



How to Zoom

Free Zoom Remote-Meeting Software Enables Omnilore SDGs to Conduct Class Meetings with Each Member at Home Via Personal Computers, Tablets, or Smart Phones (or even dial in by phone for audio-only participation).

Note: The Zoom interface on various hand-held devices may differ slightly from desktop & laptop computers. Instructions here in "How to Zoom" describe the user interface and operations as seen on computers (unless noted otherwise).

Email Zoom-Support@Omnilore.org for Help.

Zoom-Support publishes occasional "Zoom Notes". Those so far may be viewed by clicking on their titles below:

- Zoom Note #1: ["Meetings are actually CONTINUOUS and thus can be Joined at any time by anyone..."](#)
- Zoom Note #2: ["To Host or Not to Host, that is the question" – Trading Off Ease vs. Meeting Controls](#)

6 Key Things to Know about Using Zoom:

(Instructions on following pages)

For HELP on any of these instructions, email Zoom-Support@Omnilore.org

1. **ALL MEMBERS:**
How to Set Up your Zoom Account and Acquire the Zoom Software.
(You need to do this one time only)
2. **ALL MEMBERS:**
How to Join and Participate in a Zoom meeting
3. **ONLY FOR MEETING HOSTS (Coordinators &/or Zoom Techies):**
How to Schedule a Zoom Meeting and Invite Your Classmates. **NO LONGER NECESSARY FOR OMNIOLORE — Omnilore's Zoom-Support team has already scheduled a perpetual, Meet-Anytime meeting for each SDG.**
4. **ONLY FOR MEETING HOSTS (Coordinators &/or Zoom Techies):**
How to Start, Run, and Control Your Scheduled Meeting
 - Includes explanation of complete set of Meeting CONTROLS available only to a meeting's HOST. (Must be Signed In to SDG's Zoom account.)
 - See Zoom [Note #2](#) above for original advocacy of meeting controls available only for the meeting Host.
5. **FOR HOSTS AND SOME MEMBERS:**
How to Show Computerized Presentations, Discussion Questions, Videos, and other Files
6. **IF YOU DO NOT HAVE (OR CAN NOT GET) THE ZOOM APP:**
How to Participate via Web Browser & Phone (or just Phone)

1. How to Set Up your Zoom Account and Acquire the Zoom Software

It's only necessary to create your personal Zoom account one time — although the software will need to be downloaded/installed on each device (*computer, tablet, and/or smart phone*) you will use.

1. Go to <https://Zoom.us> in a web browser window on the device you will use, and click on the blue "SIGN UP, IT'S FREE" button at the upper right.
2. At that Zoom website, you will be asked to enter your personal email address and click "Sign Up". Zoom will then send you a confirmation email within minutes.
3. Click the confirmation link in that email after you receive it, and you will be guided through completion of your Zoom account setup — entering your name, choosing a password, and downloading/installing the Zoom application.
 - Note that the password you create must contain
 - (a) at least 8 characters,
 - (b) at least one capital letter,
 - (c) at least one lower-case letter, &
 - (d) at least one number.
 - Every time you join a Zoom meeting, when asked you will enter that same personal email address used in step #2 above and the password you created. (*Your device's Password Manager may remember this for you.*)
 - NOTE: If you download/install Zoom on only one device, and then try to enter a Zoom meeting via <https://Zoom.us> from another device, Zoom will prompt you to start downloading/installing the Zoom app on that device. You want to do this.

Zoom will automatically detect what type of computer or device you are on, and then automatically do the download/installation of the Zoom implementation specific for your computer or device.

2. How to Join and Participate in a Zoom Meeting

Meeting — *But if your computer does not have built-in microphone & speaker, Go To #6 for Phone-In instructions to get Audio*

- A. You will receive an email containing a “**Meeting Invitation**” automatically generated for the **Host** who set up your meeting. Click on the bolded **web location** (*hyperlink*) in the **Meeting Invitation** (see example below).
- B. At that website, you will be asked if you want to **open** the Zoom app (calling it “*zoom.us*” or “*zoom.us.app*” depending on your web browser and type of computer or hand-held device).
- If the Zoom app is not yet installed on the device you're using, Zoom will prompt you to start downloading/installing the Zoom app on that device.
 - Click to allow that, and the Zoom app will open the meeting window with you in the meeting and in “**Speaker View**” showing the Host and thumbnail images of other participants. If asked to allow Zoom to use your camera and/or microphone, click “**Allow**”.
- C. **Troubleshooting:**
- **If you do not see yourself in the Zoom app's window**, click “**Start Video**” (near lower left of Zoom window on computers — and be sure your computer/device's camera is not blocked).
 - If “**Unmute**” shows at lower left, click it. Be sure “**Mute**” & “**Stop Video**” then show at lower left because that means you are now unmuted and you can be seen by other meeting participants.
 - **Not seeing everyone:** Your Zoom window will show a larger view of whoever is speaking plus thumbnails of some of the other participants. At upper right on computer screens, you can toggle between that “**Speaker View**” and “**Gallery View**” where thumbnails of all participants fill your window.
 - **On smart phones or tablets**, instead of Gallery View, try swiping left/right to see all thumbnails. Also, click in dark area to see other Zoom controls. (Other controls may also be located differently than on computers.) Turning hand-held device 90 degrees counter-clockwise (to horizontal) may show more controls.

Example Meeting Invitation:

Underlined link is what you click on in Step #1
(password is encrypted and embedded in the link so you never need to enter it)

TCM SDG is inviting you to a scheduled Zoom meeting.

Topic: TCM class.
Time: May 8, 2020 01:30 PM
Description: First TCM class session

Please download and import the following iCalendar (.ics) files to your calendar system.
Weekly: <https://zoom.us/j/414036470?pwd=WEtudndUTFVldmo2WmhOUkhENEhTz09>
/ics?icsToken=98tyKu2pqjshNCsFzTz7YtW534b_H2k1V4rPtomAbvFDpcedFX9AexPKodqB9-B

Join Zoom Meeting
<https://zoom.us/j/414036470?pwd=WEtudndUTFVldmo2WmhOUkhENEhTz09>

Meeting ID: 414 036 470
Password: TCMsdg

Dial by your location
US (408)638-0968

Meeting ID: 414 036 470
Password: TCMsdg

3. How to Schedule a Zoom Meeting and Invite Your Classmates *(sheet 1 of 2)*

(ONLY FOR MEETING HOSTS, e.g., Coordinators and Techies)

NO LONGER NECESSARY FOR OMNILORE — Omnilore's Zoom-Support team has already scheduled a perpetual, Meet-Anytime meeting for each SDG.

From any computer, tablet, or smart phone with a web browser:

1. In a web browser window, go to <https://zoom.us/> (or just click on url to the left).
2. **OMNILORE HAS CREATED ZOOM ACCOUNTS ABLE TO SCHEDULE MEETINGS LONGER THAN 40 MINUTES:**

FOR FALL 2021 SDGs: We scheduled an August pre-meeting and all Sep.-Dec. class meetings for each SDG – all with the same perpetual (Meet-Anytime) meeting ID & same web address/link to join the meetings, to make it easy for your classmates. To check details of your SDG's scheduled "Meet-Anytime" Zoom meeting:

- **SIGN IN** at [Zoom.us](https://zoom.us/) to the individual Zoom account created for every SDG: **SDG@Omnilore.org**, with password = "???" where "SDG" is your SDG's 3-character ID. For example, **POF's** sign-in is **POF@Omnilore.org**. ([Click Here for Zoom password help](#)).
 - After signing-in, click "**Meetings**" at left and then "**Upcoming Meetings**" at top, to see the perpetual Meet-Anytime meeting we scheduled for you. If you're satisfied with this meeting, **YOU'RE ALMOST DONE — jump to [instruction 4.ix](#) (copy & compose "Meeting Invitation" to your classmates) on next page.**
 - **Otherwise, change any meeting's date or time** by clicking that meeting's link, then "**Edit this Meeting**" at bottom (or click "**Delete**" at right to cancel any meeting). Remember to click "**Save**" at bottom when done.
 - Or, email Zoom-Support@Omnilore.org and we'll make any changes you request.
 - Or, **continue with "3" below to schedule another meeting if that's really necessary. (It isn't for Omnilore SDGs.)**
3. Select/click on "**SCHEDULE A MEETING**". This will open the "Schedule a Meeting – Zoom" browser window.
 4. In that browser window, fill in "Topic" (put your SDG's 3-character ID as part of Topic field) and "Description" boxes as desired, and then carefully set each of the following fields:
 - i. **WHEN** – select **Date** and **Time** for your class meeting to start; **please adhere to the dates and AM/PM previously assigned to your SDG** to avoid simultaneous meetings by multiple SDGs.
 - *We recommend setting your Zoom meeting's Start Time as your actual SDG start time to avoid confusing members in the Meeting invitation with an earlier time. We have learned you may start your meeting earlier than that time to check out presentations & other Screen Sharing, and other side meetings etc.*
 - ii. **DURATION:** We recommend "**2.5 Hours**" or more (but whatever duration you choose is not enforced in our @Omnilore.org accounts).
 - iii. **MEETING ID:** Click "**Generate Automatically**"
 - iv. **MEETING PASSWORD:** Be sure "**Meeting Password**" is **checked**, and accept the 6-digit password Zoom generates for your meeting. (Invitees to your meeting do not even need to know there's a password because the password is encrypted and embedded in the hyperlink your classmates will click to join the meeting.)
 - v. **VIDEO:** Select "**ON**" for both Host & Participant.
 - vi. **AUDIO:** Select "**BOTH**"

3. How to Schedule a Zoom Meeting and Invite Your Classmates *(sheet 2 of 2)* (ONLY FOR MEETING HOSTS, e.g., Coordinators and Techies)

- vii. **MEETING OPTIONS:** Turn **ON** (click the box left of) "**Enable join before host**" (enabling prior side meetings) and leave the other 3 unchecked.
- viii. Click **SAVE** at bottom of window. This opens a "Meeting Information" window.
- ix. Click "**Copy the Invitation**" on the right side of the window. This brings up a pop-up window labeled "Copy Meeting Invitation".
- x. In that pop-up window, click "**Copy Meeting Invitation**" at bottom.

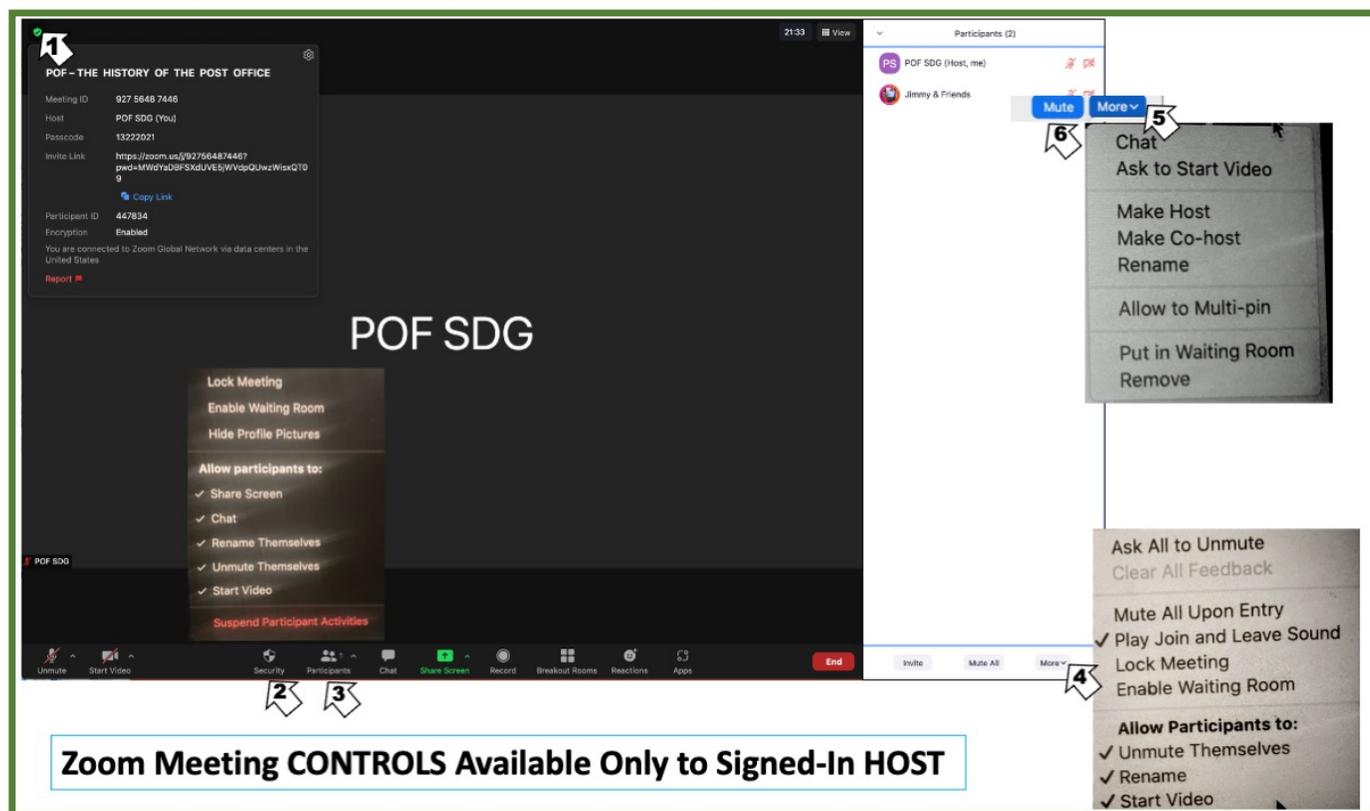
In your email system, compose a new email to your SDG@Omnilore.org classmates, and **paste** the Meeting Invitation copied in the previous step into the message body. Add a meaningful "Subject" like "**POF Will Meet next Mon (Aug. 16) via Zoom**" because Description and Phone # fields do not get filled in via this Copy/Paste,

- xi. Copy over (and/or edit) **Description** you composed in step #4 above.
 - xii. If a recurring meeting, delete copied-over lines listing your other dates.
 - xiii. Add "**Phone number = (408)638-0968**" (see example on #2 "How to Join...")
 - xiv. If it's present in the copied Meeting Invitation, delete the line (probably at the bottom) stating "Find your local number" because the linked web address does not work. (see screenshot example on #2 "How to Join...")
5. Add any necessary info specific to your SDG to the body of that email,
1. making sure the automatically copy/pasted meeting date & time and especially the web address for classmates to **Join** the meeting (<https://us04web.zoom.us/j/> followed by a **9- or 10-digit number & more characters**) are prominent or **highlighted** (perhaps make them **bold**).
 2. Add words if you think it's necessary, saying that your classmates should save this email because they will Join the meeting by simply clicking on that web address (or *copy/paste it into a new browser window*) when it's time for your meeting to start.
 3. **Send** that email to your classmates.
6. Recommended: Send a reminder email closer to the date/time of the meeting, including the same key information about how to Join your meeting.

4. How to Host, Conduct and Control *(next page)* Your Scheduled Zoom Meeting (ONLY FOR MEETING HOSTS, e.g., Coordinators and Techies)

1. **On Day & at Time your meeting is scheduled (or earlier), you as Host start the Zoom meeting:** *(This does not have to be done on the same computer or device used to schedule your meeting, but you must sign in to the same Zoom account that scheduled the meeting. If you find yourself already signed in to a different Zoom account, you must sign out.)*
 - **FOR FALL 2021 SDGs:** In a web browser window, sign In to your SDG's Zoom account at <https://zoom.us> using email address "**YourSDG@Omnilore.org**" (where "YourSDG" is your SDG's 3-character ID, e.g., POF@Omnilore.org) which is the same as used to email your classmates; use the password we give all coordinators to use for sign in to be able to host meetings. ([Click Here for Zoom password help](#))
2. After Zoom logs you in, click on "**Meetings**" at left. *(You may need to stretch your browser's Zoom.us window wider to see this left panel with "Meetings" showing.)*
3. Under "**Upcoming Meetings**", find the one scheduled for you. *(There should be only one meeting listed.)* Move your cursor over your meeting's name and "**Start**" will appear.
4. Click "**Start**" for your meeting. (Note that our Zoom accounts allow for participants to join the meeting before the Host arrives or before the scheduled start time.)
5. Allow or "**Open Link**" for the Zoom app to open.
6. In the Zoom app's window, if you do not see yourself, click "**Start Video**" near lower left (and be sure your computer/device's camera is not blocked). If "**Unmute**" shows at lower left, click it.
 - Be sure "**Mute**" & "**Stop Video**" then show at lower left because that means you are now unmuted and you can be seen by other meeting participants.
7. Zoom shows a scrollable "Gallery" of signed-in participants' thumbnail images, or In "Speaker View," a larger image of anyone speaking as **you (or your coordinator) conduct your meeting.**
 - Your coordinator (or any designee) will control the meeting as normal by verbally recognizing whoever wants to speak. Note that there is a "**Raise Hand**" feature under "**Reactions**" *(located differently on different types of computers/devices)* to assist coordinators with an orderly meeting.
 - In case of mic/speaker feedback or echoing, ask participants to "**Mute**" themselves. Or, host can selectively mute from participants' thumbnails if you know which participant is causing the disruption.

- See Key Thing “**5. How to Show Computerized Presentations**” for how presenters/speakers can “**Share Screen**” to show their presentation or other files from computers.
 - See edited screenshot and table with explanations, below the double-line after #8 below, for **Meeting Controls** available only to Hosts.
 - **NOTE: It’s best that the Host be on a computer instead of a hand-held device. The larger display (as shown below) shows the controls better. (However, the controls are available on smaller displays, just arranged differently depending on device.)**
8. When your meeting is over, have everyone click “**Leave Meeting**” or “**Leave**” or whatever shows. It might say “**End**” for the last one to leave.



Explanation of Host Controls screen (edited/merged Computer-display screenshot directly above):

1. Sign Into your SDG Host's Zoom account (step 1 above). Join Meeting (steps 2-5 above); Zoom window like POF SDG sample above appears. (Click at upper left to see Meeting Information.)
2. Click **Security** icon to see pop-up menu of 9 controls, all applicable to whole meeting.
3. Click **Participants** icon to open "Participants" panel at right.
4. Click **More** at lower right to see pop-up menu of 8 controls (some overlap with **Security** pop-up).
5. Click **More** to right of any participant's name to see 8 controls, applicable to only that participant.
6. NOTE also the “**Mute All**” button left of arrow #4 at bottom of Participants panel. (When clicked upon, it changes to “Unmute All.) **A privacy-motivated change to Zoom in early 2021 asks all meeting participants as they join the meeting, to grant permission for the host to Unmute. If granted the Host can Unmute a participant who is unknowingly speaking while muted.** See also **RECOMMENDATIONS** in table below.

Explanation of Meeting Controls Shown on Screenshot:

Name of Control	Explanation	Recommended Setting
Allow participants to Share Screen	Allows presentations from files, web pages, etc.	ON (default)
Allow participants to Chat	Allow opening chat pane, sending text to others in the meeting. Generally useful for Omnilore.	ON (default)
Rename	Host or participant may change displayed name. This is handy for host to do if anyone shows, for example, as "iPad" or a phone #.	ON (default)
<p>Mute</p> <p>There are different locations to:</p> <ul style="list-style-type: none"> • Mute one participant (an option in her/his gallery picture & on her/his line in participants panel), vs. • Mute All participants (at bottom of Participants panel) 	<p>Turn off any participants' microphone (use when unwanted noise is interrupting meeting – echo, phone call, barking, ... and if you can tell who it is).</p> <p>Mute All is handy to avoid meeting disruption during presentations, and sometimes during too-lively discussion when members talk over each other.</p> <p>When clicking "Mute All," the Host has the option to allow participants to Unmute themselves — click this option for normal Omnilore-style questions and discussion. Also encourage usage of the "Raise Hand" feature so the presenter, coordinator, or host can call on members one at a time to speak (and thus avoid interrupting each other).</p> <p>If a class member did not grant permission to Unmute when joining the meeting, instead of "Unmute" for that member, the Host will see an option to "Send Message Asking to Unmute" instead of "Unmute."</p> <p>RECOMMENDATIONS:</p> <ul style="list-style-type: none"> • At the start of your pre-meeting and class sessions, ask firmly that all participants be aware of background noise/disruptions and immediately Mute themselves when that occurs; or just Mute themselves all the time except to speak. • However, also remind everyone they should remember to Unmute themselves to be able to speak — but be on the watch for when a class member forgets when she/he should be heard, and then be prepared to click "Unmute" (or "Send Message Asking to Unmute") on her/his line in the participants panel. 	Don't use unless there's severe disruption.
Mute Participants Upon Entry	Might be handy while a presentation is being given	OFF (default) in general
<p>Unmute or "Send Message Asking to Unmute"</p> <p>(There are different locations to Unmute one vs. All participants – same as described above for "Mute")</p>	<p>Turn on participant(s)' microphone(s). Click Unmute or "Send Message Asking to Unmute" immediately for speaker/presenter if they remain muted when starting.</p> <p>NOTE: Some class members may choose to NOT grant Unmute control to the Host, which is their right for privacy reasons (e.g., other things are happening at their location). So, please do not try to override a member's decision to deny the Host "Unmute" permission.</p> <ul style="list-style-type: none"> • Clicking "Send Message...to Unmute" (when/if hearing her/him is necessary) is the best you can do. 	As said 2 rows above, you may need to remind everyone to be aware of when they need to Mute and Unmute themselves.
Ask to Start Video	If Participant is not seen, use this — sends pop-up message to the participant. (Video will be impossible if she/he has no camera.)	Try for anyone who is unseen
Waiting Room	Host must approve each participant joining the meeting.	OFF ; shouldn't use
Lock Meeting	Prevent anyone else from joining meeting.	Don't use for Omnilore classes
Remove or Report	Extreme measures for a disruptive participant. Participant may not rejoin meeting. "Report" means report to Zoom.	Hope to never use for Omnilore, but...

5. How to Show Computerized Presentations, Discussion Questions, Videos, and other Files: Share Screen

“Share Screen” (which may be labeled “Share Content” in some Zoom apps) at the bottom of the Zoom meeting window enables showing presentation files such as PowerPoint or Keynote, playing videos, and showing Word or PDF questions (or a window in your email system with questions in the body of an email).

The Omnilore SDG Zoom accounts (+ the other accounts for officer, committee, and ad hoc meetings) are set up to allow the host OR any participant, one at a time, to select an open window in any application on her/his computer or smart device, and share the contents of that other app’s window with all other meeting attendees.

- Clicking the green “Share Screen” button in the middle of the dock at the bottom of the Zoom window brings up a list of open windows in all applications on that computer/device. Click on the desired window and then click the blue “Share” button at lower right of the list.
 - The participant sharing her/his screen (the “Sharer”) will now be executing the application for the window being shared.
 - The Sharer may find an unintended window in that app is displayed, in which case the desired window needs to be brought to the front via that app's "Windows" menu (or just by clicking in the desired window if part of it is visible).
 - All operations in the Sharer's window will be seen by all other meeting participants who receive video. For example, changing PowerPoint from **Edit** mode to **SlideShow** mode causes everyone to see the expected enlarged PowerPoint show. Similarly, for playing a video in a video player window in “Full Screen.”
- **BUT BEWARE:** If the presenter clicks a hyperlink on a PPT chart, she/he must **Stop Share** and then **Share-Screen/Choose-Window/Click-Share** again, this time choosing the browser or video window that opened. Same, to return to PPT.
- Sharing the screen is *First-Come/First-Served*. No other participant can **Share Screen** until the current Sharer relinquishes control by clicking **Stop Share**.
 - The meeting Host is the exception, and can override the current Sharer by clicking “View Options” and select “Stop Participant’s Sharing.” Or, click “Share Screen” and answer “Continue” to Zoom’s question about stopping the other screen currently being shared.
 - It will be the meeting the coordinators’ responsibility to control the meeting, just like any Omnilore class meeting, by verbally directing who is to gain control of the shared screen. And, reminding each Sharer to **Stop Share** when done.
- **Note:** Participant thumbnails may overlap a full-screen Shared window, but they can be collapsed or moved by each participant as desired.

6. IF YOU DO NOT HAVE (or Can Not Install or Do Not Want to Install) THE ZOOM APP:

How to Participate via Web Browser & Phone

(or to join with just audio on your Phone — just do #8 below and stop there)

1. **Copy the web address (url) which is listed below "Join Zoom Meeting" in the Meeting Invitation email you received. Or, if it is a "lit up" (*live*) link, click it and jump to step #3.**
2. **Paste that web address into a browser's address pane. (*Chrome is preferred because you will get audio via the internet on computers & devices with speakers, and thus not need to make a phone call.*)**
3. **Click "Cancel" (or "No") in the box with question about opening (or installing) the Zoom app.**
4. **Click "Join from your Browser" (*which is a webpage link*).**
5. **A new webpage will open and request that you enter Your Name in the box. Do so and then click the blue "Join" button.**
6. **If using Chrome or other audio-enabled browser, click blue "Join Audio by Computer" button. You are now connected to the meeting. *Jump to #10.***
7. **If not using an audio-capable browser (*only Chrome?*), the Zoom meeting window will partially open. If you see "**Your browser does not support using the computer's Audio device**", click "Phone Call".**
 - **Copy down or memorize the 9-digit "Conference ID" that is displayed. Same for your "Participant ID" (*or don't — it turns out it's optional in 8.b below*).**
8. **On a phone, dial 1-408-638-0968.**
 - a. **When asked for Conference ID, paste or enter it (*from step 7 or the original "Meeting Invitation" email you received about the meeting*).**
 - b. **When asked for your Participant ID, enter it and "#" (*pound sign*). Or, just enter "#" (*for example, if you are joining by phone*).**
 - c. **If you are asked to state your name, do so and then quickly enter "#".**
 - d. **You should now be audio-connected to the meeting via your phone.**
9. **Click "x" at right side of Zoom window (*to far right of "Phone Call"*).**
10. **The Zoom window completely shows. Resize window as desired.**
11. **If "Start Video" & an icon with a red line through a camera show near lower left of the Zoom window, click there. If asked to Allow using your camera, click "Allow" or "Yes".**
12. **You are now in the meeting via audio and video (in a browser window).**