ZOOM ABC   A guide for UMKC active and retired emeritus faculty how to **manage** a ZOOM meeting yourself.

1. Upgrade your 'Zoom Client for Meetings' from https://zoom.us/download Option: add the 'Zoom Plugin for Outlook' to schedule your meeting from within the Outlook calendar.

2. From the same Zoom page, click 'SIGN IN' and select 'Sign In with SSO'. Our company domain is 'umsystem.zoom.us'. Login with your SSO name and password into the UM System. This Zoom account, paid by UM, is not time-limited and allows up to 300 participants. If you 'SIGN IN' for a free account that allows sessions of about 40 min with a limited number of participants, use a non-UMKC email account and set your password. Some of the features below may not be available.

3. In the 'Profile' menu, review your assigned information and accept all defaults.
   In the 'Settings' menu: in the 'Meeting' tab accept all 'Security' defaults; in 'Schedule Meeting' I accepted all defaults except that I set 'host video' and 'participants video' to ON and set 'allow all participants to join before host' to OFF.; in 'Meeting (Basic)' accept all defaults except set 'auto saving chats' to ON, optionally set 'file transfer' and 'polling' to ON, and set 'screen sharing' to ON with 'all can share' but 'host can take over'; in 'Meeting (Advanced)' accept all defaults except set 'far end camera control' to OFF and 'request permission to unmute' to ON; Accept all defaults in 'Email notification' and 'Other'.

4. From this Zoom page you can schedule or start Zoom meetings but the blue 'Start Zoom' icon is provided when you install the Zoom software offers more direct access. I recommend to use the 'Attend live training', 'Video tutorials', to browse the 'Knowledge base' to broaden your understanding, or to go to the Zoom home page for various other tutorials.

5. To start your own meeting now, or to schedule one for the future (PC instructions; Mac is similar) click the blue 'Start Zoom' icon. 'Zoom cloud meetings' requires you to 'Sign In' with your SSO for your UM account (or for your free Zoom instance by email and password). Choose to open the 'zoommtg' link for 'https://umsyatem.zoom.us'. If you did not explicitly log out of a prior Zoom session, you'll go straight to the central control panel. Go to the top tab 'Home'. At top right your own icon allows you to check for updates, switch accounts, logout, and more. Immediately below it a 'Settings' icon gives you access to some more settings for your own meeting preferences, and to set choices (once) for the meetings that you will manage.

6. Accept most settings. Make sure in 'General': 'always show meeting controls' and 'integrate Zoom with Outlook'; in 'Video' select your default webcam, 'always display participant names…', 'See myself as active speaker…'; in 'Audio' select Speakers and Microphone, and test them, with automatic mic adjustment ON, and set 'Press and hold SPACE key…'; in 'Share screen' set 'Side-by-side mode' and 'Silence system notifications…' to ON, and select 'Show all sharing options'; in 'Background and Filters' add (+) your preferred Virtual Background images; in 'Recording' set your local recording folder, 'Optimize…' will facilitate editing of a Zoom session, 'Add a timestamp…' and 'Record video…'.

7. In the central control panel, you can start your own personal 'New meeting', 'Join' any meeting when you know a meeting ID, but most importantly 'Schedule' a meeting for any future time. Set topic, day, time and duration. Let a Meeting ID be generated automatically, use a passcode and/or waiting room, preset video for hosts and participants as you desire, check Outlook or another calendar, and under 'Advanced Options' make an appropriate selection. Save your choices. The scheduled meeting is shown and in the 'Meetings' panel together with any other meetings that you have scheduled. If shown in Outlook you can add participant emails and send your invitations. In the Meetings panel you can start any meeting selected,

typically ahead of the scheduled time so that you have the Zoom session going before your participants arrive. If you need the login information of any meeting, click 'Show Meeting Invitation'. Under the 'Recorded' tab you can find all your recordings.

8. So, to start one of your meetings, select the meeting and click 'Start'. I typically don't use 'full screen' so that my desktop and controls can be reached. By default, the Zoom meeting controls are at the bottom. If invisible, move your mouse there. Controls from left-to-right, with hidden ones under a 3-dot menu. Click 'Mute' to mute and unmute; the ^ menu allows you to select your mic, your speakers, and to test and adjust audio. Click 'Video' to stop and start your video; the ^ menu allows selection among video sources, select your background image, and adjust video at under #6; In 'Security' you can adjust participant options, toggle the waiting room and lock the meeting. Click 'participants' to open the list of participants, with information about their video and audio status. Hover your mouse over a name and you can (un)mute that participant, and the 'more>' button gives you options like make a participant 'Co-Host' or to 'spotlight' a particular speaker within a gallery to fix him on the screen. Note that options vary with different conditions. Participants in the waiting room are shown at the top: select each name and click the 'Admit' button'. At the bottom of the participants list are options for feedback, to invite a speaker, to (un)mute all and more control options. For 'Polls', an option to ask questions or feedback, search YouTube for "Zoom polls" tutorials. Click 'Chat' to see comments posted by your participants that you may need to answer or respond to. Click 'Record' to toggle recording of your meeting. Note that the top right of your screen shows various 'View' options and arrangements, and a toggle for Full Screen.

9. '**Share screen**' is a frequently used option for presenting information to all, e.g. a PowerPoint. The '^' mernu gives options for others, even multiple participants, to share their screen. Sharing starts a selection panel 'Basic' that allows sharing of any of your screens, a whiteboard, and any application window that you have open, like a PowerPoint, Word file, etc. Do not forget to click 'Share computer sound' if anything that you hear or have as sound in a presentation should also be heard by your meeting participants. Click the 'Share' button' to start sharing. The 'Advanced' tab offers options like sharing a portion of a screen (in an adjustable green box; Note: Zoom controls do not show), sharing just your music, the input from another video camera, or to present a PowerPoint presentation as the virtual background behind you as speaker (a nice teaching option). When you share your Zoom controls may jump to the top of your screen. 'You are screen sharing' is shown, with an option to move this bar, or to 'stop Share'. Search YouTube for 'zoom screen sharing' tutorials.

10. **Breakout rooms** allow you to break up a large meeting where conversations are often difficult, into smaller groups of 6-8 participants where conversations and discussions are easy. One member of each room can then report to the whole group, once reassembled. The simplest way to use this: Click 'Breakout Rooms', select the number of rooms desired, 'Assign automatically' and click 'Create'. Click 'Options' and select at least 'Automatically move all assigned participants into breakout rooms' and set a countdown time (e.g. 30 sec) after a set time has expired or when you decide to close the rooms. Click 'Open All Rooms'. Participants are randomly distributed over the rooms, but you can change this. After you 'Close All Rooms', the main session is reassembled. You can click 'Breakout Rooms' again for a second discussion. If you click 'Open All Rooms' the same participant distribution still exists. If you want to randomize, click 'Recreate' before you open the rooms. For more complex options for different situations, watch some YouTube tutorials: search 'zoom breakout room tutorial'.

Write-up by Jakob H. Waterborg, December 2020