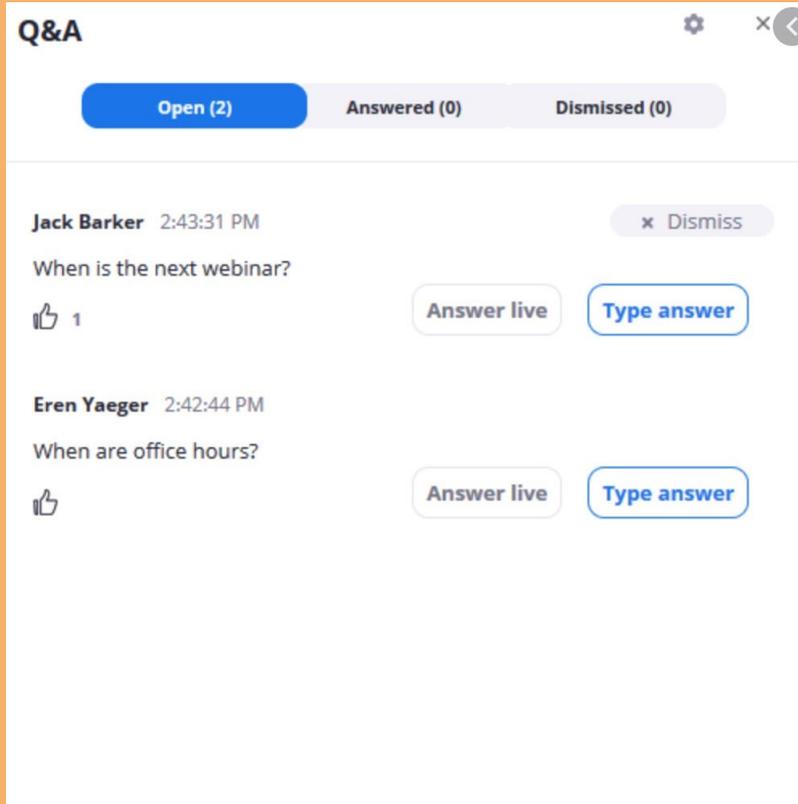
# Chat

You can chat with other participants during a Zoom call!

Be sure (double sure!) to select who you want your chat to go to - i.e. to everyone, the host/panelists or to one individual in particular.



# Chat vs Q&A



Q&A is a tool in a webinar that allows participants to ask specific questions of the hosts.

As a host, you can review them and either answer the questions in your presentation or you can have a moderator type the answers directly into the Q&A section.

You or your moderator can then mark off all the questions that have already been answered.

This is a MUCH more effective way to manage questions during a presentation as chat can become quite unwieldy with people bantering and making comments like “This is so helpful”, “I love your orange sweater” etc, etc.

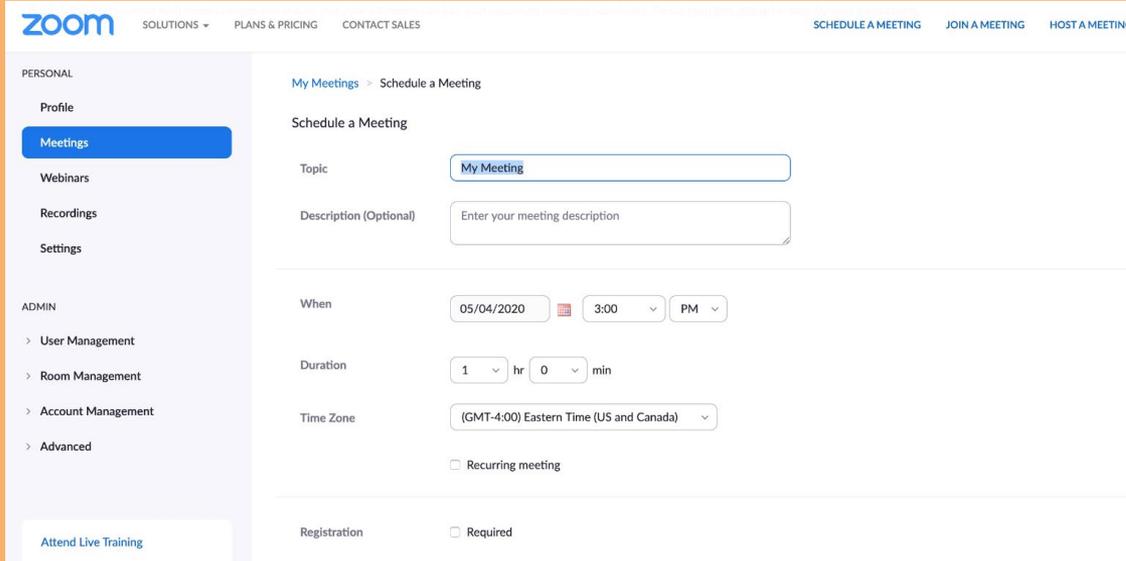
(\*\*There is also a raise hand feature if you want to selectively field questions and enable people’s audio.)



# Zoom as a Host



# Scheduling a Meeting - 1



The screenshot shows the Zoom web interface for scheduling a meeting. The top navigation bar includes the Zoom logo, 'SOLUTIONS', 'PLANS & PRICING', 'CONTACT SALES', and three main action buttons: 'SCHEDULE A MEETING', 'JOIN A MEETING', and 'HOST A MEETING'. On the left, a sidebar menu lists 'PERSONAL' (Profile, Meetings, Webinars, Recordings, Settings) and 'ADMIN' (User Management, Room Management, Account Management, Advanced, Attend Live Training). The main content area is titled 'My Meetings > Schedule a Meeting' and contains the following fields:

- Topic:** A text input field containing 'My Meeting'.
- Description (Optional):** A text area with the placeholder 'Enter your meeting description'.
- When:** A date picker set to '05/04/2020', a time picker set to '3:00', and a dropdown menu set to 'PM'.
- Duration:** Two dropdown menus set to '1' and '0', followed by 'hr' and 'min' labels.
- Time Zone:** A dropdown menu set to '(GMT-4:00) Eastern Time (US and Canada)'.
- Recurring meeting:** An unchecked checkbox.
- Registration:** An unchecked checkbox labeled 'Required'.

You'll need to create an account on Zoom.us before you can schedule a meeting.

Webinars are a paid feature so you'll need to pay for an account if you'd like to schedule a webinar.

\*\*\*The free plan limits your time to 40 minutes and limits the number of people in a meeting to 20.

When scheduling the meeting, you will select a name, description, date, time, duration and can set whether it is a recurring meeting - and whether you want to require registration.



# Scheduling a Meeting - 2

Meeting ID  Generate Automatically  Personal Meeting ID :

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Meeting Password  Require meeting password

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Video

Host  on  off

Participant  on  off

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Audio  Telephone  Computer Audio  Both

Dial from United States of America [Edit](#)

Additional settings for the meeting include: do you want to have a custom ID or have it generated automatically.

We would highly recommend requiring a password given the recent Zoom security breaches.

You can choose whether to enable everyone's video or just the host - and whether to allow phone and computer audio options.



# Scheduling a Meeting - 3

Meeting Options

- Enable join before host
- Mute participants upon entry <sup>12</sup>
- Enable waiting room
- Only authenticated users can join
- Record the meeting automatically  On the local computer  In the cloud
- Enable additional data center regions for this meeting

Alternative Hosts

Example: mary@company.com, peter@school.edu

Save Cancel

You can choose to allow participants in the meeting before the host (can be helpful if you're late).

For large-group meetings with announcements at the top, may be good to mute people upon entry.

We don't recommend the waiting room feature; it takes too much time for participants to join once you open the meeting.

We don't usually use authentication and, for important meetings, we always record and store it in the cloud for ease of sharing.

This is where you can add additional hosts for the meeting.



# Scheduling a Webinar

## Webinar Options

- Q&A
- Enable Practice Session
- Only authenticated users can join
- Record the webinar automatically  On the local computer  In the cloud
- Enable additional data center regions for this webinar

## Alternative Hosts

Example: mary@company.com, peter@school.edu

Schedule

Cancel

Scheduling a webinar requires the same steps as scheduling a meeting.

The only difference is in the webinar options.

We recommend enabling Q&A and a practice session if there are going to be multiple presenters.

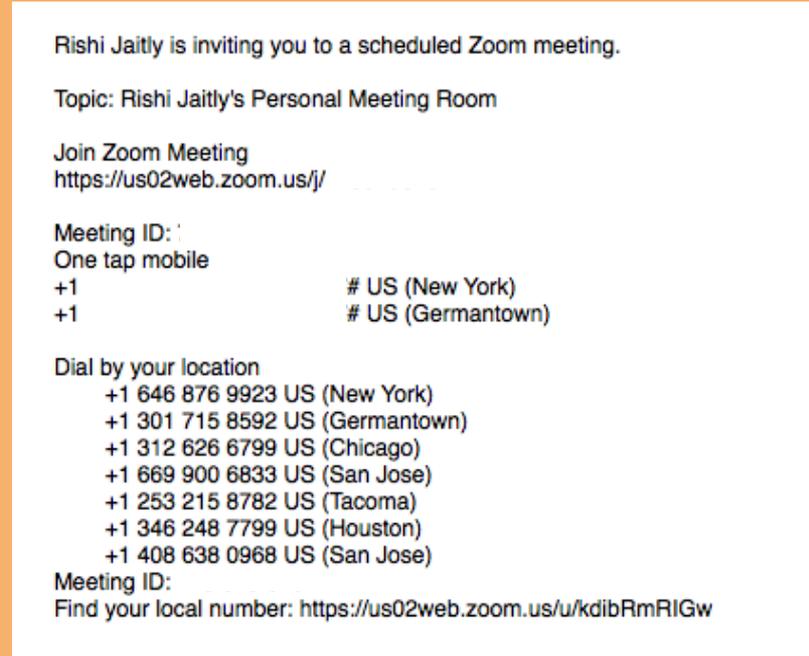
The Q&A feature is different than chat, but we highly recommend it (see next slide).



# Inviting Participants to a Zoom

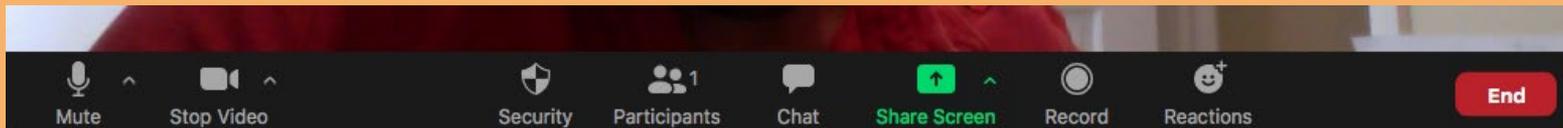
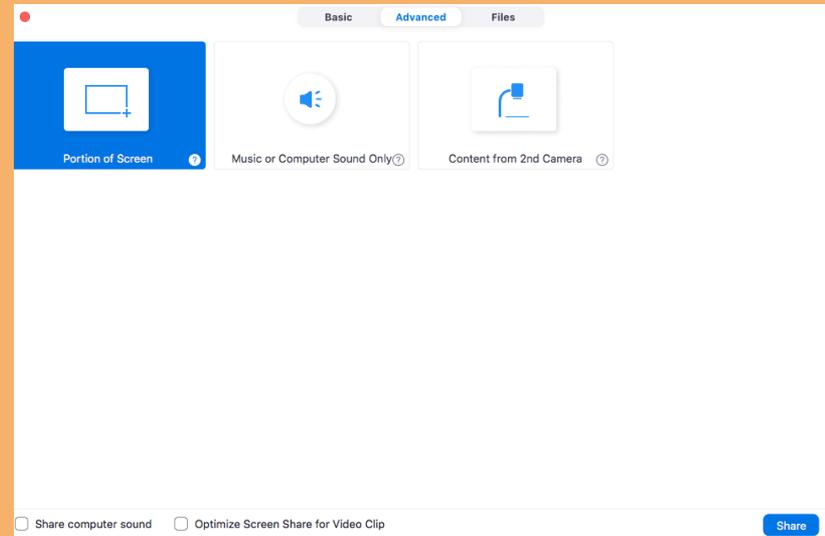
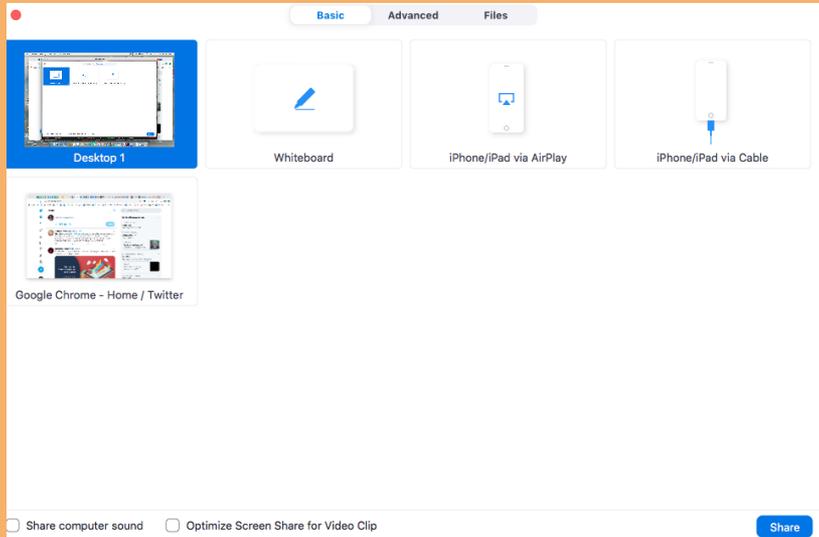
When inviting participants to your Zoom meeting, do send them all of the following:

- A calendar invite, e-mail or meeting request via your preferred platform (e.g. EventBrite).
- A link for downloading/testing Zoom in advance:  
<https://zoom.us/test>
- Let participants know they have 3 options for joining:
  - Computers with video cameras: can log in through Zoom desktop application if they have a camera or their computer
  - Zoom app on the phone:
    - Android app:  
[https://zoom.us/download#mobile\\_app](https://zoom.us/download#mobile_app)
    - Iphone app:  
[https://zoom.us/download#client\\_iphone](https://zoom.us/download#client_iphone)
  - Regular Phone call: They can also call in from a landline or cell phone
  - By clicking on “Meetings” on your Zoom desktop app, Zoom allows you to copy, paste and send all of the above!



# Screen Sharing - and more!

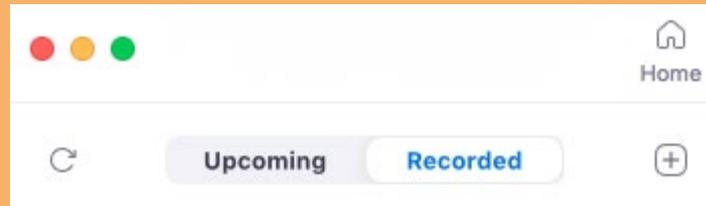
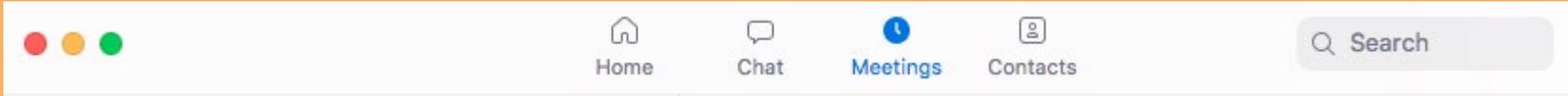
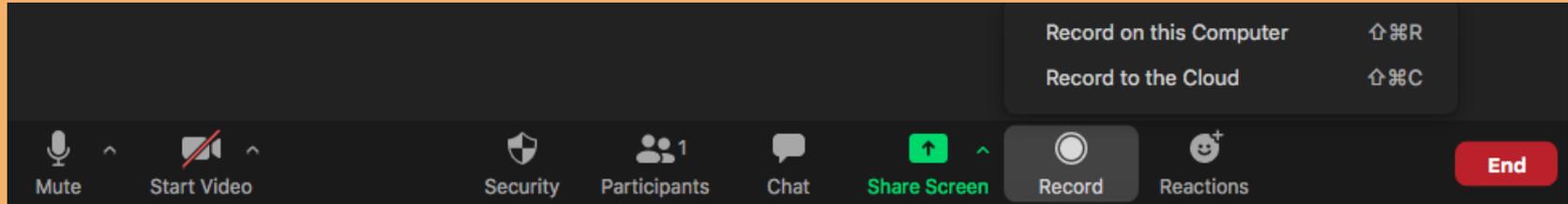
From the bottom bar, enter options to share your screen, a portion of your screen, your computer's sound, files and more! Choose the option most appropriate for your meeting.



# Recording Meetings

From the bottom bar, you'll see an option to Record your meeting. We'd recommend recording to the Cloud for easy access from any device.

Access all your recorded meetings via the "Meetings" icon at the top of your Zoom desktop app!



# Polling on Zoom

Via Settings and then “Meetings (Basic)”, you can enable Polling your participants - and set polling questions in advance or launch a poll in real time during your call! Be sure to share results with your participants afterwards.

Screenshot of the Zoom Meeting Settings - Basic tab. The 'Polling' section is highlighted with a yellow box. The 'Polling' toggle switch is turned on. The text below the toggle reads: 'Add 'Polls' to the meeting controls. This allows the host to survey the attendees. [?]'. An arrow points to the 'In Meeting (Basic)' link.

Screenshot of the Zoom Meeting Controls - Polls section. The 'Add' button is highlighted with a yellow arrow. The text above the button reads: 'You have not created any poll yet.' The buttons 'Delete this Meeting', 'Save as a Meeting Template', 'Edit this Meeting', and 'Start this Meeting' are visible at the top.

Screenshot of the Zoom Meeting Controls bar. The 'Polling' button is highlighted with a yellow box. The other buttons are 'Invite', 'Manage Participants', and 'Share'.

Screenshot of the Zoom Profile - Meetings section. The 'Meetings' button is highlighted with a blue box. The 'Upcoming Meetings' section shows a meeting titled 'Polling Test' with a start time of 'Today 11:00 AM'. An arrow points to the 'Topic' field.

Screenshot of the Zoom 'Add a Poll' dialog. The dialog is numbered 1 through 4. Step 1: 'Enter a title for this poll.' Step 2: 'Type your question here.' Step 3: 'Single Choice' and 'Multiple Choice' options. Step 4: '+ Add a Question' button.

Screenshot of the Zoom 'Polls' window. The 'Launch Poll' button is highlighted with a yellow arrow. The poll title is 'Poll 2: Second Poll'. The poll is currently closed.

Screenshot of the Zoom 'Polls' window showing the results of a poll. The 'Share Results' button is highlighted with a yellow arrow. The poll title is 'Poll 1: First Poll'. The poll is closed and has 1 voted. The results are: 'Answer 1' (1) 100% and 'Answer 2' (0) 0%.



# Breakout Rooms

Via “Meetings Settings,” then “Meetings (Advanced)” and then the icon that appears at the lower-right corner, you can enable and then control private breakout rooms! This works great during longer Board/Committee meetings.

The image is a collage of screenshots illustrating the process of enabling and managing breakout rooms in Zoom. It includes the following elements:

- Meeting Settings:** A screenshot of the Zoom Meeting Settings menu with 'Meeting Settings' highlighted by a red arrow.
- In Meeting (Advanced) Settings:** A screenshot of the 'In Meeting (Advanced)' settings page. The 'Breakout room' toggle is turned on (indicated by a red box and arrow), with the description: 'Allow host to split meeting participants into separate, smaller rooms'. Other settings like 'Remote support', 'Closed caption', 'Far end camera control', 'Group HD video', 'Virtual background', and 'Identify guest participants in the meeting/webinar' are also visible.
- Breakout Rooms Control Panel:** A screenshot of the 'Breakout Rooms' control panel. It shows 'Assign 7 participants into 2 Rooms' and options for 'Automatically' or 'Manually' assigning participants. A 'Create Breakout Rooms' button is present.
- Participant Assignment:** A screenshot of a participant list with a dropdown menu for assigning participants to a breakout room. The list includes 'Cody Del Prato' (checked), 'Bill', and 'Nick'. An 'Assign' button is visible.
- Breakout Session Management:** Two screenshots of the breakout session management interface. The top one shows 'Breakout Session - Not Started' with two sessions: 'Breakout Session 1' (2 participants: Danny Mariscal, John) and 'Breakout Session 2' (2 participants: Brandon, Kim). The bottom one shows 'Breakout Session - In Progress' with the same sessions, but 'John' is now in 'Breakout Session 1' and 'Brandon' is 'not joined'. Buttons for 'Recreate', 'Add a Session', 'Start All Sessions', and 'Stop All Sessions' are visible.
- Zoom Meeting Toolbar:** A screenshot of the Zoom meeting toolbar at the bottom. The 'Breakout Rooms' icon (a grid of four squares) is highlighted with a red box and arrow.



# Best Practices



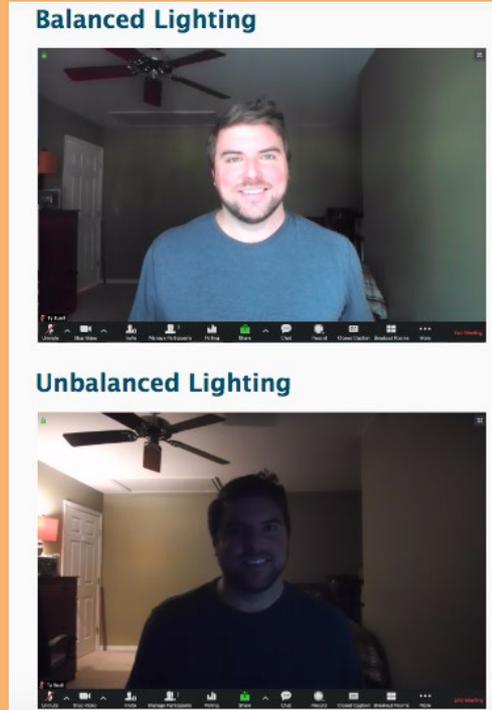
# Naming

In the screen shot below you can see that people's names appear in the bottom left portion of their picture. If you would like to change your name, put your mouse in the top right corner of your picture and a menu will appear - click on that, and then click on the "Rename" button.



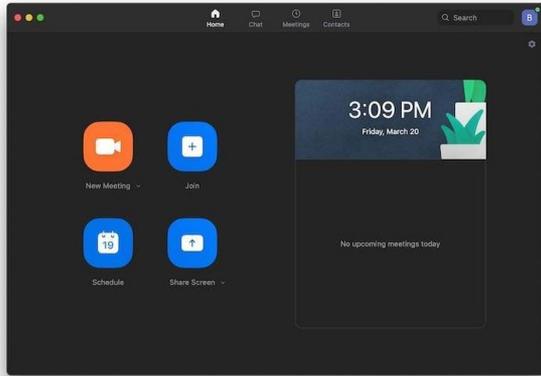
# Lighting Meetings

Ensure any natural light is in front of participants (black out shades and blinds if your natural light source is elsewhere). Also, avoid reflective blinds, wall and table surfaces to reduce glare from glass; dark table finishes & warmer wood grains work great!



# Last but not least: Virtual Backgrounds!

Beginning by first clicking on your logo or initials at the top right of your Zoom app, click through to Settings and then to “Virtual Background.” Select one of Zoom’s suggested backgrounds - or click the “+” button to use your own image! This is a great way to add atmospherics and levity to your Zoom meeting.



# Parting Advice: #BeATrueZoomer!

- **#PassionAndPersonalityMatter** . Don't hesitate from showing off your excitement and enthusiasm! It's a powerful way to keep your audience engaged - and in the room! Zoom backgrounds and festive attire help :)
- **#HumorWins** . You won't be the first, or last, Zoom call your audience participates in - that day. So don't hesitate to use humor as a device to engage! Particularly as you're opening the discussion, segueing through topics and concluding the conversation.
- **#CutToTheChase** . Zoomers will have even less tolerance for long, rambling routes to your primary point than attendees of an in-person meeting :) It can be helpful to cut to the chase at the front end, and then zoom back out (pun intended) to provide context for your contribution to the discussion, before cutting to the chase again.
- **#NameDropNameDrop** . While calling on others individually might leave the impression that you're practicing the Socratic method, do weave in the names of other Zoomer participants you see on the call - as a way of lightly, subtly nudging them to lean in and jump in with a comment. More names dropped = more voices participating = a better Zoom!



# Thanks!

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