Guide for Zoom Hosts
Rev 04-6

Islington U3A

1. Introduction

This guide is to help iU3A use Zoom for discussion groups without physical meetings.   It is being sent to you as a Group Coordinator to enable you or another member of your group to become a Zoom **Host** and set up and run Zoom meetings for your group.

This Guidance is for Zoom **Hosts** only and should **not** be sent to group members.

Much of this Guide is applicable to Zoom Basic and Zoom Pro accounts. However there are some specifics regarding Zoom Pro. This is added as a separate Section below.

The separate **Zoom Guide for Meeting Participants** should be sent to your group's members before you invite them to their first Zoom meeting.

2. About Zoom

Zoom is a computer application that enables people who are in different locations to 'meet' together face to face. The meetings are set up and managed by the **Host**, who will usually be the Coordinator but can be another member of the group.

Members other than the **Host** are **Participants** who join the meeting by clicking on a link in an email sent to them by the **Host**.

3. Setting Up and Using Zoom

a) Creating a Zoom account

If you don't yet have a Zoom account you need to create a Zoom one. This doesn't involve any cost.

- Search the internet to find Zoom.us
- Click on Sign Up; Just click on the 'Basic' package, it's free
- Enter your email address
- You'll get an email in response
- Respond to the email
- Set up your password
- This may take several minutes to complete

b) If you have been a Zoom participant before or if you want a specific separate Zoom Account for iU3A matters, you will need to set up an Account to be a **Host**. This requires you to access a special computer screen. How you do so, depends on the search engine you use as follows:

- Chrome:
  On a Mac: Click on file and then on New Incognito Window
  With Windows click on the three horizontal lines at top right on your screen, and then on New Incognito
  On an iPad, tap on the two square boxes in the top right-hand corner of the screen, select Private and tap done
- Safari: Click on file and then on New Private Window

- Microsoft Edge: Click on the horizontal lines in the top right-hand corner of the screen and then click on New InPrivate Window

If your search engine isn't in this list, you should be able to find what to do here: https://www.howtogeek.com/269265/how-to-enable-private-browsing-on-any-web-browser/

- In the screen, enter Zoom at the top, press enter to find Zoom.us
- Click on Sign Up, It's Free
- Enter your email address
- You'll get an email in response
- Respond to the email
- Set up your password
- This may take a several minutes to complete

If you now log out of your original account, your new account will become your only Zoom account and you can use it to be a **Host** or a participant in Zoom meetings.   To log out of your original account, go into it and click on your initials at the top right-hand corner of the page and click on sign out.

c) Zoom App. (for tablets or smartphones)

Beware: if you have downloaded the App and log in via the App you will not see all settings. If you want to adjust any of your Settings then you need to log in through the internet.

d) Setting up group meetings

Log into your Zoom account. It should open at the 'Profile' page.

i) General settings for all meetings:

- Select settings from the list at the top of the left side of the screen.
- A list of options will appear on the screen under 'Meeting' (ignore Recording and Telephone settings)
- You need to choose which defaults you want. One of the key choices is if you want joining the meeting to be password controlled or not.
- If not (recommended if you are only inviting known members) then for the "Use Personal Meeting ID (PMI) when scheduling a meeting", slide the option bar to off.
- If you do want to use passwords per meeting then re the above, slide to the one position; and lower down at the 'Require a password for Personal Meeting ID (PMI)' you need to have this on (either for all meetings or just for those where you are allowing Participants to join the meeting before the Host)
- Another key Setting (under the 'In Meeting (Advanced) is regarding 'Waiting Rooms'. The securest method is to have this option on – but then you will have to accept Participants into the meeting at the beginning. The other way is to have this default set at off & then Participants will be able to join the meeting directly themselves. As most of our meetings will be with only a few Members it is probably easiest to have this option set to off.

This means that participants who use the meeting link in the email you will send them with the meeting details won't need to enter the meeting ID as well.

It can be useful to have **Join Before** enabled so that participants can get into the meeting as soon as they log in but see below (re risk of 'bombing').

Don't worry about all the other settings. You can always change them later if you want. Ignore the 'Recording' and 'Telephone' options (the default settings are fine).

ii) Then and for **all subsequent** meetings start here:

- At the top left-hand side of the Zoom Screen there is a heading Personal with a list of options
- Select meetings
- Now at the top of the screen there's a list of options - select Schedule a Meeting
- Enter the date and time of the meeting and its full duration
- A message saying that free meetings can only last for 40 minutes and you need to upgrade will appear. Ignore it. **
- Ignore the other settings – these will be populated by your Default settings
- Scroll to the bottom and press save-see*below
- A new screen will appear with details of the meeting, including the **Join URL** link and the **Meeting ID** which is a number
- Click on copy the invitation on the right-hand side of the screen
- A box will appear with the date and time of the meeting and the Join meeting Link and the Meeting ID
- Click on Copy Meeting Invitation
- Paste the invitation into an email and send it to all that you want to be participants.***
- See also * and 'Phoning' section

* For those participants joining a meeting from a landline then you need to disable password (as landlines don't allow a mix of numbers and text to be entered). If your auto invite does not include a UK phone number, one or more of the numbers included in the Phoning section needs to be sent out with the invite.
**Although free Zoom meetings are limited to 40 minutes, you can set the duration of the meeting for longer than 40 minutes. Each time Zoom closes the meeting after 40 minutes everybody can return to it again using either the URL or the Meeting ID in the invitation email you have sent them.
***When sending out the meeting invite to Group members, it is recommended that this email is sent through Beacon (to ensure it goes only to only members & that it is bcc'd to comply with GDPR).

Explain this to the participants at the beginning of the meeting and remind them about how to sign in again a few minutes before the meeting cuts out.

e) Joining the meeting

As **Host**, you join the meeting in a different way from the participants:

- Log into your Zoom account
- Select meetings from the list at the top of the left side of the screen

- Details of your meetings will appear on the screen
- Click on the Start button for the particular meeting
- A launch screen will appear
- Click on the link to your bowser at the bottom of the box on the screen
- A message Open Zoom.us will appear; click on the box on the bottom right of this message and you will enter the meeting

f) Running the meeting

There are two important icons and some useful tools for managing meetings.

On a computer or a tablet, these are found by clicking/tapping the bottom of the screen. On an iPad tap the top of the screen

On the left there are two icons

- The microphone*
- The camera

If there is a line through these they are switched off. Click on them to turn them on.

To the right of the icons there are several tools

g) Participants

This tool shows the number of participants present in the meeting. When you click on this a list of all participants present in the meeting appears in a panel on the right-hand side of the screen.

Depending on the size of the group and how it operates you may decide to ask participants to use the **Hand Up** facility within this tool to indicate to you that they want to speak. Participants have a button at the bottom of their panel which the click to put their **Hand Up**. As **Host** you do not have **Hand Up.** Instead your panel has a list of participants who want to speak and you can call them in turn or how you think will work best.

In your panel there is a button you can click on to mute everybody else's microphone.   Participants can unmute their own microphones. Muting is useful to cut out background noise and you may wish to ask individual members to mute their microphone if they are its source.

h) Chat

This tool allows the group to send written messages to each other. It is unlikely to be used significantly by our groups but it is useful for you as to know how it works.

If you click on Chat a list of everybody in the meeting appears on the right-hand side of the screen. You can send a written message to everybody in the group or to one or more participants. Click on their name, type the message in the space at the bottom and press return to send.

i) Ending the meeting

At the right-hand side of these items at the bottom of the screen, in red is the link for ending the meeting. When you click on it you will get the option to end

or leave the meeting. If the participants want to go on chatting after you wish to leave, click on Leave and appoint another participant as **host**, otherwise click on End the meeting.

4. Zoom Pro Account

iU3A has taken out two Zoom Pro account which offers enhanced capabilities. This can be used by Members of iU3A (primarily Group Coordinators). If you want to use this account please contact Vivek at:
coursecoodinator.iu3a@gmail.com

Some things to remember:
- Meetings need to be centrally scheduled by a Zoom Administrator (ZA) to avoid meeting clashes.
- Recurring meetings will not require fresh invitations – the same link applies to all meetings on a particular day, week etc. Group Coordinators/Leaders need to communicate this to members and remind them prior to each meeting.
- If reception quality deteriorates for everyone, this may indicate that the Zoom server is overloaded. Firstly, ask people to switch off their video. If that does not resolve the problem, ask people to close the meeting, take a 5 minute break, then re-start the meeting. If only one person has a problem, ask them to close their device and start again.
- The Coordinator/Leader should arrive early to welcome their participants, keep the meeting to time and finish promptly. The coordinator needs to ensure that all members have left the meeting before she/he leaves, first in, last out.

The management of the iU3A Zoom Pro accounts (to allow sharing) have been unbundled to the following roles:

I) Account Owner (could be Treasurer or ZA).

II) Zoom Administrator (ZA), Vivek Nanda: Technically sophisticated member with some spare capacity and inclination to volunteer. The ZA is technically the Host for all meetings

III) Co-host (CH): The ZA will ensure each meeting has a Co-Host. This will be the Group Coordinator / Leader or can be someone in the Group with a bit more technical expertise, ie a Zoom Helper (ZH).

III) Participants (all Groups and their Members who would like to participate in online Zoom Meetings.

A) Meetings are centrally scheduled by Zoom Admin (ZA) after receiving a request from Group Coordinators/ Leaders or the ZH.

The meetings need to be added to an account calendar. This can be a manual diary and held by the ZA or can be a public electronic schedule set up through eg Google

Scheduler. This will show slots that are taken and slots that are still available for booking.

B) Recurring weekly and Monthly Meetings are encouraged since they do not require fresh invitations to be generated and communicated, as the same link applies to all subsequent recurring meetings.

C) Fortnightly Recurring Meetings are discouraged because they start clashing with multiple Monthly meetings after a month with 5 relevant weekdays in it, thus reducing the efficient utilisation of the Zoom Pro account in a significant way.

D) All Zoom Meeting invitations are set up to allow the following by default:

i) Access from landline and mobile phones.

ii) Access from any browser, which removes the need to download the Zoom App. This is done because downloading the Zoom App has caused problems with a small minority of members.

iii) Members are able to join the meeting before the host and interact with the other members present even if the ZA, who is the only host for all meetings scheduled, never joins the meeting.

iv) Sharing of screens without the host being present.

v) Groups without a regular schedule are asked to book the next meeting after the currently booked one off meeting has taken place.

E) Group Coordinators/Leaders /ZHs are sent the meeting invitation by ZA. These should be forwarded to the Group's members in the same way as in-person meetings used to be communicated before the current lockdown.

F) The Group Coordinators/ Leaders are encouraged to remind the members of their Group of the Zoom Meeting Invite prior to each meeting.

G) All members of the Group, including the ZH, can join meetings in the way that suits them best via the link across the Internet on a computer/tablet/smartphone or across the Telephony Network from their landline or mobile phone.

H) High specification equipment is not required to participate in or coordinate Zoom meetings, as Members with old computers lacking cameras and/or microphones can join the same meeting using two devices. Thus, they are able to see what the other Members of their Group are seeing on their computer while talking to the Group using their phone.

I) It is recommended that before the first meeting, Group Coordinator/Leader or their ZH should ensure that their members are comfortable with Zoom. If necessary, a "test" meeting should be arranged with the help of the ZA.

J) Creating a Co-Host for a Meeting

There are two ways that the Host can make a user a CH. During a meeting:

1. Hover over a user's video.
2. Click the more icon:
3. Click **Make Co-Host**.

Using the participants window:

1. Click on **Manage Participants** in the meeting controls at the bottom of the Zoom window.

2. Hover over the name of the participant who is going to be a co-host, and choose **More**.
3. Click **Make Co-Host**.

K) At the start of each meeting, the CH should remind members to mute their microphone when they are not speaking and avoid interrupting others.

L) Hand Icon: members should also be encouraged to use the raised hand icon to indicate their wish to speak so that the Coordinator can see them, if their device support the Gallery View. When it does not, another members can help the Chair know in which order the hands were raised.

M) If audio quality starts to deteriorate for everyone, it may indicate that the Zoom server is overloaded. Members should be asked to switch off their video. If that does not resolve the problem, ask people to close the meeting, take a 5 minute break, then re-start the meeting. If only one person has a problem, ask them to reboot/restart their device and join the meeting again.

N) Since a Zoom Pro account can only have one Zoom Meeting active at any time, the person requesting the meeting will be told when the meeting needs to be finished at the latest. This means that it is the responsibility of the person that requested the meeting to ensure the meeting finishes at or before the scheduled end time. The CH has to End Meeting For All. The ZA therefore does not need to be present at all meetings.

5. Phoning

While it is generally recommended that Zoom is used via the internet (for strength of signal) it is possible to use Zoom via a phone (by landline or from a mobile phone).

The auto generated invite to a meeting (which you copy & paste into an email to send to all participants) doesn't show phone numbers. So you have to add these (copy from below) if you know some might join from phones. Also if some are to join from a landline, you need to make sure the 'Require Password' is set to off in the meeting settings (or in your overall Settings).

While you are logging in there is the option of "Join with Computer" or "Join with Phone". If you don't have an internet connection you can use the phone option. The instructions for dialling into a Zoom meeting are:

1. Call one of the 5 UK numbers provided:
+44 330 088 5830
+44 131 460 1196
+44 203 481 5240
+44 208 080 6591
+44 208 080 6592

2. Enter your Meeting ID followed by #, which is also the numbers at the end of the link to join a Zoom meeting

3. Enter your participant ID followed by #.

Step 3 can be minimised to just # if the meeting has been setup to not require a password.

More details can be found at Joining-a-meeting-by-phone

6. Privacy & Hacking Risk
You may have read articles recently regarding the lack of Privacy or the risk of 'Zoom bombing' (ie when your meeting is hacked & other material is streamed to the meeting). Each Member needs to ultimately decide if they want to take this (low) additional risk by using Zoom. However you need to consider this in the wider sense – the use of any internet program, system, platform carry risk. So what is the scale of this extra risk? We would suggest it's low. But each Member needs to make their own conclusion.

7. Beware of Zoom bombing

Social distancing has driven a massive spike in video conferencing. That, in turn, has spawned an increase in a so-called "ZoomBombing" attacks. These attacks target public group calls on the highly popular Zoom platform. Trolls look for meetings that allow attendees to share their screens by default. Once they've joined the meeting, they blast the other unsuspecting participants with offensive/extreme content. Until Zoom corrects the default configuration, we recommend the following:

To avoid this here are some tips for **Hosts** (in the Settings of your account). These can create restrictions so **Hosts** need to balance gain vs loss:
- Disable "Join Before Host" so people can't cause trouble before you arrive
- Change Screensharing to "Host Only"
- Consider turning on 'Waiting Room'. So you can see who is waiting to join the meeting and let them in, or not.

Please see Zoom's Support page for further details on managing participants in a meeting. Or the blog here

8. Breakout Rooms
If you want to use the breakout room feature have a look at this clip (skip to about half way through):

https://www.youtube.com/watch?v=6i-NA563Ojk

9. Support

If you need support in use of this guide, if you get stuck at any stage, we can offer support. Please contact: website.manager@islingtonu3a.org and we will figure out the best way to help you.

10. Feedback

If you feel any of the above is unclear or if you think something should be added please give us feedback. Send comments to: website.manager@islingtonu3a.org

11. References

There is a vast amount of further information online to assist with Zoom. There are also now Third Age Trust produced guides (that then carry links to further information). You can access their guides here.