

Zoom Technical Tips

1. **Tip:** For security and privacy, cover the laptop / computer camera when not in use.
2. **Tip:** Consider having a technical host in addition to the EfM Mentor (meeting facilitator). The tech host helps with admitting the waiting room, Mute/Unmute, and usage questions.
3. **Tip:** Each EfM seminar will need access to a paid Zoom subscription (the free Zoom Basic plan has a 40-minute time limit on meetings with 3 or more participants). The mentor honorarium could pay for this. A month-to-month subscription (rather than annual) lets you avoid paying for summer months. More: <https://zoom.us/pricing>
4. **Tip:** For better performance / network bandwidth: turn off video applications like WebEx or Skype when using Zoom. Turn off Zoom video and only use audio if bandwidth is bad.
5. **Tip:** Zoom works better on a laptop / computer rather than on a tablet or smart phone.
6. **Tip:** If you are using a corporate Zoom account, some of the settings may be different.
7. To start a seminar, go to <https://zoom.us> Then, select **Sign In** (top right)
Tip: You are called the *host*, anyone who joins is called a *participant*.
8. On the Zoom webpage:
 - a. Left Navigation bar:
 - i. *Profile* – add your photo here (used for all Zoom calls hereafter)
 - ii. *Meetings* – see below
 - iii. *Settings* –
 1. Security –
 - a. **On** - Waiting Room
 - b. **On** – Embed passcode in invite link
 2. In Meeting (Basic)
 - a. **On** – Chat
 - b. **On** – Private Chat
 - c. **On** – File Transfer
 - d. **On** – Screen Sharing – **On** - Host Only
Tip: If you let participants screen share, they can take over.
 3. In Meeting (Advanced) – where you can enable Breakout rooms if you want them – mostly helpful in a larger group.
9. On Meetings page: Click *Schedule a Meeting*
 - a. **Time Zone:**
 - i. **On** – Recurring Meeting (group can use the same Zoom number weekly)
 - ii. **Weekly** - Recurrence
 - b. **Security:**
 - i. Enter a simple passcode – like *EfMseminar*
 - ii. Enable (click box) *Waiting Room* to be able to control who can join the meeting. The host has to admit from the waiting room individually.
Tip: Using the waiting room means participants can't join before the host.
 - c. **Video:**
 - i. **Off** - Host
 - ii. **Off** - Participant (allows them to choose when to be seen)
 - d. **Meeting Options:**
 - i. **On** - Mute participants upon entry (allows them to choose when to be heard)
 - ii. **Off** - Automatically record meeting on the local computer (recording may help those who are absent but inhibit those who are present)

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- e. **Tip:** Write down Meeting ID and Invite Link address (URL), just in case.
- f. Copy Meeting Invitation, paste into an email, send to participants
- g. When you are ready, click **Start this Meeting**
10. Participants need to open their email and click on the **Join Zoom Meeting** link
11. To join, participants must pick their computer's audio or another audio device
12. When a participant joins, the host clicks Admit (from Waiting Room) – on top of screen. Until admitted, participants will see “Please wait, the meeting host will let you in soon.” Participants are added one at a time.
13. Host joins with Audio **Off** and Video **Off**



14. At the top of the Zoom screen:
 - a. Select the multi-square grid (top right) to show the entire group (Gallery View), or enlarge on the current speaker (Speaker View)
 - b. Select arrows (top right) for Full Screen
Tip: To Screen Share a file, have it open on desktop before trying to share. Participants will see what is in the green box even if you make the box smaller.



15. On the bottom of the Zoom screen:
 - a. Left side: **Mute/Unmute** and **Start/Stop Video** control Audio and Video
 - b. Middle:
 - i. *Participants* will display the number of participants on the call
 - ii. Click on *Participants* to get a popup list of who is on the call
 - iii. On *Participants* popup: select your name to *Mute* or pull down on *More* to *Rename* yourself or *Edit Profile Picture* (shows when video is off)
Tip: Participants should enter their regular full name for clarity.
 - iv. *Chat* lets participants send either a group or an individual message
 - v. *Reactions* allows participants to post emojis in the corner of their image
 - vi. The *Chat* popup contents can be recorded on any participant's home device if they want a copy of the messages (click the 3 dots)
 - c. Right side: Participants leave the call by clicking the red **Leave**.
16. The host ends the call by clicking the red **End** and then selecting either **End Meeting for All** or **Leave Meeting**. If the host leaves without picking a new host, the meeting ends.
17. Cleanup after the meeting: participants can delete any Zoom windows and tabs that remain after the call, this deletion will not cause problems on later Zoom calls.
18. **Tip:** You or those in your seminar may want to use Zoom electronic backgrounds. Backgrounds are a solution to having a messy scene behind the speaker but if the speaker moves, the background can eat their head or parts of their body, which is distracting.
19. **About Zoom:** Zoom is easy to use and designed to be relatively simple for either a participant or a host. However, as with everything, there are downsides. “Zoombombing” is when an ill-intentioned outsider disrupts an online meeting, often by showing violent or pornographic images. Simple security measures (covering your camera port, using a password and waiting room) can avoid bad actors. Zoom as a company has long been criticized for privacy and security concerns. It is a good tool for EfM but probably not to discuss personal finances or health, state or corporate secrets. Zoom continues to evolve its products in response to these concerns.