

Moderator and Presenter Instructions for Zoom Meetings and Webinars



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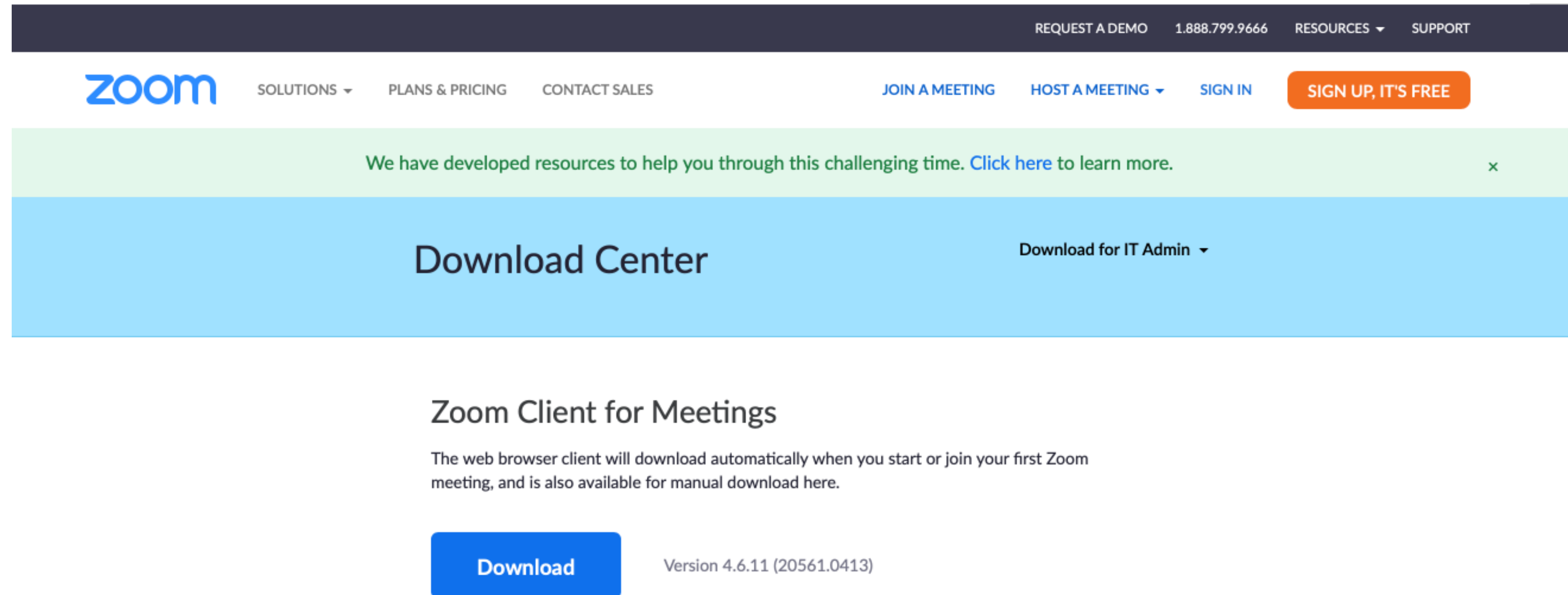
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What You Need to Get Started

- A high-speed internet connection to your computer (a hard line is ideal).
- An external webcam or built-in camera on your computer.
- The built-in microphone on your computer will work or for better sound an external USB microphone or a headset can be used.
- You do not need to have a Zoom account to join a Zoom meeting or webinar but for the best user experience (moderators must do this to utilize co-hosting controls) we do recommend you at least download and install the Zoom desktop application prior to your meeting.
- Although Zoom can be downloaded on Android and iOS devices we strongly encourage you to use a laptop or desktop over a smartphone or tablet. This will give you a better viewing experience with more functionality.

Downloading and Installing Zoom

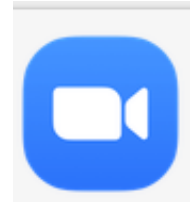
- You can download Zoom by clicking here: <https://zoom.us/download>



- In the Download Center click on the *Download* button under Zoom Client for Meetings. Then locate and run the Zoom installer (default location is the downloads folder).

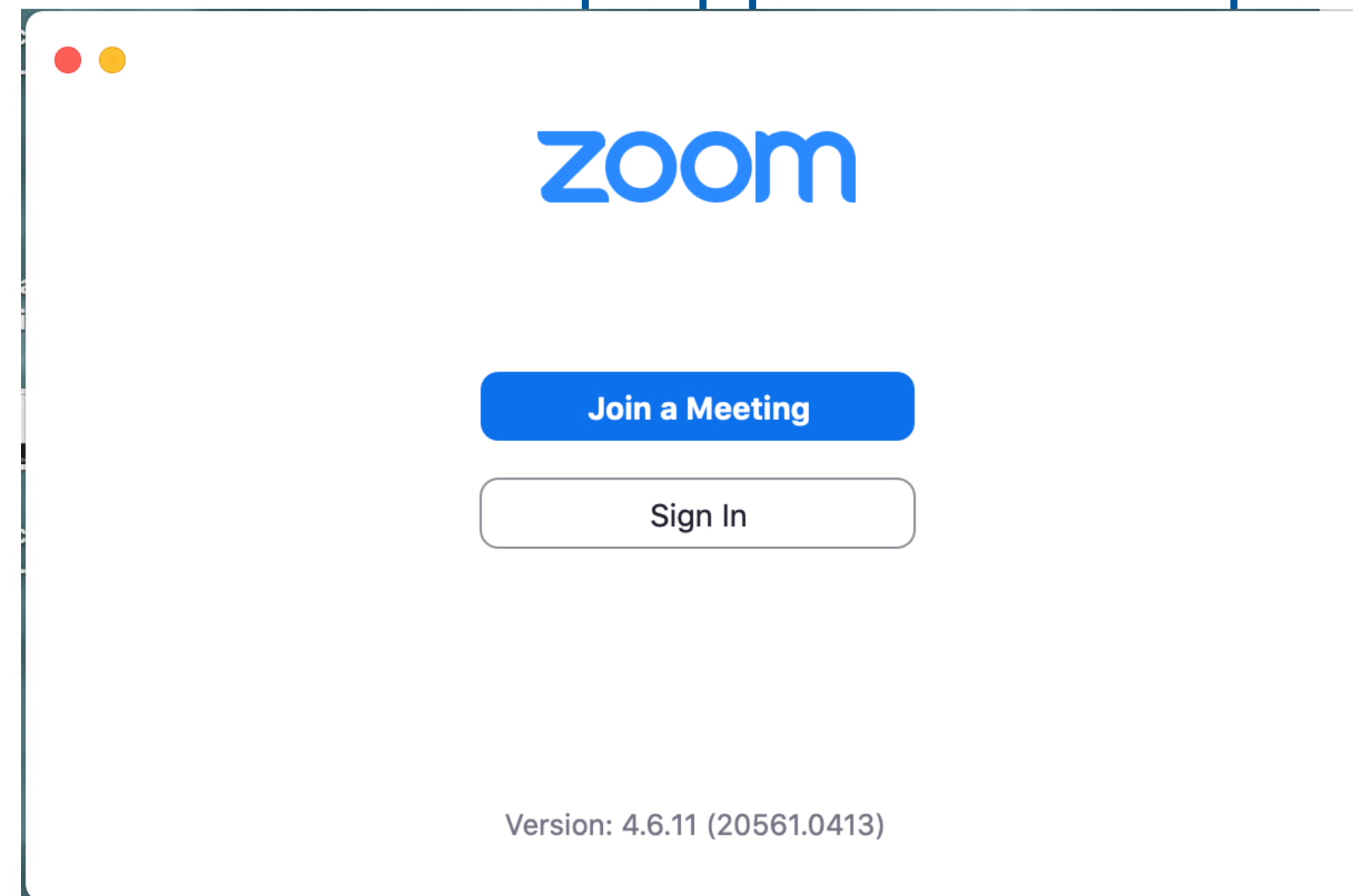
Zoom Desktop Application

- The Zoom Desktop icon will look like this:



and will be found in the Docking Station on your Mac or on the Desktop of your PC.

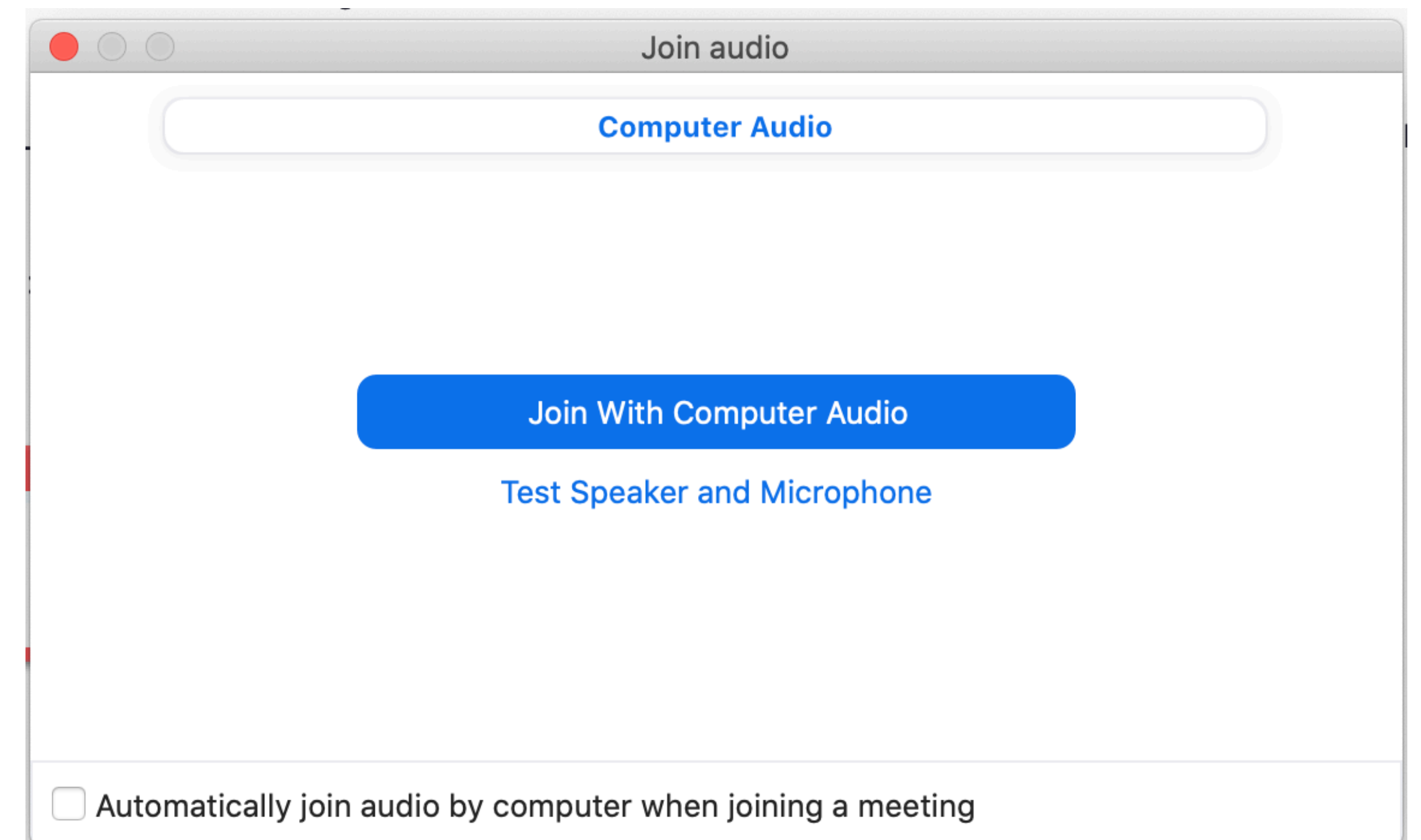
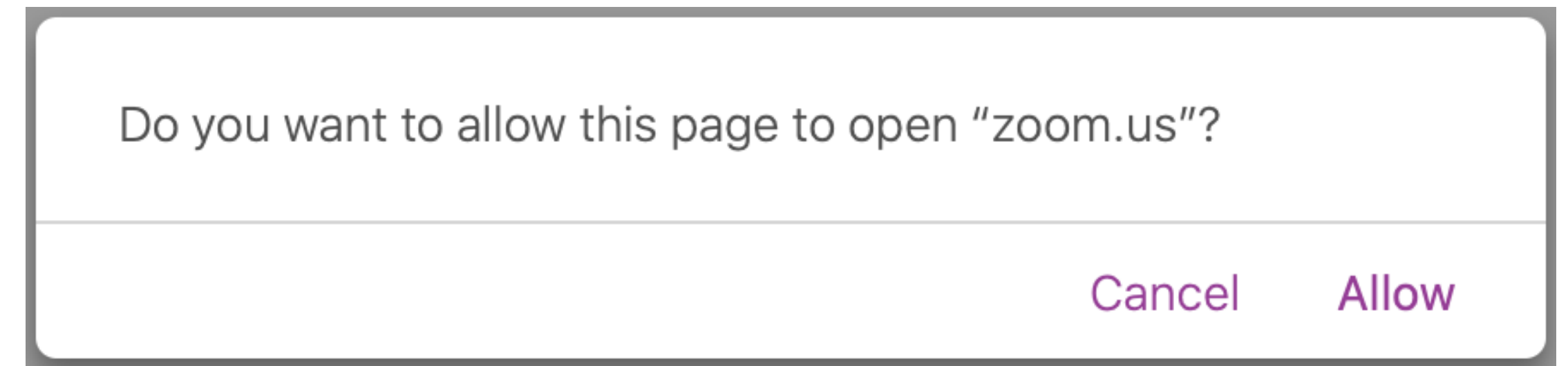
- Once you click on the icon the desktop application will prompt you with the following:



- You can join a meeting from here by entering the Meeting ID and password. If you create a free or a paid account with Zoom you can sign in here.

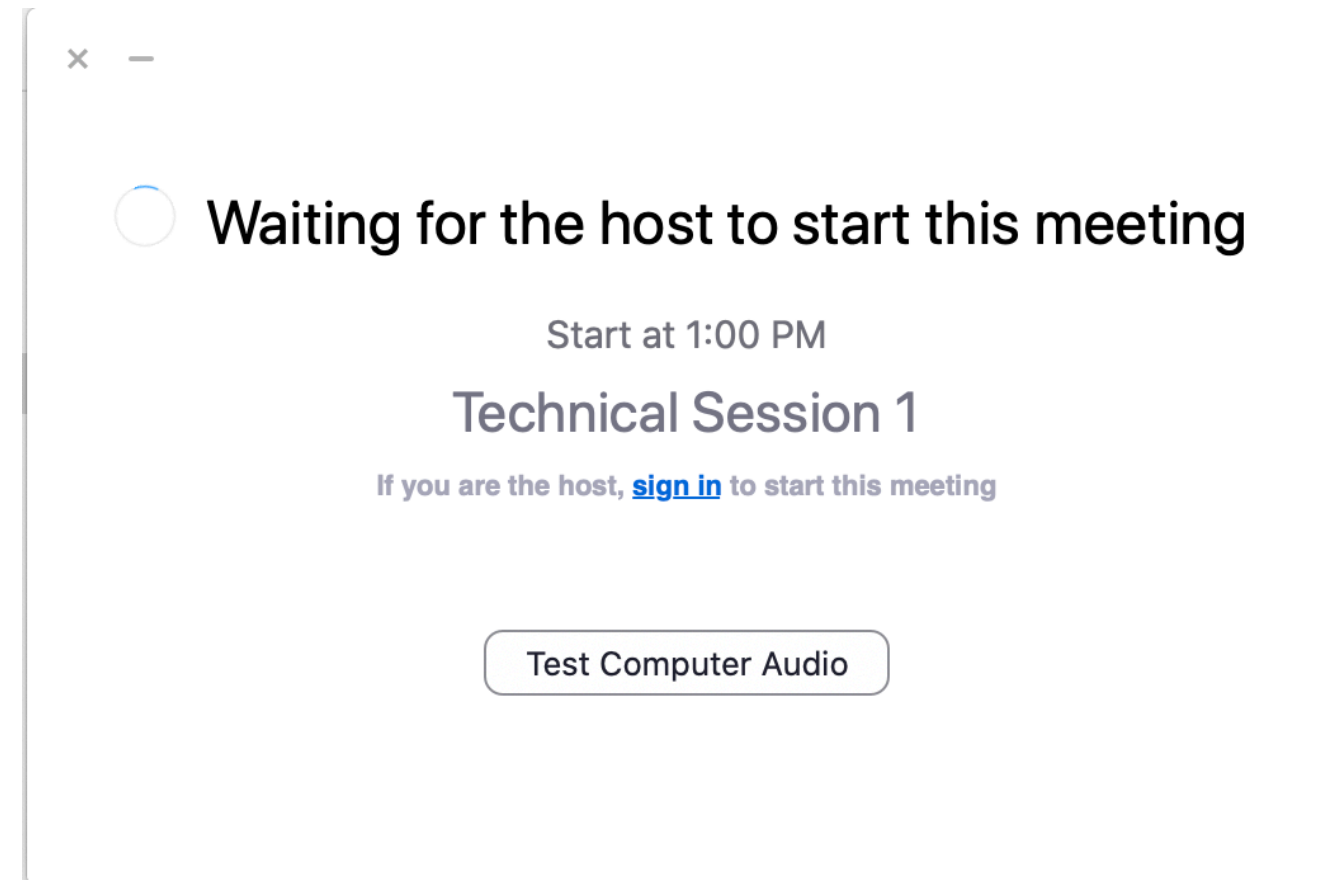
Joining The Meeting

- Find your session in the meeting app. Click on the link to join the live conference. Alternatively, you may have also been emailed a Zoom invite with a link and, or a Meeting ID and password. You can click on the link or enter the Meeting ID and password in the Desktop application or in the Zoom website in the top right corner where it says, Join a Meeting. You will then be prompted with the following window, click *Allow*.
- A window will appear with the following choices. Choose *Test Speaker and Microphone* and follow the prompts to test your audio.

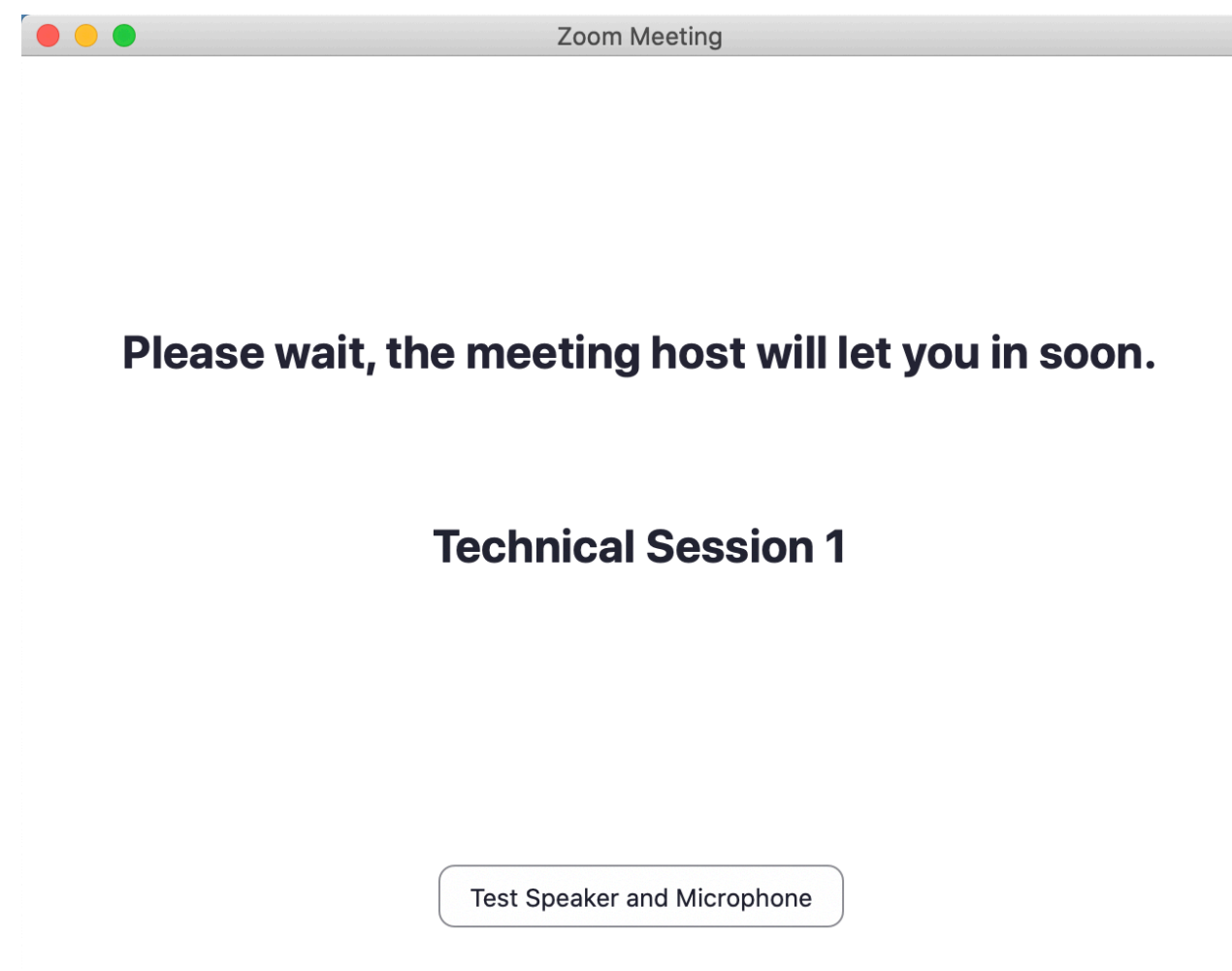


Arriving to the Meeting

If you arrive before the host you will see this message:



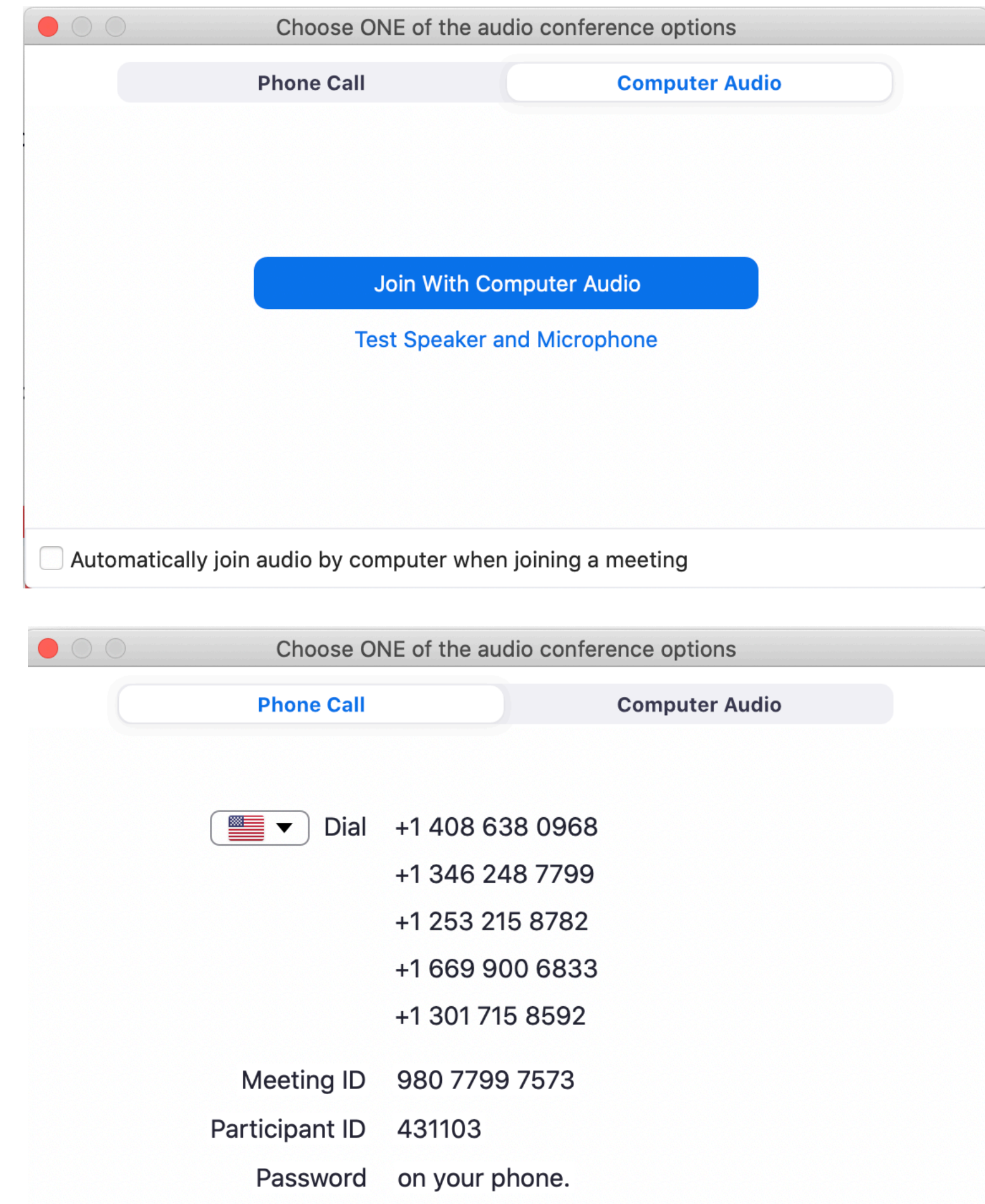
If you arrive to the meeting and you see the message below then you are in the virtual waiting room and your host will let you in shortly.



Please take this time to test your audio. Click on the “Test....” button and follow the prompts to ensure your speaker and microphone are working correctly.

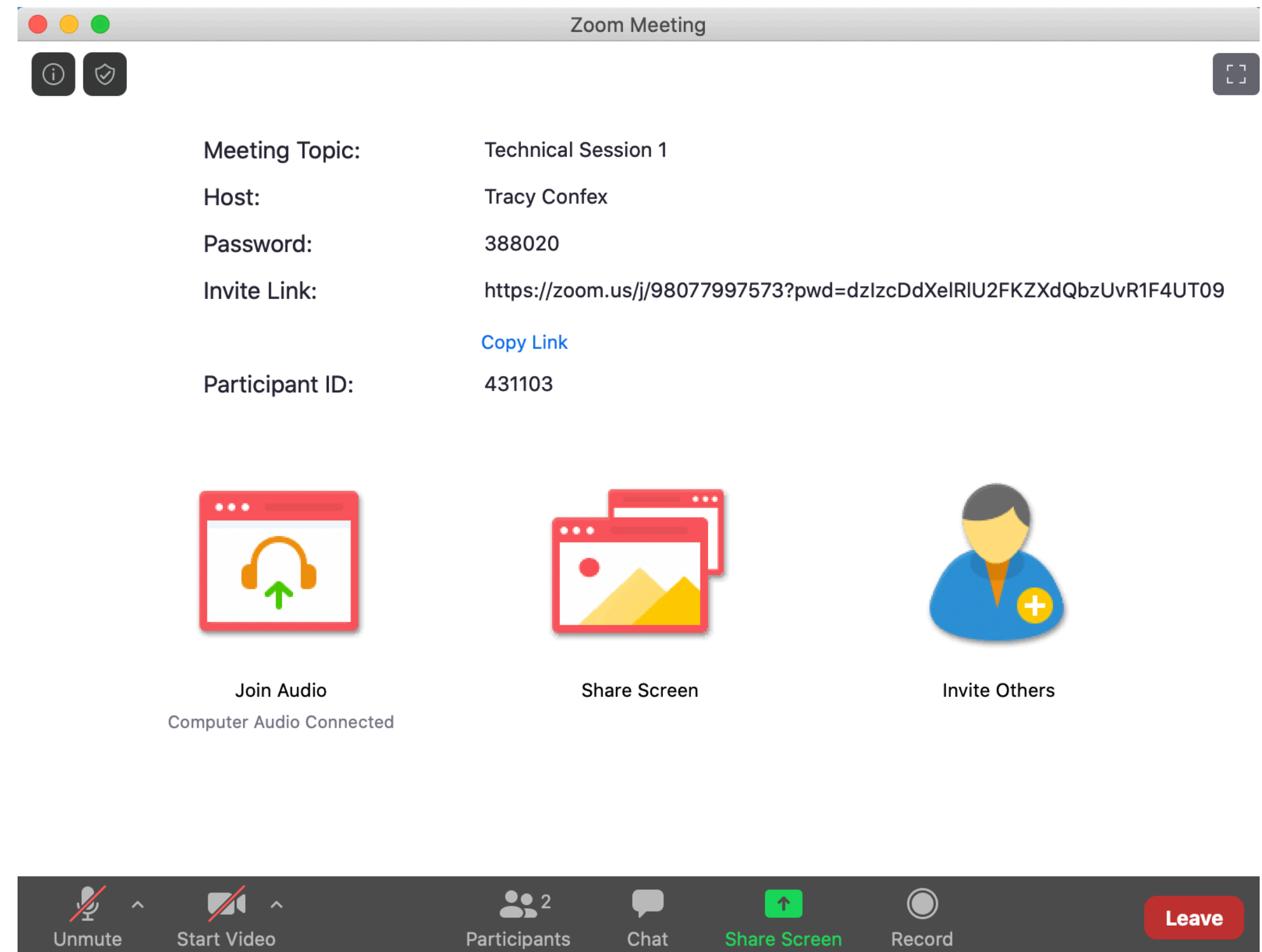
Join with Computer Audio or by Phone

Once you are admitted into the meeting (automatically or by the host) you will be presented with this pop-up window to Join With Computer Audio. Alternatively, you can dial in with your phone by choosing Phone Call (top left of the pop-up window). If you are experiencing audio issues with your computer this is your work around. Stay logged into the meeting on your computer while using your phone to speak and listen.



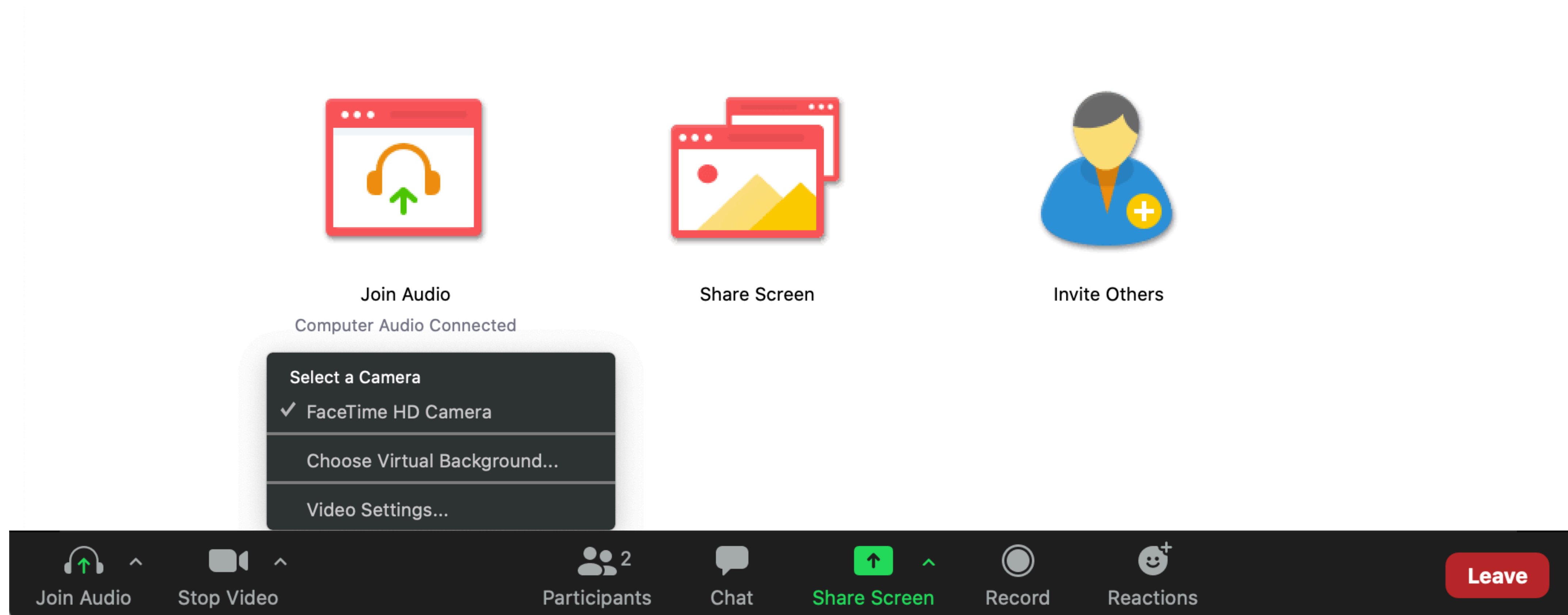
Zoom Meeting Interface

- Once you have chosen whether to join with or without computer audio your Zoom meeting screen will appear:
- This is what you will see if no one is currently sharing their screen (ie., the session title slide) or their camera.



Testing Video

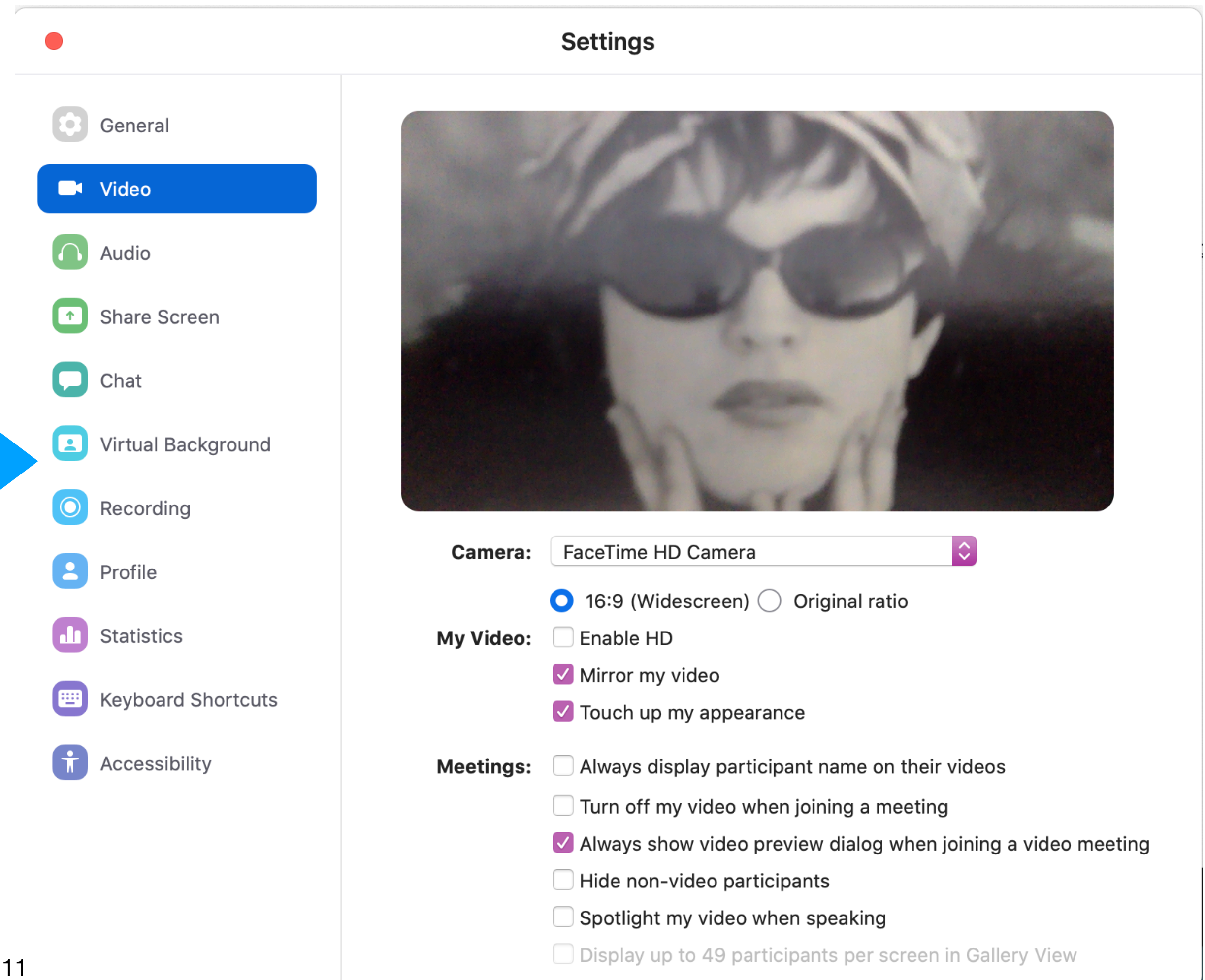
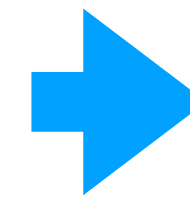
- Before turning on your camera (Start Video) you may want to preview your appearance and check your video settings. Do this by clicking on the up arrow located next to the symbol *Start Video* and choose *Video Settings*.



Video Settings in the Desktop Application

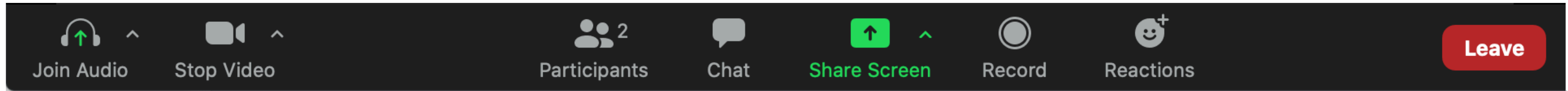
- Here you have the opportunity to see exactly how you will look before you join the meeting. You can also use the *Touch up my appearance* setting.

- If you have trouble finding an aesthetically pleasing environment for your meeting you can choose a *Virtual Background* or insert a background provided to you by your organization.

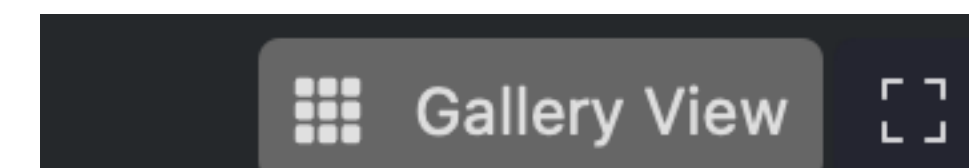
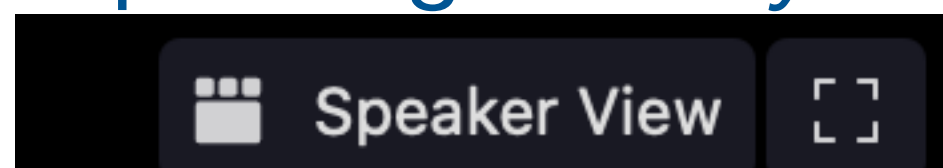
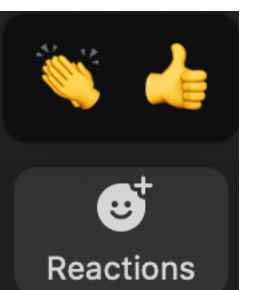


Zoom Controls Available to Participants & Presenters in the Meeting

- These are the controls available to you in a meeting. They will be located at the bottom of your screen.

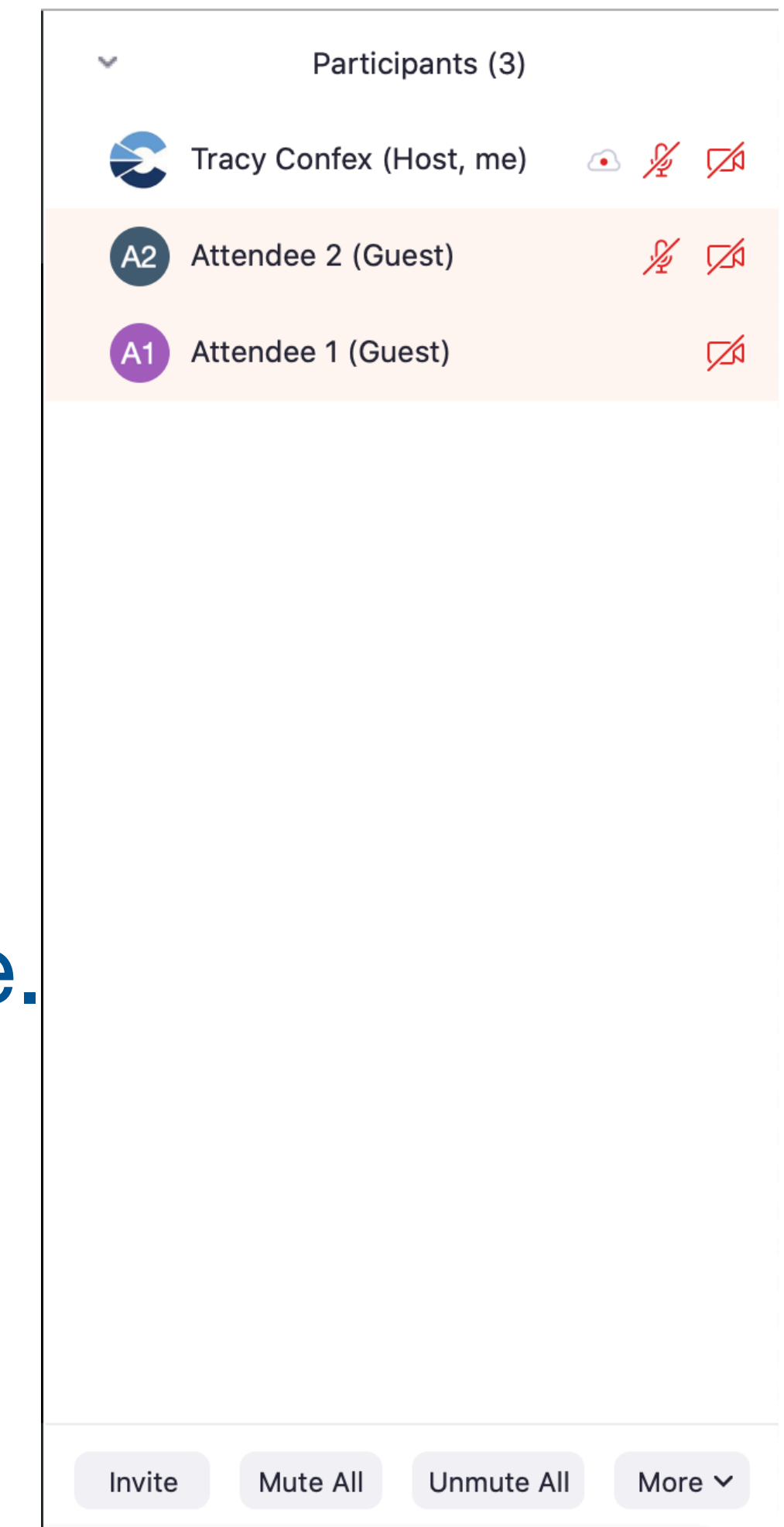
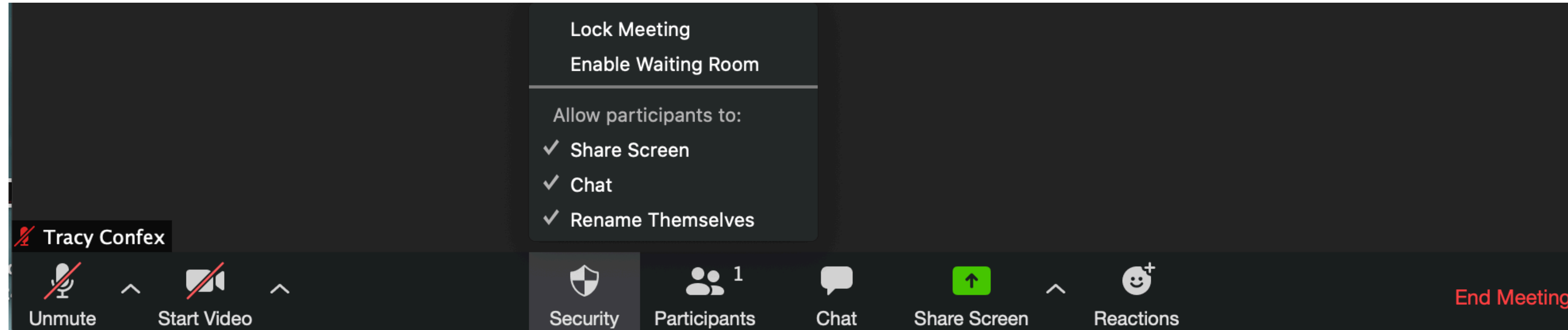


- Microphone: Mute and unmute your own microphone.
- Camera: Start and stop your video camera.
- Participants: Clicking here will show you all the names of each attendee in the meeting, along with controls that allow participants to raise and lower a virtual hand.
- Chat: Here you have the ability to send a message to *Everyone* or send a *Private* message to an individual.
- Share Screen: Clicking here will give you options for the application or desktop you want to share.
- Reactions is only available when your camera is turned on. You can choose from thumbs up or clapping hands emojis which appears briefly in your camera window after you've made your selection.
- Gallery View and Speaker View: Found in the top right corner of the screen once you've joined the meeting and at least one camera is turned on. *Speaker View* will display only the window of the person speaking. *Gallery View* will show all windows of all participants in a faces-in-windows format.

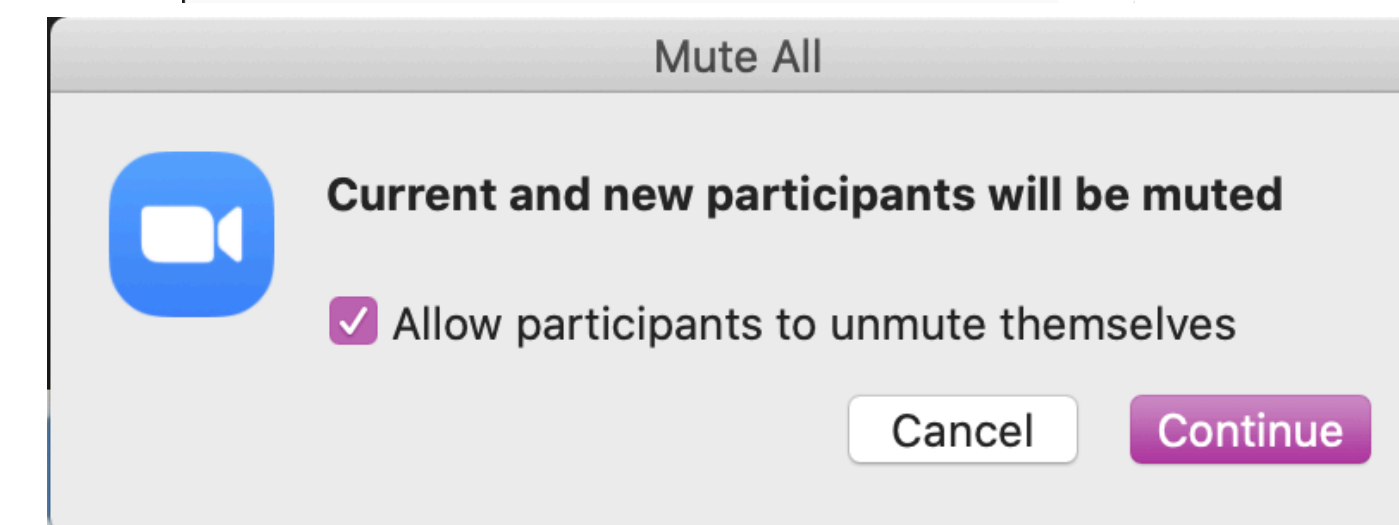


Co-hosting controls for Moderators

- Security:

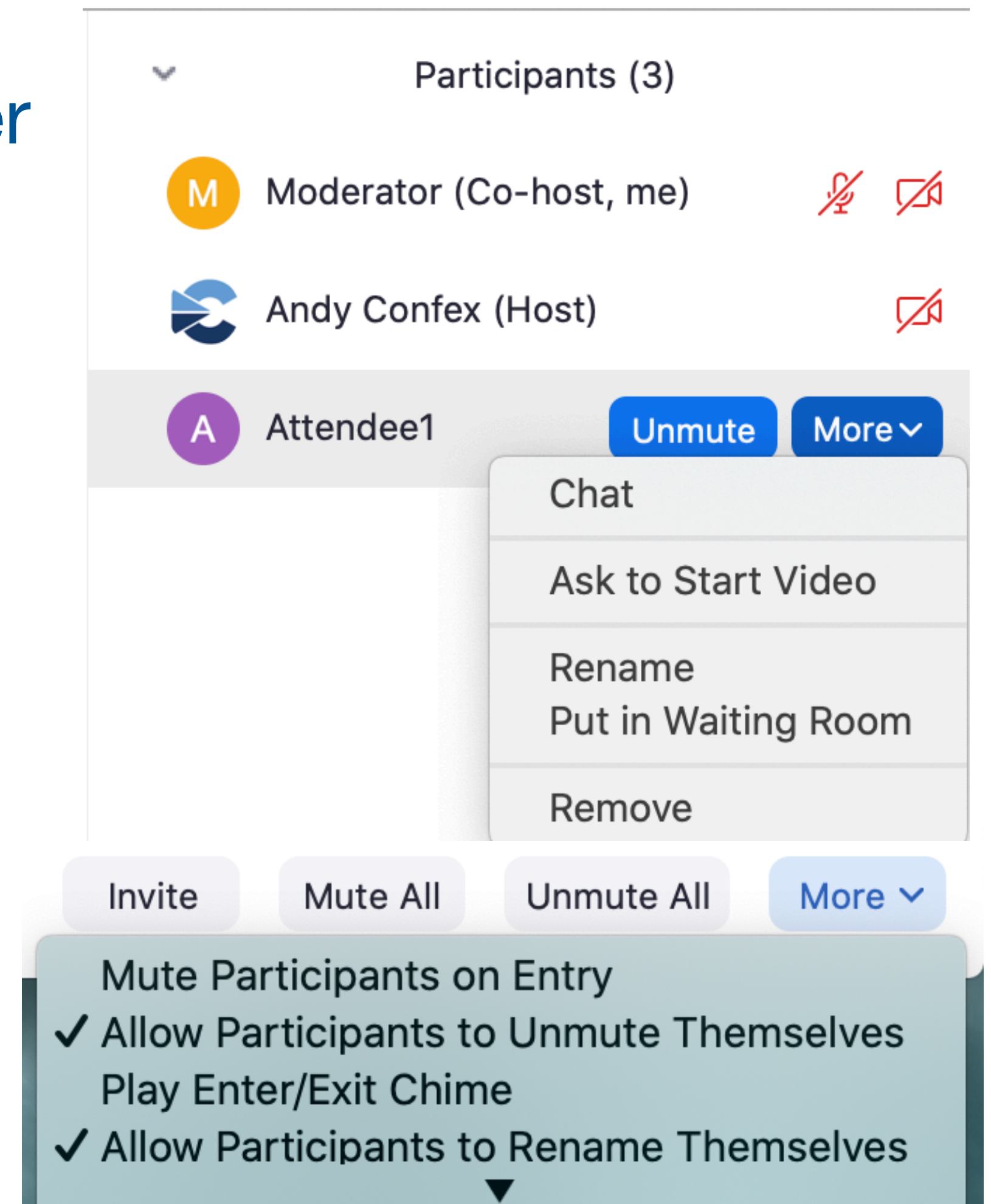


- **Participants:** clicking on this icon will open a window on the right side of the screen listing all people in attendance.
- **Mute All:** Before a speaker begins their presentation you may choose to click *Mute All* in the Participants panel to avoid any disruption. Once you click on *Mute All* a pop-up window appears. Here you can disallow or *Allow participants to unmute themselves* and click *Continue*.



Co-hosting Controls for Moderators cont.

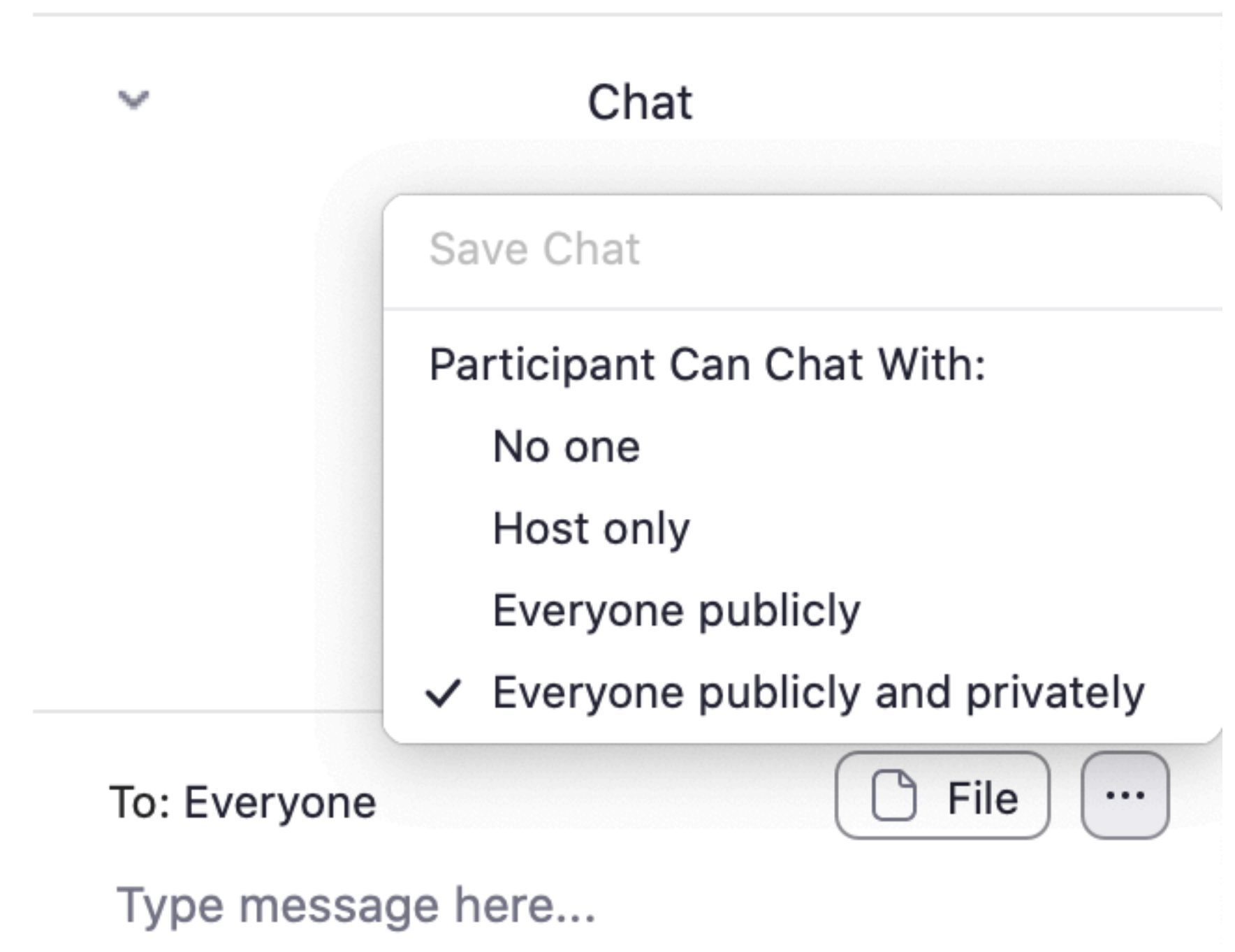
- Participants **More**: At the bottom of the Participants window you will see a *More* button. Click on the arrow to bring up the drop down menu which will give you muting options and give the participants the ability to rename themselves.
- You will also see another *More* button when you hover over an individual name. Clicking here will bring a drop down menu to the right of each name to show options pertinent to you like **Chat** with them privately or **Remove** from the meeting.



Co-hosting Controls for Moderators cont.

- Chat: Clicking on *Chat* will bring up a chat window on the right side of your screen with a message window at the bottom. Clicking on the button in the lower right corner with the 3 dots will bring up a pop-up window to choose which person you want to chat with.
- An easy way to chat with someone privately is to simply click on that person's name in the participant's list. This will immediately open a private chat with them at the bottom of the screen.

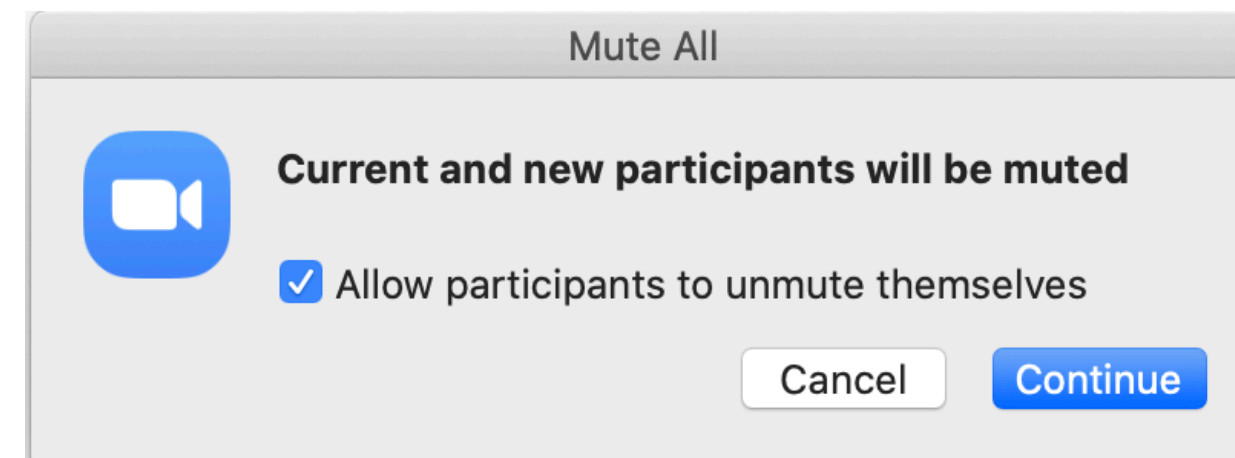
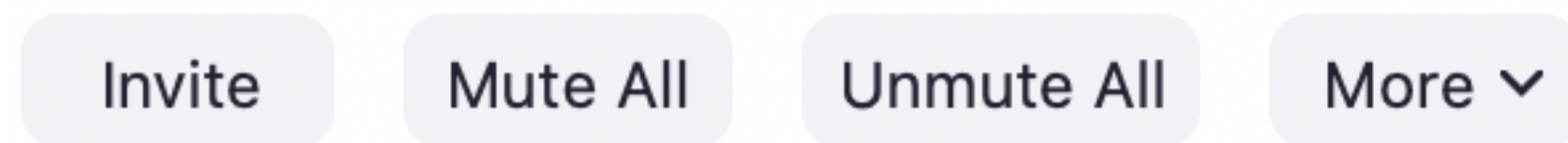
*Always look at the “To:” to ensure you’re chatting with right participant and how, privately or publicly.



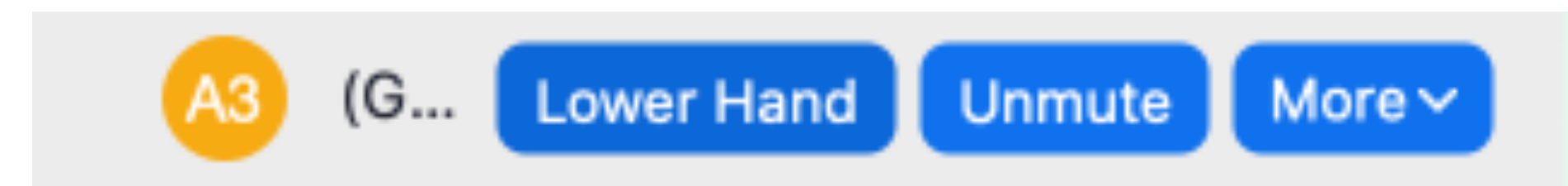
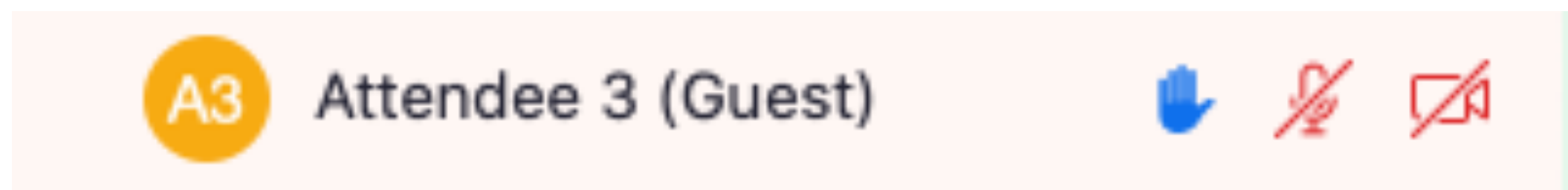
Co-hosting Controls for Moderators, cont.

Controlling external noise and disruptions in your meeting

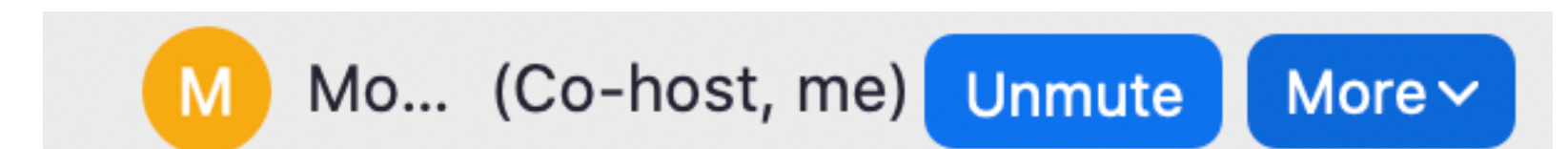
- If you're finding a lot of background noise happening in your meeting you can either remind all participants to keep their mic muted until they wish to speak or manually *Mute All*. When you click Mute All, a pop-up window appears giving you the following option:



- You can choose to keep all participants muted and unmute each participant as each one virtually raises a hand to ask a question. Hover over their name in Participants panel and a blue mute/unmute button appears.



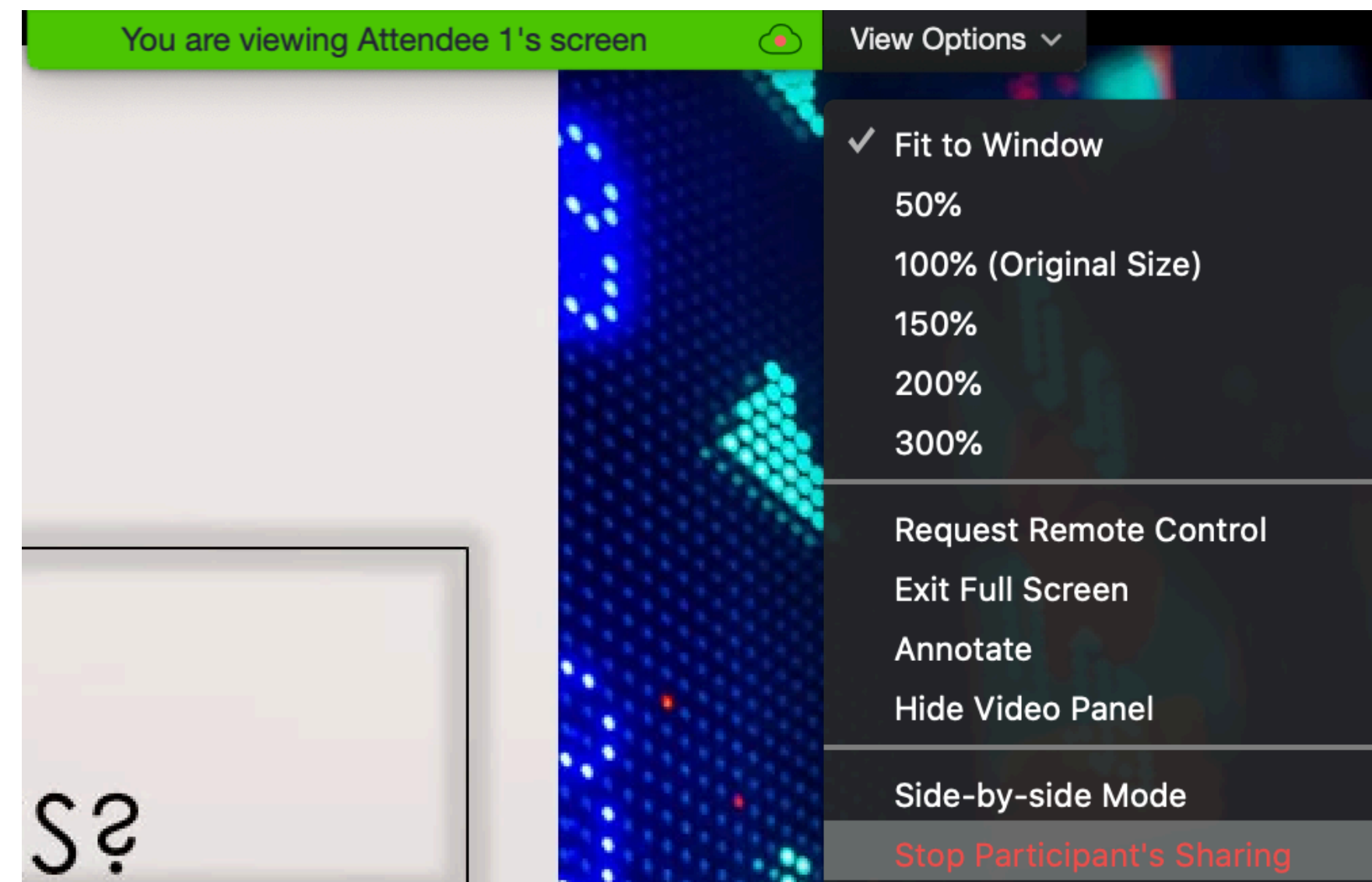
- If you choose to read aloud the questions from the chat, be sure to unmute yourself.



Co-host Controls for ZoomBombing

How to Stop Screen Share Quickly and Removing a Participant

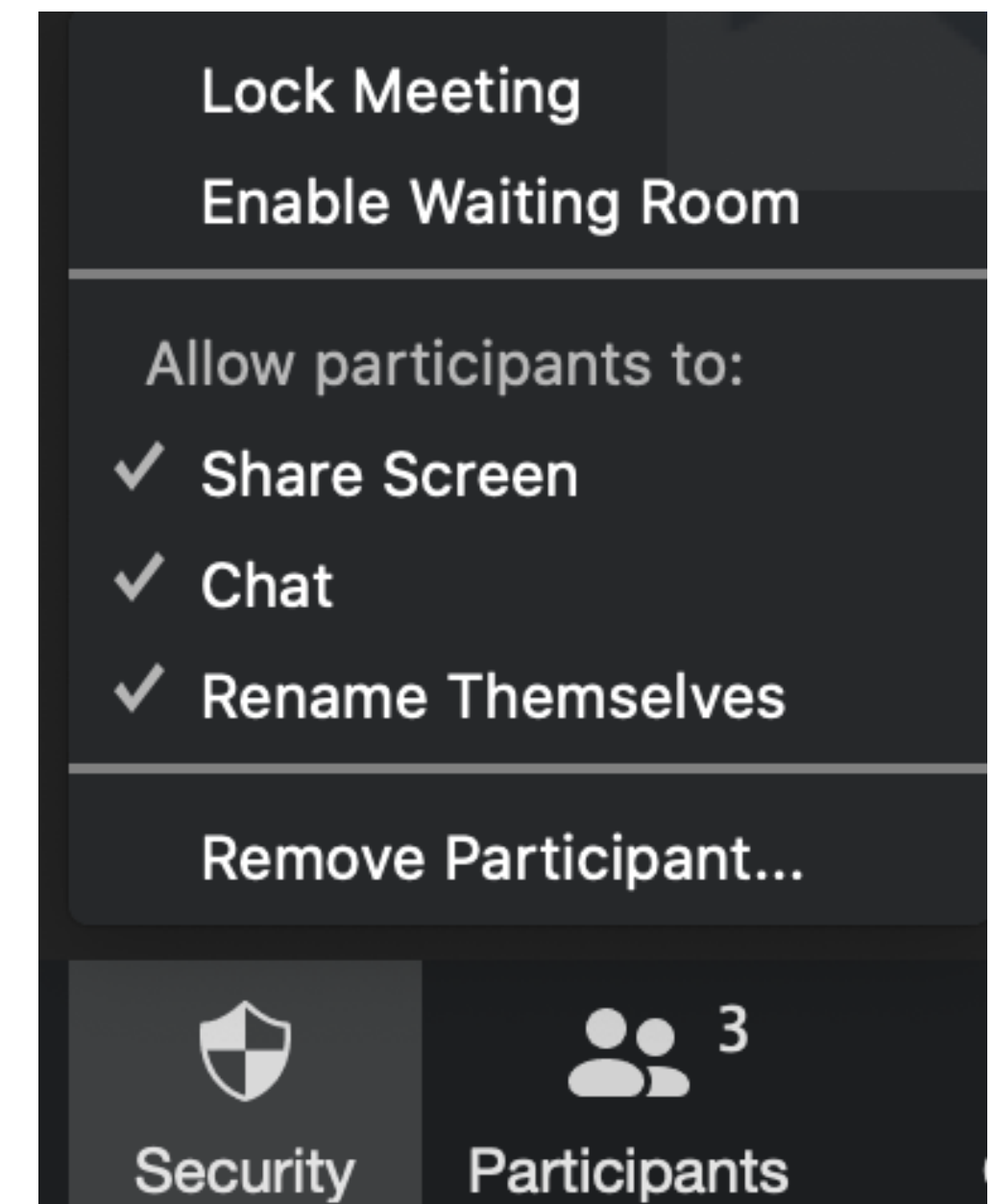
1. At the top of your screen you will see a green message bar telling you whose screen is being shared. Click *View Options* next to this green bar. Click *Stop Participant's Sharing* at the bottom of the *View Options* drop down menu.



Co-host Controls for ZoomBombing, cont.

Stopping Screen Share cont.

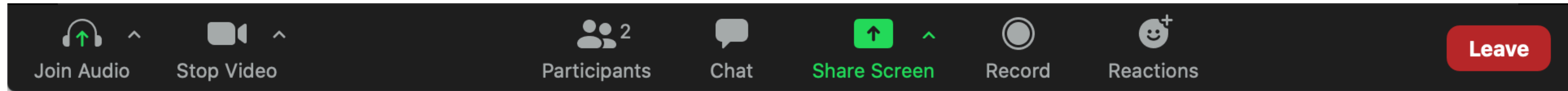
2. After you have noted who is inappropriately sharing and you want to remove them you can go to *Security* at the bottom of the screen and click *Remove Participant*. You will then be prompted with a pop-up window with all Participants' names. Select *Remove*. If you uncheck *Screen Share* in Security this will stop all participants from sharing.



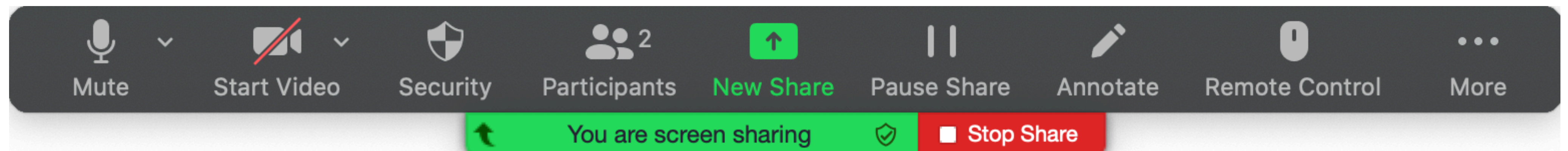
3. You can also select the *More* drop down menu to the right of their name in Participants and click *Remove*. *Settings have been configured for your meeting so that any removed participant will not be allowed to return to the meeting.

Share Screen

- Be sure your presentation is open and ready to be shared before you begin screen share. Nothing else should be open on your desktop. Click on *Share Screen*. This will bring up a window giving you several options of screens/applications to share.

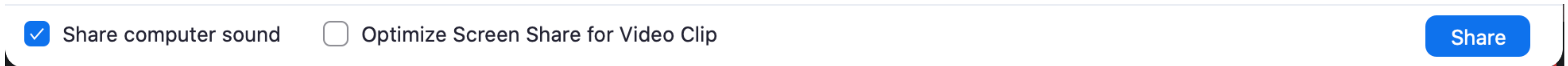


- Once you've made your choice click *Share* and then bring your presentation to full screen.
- If you need to share more than one application, have all applications open and use New Share for a seamless transition from one to the next.

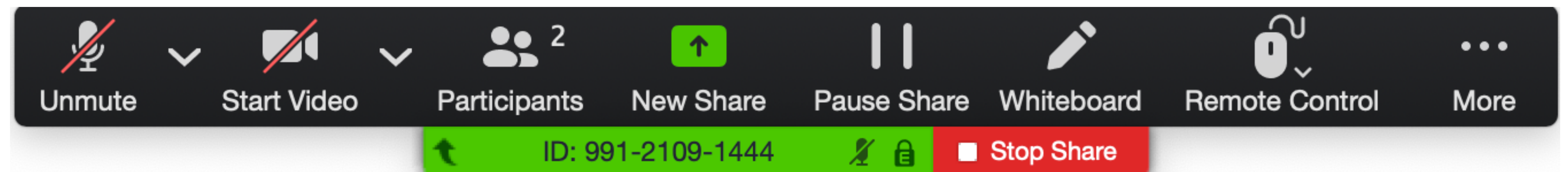


Share Screen, cont.

- If you have audio/video in your presentation click *Share computer sound* at the bottom left of your screen before you click *Share*. It is highly recommended that you practice playing your video through a free or paid Zoom account prior to the meeting. Have another person join you in the meeting (or you can join) on a different device and ask for their feedback on their viewing experience.



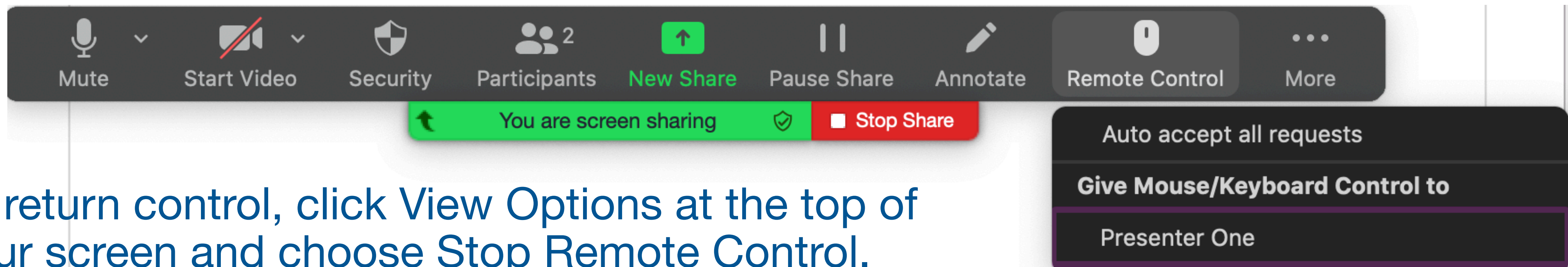
- When you're finished with your presentation and taking any questions click the red *Stop Share* button in your meeting control bar. This will allow the next presenter to share their screen as this meeting is configured to allow only one participant to share their screen at a time.



Requesting or Giving Remote Control of Your Screen

It is possible to share control of your screen with another participant. This is useful when more than one speaker is presenting a co-authored presentation.

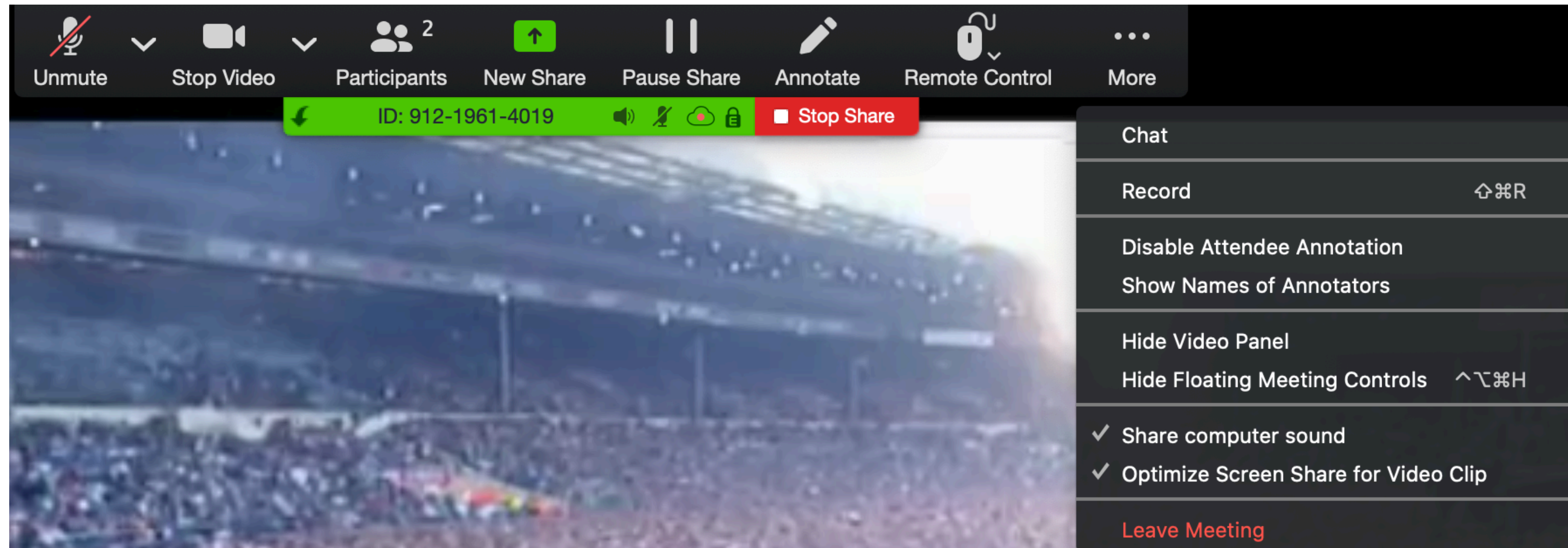
- When the first speaker is ready to give control to the second speaker click Remote Control and choose which participant you are giving control. In the example below, Presenter One is listed. Please be patient, there is a brief delay before you can take control.



- To return control, click View Options at the top of your screen and choose Stop Remote Control. Alternatively, the first presenter can also retrieve control by clicking Remote Control and then choosing Abort Control.

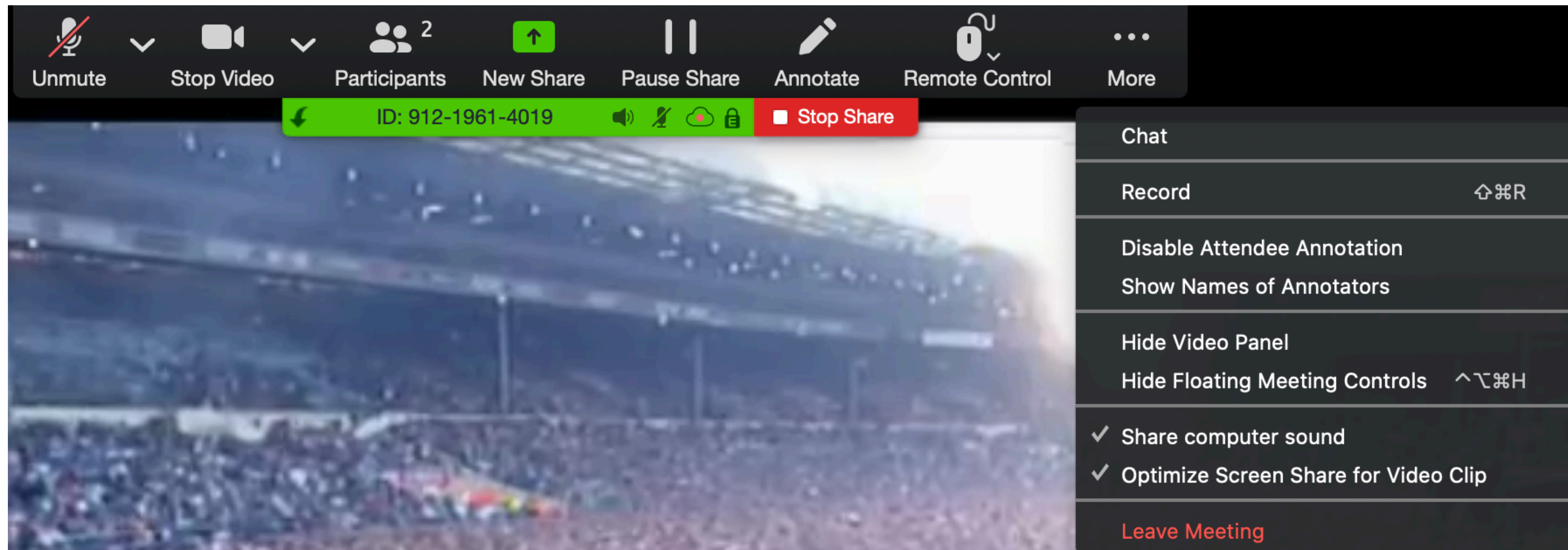
Share Screen with Embedded Videos in Presentation

- If the video plays choppy follow these steps:
- Just before you play your video click on *More* at the right side of your black meeting control bar and make sure Share computer sound is checked. Select *Optimize Screen Share for Video Clip*.



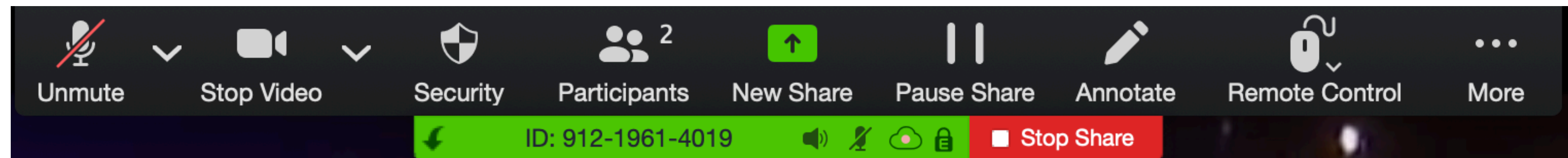
Share Screen with Embedded Videos cont.

- Go back to *More* and select *Hide Floating Meeting Controls*. This will prevent the viewer from seeing a black box overlaid on your video (the meeting control bar). Play your video.
- When your video is finished playing press *Esc* to return your meeting control bar to the screen. Click *More* and uncheck *Optimize Screen Share for Video Clip*. This is important for the viewing quality of the remainder of your presentation.



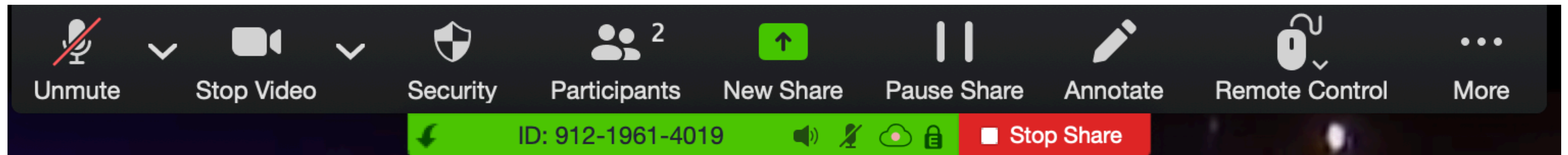
Using an External Link

- If you use an external link in your presentation it will not be seen by your viewers.
- If you absolutely must use an external link instead of embedding the file in your presentation one way to do this is to:
- Before sharing your screen, open your presentation and click on your link. Leave the linked window open. Go back to the first slide of your presentation. Select *Share Screen*, (check Share Computer Sound if it has audio) select your presentation application and go full screen.



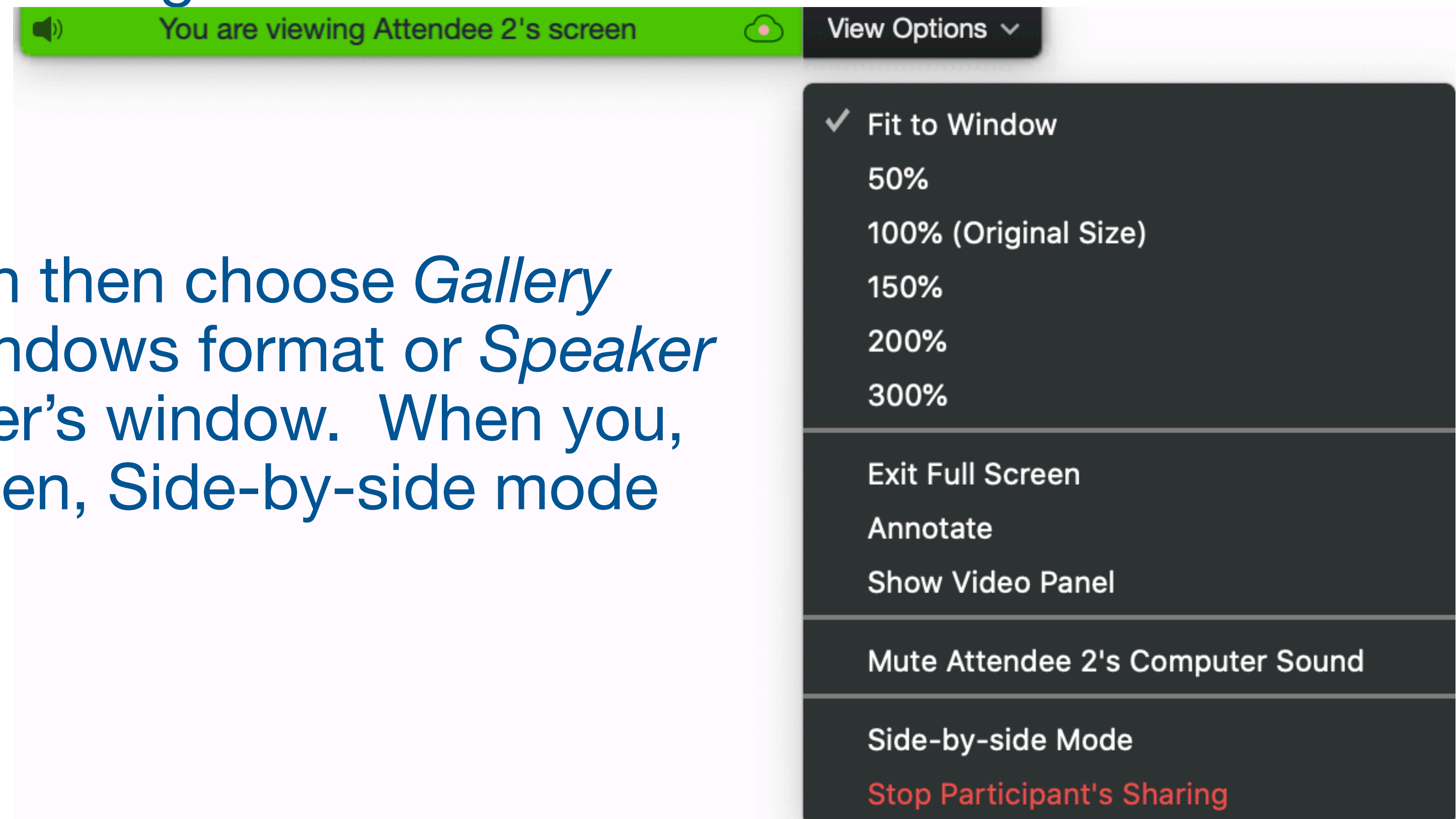
Using an External Link, cont.

- When you get to the slide that has the link do not click on the link. Instead click on *New Share* in your meeting control bar at the top of the screen. If it's hiding click *Esc*. Choose the window with your opened link and click *Share*. When you're finished click *New Share* and select the presentation application window, bring to full screen and continue with your presentation.



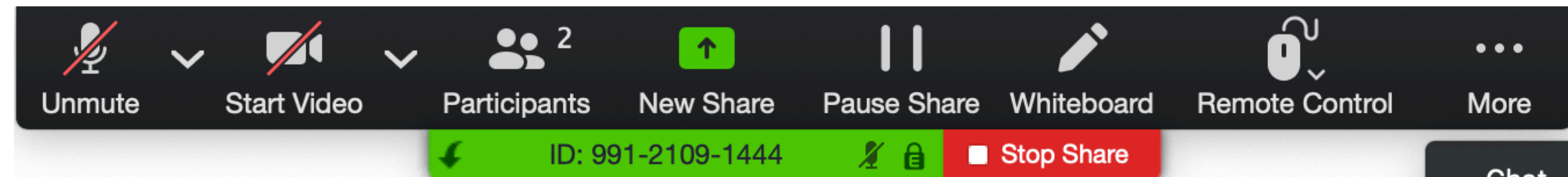
View Options

- When you are viewing someone else's shared screen you can choose whether or not you will see the presenter's face (if they have their camera turned on). Click *View Options* from the top of the screen. Choosing *Side-by-side Mode* will bring your Video panels to the right side of the full sized shared screen.

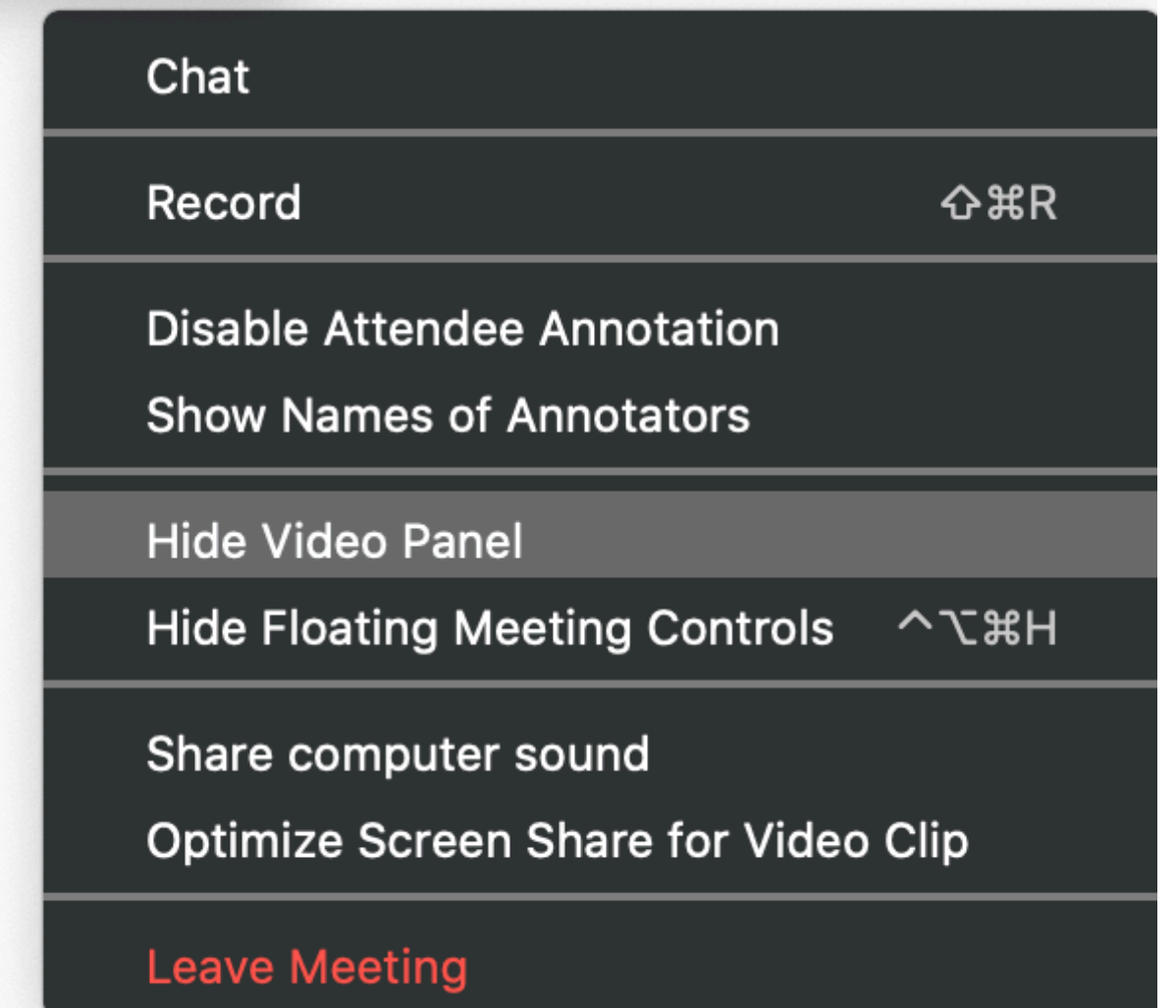


- In Side-by-side mode you can then choose *Gallery View* displaying a faces-in-windows format or *Speaker View* showing only the speaker's window. When you, yourself are sharing your screen, Side-by-side mode is unavailable.

View Options for Presenters



- When you begin your Screen Share the video panel may appear automatically (if participant's cameras are turned on). You can click on *More* and select *Hide Video Panel* to avoid any distraction during your presentation.
- When you are ready to take questions you can click *Show Video Panel* to see the participant's and/or the Moderator's face during Q&A.

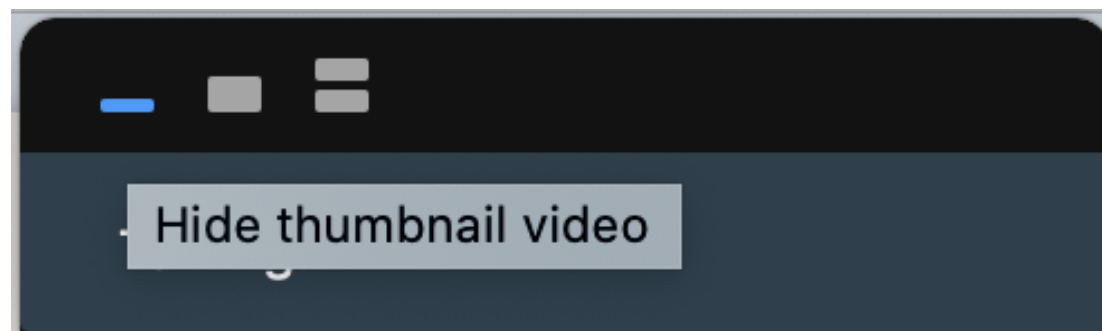


More Viewing Options

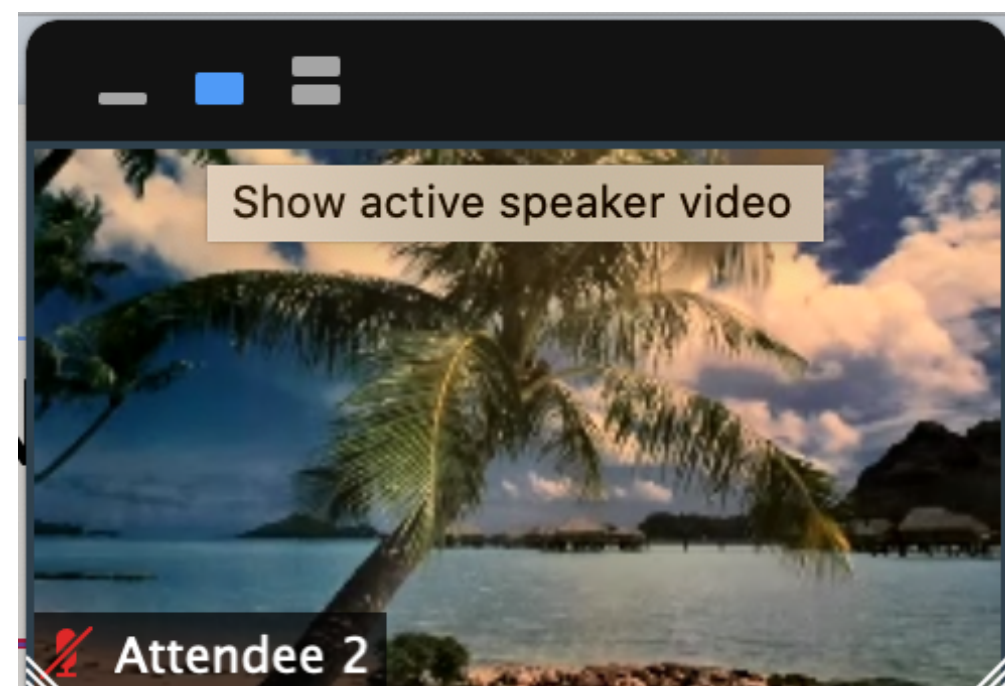
- Choosing *Show Video Panel* during your own shared screen or while viewing someone else's gives you several options:



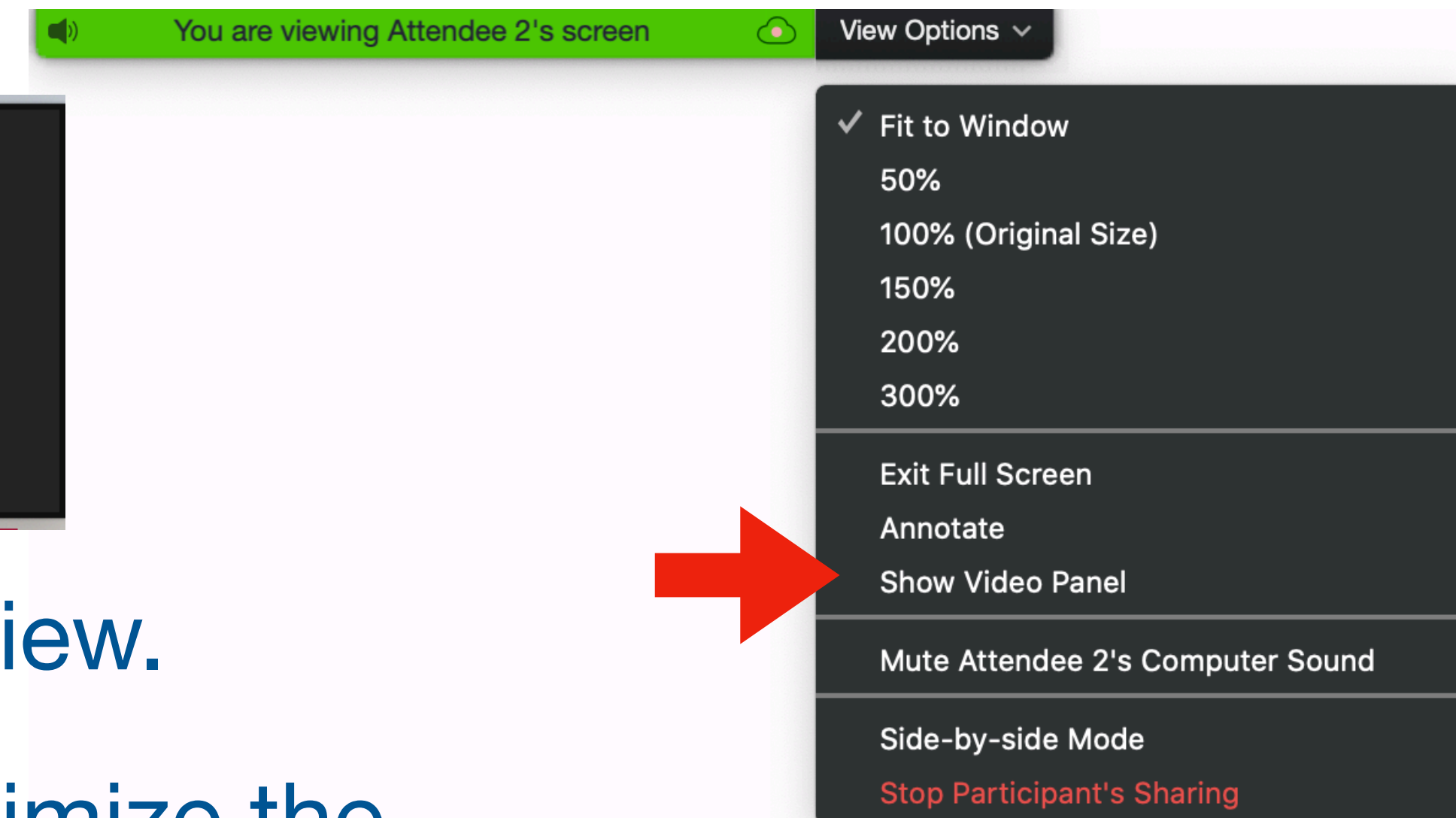
Clicking on the double bar will give you this panel view.



Clicking on the thin line will minimize the video panel.

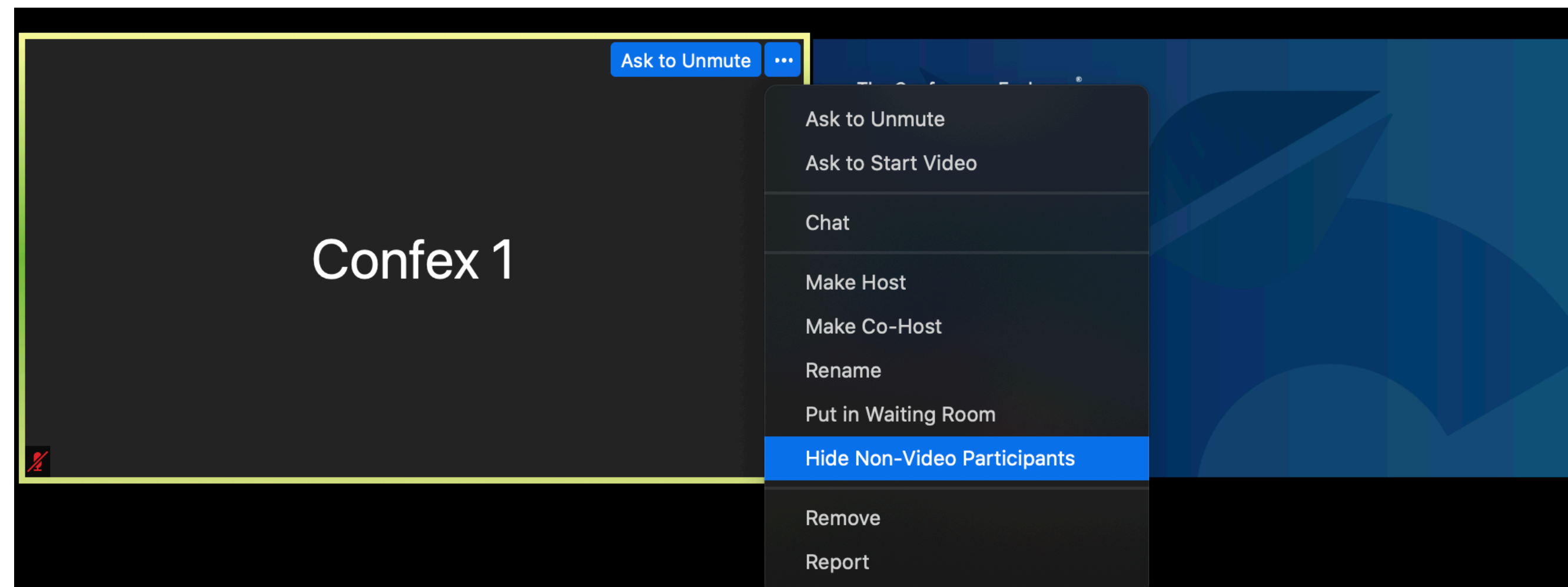


Clicking on the blue square in the middle will show only the Active Speaker's video (if their camera is live).



Viewing Options, cont.

- For participants who do not wish to have their camera turned on their video box will simply show their name. To hide all video boxes that do not have a camera turned on click the blue square with the 3 dots in the top right corner of a participant's video box and select *Hide Non-Video Participants*.



Communicating with Confex Staff During a Confex Tech Supported Zoom Meeting

- If you need help troubleshooting Zoom or working out audio or video issues in your meeting contact Confex Tech Support:
 - Confex Staff Support will be in the meeting with you. Look for the name that includes *Confex* in Participants and send them a private message through Chat.

Step-by-Step Instructions for Moderators in a Zoom Meeting

- Arrive to your meeting 15 min. before the start time. If your meeting is utilizing the waiting room you will be in a virtual waiting room until your host lets you in. Test your audio and video.
- If your meeting is being supported and hosted by Confex Tech Support they will arrive shortly and let you into the meeting. They will then make you a Co-Host. Confex Tech Support can assist you with any questions you may have before or during the meeting.
- Click *Participants* in your meeting tool bar at the bottom of the screen. Then click *Chat*. You can now see all attendees and any communication occurring during the meeting. Leave this viewable to you at all times.

Step-by-Step Instructions for Moderators in a Zoom Meeting, cont.

- Begin rehearsal: ask the presenters to practice sharing their screen. They can test their audio by simply reading the first slide of their presentation. Encourage presenters to have their camera on during their presentation, or at the very least, during the Q&A.
- When each presenter has finished practicing screen sharing have the moderator/introducer and, or all of the presenters turn on their camera(s) so the audience can be greeted with smiling faces when attendees enter the meeting. You could alternatively choose to greet your audience with a welcome or session title slide. There should always be a camera turned on and, or a screen being shared at all times.

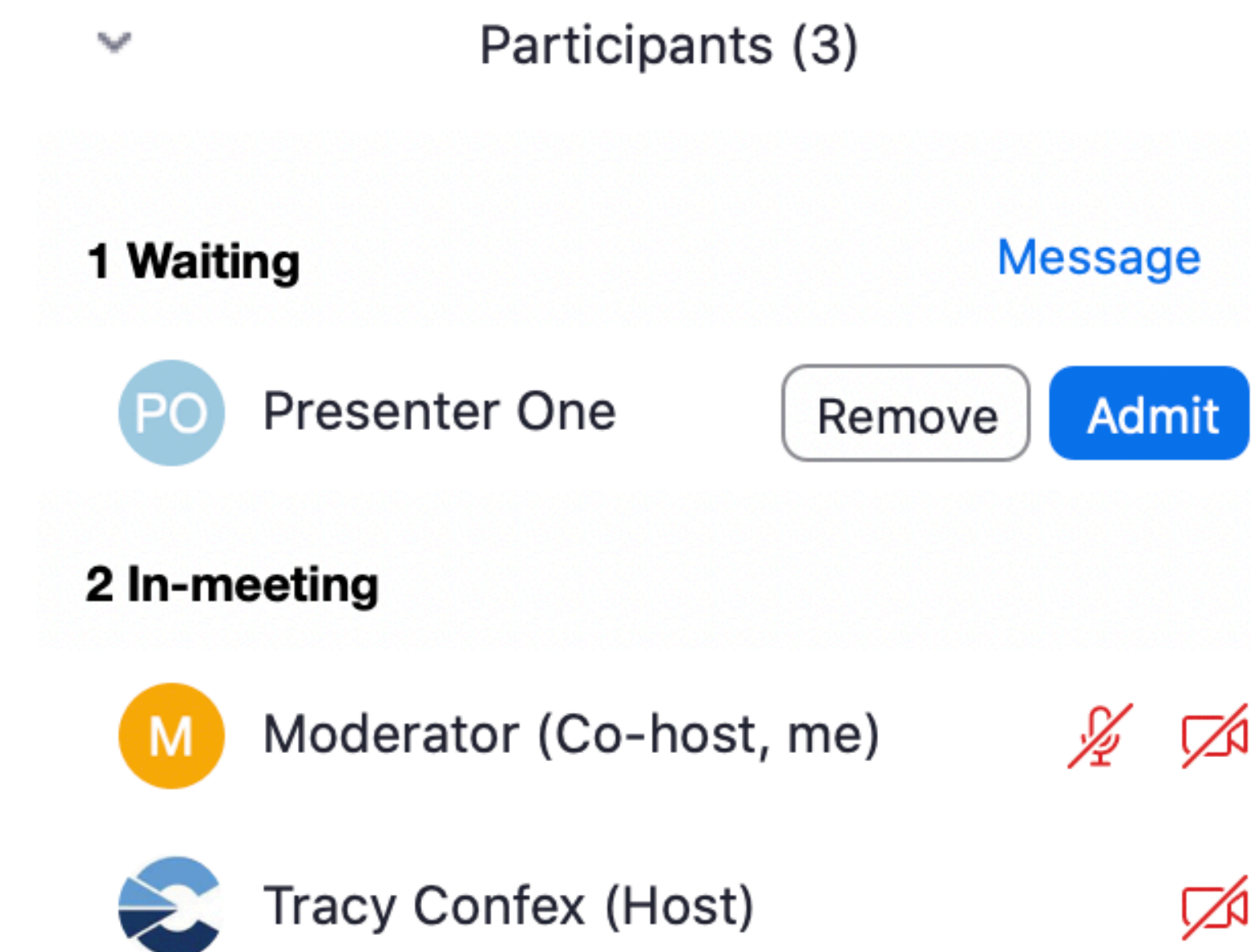
Step-by-Step Instructions for Moderators in a Zoom Meeting, cont.

- *Mute All*: Utilizing this function is personal preference. Some moderators feel comfortable just asking their presenters and attendees to mute themselves and to only unmute when they are prompted to speak. If you click *Mute All* you will be presented with a pop up window with a check box next to the option *Allow Participants to Unmute themselves*.
- *Housekeeping Notes*: The moderators and presenters should always have their camera on when speaking. When it's time to start the meeting make an announcement to your audience that their microphones will be muted throughout the presentation(s). Let them know that if they need assistance or want to ask a question they can use the virtual Raise Hand function or just type in the chat.
- While moderator is making introductions stop screen share of the session title slide. Presenter will then share their screen and intro slide. Continue introducing the presenter and let presentation begin.
- Monitor the Chat during the presentation. When it's time to do Q&A you can either *Unmute All* to allow participants to verbalize their questions or you can read aloud their questions from the chat leaving everyone except the presenter and yourself muted.
- When the meeting has ended thank your presenters and attendees and then click *Leave Meeting*. The Host (your Confex tech or a staff member) will end the meeting for all.

Step-by-Step Instructions for Moderators in a Zoom Meeting, cont.

Waiting Room Functions

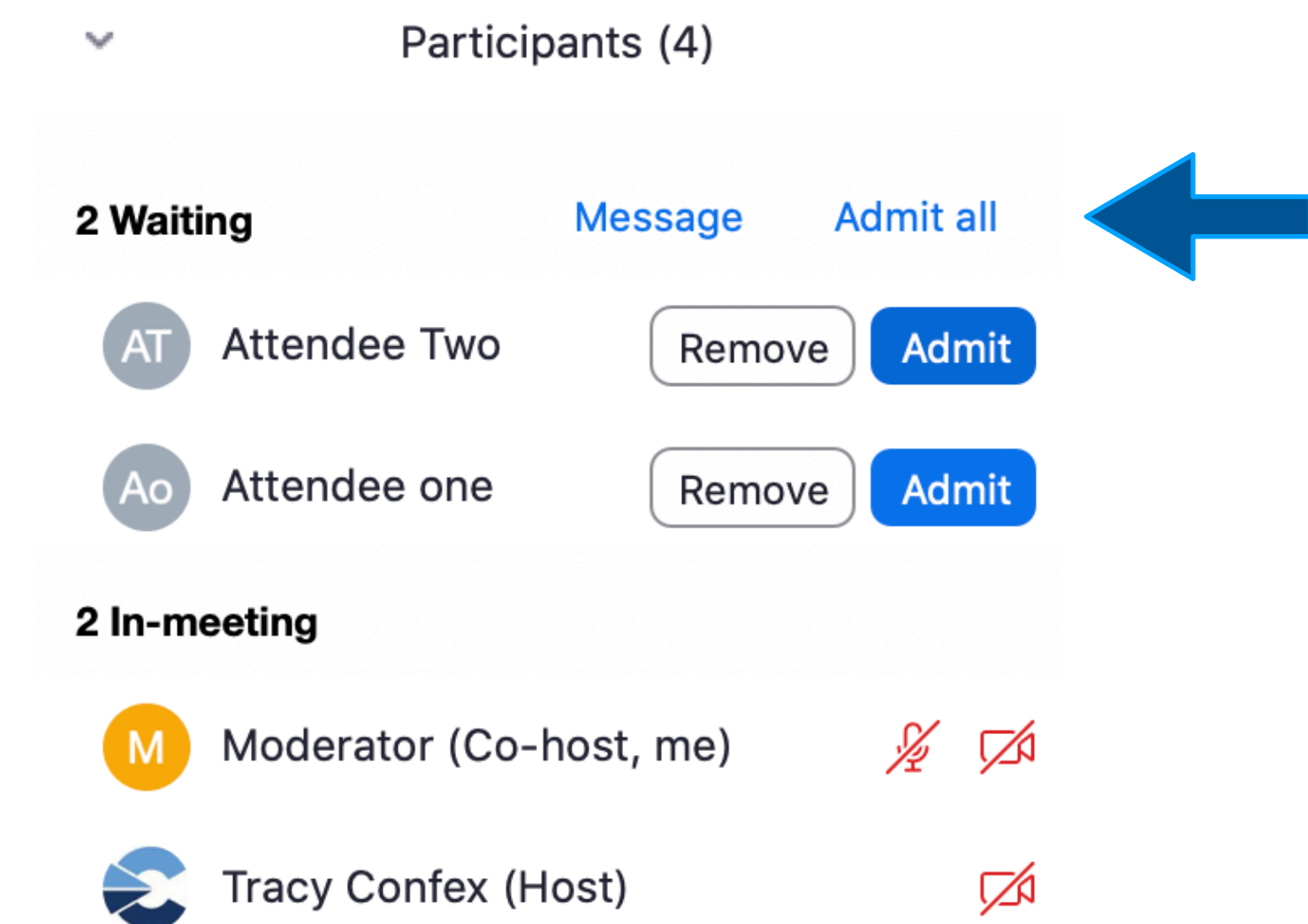
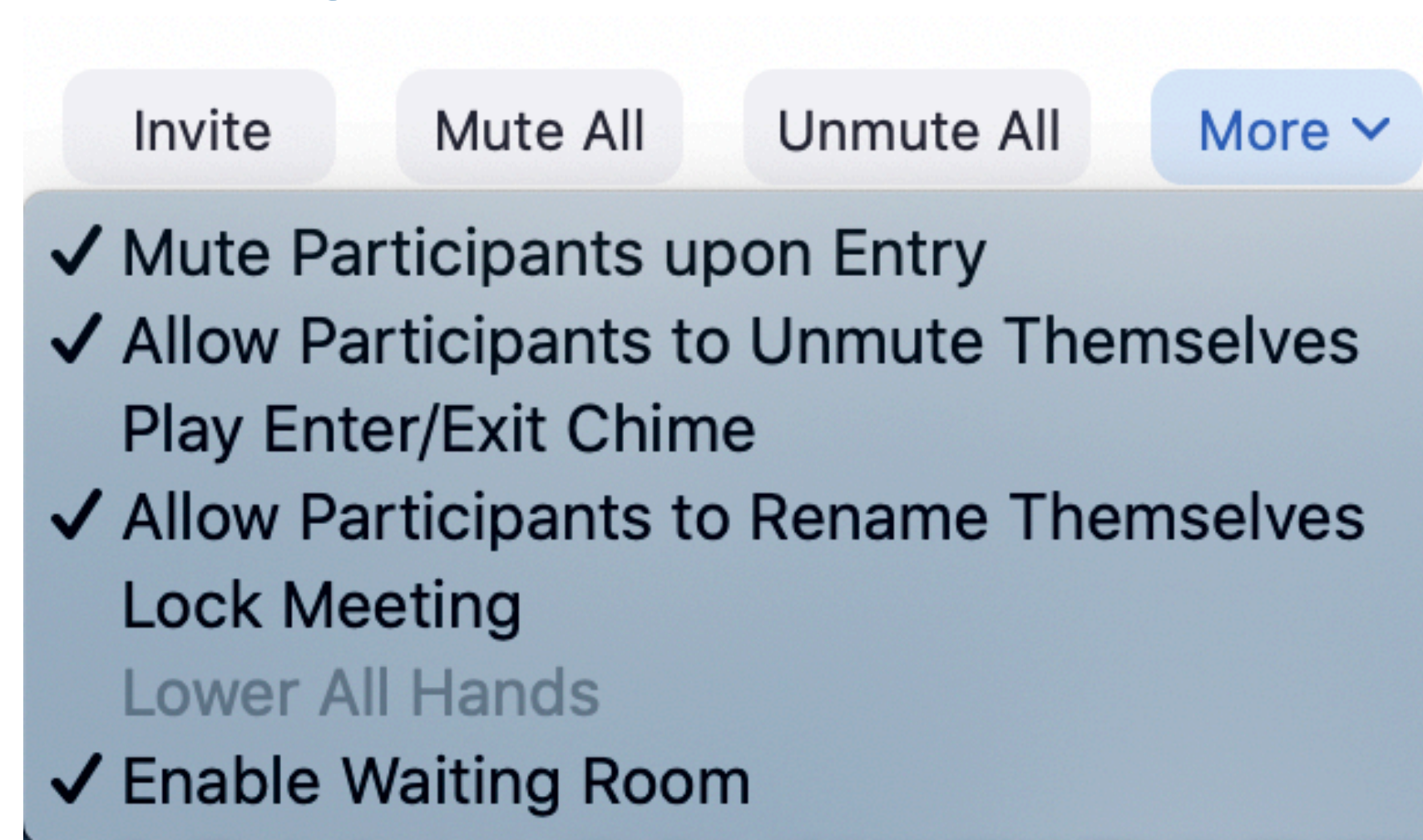
- A waiting room is helpful if you'd like to have a private practice session with your presenters before your meeting begins. The waiting room can be customized with your logo and session description.
- Keep an eye on the Participant's Panel for your presenters entering the meeting. Begin practice screen sharing as soon as your first presenter arrives.



Step-by-Step Instructions for Moderators in a Zoom Meeting, cont.

Waiting Room Functions

- A few minutes before the meeting Admit your attendees into the meeting from the waiting room by clicking Admit All.
- Then disable your waiting room by clicking More at the bottom of the Participants window and then choose Enable Waiting Room to uncheck/disable it.



Step-by-Step Instructions for Moderators in a Zoom Meeting, cont.

Playing Prerecorded Presentations

- Test all prerecorded presentations prior to the meeting: try sharing the prerecorded presentation with and without checking *Optimize Screen Share for Video Clip* in the Share Screen window to determine the best viewing experience. Always check *Share Computer Sound*.
- The preferred (safest) option is to have any prerecorded talks downloaded on your computer and easily accessible. OR...Before the meeting begins go to your session in the meeting app. Click the link to open the prerecorded presentation and leave this tab/window open so it's ready to share.
- Click *Share Screen*. Check the *Share Computer Sound* box at the bottom left of the screen (and *Optimize Screen Share for Video Clip* if this looked better). Click *Share*.
- Bring presentation to Full Screen and press Play.

Step-by-step Instructions for Presenters in a Zoom Meeting

- Log into your meeting 25 min. before the start time. You may be put in a waiting room upon arrival, your moderator will let you in shortly.
- Test your audio and video.
- Once in the meeting, rehearse with your moderator. Practice sharing your screen, make sure the moderator can hear you speaking for at least 10 seconds.
- To begin the meeting the moderator will stop sharing their session title slide (if they have one) and will give Housekeeping Notes and Introductions.
- When it's time to present click *Share Screen*, choose your application window, click *Share* and put your presentation in Slideshow Mode. Leave your last slide on the screen until you are done taking questions. If your presentation has audio be sure to check the box for *Share Computer Sound*.
- Leave your last slide on the screen until you are done taking questions.

Webinar Instructions for Moderators & Presenters

For Confex Supported Meetings

- Join the webinar 30 minutes prior to the meeting start time. Do this by clicking on the link that you received in the Zoom Invitation email. This will allow you to enter the practice session and the webinar as a Panelist.
- If your meeting is being supported by Confex Tech Support they will arrive shortly. They will then make the moderator(s) and any specified staff members/presenters a Co-Host. Confex Tech Support can assist you with any questions you may have before and during the webinar.
- Rehearse screen sharing and test your audio and video. Familiarize yourself with Q&A and Chat.
- Moderator: Share Screen with your welcome or session title slide. Confex staff will “Broadcast” the meeting 2 minutes prior to the start time. Allow some time for the attendees to stream into the meeting before you begin speaking. Moderator will start the meeting at its scheduled time with welcoming remarks, housekeeping notes and introductions. *Moderator should turn on their camera and microphone whenever they are speaking and remember to turn them off when they are not speaking.
- Explain to the audience how Q&A will be handled and give brief instructions. Stop screen share of session title slide to allow the first presenter to share their screen with the first slide of their presentation.
- Give introductions. Presenter should have their camera on during the presentation and the Q&A. Leave your last slide on the screen until you are done taking questions.

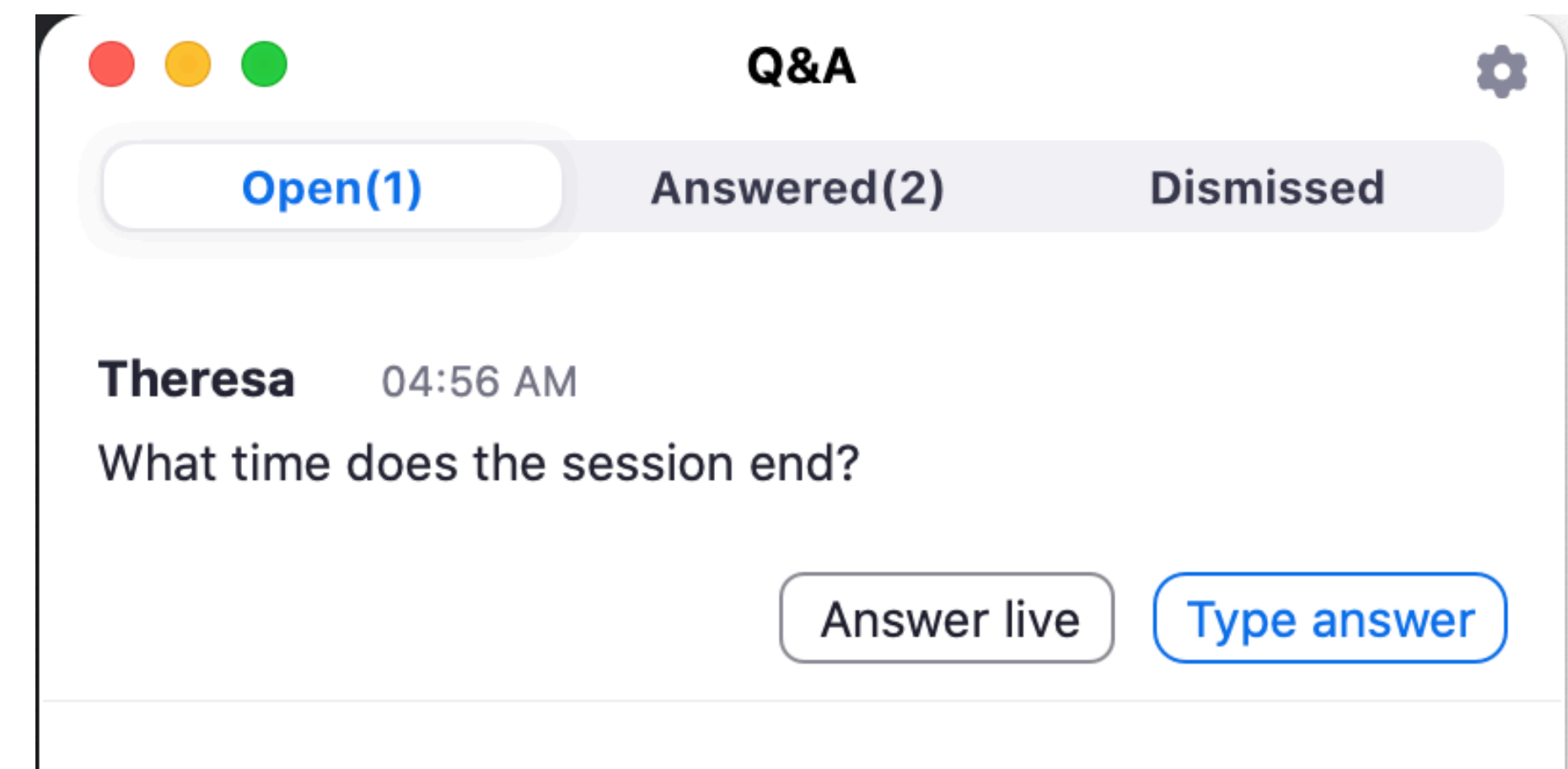
Webinar Meeting Controls

Q&A Tools

- Q&A will display a number next to the icon indicating how many questions are being asked.

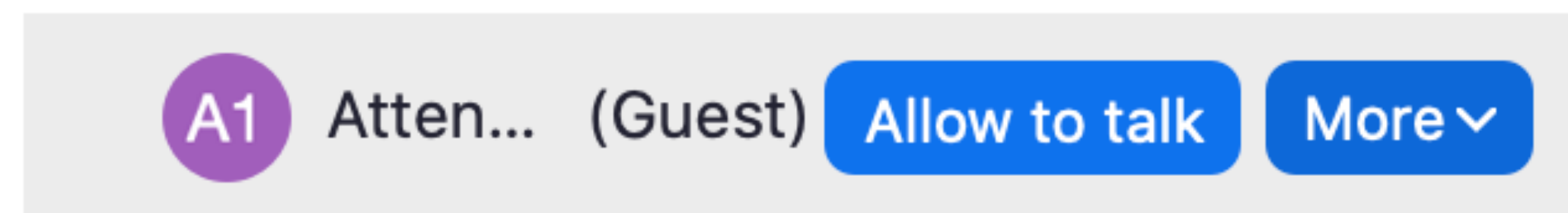


- Click on the Q&A icon and answer the question.
- This can be done by clicking *Answer live* or *Type answer*. If you choose *Answer live* be sure to unmute your microphone first.
- Be sure to *Answer* (live or typed) or *Dismiss* (unanswered) questions before the next presenter so you know when there are new questions in the Q&A.



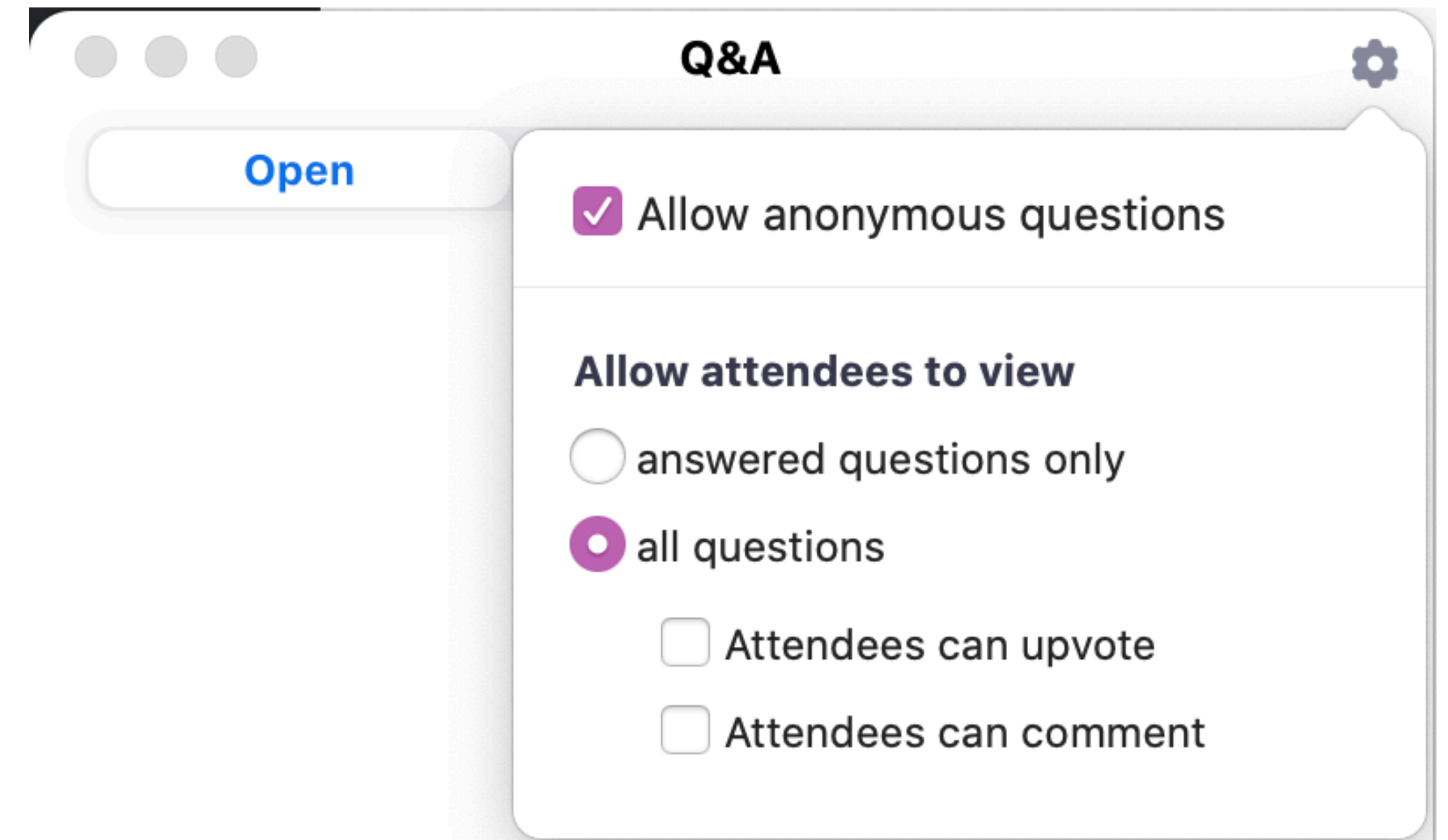
Webinar Q&A Tools, cont.

- Panelists cannot ask questions of each other in the Q&A, they can however use the Chat to ask questions.
- A moderator with co-hosting controls can also unmute attendees individually, allowing them to verbally contribute to the Q&A.
- Click on Attendees in the Participants panel and then hover over the attendees name who wishes to speak and click *Allow to talk*.



Webinar Q&A Settings

- Click on the Settings icon in the top right corner of the Q&A window. This will bring up a drop down menu and allow you to choose which answers you would like the audience to view.
- You can also allow Attendees to upvote and comment.



Moderator Instructions for Attendees on How to Use Q&A in a Webinar

- Before you begin the meeting you should give brief instructions to your attendees on how to use the Q&A.
- Attendees: click on the Q&A icon in your meeting tool bar. A window appears with a message box located in the bottom of the window. It will say, “Type your question here...”
- Type your question and press enter or click *Send*. You can also check the *Send anonymously* box at the bottom of the Q&A window (if you have made this option available in the Q&A settings).
- The Moderator can either choose to share the answer publicly by pressing enter or clicking *Send*, or click the box to *Send Privately*.
- If there is a public reply their answer will appear in the Q&A window.

Tips on a Successful Zoom Meeting

- Choose an uncluttered location inside, quiet and free from interruptions.
- When possible, connect with a hard line ethernet cable to obtain the fastest and most stable connection or ensure you have a strong and secure Wifi connection.
- Before joining the meeting close all unnecessary applications so all processing power can be used to maximize the quality of your Zoom experience. In addition, turn off all sound notifications (on your computer/ cell phone/ tablet, etc.) to avoid any audio or visual disruptions.
- Pay attention to the lighting in the room. Too much light behind you will make you appear a dark figure. To counteract back lighting make sure you have a good source of light in front of you.
- Test your microphone and computer audio prior to the meeting. If you are using a headset with a built-in microphone be sure to test this well in advance of the meeting. Be conscious of any external noise close to your microphone such as your hair or rustling papers.

Tips on a Successful Zoom Meeting

- Use a professional virtual background with your organization's logo.
- Know the phone-in information for the Zoom meeting you are attending. When you enter the meeting you will be asked to Join by Computer Audio or by Phone Call. Click Phone Call to see the dial-in information.
- If possible, practice presenting with a friend in a Zoom meeting through a free Zoom account.
- If you are using an external monitor be sure you are very confident screen sharing your presentation/application through this monitor before you present live.
- Look into your camera! Even if you need to look at your notes on a separate screen or a piece of paper, just as if you were at the podium your audience is still out there and looking for your eye contact and engagement.

Tips on a Successful Zoom Meeting, cont.

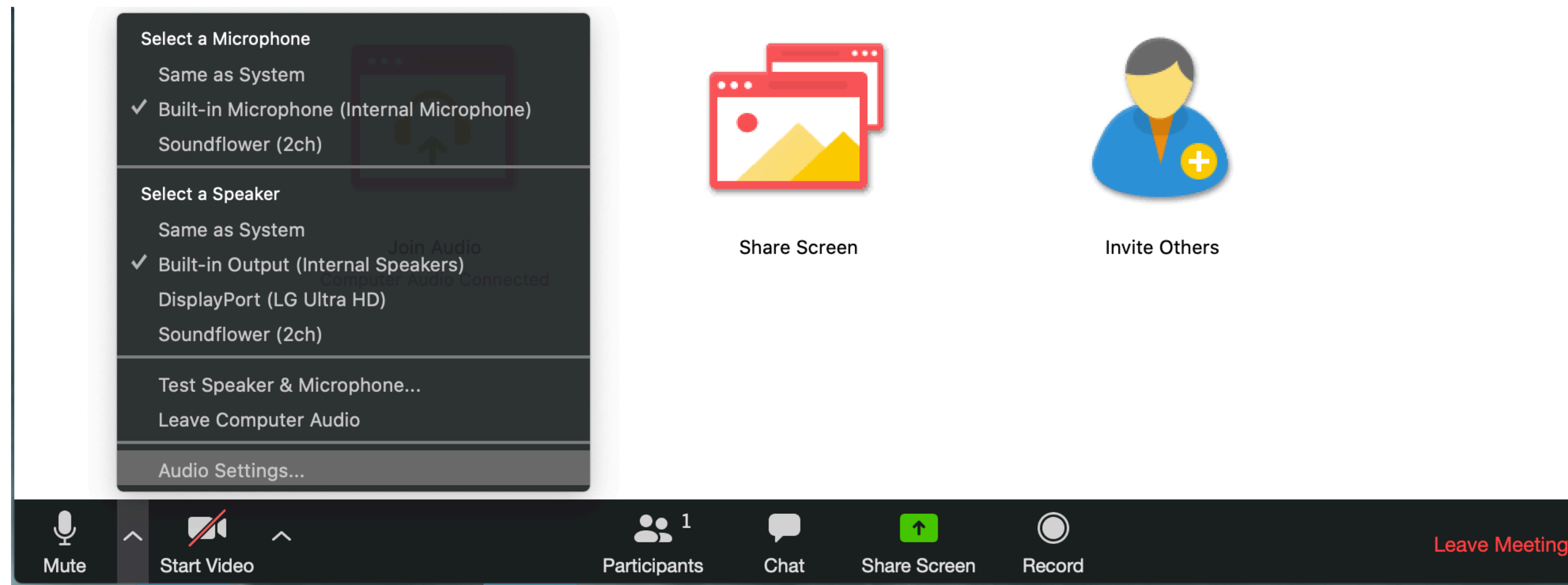
- Think about your actions on camera. Remember that everyone can see and hear you at all times when your microphone is unmuted and your camera is on.
- Explore Zoom Setup options in the Desktop Application, such as choosing a *Virtual Background* or *Touch up my appearance*.
- Your meeting will have the best audio experience if all participants mute their microphone until they are ready to speak.
- If you are a presenter have a glass of water nearby.
- Make sure no one in your location is using a lot of bandwidth.

Troubleshooting Zoom

- **Navigating:** If you find yourself out of the Zoom Window and you're unsure how to get back, press Command Tab on a Mac or Alt Tab on a PC to show applications that are running and press Tab until the Zoom icon is highlighted.
- **Screen Sharing:** If you have trouble sharing your screen check your Security & Privacy Settings or Sharing Settings in your System Preferences on your computer.
- **Audio Issues:**
 1. If you can't hear the participants in a meeting make sure your computer speaker volume is turned up. Ensure your speakers are selected for the active output in Zoom. Do this by clicking on the up arrow next to the microphone icon in the Zoom toolbar. Click on Audio Settings and then click on the *Test Speaker* button, if you hear audio this is set up correctly. If you do not hear audio, use the drop down menu to select a different output and *Test Speaker* again. Repeat this step until you hear audio.

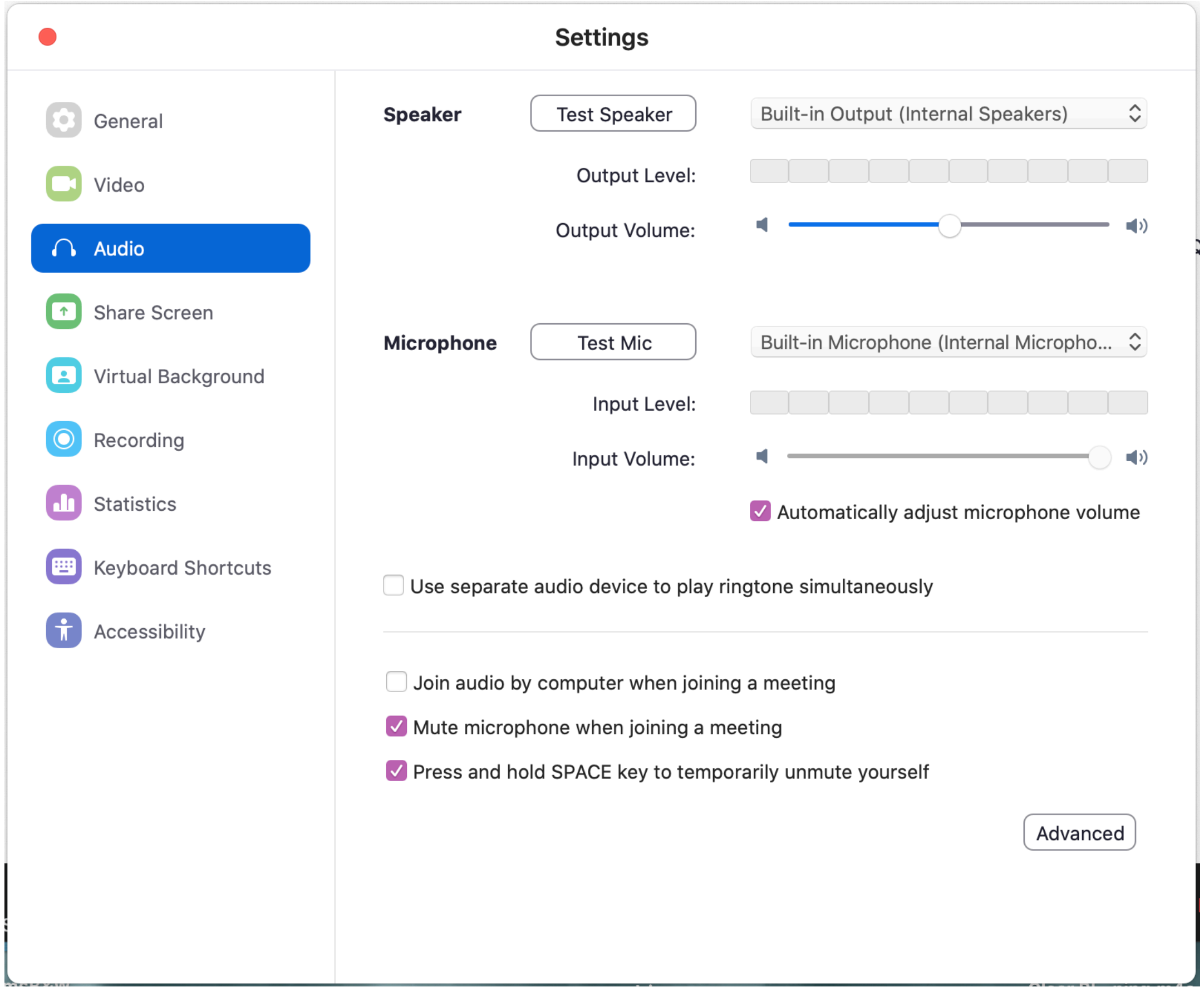
Troubleshooting Zoom

Audio Issues Continued



2. If other participants can't hear you make sure you have the correct internal/external microphone set up in Zoom. Click on the up arrow next to the microphone symbol in the Zoom meeting toolbar and click Audio Settings. Click the test mic button; you should see colored bars in the volume meter and your test meter will be replayed through the speakers. If you do not see the colored volume bars or hear the audio message recorded, use the drop down menu and select another microphone and repeat the process.

Audio Settings

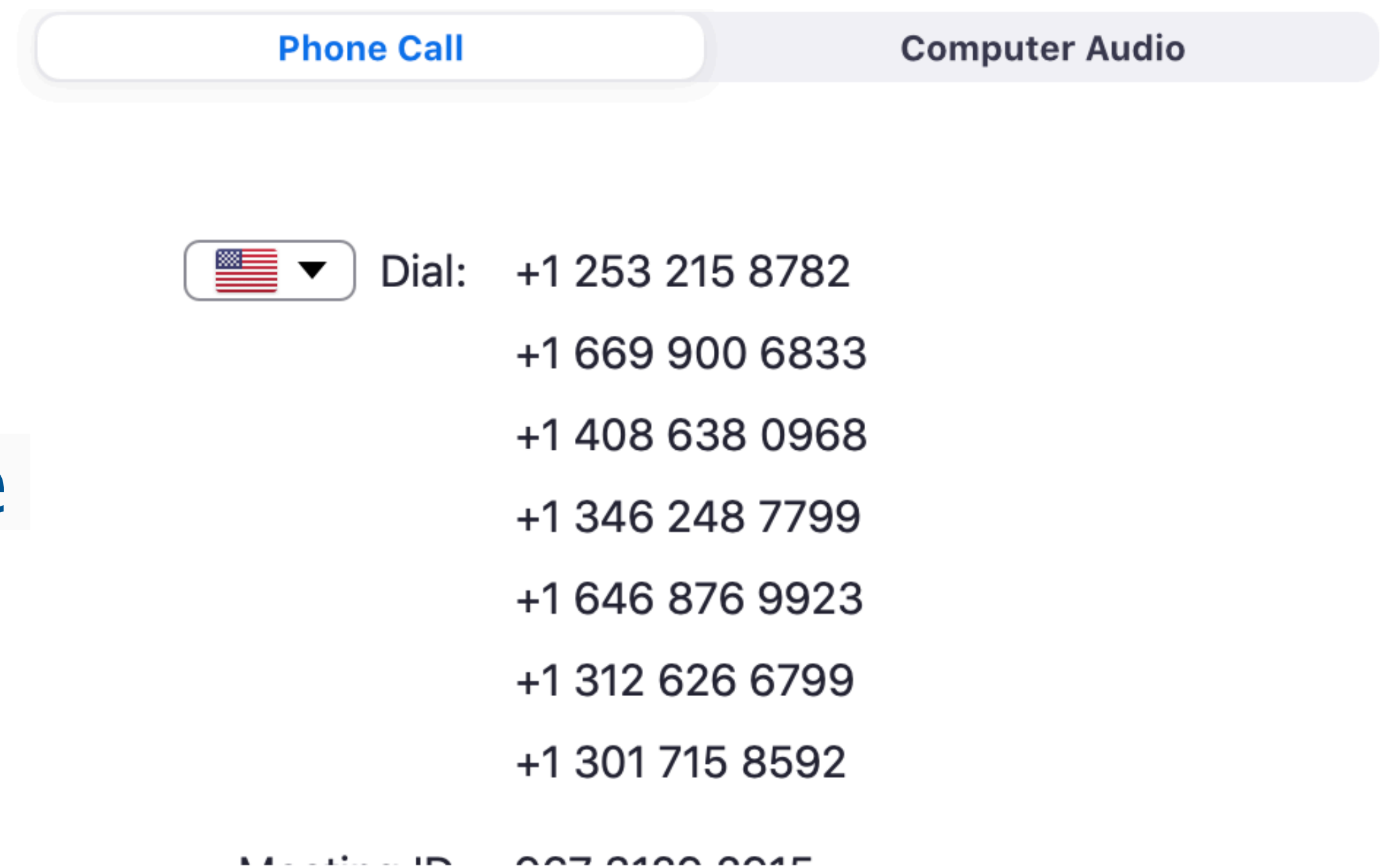


Joining a Meeting By Phone

If you continue to experience audio issues you can join a Zoom meeting by calling in from your phone:

- Click the up arrow next to the microphone symbol in your meeting tool control bar and choose Leave Computer Audio.
- Now click Join Audio. The following window appears.
- Choose Phone Call.

Here you will find the phone numbers, Meeting ID, Participant ID and password. Dial the call-in number with the area code closest to your location and follow the prompts.



The screenshot shows the 'Join Audio' window with the 'Phone Call' tab selected. It displays a list of phone numbers for dialing, a meeting ID, and a participant ID.

Phone Number
+1 253 215 8782
+1 669 900 6833
+1 408 638 0968
+1 346 248 7799
+1 646 876 9923
+1 312 626 6799
+1 301 715 8592

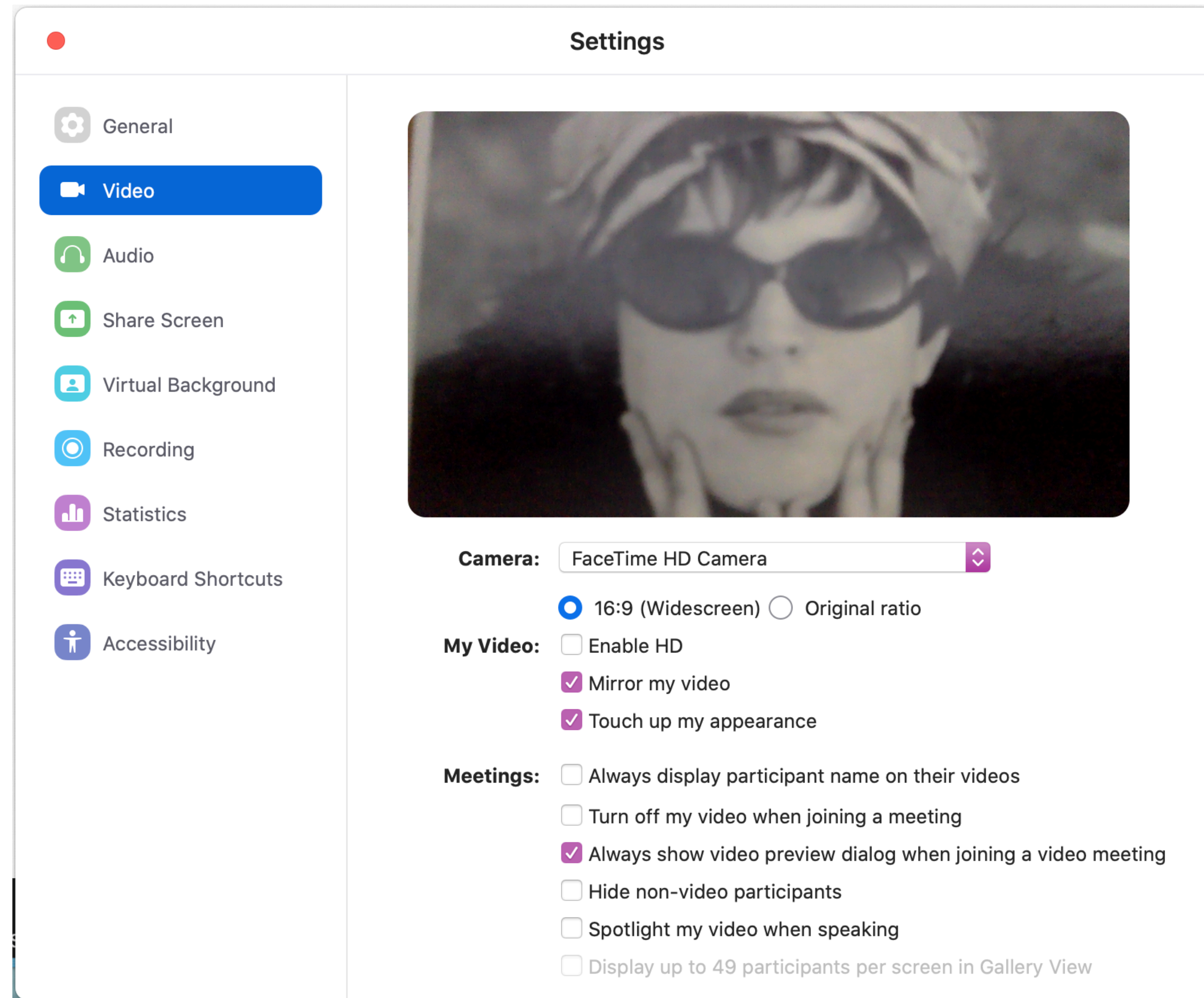
Meeting ID: 667 6100 0015

Troubleshooting Zoom

Video Issues

- Can the other participants see you? Make sure your camera is turned on (or plugged in if using an external webcam) and selected in Zoom. In the Zoom meeting click the up arrow next to the camera symbol and choose Video Settings. Make sure your camera is selected in the *Camera* selection. If it is not, use the drop down menu to select the correct camera. If the camera is turned on, make sure nothing is blocking the camera view. If using an external web camera, try connecting to a different USB port and repeat steps to select the correct camera. If you continue to experience difficulties, try restarting your computer/device.

Video Settings



Zoom Resources

- The following video gives you brief instructions on how to join a Zoom meeting:

<https://support.zoom.us/hc/en-us/articles/201362193-How-Do-I-Join-A-Meeting->

- More information on the various functions within Zoom can be found here:

<https://support.zoom.us/hc/en-us>