ZOOM MEETINGS 101

Tech 2020 Solutions

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Zoom Meeting as a Business Tool
A Tech 2020 Overview

To help our clients and colleagues navigate remote working, we have prepared the following guide and "How To" on working with the Zoom Meeting application for remote audio and video meetings.

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Getting a ZOOM Account and Plan Types

Zoom offers a free Basic account plan which includes unlimited 1-on-1 calling and allows up to 100 participants per call, with the drawback that any calls of 3 or more participants are limited to a maximum of 40 minutes in length.

For longer group calls, a monthly subscription plan at the Pro tier extends the limit on calls of up to 100 participants to 24 hours, while adding some other tools such as user management controls, usage reports, and up to 1GB at a time of cloud storage for MP4 recordings of Zoom calls. The Pro plan costs $14.99/month/host and renews on a monthly basis.

For larger companies, the Business and Enterprise plans allow for up to 300 and 500 call participants, respectively, while also adding more features such as custom URLs and branding for company meeting rooms, an admin dashboard, incorporation of a company's own local or cloud storage, setup of local VMs on local machines, and at the Enterprise level, unlimited cloud storage and enhanced reporting tools.

The Business and Enterprise plans each cost $19.99/month/host and renew monthly; however, the Business plan requires a minimum of 10 hosts, and the Enterprise plan requires a minimum of 50, making their effective costs at least $199.90/month and $999.50/month, respectively.

The features, participant limit, and duration limit of any call are those assigned to the host of the call; that is, one Pro user hosting a call for several Basic users will be limited to 24 hours, not 40 minutes.

Starting Your Call

Regardless of which account tier you select, anyone of any tier, or having no account at all, can join your call by way of your call's invite link. Once you've downloaded the desktop or mobile app from Zoom's

website, you can start a meeting from the **New Meeting button**.

Creating Your Personal Meeting ID

If you'd like to always have the same room URL, click the dropdown arrow for New Meeting and check the "Use My Personal Meeting ID (PMI)" option. Below this checkbox, you will see your PMI; as long as the above box is checked, the URL of meetings you host will be

https://zoom.us/j/**YourPMI**. If you click on your PMI in this dropdown, it will allow you to copy this URL, or a full invitation which includes call-in numbers for various regions, or if you then click "PMI Settings," there will be several custom settings for calls you host under this URL.
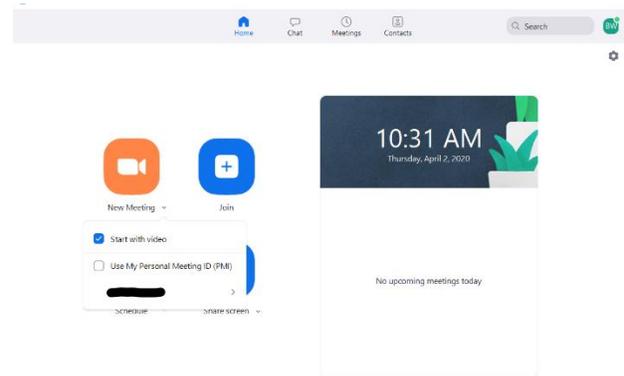
These include requiring a password to join your meetings (contained in the full invitation when copied), requiring that those who join have their own Zoom account, muting all other participants on entry, enabling a waiting room where users can be checked by the host or other admins before being admitted to the call, allowing users to join before the host themselves, automatic recording of meetings, and enforcing whether the host/participants can use video, telephone audio, and computer audio.

A word about "Zoombombing"

Depending on the nature of your meeting, it is important to keep several of these settings in mind; namely those which involve who can join the meeting and how they can do so, as at the time of writing, "Zoombombing" is a problem of moderate scale in which trolls find Zoom links posted online and join intending to disrupt calls/spread the links further.

For this reason, it is advised not to post your Zoom invitations publicly for any meeting you aren't actively advertising to the public, and to share the link with intended recipients via secure methods only.

Suggested Meeting Settings

For all uses, muting participants on entry and making use of a waiting room are great ways to limit the potential effect of unwanted participants, as the host can screen those trying to join in the lobby and unmute them once they're in. In a recent update, Zoom made these the default settings, but we suggest double checking them to be sure. **We highly recommend updating Zoom whenever you are prompted to do so**. To handle the recent surge in usage, the Zoom team has been making necessary updates to their software and rolling them out piece by piece to ensure a smooth, secure experience.

One additional suggestion is to only use your PMI when making private Zoom calls, and if any public calls are made, to uncheck this box and allow a unique, one-time URL to be generated for each public event. All the suggested settings can also be configured from within an ongoing call, in this case.

Once you're comfortable with the settings of the meeting you're about to host, you can click on the New Meeting button itself and a window will open up containing your new call, including your own video feed if you enabled video for the host and have a camera set up.

Camera and Microphone Setup

Now that you're in your call, either as a host or as a participant, if you move your mouse, you'll see a settings bar along the bottom of the screen.


 On the left side of this bar, you'll see a microphone which you can click on to mute or unmute yourself, and a camera which you can click to start or stop your video feed. Each also has an arrow which opens their respective settings.

If you're working remotely and cannot hear the other participants on your call, ensure that your device's sound is on and raised, both within the remote connection, and on your local device. If either one of these volumes are too low or muted, you will not get sound from your remote connection. You can minimize your remote connection window to return to your local desktop, and check the volume settings there as well.
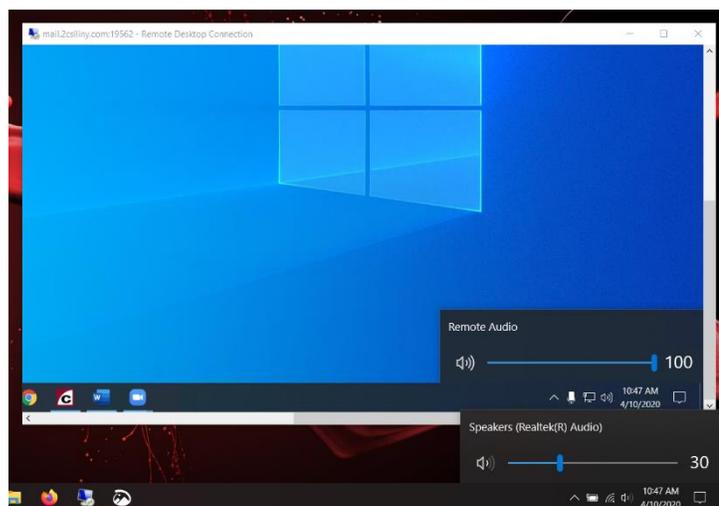
Using Zoom Via a Remote Connection

If you are using Zoom on a computer you're accessing via remote connection, you may have to select the Remote option for your microphone and/or speaker to work. If you're having trouble, open Audio settings from the microphone's arrow and you'll be able to test your microphone and speaker without disrupting the meeting you're in. If you're on a remote connection, and your device or external microphone and camera are not registering to be selected, you may have to configure Remote Desktop to allow for recording from this device. To do this, exit out of your remote connection, and reopen it to the window below, but instead of clicking "Connect," first open "Show Options" and navigate to "Local Resources," as shown below:
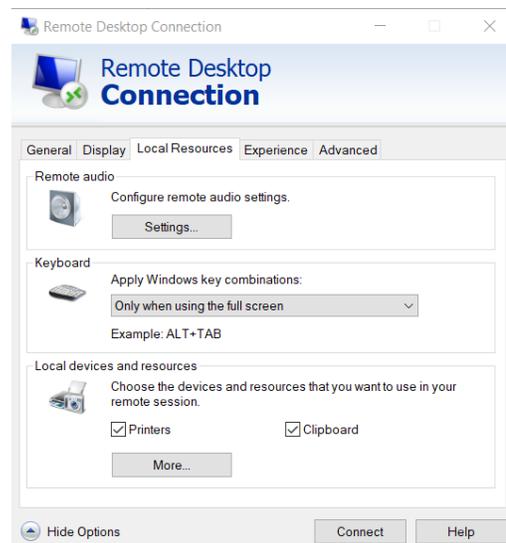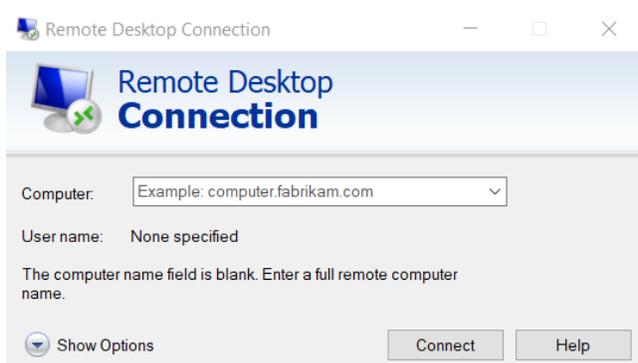
Open "Settings…" towards the top, and in the window that pops up, be sure that "Record from this computer" is selected under "Remote audio recording." Once it is, click "OK," and then connect to your remote device as you would normally. If your devices still aren't recognized, the issue may be with your home computer or the devices themselves. In this case, you will have to look up troubleshooting specific to your accessories, or your computer model. Most external cameras and microphones will have their brand and model indicated somewhere on them; if you are using your computer's camera and/or microphone, the issue could be in your local computer's device settings.

VIRTUAL BACKGROUNDS

All Zoom plans include a Virtual Background feature, which allows video users to remove or change their background, even without a green screen! The effect can get a little fuzzy without one though, especially if you're sitting in front of a wall with many decorations or if you frequently change your distance from your camera.

To try out this feature, click the arrow next to the camera in the bottom left of your Zoom call and select "Choose Virtual Background" from the menu, which should open a popup window. Here, you can choose from several default backgrounds offered by Zoom or click the **+ symbol** to choose an image saved on your device (the one you're remotely connected to, if that's the case). Once a custom image has been used it will appear in the initial popup window; also, your virtual background will still appear in your next Zoom call if you were using it at the end of your previous call, so if you have a fun background for a less formal call, be aware if you may be joining a more formal meeting shortly after.

On the Call

As the host of a meeting, you can manage other participants in several ways by hovering your mouse over their portion of the screen. You should immediately see a **"Mute"** option upon doing this, but there should also be a **"…" button** next to this which opens a few more options, such as changing their screen name or hiding users without video feeds from your view. The former can be useful if someone joins and

their name appears as a non-identifying username, such as "BWZoom97," or as their device's name, such as "Dad's iPhone 6," which may look less than professional; the latter is useful if you have a large call and want to ensure that those who do have video can be seen.

Zoom Meeting Screen Functionality

In the center of the bottom bar of your video, there are several tabs:
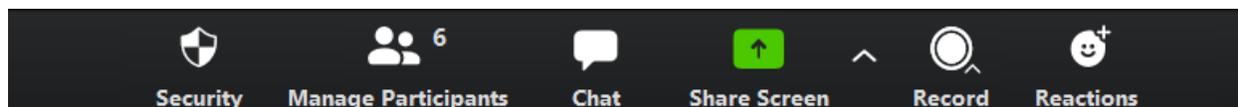
- "**Security,**" a host-only tab which allows the host to lock the meeting, if everyone expected to join has joined, and enable or disable a waiting room for those trying to join. The host can also change participants' permissions here, allowing them to rename themselves, use the chat function, and share their screens.
- "**Manage Participants**," which opens a sidebar listing all current participants and enabling you to make various changes to them as you could by hovering over them individually with your mouse. At the bottom of this sidebar, there are buttons to **mute** or **unmute** all participants at once, as well as an "**Invite**" button. This invite button opens a popup which gives you the option to copy either the meeting URL, or a full invitation to your clipboard; the full invitation will consist the meeting URL, the meeting password if one has been set, and several phone numbers a participant may use to call in, depending on their location
- "**Chat**," which opens up a sidebar in which you can send messages to the other participants. This is useful if there's a relevant link or title you want to share, but that doesn't warrant sharing your screen or if you are a non-host in a meeting which only allows hosts to share.
  - A note on **Private "Chat:"** Private chats to individual participants are also available, however, at time of writing there are reports that 'private' chats appear alongside the main channel to anyone who prints a copy of the meeting, whether they were a recipient or not. This could either be a feature or a bug, but use caution regardless; private chats are useful to ask a follow-up to someone that only concerns your work, or send a link to someone who may be more interested than others, but not to share any information you wouldn't want any other participants to see.
- "**Share Screen**," one of the primary draws of teleconferencing, and included in every tier of Zoom. By clicking this green box, you open a window in which you can select which of your applications to share with other participants. This allows you to review documents, watch videos, give presentations, or just show a resource relevant to what you're discussing, essentially the same as if you were meeting in-person. You can also show your entire screen, though for privacy reasons this is not recommended unless what you plan to show requires it; if you plan to show multiple windows, you can always switch which window you're sharing from the green bar that will appear at the top of your screen while sharing.

- An arrow next to "Share Screen" opens a couple of settings regarding sharing, including whether everyone or only the host can share, whether multiple participants can share at once, and whether anyone or only the host can take the screen from someone else who is sharing, if only one can share at a time.
- "**Record,**" which begins/ends a video recording of the call you're on to either your device (remote device if that's the case) or your account's cloud, depending on what you select.
- "**Reactions**," which allows you to briefly place a 'clapping' or 'thumbs-up' emoji in the corner of your screen for other participants to see. Given the prevalence of 'reactions' across most social media, it wouldn't be surprising to see Zoom add more options here. The skin tone of the hands used in these emojis can be customized, similarly to how they can on smartphone keyboards, under "General" in Settings (which can be seen in the left sidebar when opening the audio or video settings); their default tone is a neutral yellow.

Joining Calls

To join a Zoom call, click the link sent to you by whoever has invited you. If you have the app it should either open the app or give you the option to do so; if you don't, then a new tab will open with instructions on how to download the app, however there should be a small link on this page which will instead open the call in your browser if you do not wish to install the app.

Note if for some reason your Zoom meeting link does not work properly, you may need to use another browser (like Chrome) to open the link.

Leaving Calls

To leave a call, find the red **"Leave Meeting"** button in the bottom right of your screen when moving your mouse over your call. Simply closing your tab will not remove you from the meeting, and as camera/microphone behavior in this situation is not officially documented, it is best practice to make sure you leave before closing your tab.

If you are the host of a meeting, there will instead be an **"End Meeting"** button in the bottom right of your screen; by default, upon clicking this a prompt will appear with the option to either end the meeting for everyone, or simply leave. If you choose only to leave the meeting from here, then the meeting will continue until all participants have left, or you rejoin and end it.

We hope you find this information helpful. If you have more questions on how to use Zoom, their own documentation is very thorough, and will always be up to date; this guide is up to date as of April 10, 2020. The main page of Zoom's support can be found at https://support.zoom.us/hc/en-us. And as always, we at Tech 2020 are always a call away.

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