

Zoom Hints and Tips for Hillingdon u3a

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1. Introduction

This is the first fully published edition of a document describing some Hints and Tips for Zoom users within Hillingdon u3a (Hu3a).

It contains a series of Hints and Tips intended to help members to develop their knowledge of navigating through the many Zoom sessions that are held each week.

It is aimed at new users getting started and will hopefully provide Hints and Tips for those who are more used to 'meeting' in this way. This edition is targeted at members who use a **standard laptop or PC** although similar Zoom functionality is common to most devices, except that they are likely to be accessible in a different way.

We hope to be working on some of the variations and enhancing hints and tips in a future issue.

A few months ago, we held some 'training' meetings with members and hope to do this again. Many of those members are now regular users.

Please let us know if you find any mistakes, but especially anything new, and variations you might find on those other devices.

Structure of This Document

This is a large document and is not intended to be read in its entirety in one go. It is perhaps best used as a reference document with each of the main sections covering a specific part of your journey, as shown below.

The main sections start on a new page to enable them to be kept together when working.

These Hints and Tips are grouped to help you find the solution to the problem you are experiencing.

The main sections cover:

Section	Entitled
1	Introduction
2	Starting Up
3	Joining (and Leaving) a Meeting
4	Actions During a Meeting
5	A Meeting with a Speaker

Not So Difficult!

The basics of Zoom are very simple and will allow you to watch/join in with many presentations as if you were watching your television, all in the comfort of your own home. All the instructions you should need are covered in the two sections, Starting Up and Joining (and Leaving) a Meeting.

There are two basic actions to take:

1. Load the software onto your device. You only need to do this once (for each device if more than one).
2. Click on the line within the Invitation email you will receive.

How Permanent Will My Actions Be?

DO NOT BE AFRAID to try some of the actions through this document because almost all (except those in the Starting Up section) will be taken back to the basic configuration once you leave the meeting so you will be back to a standard configuration next time and able to try something new!

If you have any subsequent problems, contact one of the IT Team and we will try to help.

Further Assistance?

Further investigation following the release of the draft, Marie has identified a youtube video which has a presentation introducing new users to the basics of Zoom and you may wish to view it as well as reading Sections 2 and 3 of this document.

The first link below takes you to that video. The second, referenced within, enables you to run a test version of Zoom which will let you navigate the basic options and instructions described below in section 3.

<http://www.youtube.com/watch?v=mbbYqiurgeo>

<http://www.zoom.com/test>

2. Starting Up

The instructions on this page should be carried out each time you intend running Zoom on a different device.

- If you have not used Zoom before you will need to **load the software** (see below). Generally, this only needs to be done once, but may need to be repeated if you change devices.
- You will need to complete some details during the software load process. These include adding your **Display Name** which will be used to label your 'personal window' (see below) once into a meeting. This will help others, including the Host, to know who is attending.
- If you wish to **change your displayed name** you can either:
 - change it permanently by Signing in to your account. Select Profile (in left screen) and to the right of the picture and name select *Edit*. Amend Display Name and save the change.
 - Or change it when you are in a meeting (see later for options 'in a meeting').

Loading Zoom Software

if you decide to load it early and you are a Laptop owner, go to <https://zoom.us/download> and install the client for meetings. Tablet owners must go to their App store and search for Zoom.

If you try to join a meeting without having loaded the software on the chosen device you will be prompted to do so before you can continue. This may delay your ability to join the meeting at the start so it is best to load it beforehand. If you have not done so and are prompted in this way you will be provided with a 'pointer' which will take you through the process.

Notes:

Below are some definitions used within this document. They are not common technical terms, simply to describe where you are on the screen.

Personal Window: For the purposes of this document your 'personal Window' is the window you will be allocated when you enter any meeting. You will typically appear in a matrix of windows, one for each connection to the meeting.

Dark Border: Once you are in a meeting and amongst a matrix of other 'personal windows' they will be grouped in the screen leaving a 'dark border' around the edge. This contains many possible actions which are available to you and discussed later, but you should note that they are not all evident until you move your mouse in that area.

3. Joining (and Leaving) a Meeting

Unless you are running it, you **must be invited** to a meeting.

Pre-Meeting

- Invitations to Hu3a meetings which are arranged centrally (such as Monthly Meetings, Training sessions, etc) will be **sent to all members for whom we hold an email address**. We currently use Mailchimp.
- If you want to join an Interest Group meeting you will have to **ask the Group Leader** if that is OK. If so, they will add you to their distribution list. You will be sent an invitation on an email from that Group's coordinator.

On the Day

- First of all, make sure that your **computer sound is on** and at a reasonable level. This is the volume of sound as you will hear it. You will get used to where to set this with experience (Suggest 65 to 75). It is best to open this at first because when Zoom opens its window it may obscure your sound icon in the control bar.
 - If that happens, it is possible to either leave the meeting, adjust the sound and re-enter
 - Or you can change from Full Screen view, make the change and return to Full Screen, whichever is easier.
- There will be an instruction within the email which will ask you to '**Click on the Link**', or something similar.
 - This will usually be a long string of characters which will be highlighted or in a different font or colour. Just place your **cursor on the line and left click** once.
 - It is best to do this a few minutes prior to the scheduled start of the meeting to allow you time to complete the process. **Don't be impatient**. Just wait as you might be queued.
- There is usually other information available to help to join the meeting, such as a password, etc., but the above method is much easier.

The Joining Process

- A window will open on your screen.
 - You may see a message which asks *if you are Hosting the Meeting, if so, then you should start it*. If you are not the Host, **just wait**.
 - The Host may not have opened the meeting yet (you will be advised) so wait until they open it and let you in as you may be **held in a queue**, especially if there are to be many attendees.
 - Your '**personal window**' will **pop** up but it will take several seconds for you to have full access (ie be able to speak).
- You will be prompted that you are entering the meeting and will be asked if you want to test your sound or Join with Video.
 - You will probably not need to test your sound.
 - It is **best to join with video**, most people do. This will show you and your backdrop in your **personal window**. It is easy to turn it off later, see later.
- You can Mute at this stage if you wish. This stops noises from your environment (telephone, washing machine, radio, doorbell, etc) including you speaking, from being heard by all the attendees. It is easy to turn this on and off, see later.

Leave Meeting

If you want to leave a meeting you have a couple of options

- Hover your mouse in the dark border and in the bottom corner there will be an option to Leave Meeting. Select this and follow the instructions.
- Close the Zoom window, or close the browser altogether.
- Leave it active because the Host will close the meeting later and all attendees will be closed as well.

4. Actions During a Meeting

As this is the main part of the meeting, there are **many actions you, as a participant**, can take within your '**personal window**' or around the outside of the screen. They will remain for only a short time.

Further controls are available if you are in a meeting with a Speaker. See **A Meeting with a Speaker**, the next main section.

When there are a number of attendees in the meeting, each will appear within their own 'Window'. The order in which they appear will change as people come and go.

Controls Using your own Personal Window (ie. with Video)

If you join '**with Video**' whatever your camera points to will be displayed (usually the attendee and their 'environment'). If you have not joined 'with Video' just your **Screen Name** will appear in a black background. Other options are available to the more experienced user.

If there is a **red microphone icon** in the bottom of your picture you are muted.

By hovering your mouse on your Window you will be shown a menu and will be able to make these changes.

- To **Rename** your window select this and overwrite what is shown. Close this menu to save it.
- To change between **Mute and Unmute**, select the menu line and you can toggle between these states.
- There are Others which will be developed later.

Controlling your View of the Meeting

Many of the functions will be in the **dark border** around the matrix of Windows i.e. the other attendees. Most are **not displayed until you hover your mouse** in this area.

To the top right, you have the option to choose between **Gallery View** and **Speaker View**, as well as to show **Full Screen**. These are accessible via the nine-dot matrix.

Moving between Gallery and Speaker can be done with a single click on this line. If you are in Gallery View, the words 'Speaker View' will appear because that is the option you will change to if you select it. And vice versa.

View – Gallery

Most meetings that you join will be in Gallery View where attendees' Personal Windows will be displayed in rows within a matrix depending on how many are attending.

- If there are only a few (4 to 12), then the Windows will be large but as people join, the windows will shuffle into rows with the windows becoming smaller until they reach the maximum for the screen (usually 25).
- If more than 25 people join the meeting they will appear on continuation 'pages'. Move your mouse within the **dark border** and you will see a couple of useful points
 - At the bottom of the screen you will see Participants which will tell you how many there are.
 - An arrow will be shown in the side margins to allow you to scan the other attendees. We have had almost 140 attendees when there have been 6 pages showing member Windows. Click on the left or right arrows to move between those pages. You will not affect anyone else.

View - Speaker

This is an ideal setting when it is a 'one to many' meeting (i.e. one speaker and many attendees) as the Speaker will be shown and they will often share their screen giving you the best view of the subject.

However, if you **use Speaker view in an open forum** each time someone speaks (or there is a noise from a connection), the Window of that attendee will fill the screen and the continual changes will be off putting so is to be avoided.

It is best that unless the speaker suggests otherwise **all attendees should Mute** themselves. A Speaker (or Host) might Mute all attendees to avoid these interruptions.

View – Full Screen

By choosing this option the Zoom Window will enlarge to cover the (Microsoft) Windows borders so you will not have access to other functions outside Zoom (such as control of sound). It is reversible.

Further View Options are available specific to when a **Speaker takes control** of the full Zoom window.

Zoom – Footer Controls

These will appear at the bottom of the screen for a few seconds when you hover your mouse in the **dark border**.

The following options are described separately below; Mute, Video, Security, Participants, Chat, Share Screen, Record and Reactions.

Managing Mute, the options

You will see a Microphone Icon in the bottom left corner of the **dark border**. If the microphone is complete, then you are **Unmuted**, if it has a diagonal line through it, you are **Muted**. Left click alternately to switch between the two.

- There are other ways to Mute/Unmute:
 - Within your **Personal Window** (see *Controls Using your own Personal Window*, above).
 - If you are Muted and wish to **speak for just a short time**, you can **Unmute by pressing the Space bar** and holding it while you speak. When you release the bar, the Mute will return.
- The Host has the ability to Mute all or just one within the meeting.
 - The All option will typically be used when a Speaker is about to present (Think of this as a *one-to-many meeting*) preventing disturbances from any connections. But the Speaker might be happy to take questions throughout and will advise you.
 - The option to Mute one attendee can be used when there is a noise disturbance, such as interference (two devices too close together), the member has broken away to take a phone call or answer the door without Muting (It happens!).

Managing How You Appear on Video

You will see a **Camera Icon** next to the Microphone option. If the camera is complete, your connection will be **With Video**, but if there is a diagonal line it will be **Without Video**. Left click alternatively to move between the two.

- Explaining these two options.
 - With Video will **display a picture** that will typically include you and your background.
 - If you choose Without Video just your **display name** will be shown in a black window.
- Sometimes the **Without Video** option is best during a (*one to many*) presentation, i.e. when there is a big audience, as it is possible that it reduces the strain on bandwidth and helps to avoid interference.
- Note: If you click on the arrow it will give you more complex options at the bottom left such as different backgrounds, but these are not yet covered in this document so it is **best to avoid** at this stage.

Participants

This opens a further Window beside the matrix of members which **lists the other attendees**. The list is scrollable. You can see if Participants are Muted or whether they are using Video. You can close this window by clicking in the top left of it when you will see an option to close. Your screen will revert to the full matrix as before.

Other options exist if you are the host.

Chat

You can Chat with **all OR** just **one other** participant. Be careful **not to disrupt the meeting!**

If you select All, your message will pop up on everybody's screen. Not so clever in a big meeting!

To **select a single recipient**, once you are in Chat you will see a '**drop down**' arrow next to the word 'To'. Run down that list until you find the person you want to contact. But **be careful** ! If the meeting has a lot of attendees there may be a lot of them called 'Ann' or 'Alan' who have not put their surname and you may get the wrong one!

If you receive a Chat, a small window will appear on your screen centrally and towards the bottom of the matrix.

You can reply to a Chat, but take the same precautions, i.e. that you chose the correct person.

The Host can **suppress this option** if it is misused.

Share Screen (shown in green)

Only use **Share Screen** **if YOU are giving the presentation** or you will appear full face on everybody's screen!

If you are giving the presentation, the Host will pass control to you.

Record

DO NOT use Record as copyright laws or GDPR rules may be broken.

Reactions

You will be shown a few icons which you can chose to show your thanks, whether you liked what you were shown, etc. This will show in your personal window (if you are using Video) for a short while.

View – Other Options

Settings (virtual background) Video Settings, Background filters are not covered in this early version of the document.

5. A Meeting with a Speaker

Almost all meetings will begin as a **forum** where people join and become part of the Gallery, i.e. the basic matrix of members you see.

Some will remain that way, such as a Book Group, Language or Current Affairs where people are talking to one another across the forum all of the time. Others will be with a Speaker where a presentation will be given, such as our Monthly Meetings or a virtual London Walk, or many of the other Interest Groups such as History, Canal Art, etc.

This latter category will start as a forum but at some stage the Speaker will take over the screen and you will see what is on their device.

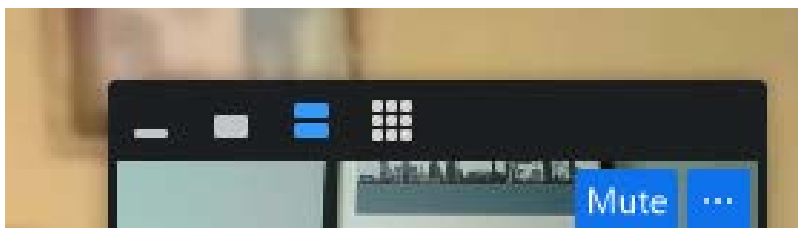
However, in doing this it can leave an area with a selection of other attendees (a partial matrix?) which can either obscure part of the presentation or be off putting as people move about. There are a few ways of improving this situation:

- Manipulate how much is shown in the partial matrix.
- Hide Video Panel
- Divide your display to a Side-by-Side option.

The first option is described immediately below. The other options are available, amongst other features, in **View Options** which are described later.

Manipulate the 'Attendees' Matrix

The picture or block of pictures will have a control bar across the top such as this below. Try selecting any one of these with a single click to cut down the obstruction in a way that suits you.



The best option is the single bar on the left which leaves **just a single black bar**. This shows a text which tells when the Speaker 'is talking'. The second option will show one window beneath that heading bar (typically the Speaker), the third will show a single column with a few personal windows and the 'nine-point matrix' will show a small array of personal windows, usually two columns of three or four.

Whatever you have chosen can be dragged to another position if necessary so the first option (single heading bar) will cause the smallest obstruction, especially if dragged into the top right corner.

You can easily return to an array which suits you, perhaps when the presentation is finished, by choosing a different option. That shown is the top of a single column of attendees which is the 'double bar' shown in blue.

Unfortunately, if more than one connection is **making noise or speaking**, different screen names will keep appearing so it is better if all non-Speakers are Muted in this mode.

Once the Speaker has finished they will return you to the matrix of attendees.

View Options

In this situation (Speaker Sharing) the View Options, as shown in the top centre of the screen will be different. The menu will appear next to the title 'A Speaker is sharing their screen'.

The options include Zoom Ratio, Hide Video Panel, Annotate, Exit Full Screen, Follow Presenter's Pointer, and Side by Side Mode.

Zoom Ratio

When the Speaker shares their screen it will generally fill your device screen. If it doesn't (it has only happened to me once), or perhaps you need to change the size to see a small detail, you can change the magnification factor. It does not affect any other attendees including the Speaker, and can be readily changed back.

Hide Video Panel

This is one solution to the problem of attendees obscuring the Speaker display. If selected the whole Attendees Matrix described above will disappear.

It is simple to return by entering View Options and *Unhiding* the Video Panel.

Annotate

This provides a whole selection of about a dozen options allowing you to write and draw on the screen.

I would **strongly advise against** using this unless you are giving a joint presentation. It would be **rather rude to interrupt** the speaker.

Exit Full Screen

When the Speaker shares their screen it will tend to take over your whole screen, including your Windows Instruction Bars preventing you from performing other activities.

One time this might come in useful is if you find that you need to alter the Sound Volume when you can select Exit Full Screen to do so. It will not affect anyone else or the Speaker and is reversible in a similar way.

Follow Presenter's Pointer

I've not seen this used.

Side-by-Side Mode

This is another option for helping to move the matrix which is obstructing the presentation. There are two options: *Side-by-Side Speaker* and *Side-by-Side Gallery*.

By selecting one of these, your screen will divide into two windows horizontally (about 60:40 ratio) with the presentation on one side. If you choose the 'Speaker' option, a single *personal window*, i.e. that of the Speaker, will appear on the right. If you choose the 'Gallery' option, a matrix of other attendees will populate the right of the screen.

By hovering your mouse over the joining line between the windows you can click and drag it to adjust the size of the two windows.

Again, it is easily changed back.