

# **RI Zoom Instructions—Updated 1-16-23**

## **CONTENTS**

Instruction #1: Getting Your NDM Zoom License

Instruction #2: Signing In/Checking Settings

Instruction #3: Scheduling a Meeting

Instruction #4: Sending the Invitation to Your Class

Instruction #5: Hosting/Starting a Meeting

Instruction #6: How to Add a Co-host

Instruction #7: Some Useful Zoom Functions—Practice!!

Instruction #8: Sharing Your Screen

Instruction #9: Viewing Options

Instruction #10: Polling

Instruction #11: Recording

Instruction #12: Closed Captioning

Instruction #13: Gray Box Interference

Instruction #14: Muting All

Instruction #15: Breakout Rooms

## **Instruction #1: Getting Your NDM Zoom License:**

**Note:** *If you do not have a Zoom Pro account, you will be joining an account set up by Notre Dame.*

**Caution:** *You cannot have more than one Zoom account associated with an email address. If you have a free account and want to keep it, you will need to create another email address for the new licensed Zoom account. When you login to teach, make sure you are on your Notre Dame account and not your free account that has a time limit of 40 minutes.*

- Shirley or Sandy will ask for the email address you want associated with your new Zoom account
- You will receive an email request from Zoom to activate the account. If you don't see it, check your spam or junk mail.
- Click "Activate Your Zoom Account," create a login (the email address you will use with the account) and an easy password. Share the login and password with Shirley and Sandy.
- Use this login and password whenever you sign in to your NDM Zoom account.

**Note:** *Due to costs, you may be asked to share a license with another coordinator, and you will receive further instructions from Shirley or Sandy.*

## Instruction #2: Signing In/Checking Settings

*Note: Sign out of other Zoom accounts before signing in to your NDM account*

- Put Zoom.US/signin in your browser.
- If asked, enter the email address/password for your account.

*Note: If your profile page pops up instead of your sign in page, you are already signed in, but scroll down and check the "Sign-In Email" line to make sure the account listed is the correct one. If it is not, scroll down to the bottom of the profile page and click on "Sign me out from all devices" and sign in again.*

## Checking Settings

Go to your profile page, select "Settings" from the list on the left. Check to see if settings are as you want them. If the "button" is blue after an item, it is turned on. If the "button" is a faded blue, it is permanently turned on by Notre Dame and cannot be disabled. If it is gray, it is turned off, but you can turn it on by clicking on it.

You should review all settings. Here are some that need special attention:

- Zoom now requires that you select a security measure. We recommend:
  - Turning off the setting for "Waiting Room" since this can delay participants entering the meeting and requires someone to manage the waiting room during your class
  - Turning on "Require a passcode when scheduling new meetings" and "Embed passcode in invite link for one-click join"
- If you have your own Pro license, find the setting for "Co-host" and turn it on, otherwise you may not be able to assign a co-host during meetings if desired. (Notre Dame licenses are already set for enabling co-hosts)
- We recommend turning on "Allow participants to join before host" so that if your class participants are having problems joining the meeting, they can get help before the class starts. It also allows the participants to greet each other even if you have not joined yet.
- If you think you may want to use polls, enable Meeting Polls/Quizzes (see #10 Polling)

- If you will be using visuals with your class, enable Screen Sharing (see #8 Sharing Your Screen) If participants also will be sharing the screen, you must allow this in settings, otherwise you must enable it during each meeting with the share screen options tool.
- If you want to use the Whiteboard, enable it in settings.
- Allow participants to rename themselves.
- Breakout room-Meetings is permanently turned on by Notre Dame (see #15, Using Breakout Rooms)
- Enable Manual captions and Automated captions (see #12, Closed Captioning)
- It is helpful to turn on email notification to notify the host when a cloud recording is available (see #11, Recording)

### Instruction #3: Scheduling a Meeting

- After signing in, go to the profile page and click on “[Schedule](#)” at the top of the profile page
- A form will open to fill out (*Note: You may not see all of these*)
  - Topic (course name)
  - Description (leave blank)
  - When (date and time of your class, including AM or PM)
  - Duration (length of your class—choices are in half-hour increments; don’t worry, it will not cut you off if you go over the time)
  - Time Zone (it should automatically be set on Eastern Time; if not, select the appropriate local time zone—it is possible that you will have to go back to settings to do this if you can’t change it on the form)
  - Recurring Meeting (not recommended unless you have used it successfully before—you will still need to send weekly invitations; avoid using the calendar function)
  - Registration required (do not select this)
  - Meeting ID (select “Generate Automatically”)
  - Template (leave blank)
  - Security (Select “Passcode” and a number should be automatically generated that will be embedded in your invitation link for one click joining, if you have used the recommended settings—See Instruction # 2)
  - Do not select “Waiting Room”
  - Do not select “Require authentication to join”
  - Video (select “On” for Host and Participant)
  - Audio (select “Both”)
  - Meeting Options (select “Allow participants to join anytime” and any other options you want; we do not recommend “Automatically Recording” for copyright and privacy reasons; do not select “Alternative Hosts”—it is not the same as a co-host)
  - Purpose drop down menu (select “[Meeting](#)”)
  - Click “Save”
- The next screen shows meeting details you selected. Scroll down and click “[Copy Invitation](#)” at the bottom of the screen. Do **not** click on “Calendars.”
- The next screen will display a copy of the invitation. At the bottom click “[Copy Meeting Invitation.](#)” Go to your email account, open a new email and paste the invitation into the text area before copying or pasting anything else—if you copy or paste something else, the invitation will disappear.

## **Instruction #4: Sending the Invitation to Your Class**

***Note:** You will need to send an invitation each week the day before each class, even if you choose the “recurring meeting” option.*

- Paste the meeting invitation you have created (see Instruction #3) into the body of an email before you paste anything else.
- Before the semester starts, Sandy will send you a final class list with email addresses of your participants. Make sure that Shirley and Sandy are included in the list so they receive the link to your class. Put your own name in the “To” line of your invitation email and copy and paste the email addresses from your class list into the “BCC” line.
- In the subject line, put RI, the name of your course, day and time, and the date of the class for the current invitation, e.g. “RI, Art Talks, Tuesday, 11:00, Sept. 8.” You will send a new invitation each week the day before the class with the correct information for that week
- Review the email and send.

***Note:** Your participants will join the class from the link in the invitation. As the host, you will **not** start the class from the invitation link. See Instruction # 5 for **Hosting/Starting a Meeting**.*

## **Instruction #5: Hosting/Starting a Meeting**

**Note:** *If you are using the “share screen” function in your class, before you start the meeting, make sure to open any files, PowerPoint, videos, etc. you wish to have available and close other files to remove clutter.*

**Note:** *Do not start your meeting using the link in your invitation. If you do, you may not have host functions. Sign in to Zoom through your browser (see Instruction #2).*

- Start your meeting 15-30 minutes early to assure that everything is working properly. Members of the class may also join early and may have problems that need attention.
- Sign in to Zoom through your browser
- On the Profile page, Click on “Meetings” in the panel on the left. This will display all of your scheduled meetings by date and time.
- Find your current class meeting and click on “start” next to it on the right. If you don’t see the start button, hover your cursor to the right and it should appear. If instead of “Start” you see “Join,” it is ok. It means that someone got on before you did. Just click “Join” and you will enter the meeting as host.
- A box will open up with “Open Zoom Meeting.” Click on this.
- Click on “computer audio”
- Confirm that your video and microphone are on in the lower left of the Zoom screen. If there is a red diagonal line through either one, click on it to activate it.
- Create a co-host for your meeting to assist with managing your class, e.g. muting participants, getting tech assistance if necessary, and keeping the class informed if you get disconnected until you can get back on (See Instruction #6 on How to Add a Co-Host).

## Instruction #6: How to Add a Co-host

***Note:** Having a co-host can make a class run more smoothly. You can have more than one co-host and you can take away the co-host designation at any time. The co-host has most of the functions of the host. Adding a co-host can only be done once the meeting starts.*

Settings for creating a co-host:

- Creating a co-host can only be done with a **Pro account** (not a free account)
- The **co-host setting** must be enabled in the “Settings” list on your profile page. If you have your own Pro license, go to “Settings” and scroll down until you find the setting for “Co-host” and turn it on, otherwise you will not be able to assign a co-host if desired. (**Note:** NDM licenses are already set for enabling co-hosts)

There are two ways a Host can make a participant a Co-Host:

- Hover the cursor over the video of the person you want to make co-host
- Click on the **3-dot menu** located at the top right of the image
- Click **Make a Co-Host**

Alternatively, this can be done through the Participants menu:

- Click on the **Participants button** on your Zoom toolbar
- On the right side of the screen, **hover your cursor over the participant’s name** you want to make co-host
- Click on **“more”**
- Click on **“Make Co-Host”** (You may be asked to confirm that you want to make that person a co-host)

***Note:** You will see an “alternative host” setting on the bottom of the “scheduling meeting” page. This is NOT the same as a co-host. An alternative host can open a meeting for the host, e.g. if the host is late, but the host takes over when he/she joins the meeting. The alternative host must be on the same account as the host, so if they are not, Zoom will not allow you to make that person an alternative host.*



## **Instruction #7: Some Useful Zoom Functions—Practice!!**

**Note:** Set up practice meetings and use these functions to see what you can do with them. You can practice on your own if you click on “Host a Meeting” at the top right on your profile page and select either “With Video On” or “With Video Off.” This will open a Zoom meeting so that you can practice with buttons on the toolbar, including sharing your screen. If there is an upward arrow on a function button, clicking on it will give you additional options.

You may see these buttons (some may be visible only if you click on “more” or three dots in a vertical line), depending on what you selected in your settings:

1. Mute/Unmute
2. Video/Stop Video
3. Security
4. Participants
5. Polls
6. Chat
7. Share Screen (including PowerPoints, files, videos, whiteboard, desktop)  
**Note:** Play with the whiteboard in advance to see if you want to use it in your class.
8. Record
9. Reactions (includes “Raise Hand”)  
**Note:** The “Raise Hand” function can be used by participants to ask questions. Using this function will move participants’ videos on your screen to the first spot and place them in the order in which they raised their hands. They should be asked to lower their hands once their questions are asked, or you or your co-host can do this by clicking on the blue box in the upper right corner of their videos and selecting “Lower Hand”.
10. Breakout Rooms
11. Captions (You must enable closed captioning in settings for this)
12. Ending the Meeting

## **Instruction #8: Sharing Your Screen**

***Note:** Before you open Zoom, open any items you may wish to share with your class. Close items you will not be using to reduce screen clutter.*

- Once you open the meeting, click on the black up arrow in the “Share Screen” button in the center of your Zoom toolbar
- You will see a panel appear with small boxes—these are the items you have open from which you can select to share with your class. One of the boxes will be a whiteboard that you can share if you want to draw or write or type during the class. Click on the item you wish to open. (Don’t click “Share” yet)

***Note:** If you don't see the item you want to share, it is not open. Don't panic! Go to your desktop, open what you want to share and repeat the steps above.*

- If what you are sharing contains a video, click on “Share sound” and “Optimize for video clip” in the lower left corner of the panel
- Click on the “Share” button in the lower right corner of the panel—this will share your screen with the class and you will see a green bar at the top or bottom of your screen that says “You are screen sharing.” Ask the class if they can see your screen.
- If you want to select another item to share, click on the green “New Share” button, select another item, and click on “Share” in the lower right of the panel.
- When you want to stop sharing your screen, click on the red “Stop Share” bar to the right of the green “You are screen sharing” bar.

## **Allowing Others to Share Screens During Your Class**

- Before opening your meeting, click on “Settings” on the left side of your profile page, scroll down to “Screen Sharing,” and then “Who Can Share?” Select “All Participants.” If you want to control who can share, e.g. an invited lecturer, make that person a co-host (see Instruction #6) and they can share following the steps above. If someone in the class wants to share their screen and clicks on “Share Screen” you may see a window asking if you are allowing it.

## **Instruction #9: Viewing Options**

The two most common views used during classes are “Gallery View” and “Speaker View.” One way to enable these is by clicking on “View” or a grid in the upper right corner of your Zoom screen. You can switch between these views at any time.

***Note:** Your choice of view only affects your own screen, not the view of your participants.*

- “Gallery View” allows you to see as many video images of your class participants as can fit on your screen. Additional participants can be viewed by clicking on an arrow on the sides of the screen.
- “Speaker View” allows you to see a large image of the person speaking while other video images remain small.
- Getting rid of images of other participants: If images of participants are overlapping and obscuring a shared screen, e.g. a PowerPoint, there are several ways to deal with this. Once screen sharing begins, click on the minus sign at the top of the panel of participant images. Alternatively, you can click on “View Options” at the top center of the shared screen and select “Minimize Video Panel,” “Hide Video Panel,” or “Side-by-side Mode.” In “Side-by-side Mode” dragging the dividing line with your cursor can adjust the viewing area between the shared screen and participant images.

***Note:** The person sharing their screen will not have a “View Options” button, but can click on the minus sign at the top of the panel of participant images to minimize them.*

## Instruction #10: Creating and Launching Polls

The Zoom polling feature allows you to create single or multiple-choice questions for use during your meeting. You must make sure polling is turned on in your “Settings” **before** you schedule your meeting. Once you have turned on the polling feature in settings, you do not have to do it again for future meetings.

*Note: Zoom now allows you to create your poll while you are scheduling your meeting **or** during a meeting; however, creating it will take time and thought, so we recommend that you create your poll in advance rather than making your meeting participants wait.*

### How to create a poll:

Since creating polls differs in different versions of Zoom, it is best to view the following video if you want to set up a poll:

<https://www.youtube.com/watch?v=dgZxc09FCIQ>

The following are general instructions on creating a poll:

- Schedule your meeting as usual, but before copying the invitation, scroll down to the bottom to “Polls/Quizzes”. Click on the “Create” button below this. In some versions of Zoom the Polls/Quizzes will be near the top of the screen.
- Click (or double click) on “Untitled Poll” and enter a title for your poll
- Click (or double click) on “Untitled Question” and type in your question
- Double click on your possible answers and type them in (You can add more answers by clicking on “More Options”)
- Select whether single or multiple choice in the upper right
- You may add as many questions as you wish by clicking on “Add a Question”
- Click “Save” at the bottom
- To create an additional poll, click “Create” again at the bottom of the page you used to set up your meeting. You may create as many as 25 polls.
- Copy invitation and send invitation as usual
- To create a poll **during** a meeting, click “Polls” on the taskbar and follow steps above.

### How to launch your poll during a meeting:

- Click “Polls” on the Zoom taskbar
- If you have set up more than one poll, select the poll and click “Launch Poll”
- To stop the poll, click “End Poll”
- To share the results with your class, click “Share Results”
- You can select “Re-launch” to restart the poll (but you will lose previous results)

*Note: If a participant can't see the poll, they need to update their version of Zoom*

## **Instruction #11: Recording a Zoom Class**

*Note: If the material is not covered by copyright, we recommend that you consider recording your classes so that those who are unable to attend can view them later.*

### **Settings for Recording:**

Before you schedule a meeting, click on Settings on the left side of your profile page. Near the top you should see 5 large headings that look like this:

Meeting   Recording   Audio Conferencing   Collaboration Devices   Zoom Apps

Click on Recording. This should open settings for recording your class. Turn on the settings you prefer. Make sure you have turned on “Allow cloud recording sharing”. We don’t advise requiring authentication or passwords for your recordings. The settings you select will be in effect unless you go back in and change them.

### **How to record a class:**

Before scheduling your class, click on Settings on the left side of your Profile page. Scroll to “Notify host when cloud recording is available,” which is near the bottom of the page under “Email Notification”. This setting will hold for future classes unless you change it.

When the class starts, ask participants whether they object to recording. If anyone objects, let them know they can turn off their video and stay muted. Click on the “Recording” or “More” button on your Zoom taskbar at the bottom of your screen. You will be given two options: “Record on this computer” or “Record to the cloud”. Since the file may be large, it is best to select “Record to the cloud”. Your participants will see a window pop up that lets them know you will be recording.

When the class is over, click on “Recordings” or “More” on the taskbar and select “Stop recording.” If you end the meeting without stopping the recording, it should still be saved and accessible under Recordings on the left side of your Profile page.

### **How to create access to the recording:**

Zoom will send you an email with a link to the recording. If you don’t see the email in your inbox, check your spam or junk folder. When a participant requests the recording, you can copy and paste the link into an email and send it to them. They should be able to open the recording from the link.

*Note: Cloud recordings are not permanent. They will be deleted after 90 days.*

## **Instruction #12: Closed Captioning**

*Note: We strongly recommend that you allow participants to turn on Closed Captioning. For them to do this, you must turn it on in your settings.*

- Go to your Zoom profile page.
- Click on "Settings" on the left side of the screen.
- Scroll down and turn on manual and automated captions (it is pretty far down the page—if you know how, you can use the search function to find it)
- It may ask you to save this setting—if it does, click on "Save".

***Note:** This setting will hold until you change it. Remember that closed captioning will not be active in your class unless you turn it on from your Zoom taskbar or someone requests it by clicking on their transcribe button on their Zoom taskbar, and you confirm your permission. Closed captioning will appear on your screen too. If you do not want it on your screen, you can go to your "transcribe" or "more" button and select "hide captions or subtitles". Participants who have opted to use closed captions will still be able to see them.*

## **Instruction #13: Getting Rid of Gray Boxes When Screen Sharing**

***Note:** Gray boxes may obscure your shared screen. You may not be aware of it, but those viewing your screen may see them. This is caused by some Zoom security settings. You should ask your class whether they see gray boxes. If they do, follow these instructions. Once you have done this, the boxes should be gone permanently.*

- During a meeting, go to the video button, usually in the lower left of your screen on your Zoom task bar, and click the small up arrow on the right side of the button. This will display a menu
- Click on Video Settings
- In the left column, click on the Share Screen option
- At the bottom, click on Advanced
- Locate Screen Capture Mode and click on the down arrow on the right of the rectangle; choose the "secure share with window filtering" option
- Click on the "X" in the upper right-hand corner of the screen to Exit back to Zoom

## **Instruction #14: Muting All At One Time**

For most classes, it is necessary to mute all of the participants in order to avoid interference from background noises. There is a simple way to mute all participants, as well as those entering the meeting after muting has been done.

- When you are ready to start your class and want everyone muted, click on your participants button on the Zoom taskbar.
- This will open a white panel on the right of your Zoom screen. You will see a list there of all participants.
- At the bottom of the list you will see a button that says “Mute All”. Click this button and all will be muted except for you. All others will need to “Unmute” themselves to speak.

***Note:** If you have a co-host, you can ask that person to do this for you, but you will also be muted and will have to “Unmute” yourself to speak.*



## **Instruction #15: Using Breakout Rooms**

Breakout rooms can be a useful way to split up participants into smaller groups and to encourage discussion. If you have a Notre Dame license, the setting for creating breakout rooms is permanently turned on. If you have your own license, you need to check your settings and turn on the breakout room option before scheduling your meeting.

Creating and using breakout rooms is not difficult but requires some thought and several steps. You can find a useful guide for this using the following link:

<https://support.zoom.us/hc/en-us/articles/206476313>