ACCOUNT SETTINGS

When signing into your Zoom account in your browser, you are able to adjust a number of settings that will allow you to take full advantage of the platform.

From the left-side menu on your Zoom homepage, you can click “Settings” where you will find a list of options that you can activate (or deactivate) including, but not limited to:

- Breakout Rooms
- Non-Verbal Reactions
- Whiteboard + Annotation
- In-Meeting Chat
- Polling

These settings must be activated beforehand in order for them to work during the meeting, so we recommend immediately accessing your settings to determine what you currently have enabled.

Please note: Some settings may require a Pro or Business Account.

INDIVIDUAL MEETING SETTINGS

Clicking “Meetings” from the left-side menu will bring you to a list of upcoming meetings. You can set individual meeting settings when you schedule a new meeting by clicking the blue button or by clicking an already existing upcoming meeting.

From here, you can set the following for each individual meeting:

- Title, Description, Date, and Time
- Registration Page
- Meeting Password
- Audio/Video Defaults
- Waiting Room
- Automatic Recording
- Alternative Hosts

These settings only apply to the individual meeting, though if you are creating a meeting that can be a template for future meetings, you can access the details of an existing meeting and save it as a meeting template. Once you do that, you can use that template to create future meetings, and those will have the same settings applied.
After clicking “Meetings” from the left-side menu, there will be a bar with different tabs where you can access the following:

- **Upcoming Meetings**: A complete list of all scheduled future meetings
- **Previous Meetings**: A complete list of completed scheduled meetings
- **Personal Meeting Room**: Details (URL and settings) for a personal meeting room
- **Meeting Templates**: A list of all saved meeting templates

### Personal Meeting Room

The personal meeting room is a quick and easy way to host a Zoom meeting without having to pre-schedule or create a meeting.

Your personal meeting room will always have the same settings and URL. You can change those settings and access that URL from the “Personal Meeting Room” tab.

This type of meeting is best for small, short, and impromptu or one-off meetings.

### Meeting Templates

If you are scheduling a lot of meetings with similar settings, it may be useful to save meetings as templates so that you can replicate them easier.

Click an upcoming or previous meeting, scroll to the bottom of that meeting’s details page, and select “Save as Meeting Template.”

Once you save that template, it will appear in the “Meetings Template” list where you can see all the templates and edit them as necessary. When you schedule a new meeting, you will have the option to use a template, and all of that template’s settings will automatically carry over into the new meeting. You can also choose “Schedule Meeting with this Template” from the “Meetings Template” list.
There are three types of host functions on a Zoom meeting. Each type has a different level of features they can control.

<table>
<thead>
<tr>
<th>Feature</th>
<th>Host</th>
<th>Co-host</th>
<th>Alternative Host</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mute and unmute participants</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Stop participant’s video</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Ask participant to start video</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Promote participant to host or co-host</td>
<td>✓</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Remove attendees</td>
<td>✓</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Rename participants</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Ask participants to go into breakout rooms</td>
<td>✓</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Mute controls for participants (ask to mute, mute all, mute on entry)</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Starting meeting</td>
<td>✓</td>
<td></td>
<td></td>
</tr>
<tr>
<td>View participants list</td>
<td>✓</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Share screen</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Create and edit polls</td>
<td>✓</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Start polls</td>
<td>✓</td>
<td></td>
<td></td>
</tr>
<tr>
<td>End meeting</td>
<td>✓</td>
<td></td>
<td>✓</td>
</tr>
</tbody>
</table>

There can only be one host in each meeting, but there can be multiple co-hosts. Co-hosts are added once a meeting has began and only the host can make a participant a co-host (other co-hosts do not have that ability).

An Alternative host is added when the Host makes the meeting. The alternative host must be someone who has an email associated with a Zoom account. The main advantage of having an alternative host is for them to be able to begin a meeting in the hosts absence.

Pro Tip
If the host wants to make a participant or a co-host host, they do not become a co-host, they become a participant. And the new host must make them a co-host.
Zoom’s In-Meeting Toolbar is the key to unlocking all of Zoom’s features. The toolbar typically appears on the bottom of the Zoom window and contains the following buttons, though please note that some of the buttons may not appear based on whether you are a host or participant or whether a specific feature is enabled.

Voice Settings / “Mute”

When setting up a meeting in Zoom, you can choose whether all participants enter the call with their audio turned on. We suggest that everyone starts muted and can un-mute themselves when they want to speak. This cuts down on distractions and audio feedback. Participants can mute themselves from the toolbar, and they can also adjust whether they are using computer or phone audio.

By default, most participants will be using computer audio, but if internet connection is unstable, dialing in with phone audio may be recommended. This will allow a participant to join the Zoom meeting by calling in with a voice call - if their video connection is lost, they will still remain in the meeting over audio. You can adjust this by finding the carrot arrow next to the audio button in the toolbar and selecting “switch to phone audio.” A popup will appear with the dial-in instructions.

Video Settings / “Start Video”

Similar to audio settings, when creating a meeting, you can decide to set all participants videos to be on or off by default. For privacy and connectivity purposes, we suggest that you set all participants to have their videos off. You can urge participants while in the meeting to turn their video on, if they are comfortable. We find that video is a great way to measure engagement, and it builds a greater sense of community within the call, but it is typically not advised to require all participants to have their videos turned on.

A useful privacy setting for videos is setting a virtual background. This allows participants to change their background to a number of pre-loaded or self-selected backgrounds so that other participants cannot see what may be behind them. You can adjust this by finding the carrot arrow next to the video button in the toolbar and selecting “change virtual background.” A popup will appear with the instructions.

Pro Tip

If a person does not dial in using their specific participant ID as included in the phone audio instructions, they will appear as two separate participants. Please urge people to join using their specific participant ID so that this does not happen. Not doing this often results in audio feedback and issues with breakouts and other engagement within the platform.

Please note: Some older versions of Zoom and some computers will not have this capability.
Participant Window
By clicking “Participants,” you can see who has entered the Zoom Meeting Room. This list will include the display names and additional options for each participant. From here, you would be able to see hosts and assign hosts/co-hosts, view whether participants are providing any non-verbal feedback, and mute/unmute particular participants.

In-Meeting Chat
When you click “Chat,” a window will appear that will allow you to send text to all participants or specific participants privately. This is a great way to get feedback and questions without disrupting flow. If you choose, you can allow files to be transferred over chat, and you may also save the chat transcript.

Depending on host status or whether you have the setting activated, several other buttons will be available to you in the toolbar.

Breakout Rooms
As a host, you can use this button to set up breakout rooms. As a participant, you can use this button to see what breakout room you are assigned to and enter/re-enter your assigned breakout room. Please refer to the section on breakout rooms later in this guide for more information.

Screenshare
You may use this button to share your screen. When adjusting settings in the back-end, you can allow all participants to share their screen or only allow hosts to share. Please refer to the section on screensharing later in this guide for more information.

Reactions
You may use this button for additional on-screen non-verbal reactions (clapping, thumbs up). If activated, these reactions will be visible to all attendees, and they will appear in the top left of the participants video box. Please refer to the later section on non-verbal reactions for more information.

Record
If activated when creating the meeting or adjusting back-end settings, you can stop/start recording using this button.

You are able to save the recording to the device or to the cloud. We suggest to record to the cloud, especially if you plan to share the recording widely, as you can circulate a link of the video directly from your Zoom account.

Once you start a recording, you can pause the recording so that it does not record specific sections. If you stop a recording, it ends the video clip. This is particularly relevant if you are using the breakout room function since the recording can only record the main room (not any of the breakout rooms). If you pause the recording while the breakouts are in session and then resume when all participants return, your video will save as one long continuous recording. If instead, you stop the recording while the breakouts are in session and re-start when all participants return, this will be saved as two separate videos.
OPENING THE CHAT BOX

To open the chat box in Zoom, toggle down to the bottom list and click chat. There are a few things that you can do in the chat box. First you can message everyone or privately message one participant. You can also upload files, and you can save the chat. Many of these functions must be set up on the back end, so please refer to your general account settings.

UPLOADING FILES

To upload a file to the chat box in Zoom, click the ‘file’ button on the bottom right side of the chat box.

Please Note
This function must be enabled on the back end before the start of a meeting.

SAVING THE CHAT LOG

There are two options for saving chat in a Zoom meeting:

Manually
To manually save a chat, click the three dots on the bottom right corner of the chat box. When the box opens click save chat. The chat will download to your local device.

Automatically
To automatically save a chat from a zoom meeting, the host must set that up on the back end before the start of the meeting. Once that is set up at the end of the meeting you can find the saved chat in the Record section on your Zoom account along with the video recording of the meeting.

Note: Only the public chat is saved - private messages between participants are not included.
SCREEN SHARE OPTIONS

In your toolbar, you will see a green “Screenshare” button. When you click it, a pop-up will appear, and there are three primary methods of screen sharing:

1. FULL SCREEN SHARE
   This will share everything visible on your screen, including your desktop or other programs you may have open. This is particularly useful if you want people to mirror what you are doing on your screen or if you are showing multiple program windows.

2. APPLICATION WINDOW SHARE
   You can choose to share only a single application/program window (e.g., only a Word document, browser window, etc.). This allows for more privacy for the person sharing the screen because only the one program is visible to the audience. However, this view is not useful if you will be switching between many different windows.

3. WHITEBOARD
   A simple white screen which can be used for the host or participants to annotate (write or draw) collectively.

Please note: There are also check boxes to share computer sound and optimize screen sharing for video. While you can certainly share videos, we do not recommend sharing them from your screen because of lag and bandwidth. Instead, we recommend sharing a link to the video in the chat and encouraging participants to watch it on their own and return to Zoom when they are done.
Fewer people know that whiteboards exist, but they can be a great way to coordinate ideas as if you were in a room sharing chart paper or physical whiteboard. Zoom’s Whiteboard share is essentially a blank white screen on which people can collectively draw pictures or write text.

Some ideas for using this feature are:

- Draw a collective picture
- Gallery walk
- Brainstorm as a group
- Pictionary and other games
- Teaching tool for math
- Illustrating sports plays and formations

In order for the whiteboard to work effectively, annotation has to be enabled in the account settings.

If annotation is enabled, participants will be able to use a new set of tools from a new toolbar that will appear on the screen. If the toolbar does not appear, participants may have to hover to the green bubble near the top of their screen that shares who is sharing their screen, and a “View Options”.

Annotation options include text, drawing, and stamps. The spotlight option is a great facilitation tool to call attention to specific areas of the screen.

Pro Tip
If participants are having trouble seeing their drawing even though annotation is on, it may be that they may be drawing in white over a white background. Ask them to change their color using the “Format” button in the annotation toolbar, and see if that fixes the problem.

Please Note
Annotation can be used on any shared screen, not only a whiteboard. It is most applicable to whiteboards since it is a blank white screen, though hosts and participants can even annotate on shared text or images!
Polls must be created before the start of a meeting. If polls are associated with a meeting, the host can launch them while in the meeting by finding the “Polls” button in their Zoom toolbar.

A pop-up with the poll questions will appear, and participants will be able to respond. Note that hosts and co-hosts cannot respond to the poll themselves.

Once the poll is launched, the host can end the poll and then share the results on-screen with the participants by following the prompts in the poll window.

The poll results will be saved in the poll section of the meeting’s detail page after the meeting is over, and a detailed report of poll responses can be downloaded as a report. More details on accessing reports can be found later in this guide.
DISPLAY NAME

Each participant can adjust their own display name. Especially for large-scale learning events (webinars, workshops, etc.), we suggest that participants change their display name to include their name, pronouns, and organization.

You can find the “Rename” setting in the top right corner of your personal box with your face or name on it. You may also right-click your personal video box, and an option to “rename” will appear in the dropdown.

VIEWING OPTIONS

Generally, there are two main viewing options, Gallery and Speaker View:

- **Gallery View** allows for you to view video boxes for all participants in one screen
- **Speaker View** will prominently display the video of who is speaking

When there is a screen being shared, there is an additional viewing option called “Side-by-Side” Mode. If you hover around the top of your screen while another person is sharing, you should see a green bar pop up that says who is sharing that screen. Next to that is a drop down menu called “View Options,” and in that dropdown, there is an option for “Side-by-Side” Mode. This allows you to view the shared screen and participant’s video in one window.

Once you have that option activated, you can drag the divider between the shared screen and participant videos left and right to see more or less participants and adjust the size of the shared screen.

Pro Tip

We typically suggest using Gallery Mode.

NON-VERBAL FEEDBACK

You can use Zoom reactions in your meetings to gauge your audience with minimal audio-visual distraction.

You can find “Reactions” in your main toolbar, and these emoji symbols appear in the top left of your personal video square when you click them.

There are more non-verbal cues if you pull up the “participant window” - under all of the names, you’ll see different buttons.

Clicking these buttons will appear in your video box and next to your name in the participants list while they are activated. They will remain until the participant retracts it. For example, if a person uses the “raise hand” button, they will have their hand raised until they actively put it down.

Please Note

Using these non-verbal reactions will immediately jump a participants name to the top of the participant list to signal to hosts that they warrant some kind of attention.
When you choose to automatically set up breakout rooms, Zoom will divide participants at random. However, once you see the list of participants divided amongst the rooms, you are still able to move participants around.

To manually set up breakout rooms you will see a list of the names of all the meeting participants, and if you click on the participants names, you can add them to the room of your choice. Thus, you are adding each participants to the rooms, one by one.

Please Note
The breakout room function has to be enabled on the back-end account settings.

Options
Once you have clicked “Create Room,” there is an “Options” drop down menu on the bottom left that allows you set parameters such as time limits, the ability to move back and forth between the main room and their breakout, and a countdown to return to the main room once closing the breakout room.

Pro Tip
Only the host can set up breakout rooms. Co-hosts do not have this ability.
OPTIMIZING BREAKOUT ROOMS FOR PARTICIPANTS

Screensharing

The screenshare options are the same as in the main room.

Chat Box

In the chat box in a Breakout Room, you are only able to chat with the other participants in your breakout room, but you have all the same functions as the main room’s chat box.

Recording

If a participant in the Breakout Room has the ability to Record, then Breakout Room sessions can be recorded. There is a back end setting where you can make it so participants (as well as hosts and co-host, can record). Breakout rooms do not get recorded by default.

Returning to Main Session

Return to the main room by clicking “Leave Breakout Room” in the bottom right corner. You will see a pop-up that will ask you if want to “Leave Meeting” or “Return to Main Session.” DO NOT CLICK “LEAVE MEETING,” or you will be kicked out of the Zoom call completely. Instead, click “Return to Main Session.”

Ask for Help

To ask the Zoom meeting Host for help, find the “Ask for Help” button and click it. You will see a pop-up come up and you then will click “Invite Host” in the pop-up. At which point they will be notified to come into your Breakout Room. Currently, Zoom does not allow you to message the host from the Breakout Room.

Re-entering Break-Out

Once you are back in the main room, if you want to jump back into your breakout room, you must click “Breakout Room” in the toolbar to re-enter using the pop-up prompts, as seen below.
Recording is a function you can turn on, and it’s really useful if you want to circulate a video of the meeting to participants, after the meeting is over. Recordings can be started manually any time during a meeting or automatically if the host selects the option when creating the meeting.

The recording can be both stopped or paused during the meeting. On the back end you can allow for participants to be able to record or not.

**SHARING RECORDINGS**

There are two ways to record a Zoom meeting, recording to a local device or the cloud. See Zoom’s break down of the differences. To find the recording, follow these steps!

**RECORDING CONSENT**

While New York state is a one party recording state, it’s a best practice to make sure you have clear language about consent to be recorded. This language can be included in the registration information. Here is Youth INC’s disclaimer language as an example.

**Youth INC Recording Disclaimer:** Please note that the host allows audio and other information sent during the webinar to be recorded. The recording may be shared or reposted to various online locations at a later date, and may be discoverable in a legal proceeding. By joining these webinar sessions, you are giving your consent to be recorded. If you have any questions or concerns, please contact Name, email.
When you sign in to the Zoom web portal, you can navigate to Account Management, then Reports.

In the Usage Reports tab, click Meeting. In the drop-down menu below Report Type, select the search option. Search by time range: Select a time range then click Search. Click Generate in the last column (Zoom will redirect you to the Report Queues tab where you can download the report as a CSV file).

Registration list, polling results, and attendance lists can be found under reports, if your Zoom meeting has registration or polling enabled.

Attendance shows up in “Usage” reports where you will receive an Excel-based list where you can view how long participants stayed in the Zoom meeting.

Registration lists and poll results can be found under “Meeting” Reports. You can generate a registration list before a meeting or after a meeting.
Youth INC has taken advantage of Google Sheets to provide more interactive ways for participants to engage with content during an online engagement. There are limitless ways to use Google Sheets, though the template above shows some of the ways we have used the tool.

You can share the link to an editable document, and participants can manipulate and interact with the sheet in real-time. Hosts can share their screen and narrate instructions as participants have the Google document open on their own devices in a separate browser window.

This is most effective on standard computers and laptops as opposed to mobile devices as it is necessary for participants to easily switch between the Zoom and browser windows.

Please note that this may take extra levels of tech support and patience as people navigate how to use the platform.

The Google Sheet can be used in the same way as you would a shared Whiteboard screen with the added benefit of being able to share and continue to work on the document afterwards.

Below are examples of some of our favorite activities to do on Google Sheets.
Zoom has stellar articles to help navigate the use of their system. These step-by-step instructions and video tutorials can be found in their Support Center.

**Zoom Support Center**

Zoom also hosts their own live training sessions which can be incredibly useful for new and advanced users. These training sessions are also available pre-recorded. To learn more and to register, please refer to the link below.

**Zoom Live Training**

A very useful resource for Youth INC has been Training for Change, an organization that offers free and affordable trainings on online facilitation. Learn more information about their upcoming offerings below.

**Training for Change Website**

There are many other comprehensive Zoom training guides and websites and other resources on Online Facilitation and Curriculum Design. Feel free to refer to any of the following for additional support:

- **NovoEd: Foundations of Learning Experience Design**
- **Center For Innovation in Teaching and Research: Engaging your Learner with Video in the Classroom - Zoom Best Practices and Tips**

For any more questions, feel free to reach out to the Youth INC Programs Team! partnernetwork@youthinc-usa.org