Zoom Best Practices

Keys to running a successful video conference

- Having participants chat with only the Moderator reduces confusion and messages being lost.
- Meetings should be configured for audio and video muted on entry (mute on entry)
- Regarding Recordings
  - Manual recording should be used if you only want to record a specific part of the meeting
  - Auto recording will be the easiest way to a recorded meeting while scheduling
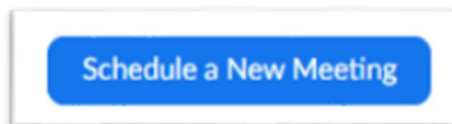
Best practice for participants in the meeting

- Participants should Test audio/video settings before meeting
- Mute audio when not speaking
- Use Side by Side view when the screen is being shared
- Be sure to use Chat to communicate with the room and or moderator
- Avoid noisy environments
- Ensure you have a good Internet connection
- Introduce yourself before speaking
- Stick to the agenda
- Allow time for troubleshooting
- Be punctual

Sign into Zoom

- Using the browser of your choice navigate to the following web address: umich.zoom.us

Schedule a Zoom meeting

These are the key things you will want to select for this Zoom meeting

- Participant video 'off'
- 'Uncheck' Enable join before host
- 'Check' Mute participants upon entry
- 'Check' Record the meeting automatically
- Alternative Hosts, this is where you can add additional moderators/hosts to the meeting

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Accessing the scheduled meeting

- It is important that you sign into the meeting so that you have the moderator/host controls
- Log into your Zoom account (see above)
- Your zoom dashboard will open and in the center of your screen you will see a list of the meetings you have scheduled. Locate the meeting you want to start and click the Start button.
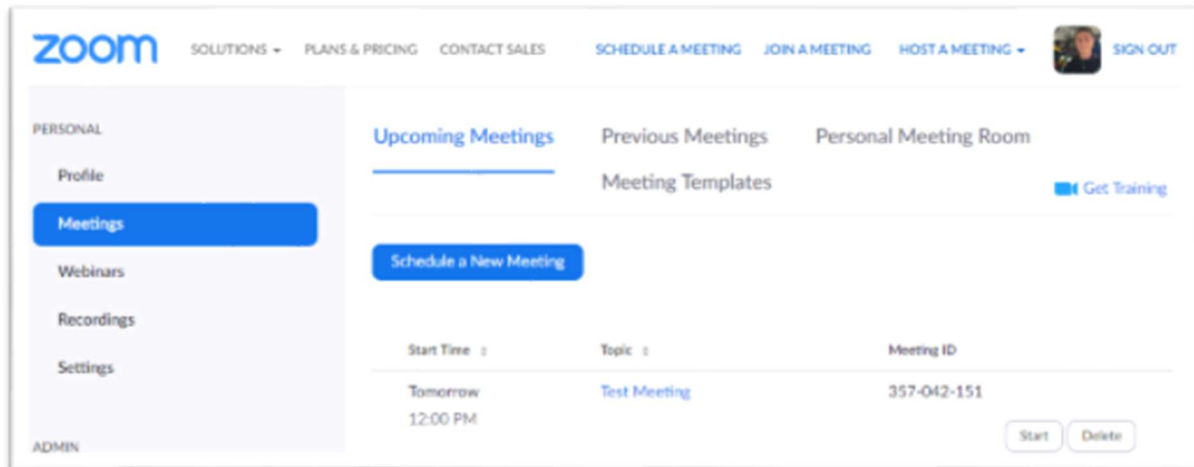
- Be sure to access the meeting using the download Zoom App instead of the website
- You will join with 'Computer Audio'
- Testing the speaker and microphone is beneficial prior to the meeting

Mute Options

1. Hover over a participant and click More for these options:
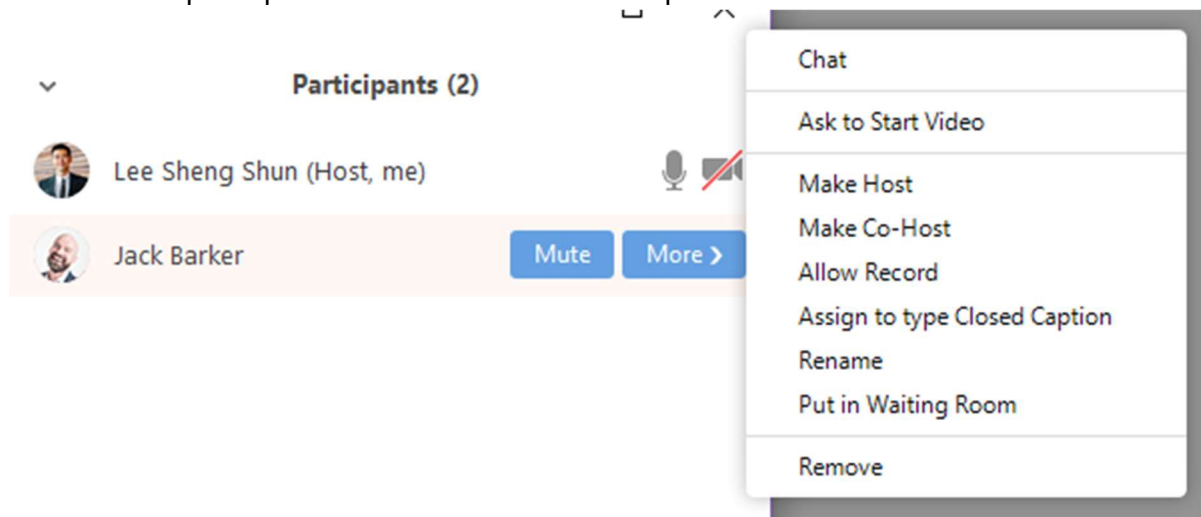
     a. **Mute** this specific participant
     b. **Chat**: Open the chat window to send messages directly to the panelist.

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   c. Stop Video: Stop the participant's video stream so they are unable to start their video. If the participant hasn't started their video, you will see the Ask to Start Video option.

   d. Make Co-Host (only available to the host): Assign the attendee to be a co-host. You can have an unlimited number of co-hosts.

2. You will also have access to enable or disable these options at the bottom of the participants list:
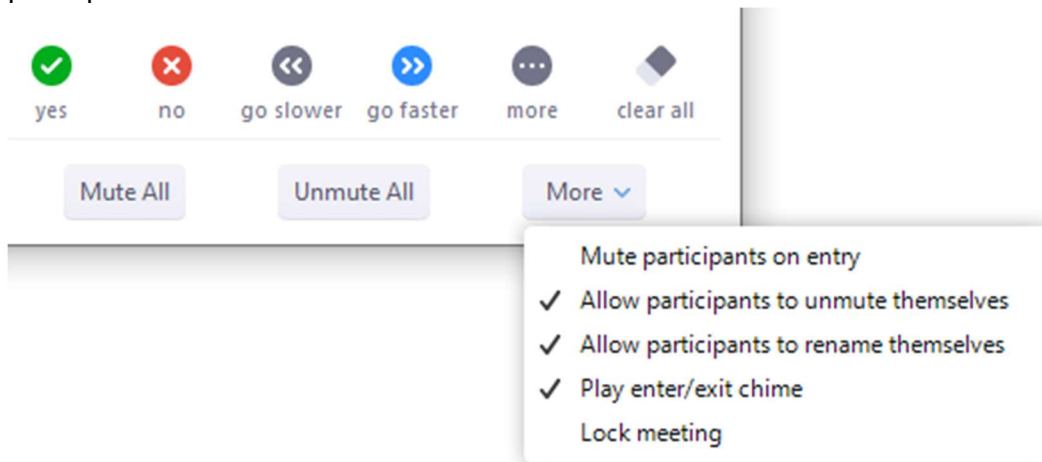
   a. Mute All / Unmute All: Mute or unmute all participants currently in the meeting.

   b. **Mute participants on entry**: Automatically mute participants as they join the meeting.

   c. Allow participants to unmute themselves: Participants can unmute themselves if they want to speak to others in the meeting.

   d. Allow participants to rename themselves: Participants can change their screen name displayed to other participants.

   e. Play enter/exit Chime: Play a sound when participants join and leave the meeting

   f. Lock meeting: Don't allow other participants to join the meeting in progress.

Recordings

Automatic recording is an option that allows the host to start local recording or cloud recording automatically when the meeting starts.

- Automatic cloud recording will start whether the host joins by computer, mobile device or telephone dial-in, if the host has available cloud recording space. Automatic cloud recording will also start if joined before the host is used and participants join before the host.
- Automatic local recording will only start when the host joins from the Zoom desktop application.

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To enable automatic recordings

1. Go to My Meetings.
2. Click on Schedule a Meeting or select the meeting topic from the list of Upcoming Meetings and click Edit this Meeting.
3. Note: You can also select your PMI by clicking on the Personal Meeting Room tab.
4. Under Meeting Options, check Record the meeting automatically.
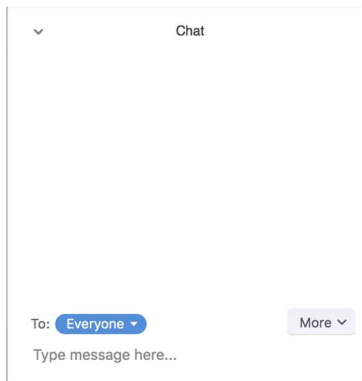5. Click Save.

Chats

Video Only or While Viewing a Screen Share

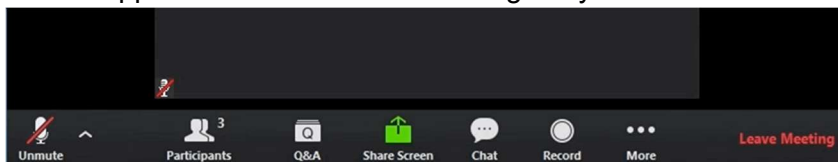1. While in a meeting, click Chat in the meeting controls.

2. This will open the chat on the right. You can type a message into the chat box or click on the drop down next to To: if you want to send a message to a specific person.

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3. When new chat messages are sent to you or everyone, a preview of the message will appear and Chat will flash orange in your host controls.

While Screen Sharing

1. While screen sharing, click More in the meeting controls. Choose Chat.

2. A floating chat window will appear.
3. If you receive new chat messages while screen share, the more button will flash orange to indicate the incoming message. You can click on More, then Chat to open the window.

Chat only with moderator

You will be able to adjust this setting once you have signed into the meeting
● Click More to display in-meeting chat settings.
● Select 'Host only'

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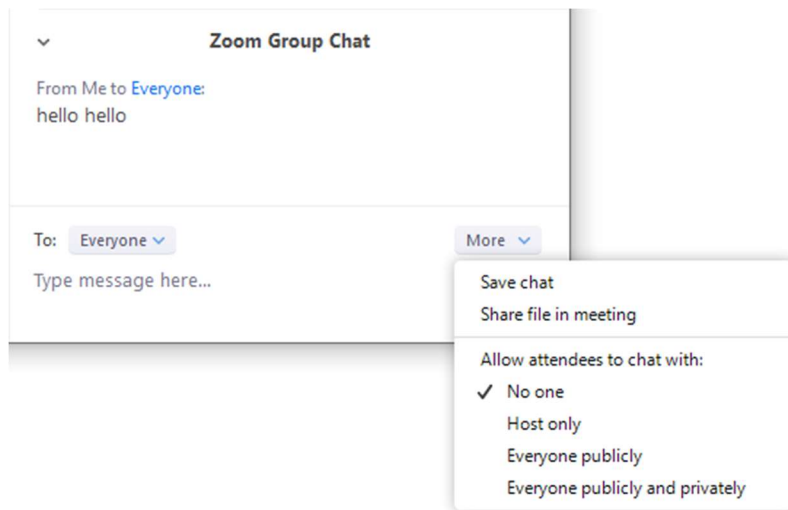
To start a manual recording

Note: Only hosts and co-hosts can start a cloud recording. If you want a participant to start a recording, you can make them a co-host or use local recording. Recordings started by co-hosts will still appear in the host's recordings in the Zoom web portal.

To record a meeting to the cloud:

1. Start a meeting as the host.
2. Click the Record button in the Zoom toolbar.
3. Select Record to the Cloud to begin recording.

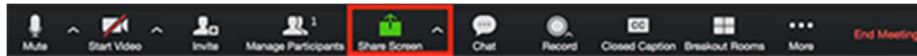4. To stop recording, click Pause/Stop Recording or End Meeting.

   a. Once the recording has been stopped, the recording must be processed before viewing. Zoom will send an email to the host's email address when the process is completed.

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Sharing the screen

Click the Share Screen button located in your meeting controls.


- You have the ability to share your entire screen, but if you are hosting the PowerPoint presentation you only want to share the PowerPoint application (be sure to have have it open before sharing)
- Sharing only the PowerPoint prevents the participants from viewing your chat, participant list, and video screens. They will only see the full screen powerpoint.

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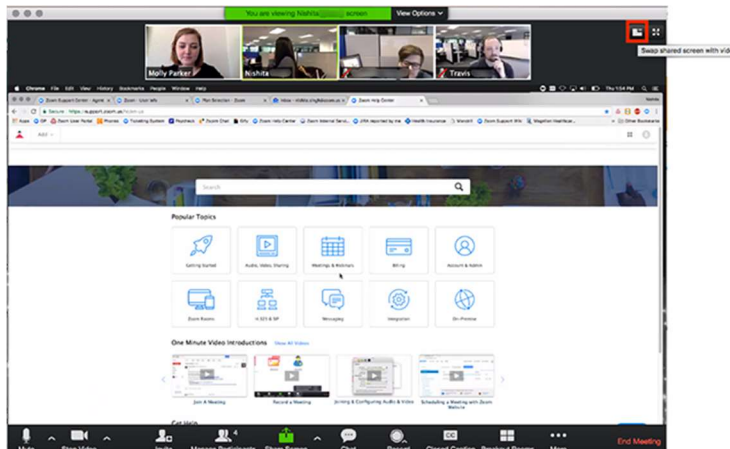
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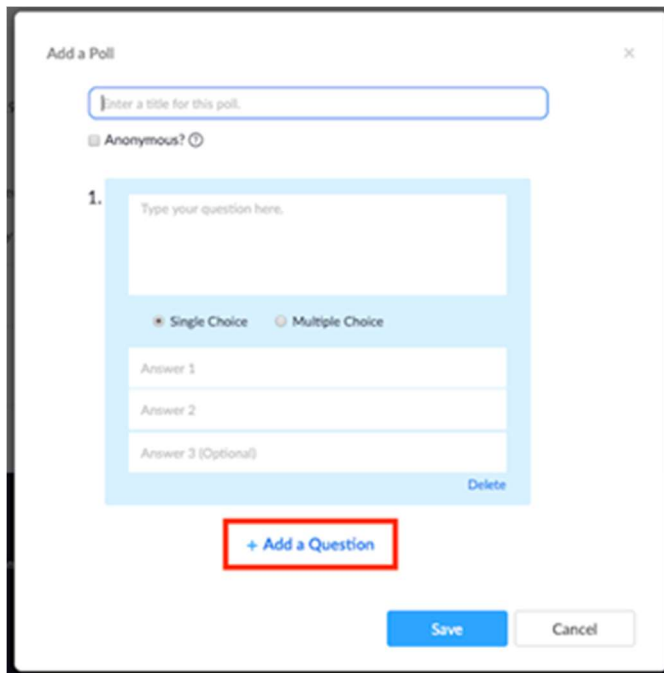
6. You can add more polls by repeating Step 2.

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.

Modifying Split Screen during Screen Share

When you are viewing a screenshare, you can view the screen share with an active speaker or gallery view at the top of your screen or in Side-by-Side Mode.

1. Click the swap icon at the upper right corner of the Zoom window to switch the content for the video feed.
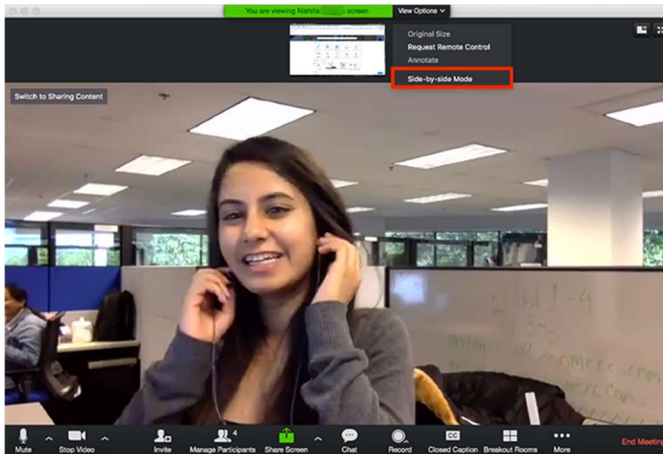

2. Click the icon at the upper right to swap it back or click Switch to Sharing Content.

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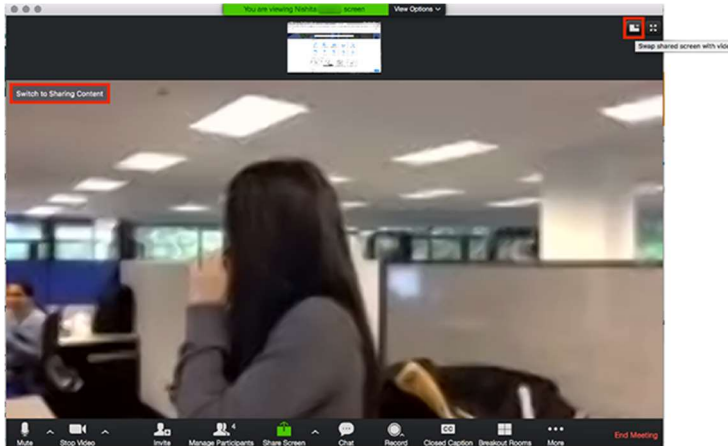
3. Click View Options, then Side-by-Side Mode to switch into Side-by-Side Mode.

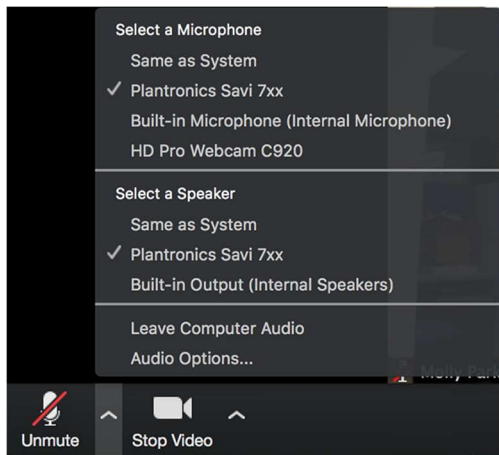# Test Audio, Microphone, and Video

Testing Audio

Before a meeting
1. Log in to the Zoom client.
2. Click your profile picture then click Settings.
3. Click the Audio tab.
4. Follow the sections below to test your speaker or microphone.

During a Meeting
1. In the meeting controls, click the arrow next to Mute/Unmute.

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2. Click Audio Options. This will open your audio settings.

Testing Microphone

1. In the Microphone section, you will see the green Input Level bar move when Zoom is picking up audio.
2. Click Test Mic to test your microphone.
3. Your audio will start recording. Click Recording when you are done and it will play back. You can select another microphone from the menu or adjust the input level.
4. Check Automatically adjust microphone settings if you want Zoom to adjust the input volume automatically.
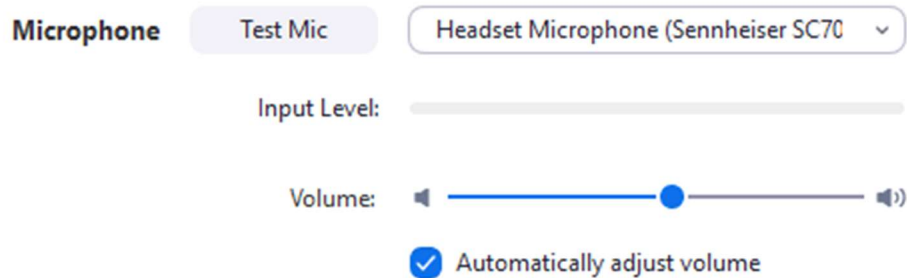
Testing Video

Testing before a meeting

1. Log in to the Zoom client.
2. Click your profile picture then click Settings.
3. Click the Video tab.
4. You will see a preview of your camera and can choose a different camera if needed.
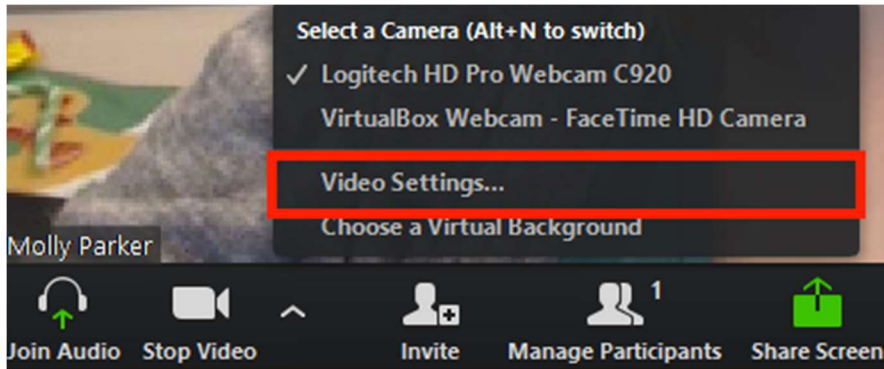
Testing your video while in a meeting

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

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2. Select Video Settings.

    a. Zoom will display your camera's video and settings.
3. If you don't see your camera's video, click the drop-down menu and select another camera.