

# Guide to using Zoom as a video conference **Host**

## 1. Introduction

This guide is to help U3A Interest Groups use Zoom video conferencing for discussions without physical meetings.

It is being sent to Group Convenors to enable them or another member of their group to become a Zoom Host and set up and run Zoom video conference meetings for their group.

This Guidance is for Zoom Hosts only and should not be sent to group members. The separate Guide to Zoom for meeting Participants should be sent to your group's members before you invite them to their first Zoom meeting.

## 2. About Zoom

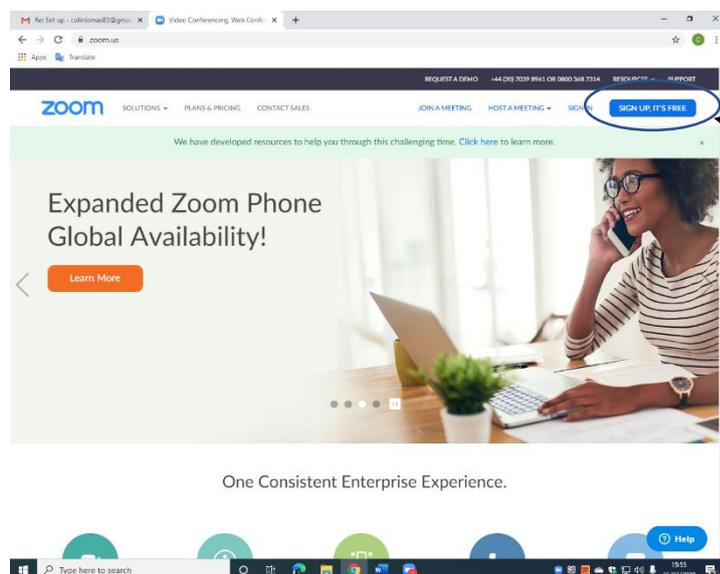
Zoom is a computer video conferencing app that enables people who are in different locations to 'meet' together face to face. The meetings are set up and managed by the **Host**, who will usually be the Group Convenor but can be another member of the group.

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. Installing and Setting Up Zoom

Before you can start using Zoom, you need to download the software and set up an account. To do this:

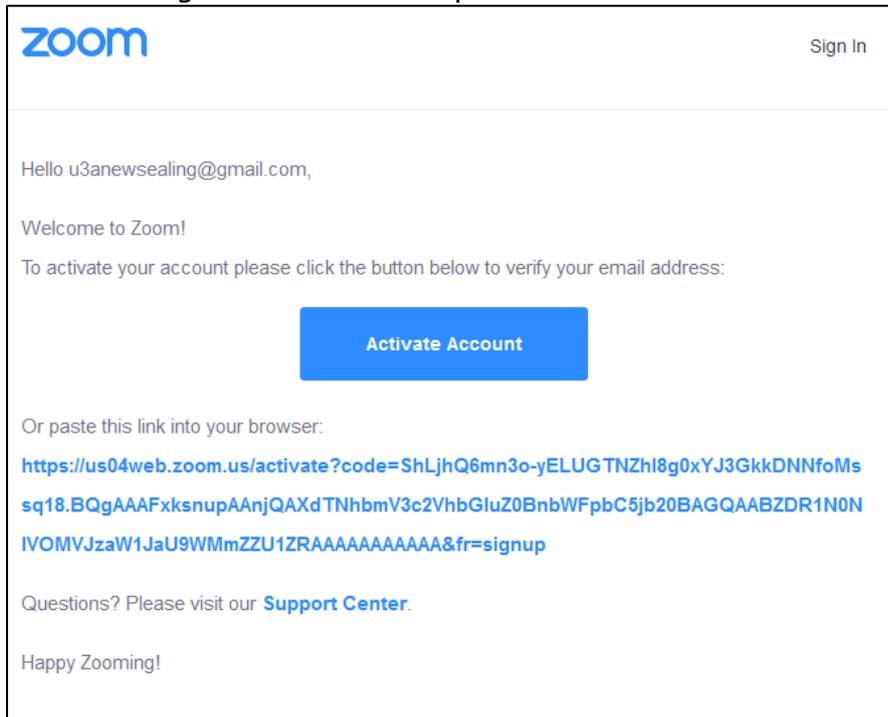
- In your Internet browser (eg. Chrome, Edge, Firefox, Safari), go to <https://zoom.us/>



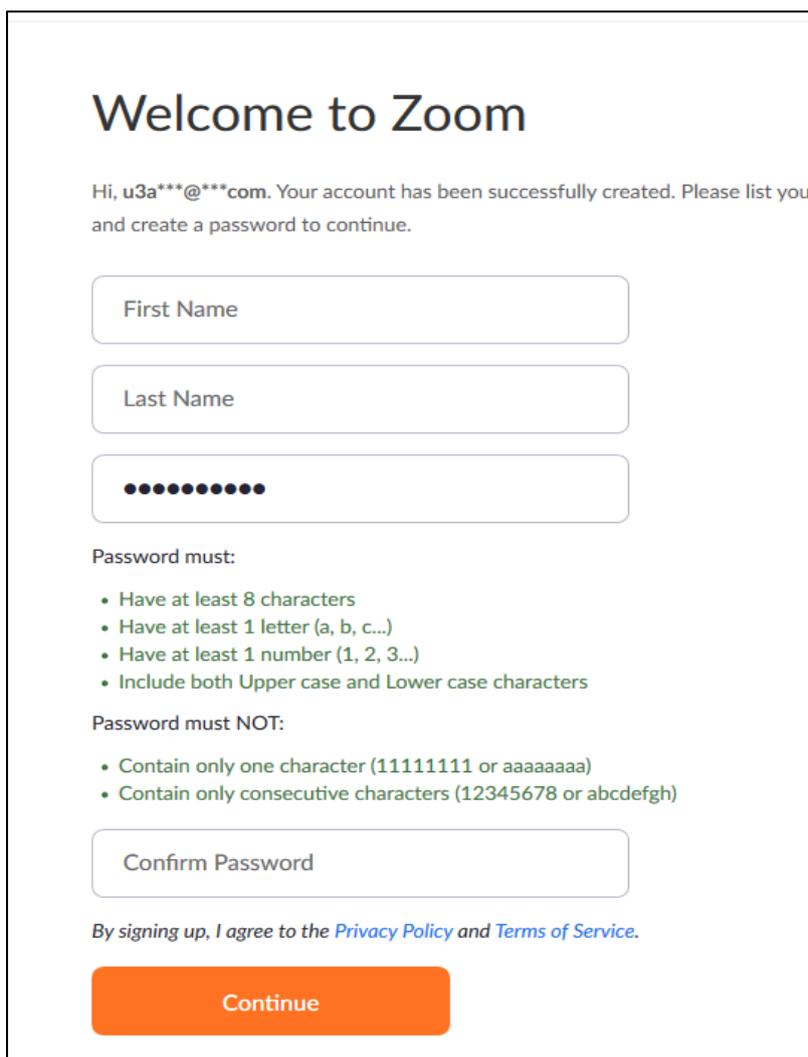
- Click on **Sign Up for Free** – you are ok to use the 'Basic' package, which is free

- Enter your **Date of Birth** on the next screen
- Enter your **Email address** on the next screen, then click '**Sign Up**'

- You will get an email in response.



- Click on '**Activate Account**' in that email to confirm the 'Sign Up' process
- Now in your Internet browser, you will see the following screen displayed



- Enter your **First** and **Last Names** and create a **Password** for your Zoom account and make a note of this – you will need this each time you sign in to use Zoom.

- After this you will see a page asking you to **Invite your Colleagues** to a Zoom meeting. For now, **SKIP THIS STEP.**

- You will then see a page inviting you to **Start a Test Meeting.** You may wish to try this to see how Zoom works but, if not, Skip this Step and **GO TO YOUR ACCOUNT.**

- The process above will take a few minutes to complete but you will then come to your **Profile** page, including your **Personal Meeting Id**.

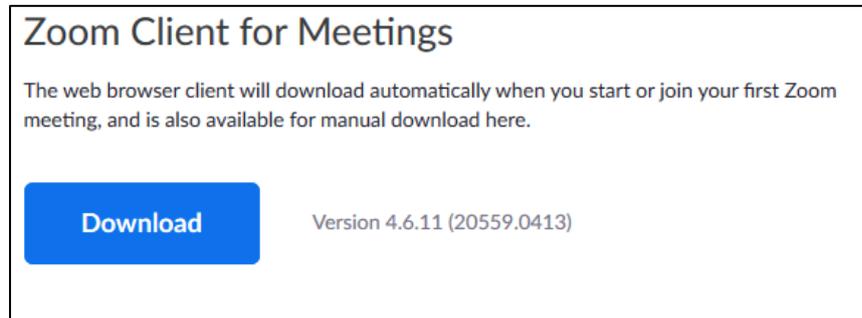
The screenshot shows the Zoom Profile page. The 'Personal Meeting ID' is highlighted with a blue circle and an arrow pointing to it from the text above. The ID is '977-579-7164'. Below it, there is a URL: 'https://us04web.zoom.us/j/\*\*\*\*\*164?pwd=\*\*\*\*\*' and a 'Show' link. A note says 'Use this ID for instant meetings'. Other settings include Sign-In Email (u3a\*\*\*@gmail.com), User Type (Basic), Capacity (Meeting, 100), Language (English), Date and Time (Time Zone: (GMT+1:00) London, Date Format: mm/dd/yyyy, Time Format: Use 24-hour time), Calendar and Contact Integration, Sign-In Password, Host Key, and Signed-In Device (Sign Me Out From All Devices).

Before you set up your first meeting, we suggest you change a few settings on your account.

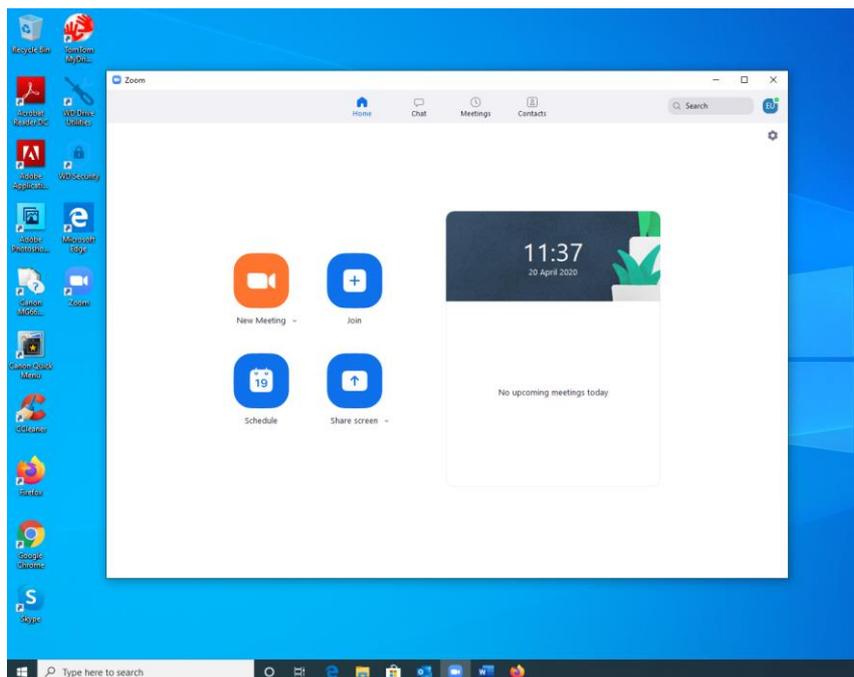
- On your **Profile** page, click on the **Settings** option (in the menu list on the left-hand side)
- Under '**Schedule Meeting**',
  - switch **ON Host** video and **Participants** video
  - make sure both **Use Personal Meeting Id** for **Scheduled** and **Instant** meetings are switched **OFF** (this means every meeting you set up will have a unique Meeting Id, rather than using your general one – this makes your meetings more secure)
  - all the **Password** related settings should be switched **ON** – that should be the default
  - **Mute Participants on Entry** should be switched **OFF** – that should be the default
- All other settings can be left as they are.

**You are now ready to set up your first meeting** however, before doing so, you should **Download** the **Zoom Client** app – this is what you will need to take part in a Zoom meeting, and it is the easiest way to organise any meetings you are running. *You can set up meetings through the Zoom website, but we suggest you use the Zoom Client instead.*

- On your **Zoom Profile** screen, click on **Resources** (top right) and select '**Download Zoom Client**'.
- On the next screen click on **Download** for the '**Zoom Client for Meetings**'.



- You will then get a dialogue to **Save** the **ZoomInstaller.exe** file, which you then need to '**run**' to install the **Zoom Client** app.
- When the installation is complete, and you have logged in to Zoom (using the email address and password you set up previously), the Zoom Client app will then display the following screen:



## 4. Setting Up a Zoom Meeting

Although you can start a meeting instantly (using the 'New Meeting' icon), it is best to schedule your meetings beforehand, so click on the **Schedule** icon, then

- Enter the **Name** of the meeting under **Topic** – the default is '<your name> Zoom Meeting' [*This might be something like 'Book Group meeting'*]
- Enter the **Date** and **Start 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 – you can ignore it*] \*
- All the other settings should be set correctly by your Default settings and these will be:

- Meeting Id – Generate Automatically
- Require meeting password should be set
- Video should be 'On' for both Host and Participants
- Audio should be set to Telephone and Computer Audio and Dial in from the UK
- Scroll to the bottom and press **Schedule** to book this meeting.
- A new screen will appear with details of the meeting, including the **Join Zoom Meeting URL** link and the **Meeting ID** and **Password** which are both numbers.
- There is also the option to '**Copy to Clipboard**' on this screen, which you should do, so that you can Paste the details into an email message. [NB. depending on the email software you are using (eg. Outlook), Zoom may automatically generate an email message for you with all the meeting details included]
- Assuming the email message has not been automatically generated, you now need to go to your email system to send the details of the meeting to all the participants.
- In your email message, **Paste** the details of the Meeting that were copied to the Clipboard, above.
- Send that email to all the people you want to be Participants.

*\*Although free Zoom meetings are limited to 40 minutes, you can set the duration of the meeting for longer than 40 minutes. Zoom will sometimes 'upgrade' the meeting whilst it's in progress to bypass this 40-minute limit. If not, near or at the end of your 40 minute session, you can close the meeting then restart it a few minutes later and everybody can return to the meeting using either the URL or the Meeting ID in the invitation email you have sent them.*

*You should 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 ends.*

## 4. Starting up a Zoom Meeting

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

- Open your **Zoom Client** app and **Login** to your Zoom account.
- You should then see your list of scheduled meetings for today listed. Click on the **Start** button for the meeting you want to start.
- Zoom will then start the meeting and you will initially just see yourself on the screen. As other people join the meeting, they will appear in your Zoom meeting window.
- Note that if you have a '**Waiting Room**' set up for this meeting, you have to Admit people to the meeting – see below for how to do this.

### Tips for running the meeting

- There are 2 'views' available in a Zoom meeting – these are '**Gallery view**' and '**Speaker view**'. To change your 'view', move your cursor towards the top of your Zoom meeting window and you will see the other 'view' shown – click on this to change to that 'view'.  
For a meeting, '**Gallery view**' is probably the best one to use as you then see all the participants displayed in your Zoom meeting window. With '**Speaker view**', the person speaking is displayed as a large image with other participants as small images – this is better for a lecture situation.

- At the start of the meeting, you may want to view the participants as they enter the meeting to confirm they are able to access the meeting correctly. To do this, move your cursor towards the bottom of your Zoom meeting window and you will see '**Manage Participants**' shown. Click on this and a list of the participants will appear to the right of your video window, along with their video and audio status (ie. whether they are both on and working).  
In addition, if you have a '**Waiting Room**' set up for this meeting, you have to **Admit** people to the meeting under Manage Participants – this can be a useful additional security measure for your meetings if you are concerned about unauthorised participants.
- For meeting participants, there are two important icons on the left of the Zoom meeting window – these are the **Microphone** and the **Camera**. On a PC or a tablet, these are found by moving your cursor towards the bottom of the screen; on an iPad move your cursor towards the top of the screen. If there is a **line through** either of these, they are switched **OFF**. Click on either one to turn them ON.
- Under the Participants list, at the bottom of your panel there is a button you can click on to **Mute** everybody else's microphone. If you do this, you can allow participants to unmute their own microphones or you can control this. 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. It is also best for a lecture situation where one person is speaking whilst other participants are listening.
- Depending on the size of the group and how it operates you may decide to ask participants to use the **Hand Up** facility under the Participants list, to indicate to you that they want to speak. Participants have a button at the bottom of their panel which they click to put their **Hand Up**. 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.
- There is also a **Chat** icon available in the Zoom meeting window - this allows participants to send written messages to each other during the meeting. It is unlikely to be used significantly by our groups but it is useful for you as a meeting Host 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.

## 5. Ending the Meeting

At the right-hand side of the icons at the bottom of the screen, in **red**, is the link to **End the Meeting**. As the Host, when you click on this 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**.

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