

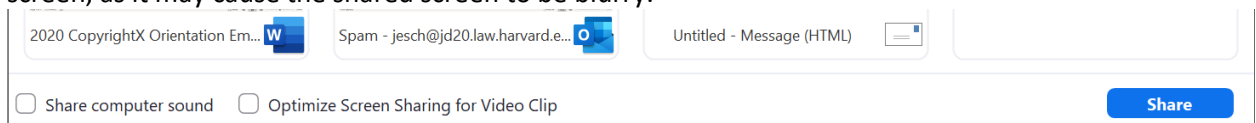
Zoom basics – CopyrightX 2020

Version 3.0 – Jennifer Esch

Below are some basic tips to help you get started with Zoom. The Zoom support website is fairly comprehensive. I've tried to include links to the most relevant portions.

You can share your screen (all active windows), a single window (application), or use the Zoom whiteboard.

- You do not need to preload files to share them, but it can be easier to have the files you want to use open before you start your class.
- Detailed instructions are here: <https://support.zoom.us/hc/en-us/articles/201362153-How-Do-I-Share-My-Screen->. Briefly:
 - Pick your slide software of choice (e.g., powerpoint) and have the file you want open.
 - After clicking the “Share Screen” Button in Zoom, select the appropriate application (your slide software of choice, e.g., powerpoint) and then enter into presenter mode.
 - Zoom also provides a list of all help topics related to screen share here: <https://support.zoom.us/hc/en-us/sections/201740106-Screen-Sharing>
- Choosing to share a single window (application) is generally recommended rather than sharing your screen directly (all active windows).** Sharing windows instead of your screen means that you have to start a new share every time that you want to switch materials (i.e., go from one powerpoint presentation to another). However, sharing windows can be “safer” in that you will not accidentally share private materials open on your desktop (e.g., emails, personal information you may be using to write letters of recommendation).
 - The shared window will have a **green outline** during your active share (to help you keep track of which window is being shared).
 - If you **pause** your share, the shared window will have an **orange outline**. It's helpful to pause if you want to jump around in a powerpoint, i.e., move from slide 4 to slide 14 without showing slides 5-13. In this example, you would hit pause while on slide 4, advance to slide 14, and then resume sharing.
 - If you want to share powerpoints in “presenter mode” (i.e., version without toolbars) and still privately access other documents and your Zoom participant and chat windows, you can do so by **changing your powerpoint slideshow settings** and then **sharing a single window (application) in Zoom** instead of your full screen. Detailed instructions and images explaining what this means are at the end of the document [here](#). This is especially helpful if you are using only one monitor.
- VIDEO SPECIAL INSTRUCTIONS:** If you want to share video, you need to select “Share computer sound” and “optimize screen sharing for video clip.” These options are given to you (subtly) at the bottom of the pop-up window for the “Share Screen” Button. Zoom recommends that you do not select “optimize screen sharing for video clip” when you are not sharing video in full screen, as it may cause the shared screen to be blurry.



Chat can enable participants with (1) everyone, publicly and privately (2) everyone publicly or (3) the host only. Chat can also be disabled.

- Zoom has detailed information about chats here: <https://support.zoom.us/hc/en-us/articles/203650445-In-Meeting-Chat>. The portion specific to changing chat settings is [here](#).
- Allowing participants to chat privately with each other is a personal choice. It can allow participants to help each other resolve technical issues without clogging up a public chat. Participants may also use it to thank each other for asking good questions. On the other hand, you are enabling text-based side-chatter to happen at all times. Some of this discussion may be course-related, but some may not be.
- **You can save your chat after the meeting, or choose to have it saved automatically.** Zoom has detailed information about saving chats here: <https://support.zoom.us/hc/en-us/articles/115004792763-Saving-In-Meeting-Chat>.

Participants can use reactions to “raise their hands.” This tool is very useful for managing discussions so that no person is talking over another.

- Zoom has detailed information here: <https://support.zoom.us/hc/en-us/articles/115001286183-Nonverbal-Feedback-During-Meetings>. In general, student and faculty Harvard Zoom accounts have this feature enabled. I expect this should be true for everyone.

You can use polls to get full-class participation.

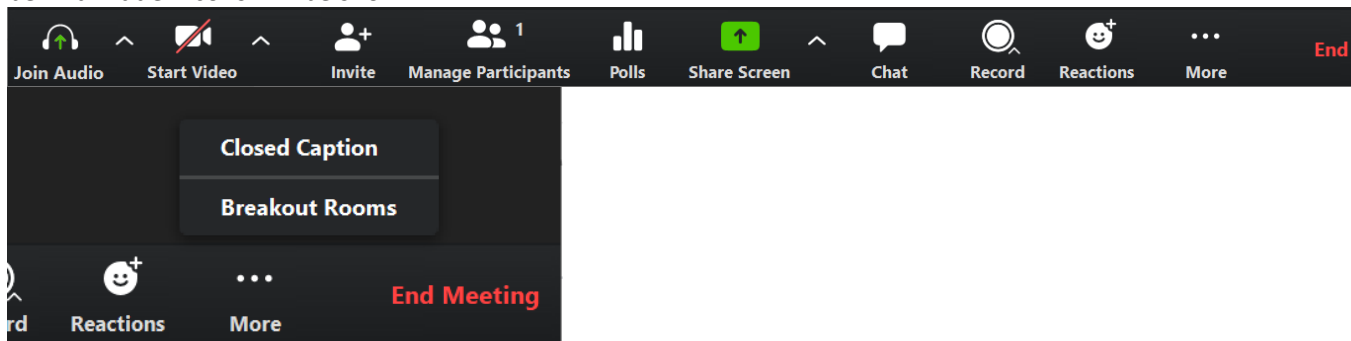
- You can use polls. You may need to turn them on in your “advanced features” settings. You can access these settings as described [below](#).
- Zoom has detailed information here: <https://support.zoom.us/hc/en-us/articles/213756303-Polling-for-Meetings>. In general, student and faculty Harvard Zoom accounts have this feature enabled. I expect this should be true for everyone.
- In case you are testing Zoom and getting worried --- once polling is enabled, the polling option appears to show up in your **scheduled** meetings, but not in meetings that you access from the “new meeting” button in the Zoom desktop client. (At least based on my testing.)

You can use breakout rooms to have small group discussions.

- Zoom provides detailed information here: <https://support.zoom.us/hc/en-us/articles/206476313-Managing-Video-Breakout-Rooms>.
- Briefly:
 - You will want to check that you have enabled breakout rooms in your “advanced features” settings. How to access these settings is described [below](#).
 - Once enabled, you can start breakout rooms using your toolbar in Zoom:



- Because the Breakout Room icon is one of the last in the toolbar, it may not show up in your toolbar depending on the sizing of your Zoom window and screen. If you don't see this icon, you may need to select “more” at the end of your toolbar (icon with ellipsis). Then the options behind hidden icons will be shown.



It can be helpful to use key-stroke shortcuts to access your participants window and chat windows. You can also access them from your Zoom toolbar, but some of the icons are hidden if you resize your Zoom screen.

- Both the participants window and chat window can be accessed from the Zoom toolbar from the “Manage participants” (icon with two people) and “Chat” (icon of speech bubble and ellipsis).
- The **participants window** is a list of participants along with access to your controls over them. Zoom has detailed instructions here: <https://support.zoom.us/hc/en-us/articles/115005759423-Managing-participants-in-a-meeting>. Briefly:
 - You can use the participants window to mute/un-mute specific individuals, stop the video of specific individuals, chat directly with specific individuals, or remove an individual from the meeting if needed.
 - When sound is coming from a particular participant, you will see the microphone next to that participant's name “filling up.” In this way, you can mute specific individuals that are causing feedback. You can also mute everyone at once using a button at the bottom of your participant window.
 - The participants window will also show non-verbal feedback (like raised hands). Participants with raised hands move directly to the top of the participants list.
- The **chat window** is discussed above. It is a window for live text-based chatting.
- Because the Zoom toolbar can show up differently depending on window size and whether you are sharing your screen, using keyboard shortcuts can be helpful if your windows suddenly disappear and you don't want to have to hunt around for the relevant icons. For a complete list of keyboard shortcuts for both windows and mac: <https://support.zoom.us/hc/en->

us/articles/205683899-Hot-Keys-and-Keyboard-Shortcuts-for-Zoom. Shortcuts for chat and participant windows for Windows and Mac are below.

- Windows
 - **Alt + U** = makes the **participants window** appear and disappear
 - **Alt + H** = makes the **chat window** appear and disappear
- Mac
 - **Command(⌘) + U** = makes participants window appear and disappear
 - **Command(⌘) + Shift + H** = makes chat window appear and disappear

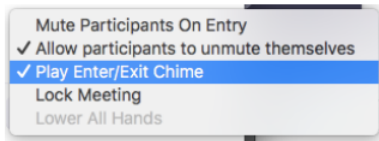
You can choose to have exit/enter chimes for your participants or not.

- There is an option to change the default in your “advanced features” settings.
- You can also change these settings in a given meeting.

Enable a Chime for a Meeting in Progress

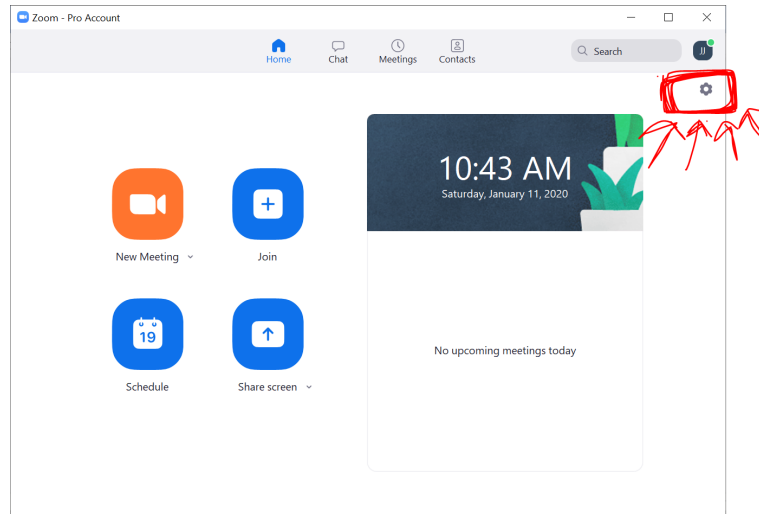
If you would like to enable a chime on a meeting you are hosting that's already in progress:

1. Click Manage Participants to view the participant list of the meeting.
2. At the bottom of the participant list, select **More**.
3. From the menu that appears, enable the **Play Enter/Exit Chime** option.

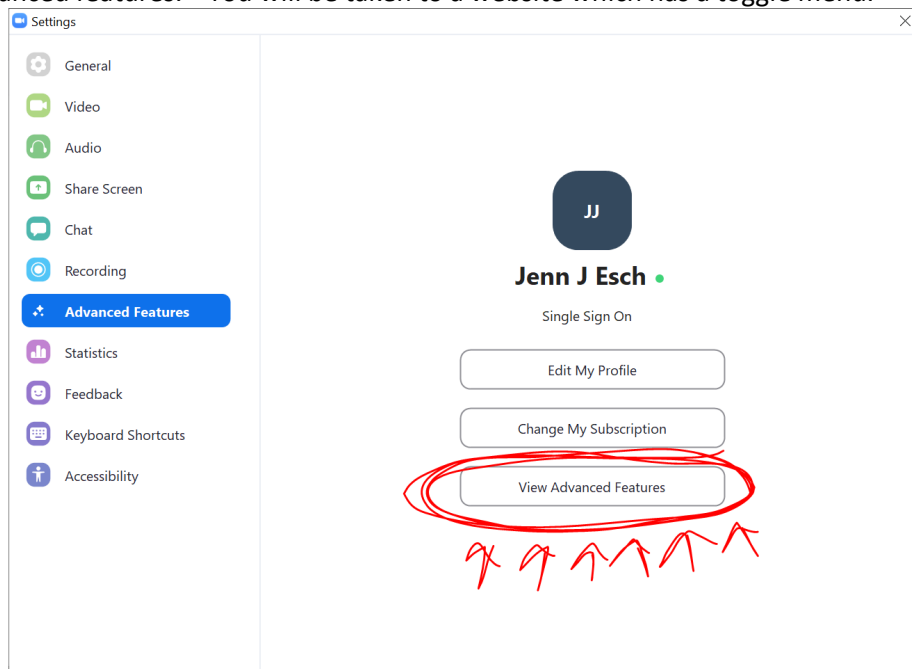


Checking your “advanced features” settings.

- Zoom allows you to change some defaults in a somewhat hidden place.
 - The most relevant features here appear to be (1) autosaving chats (2) allowing participants to annotate (3) autosaving the whiteboard (4) **polls** (5) scheduling privileges (6) enter/exit chime defaults.
- You only need to do this once
 - Changing your settings should apply to all meetings you host, including ones that were scheduled before you changed the settings.
 - If meetings are scheduled on your behalf, it is still **your settings (the person hosting the meeting)** that apply, **not the settings of the person scheduling the meeting**.
- One way of getting there
 - Step 1: Go to Harvard.zoom.us and click “sign in”
 - Step 2: In the menu bar on the left, select “settings”
- Another way of getting there
 - Step 1: Go to Zoom settings in the Zoom client (see screenshot below)



- Step 2: Go to the “advanced features” tab on the left toolbar. Then click “view advanced features.” You will be taken to a website which has a toggle menu.



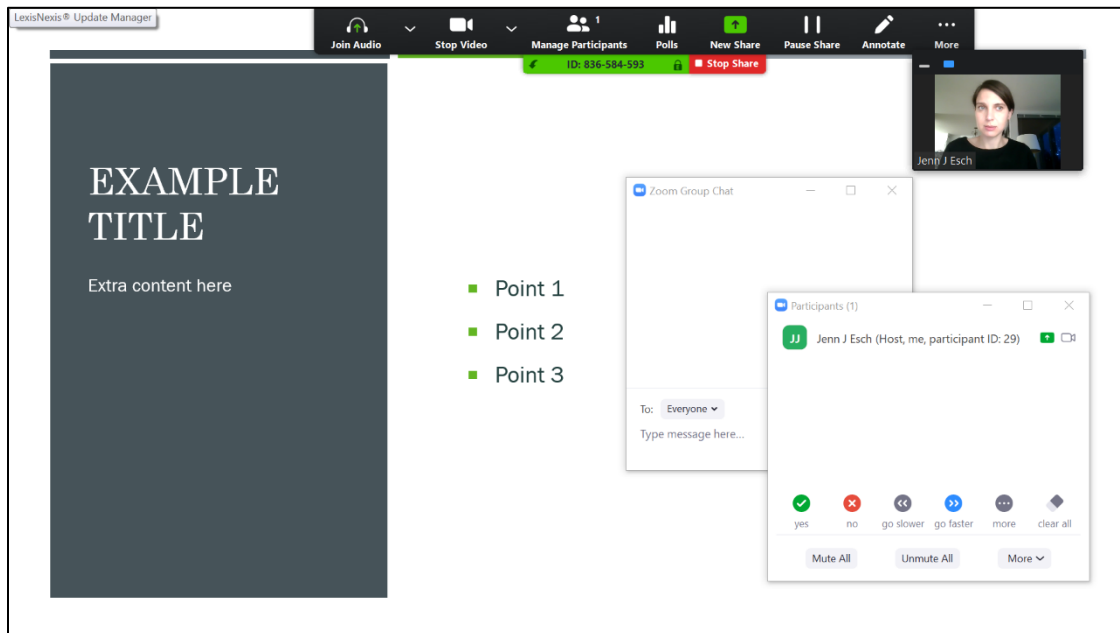
Advanced instructions

Below are further details about more advanced settings.

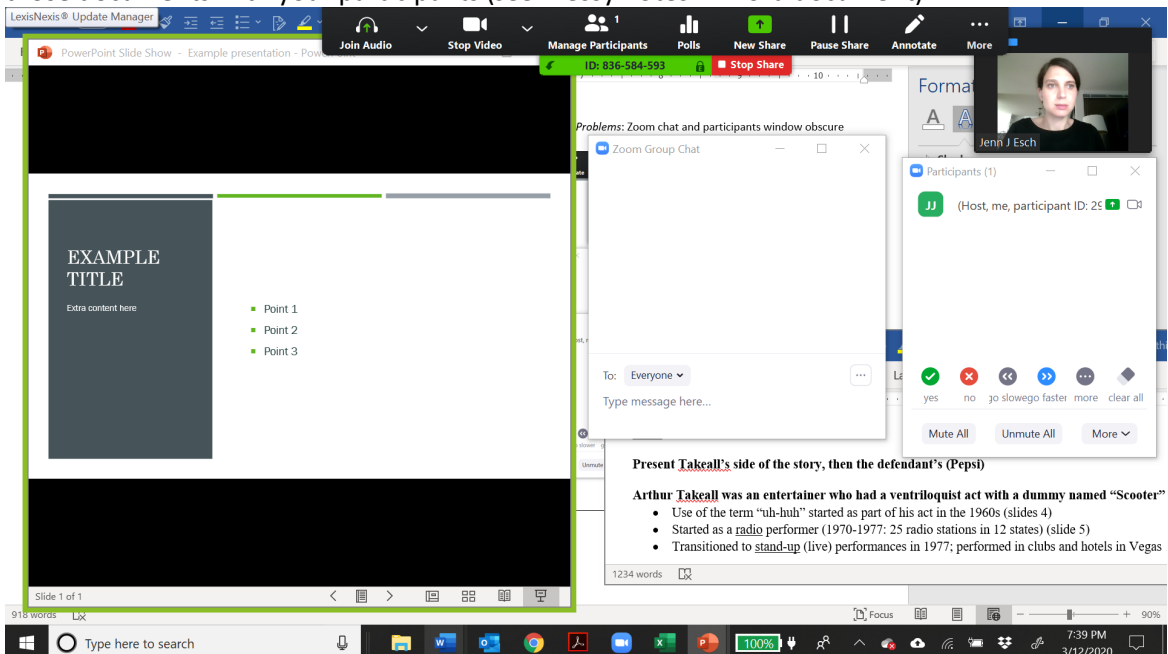
Sharing powerpoints in presenter mode while avoiding full screen. This is especially helpful if you only have one monitor and can be achieved by (1) sharing a window in Zoom (not screen) and (2) changing powerpoint settings.

A comparison of the outcomes is below:

- **Option #1: Single monitor used to share powerpoint with default presenter mode (full screen in powerpoint, window sharing in Zoom).** *Problems:* Zoom windows (chat, participants, video) obscure parts of your slides (in your view, not in your participants' views). You can't access other documents at the same time.

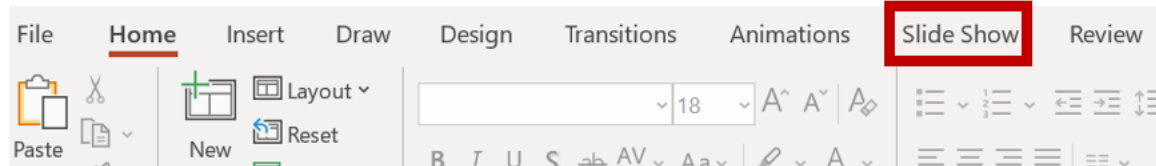


- **Option #2: Single monitor used to share powerpoint with adjusted settings in powerpoint, window sharing in Zoom.** Participants see only what is outlined in **green** (powerpoint window to the left). You can see and have access to the participants window and chat window without obscuring your slides. You can also access other documents if you have to, without sharing those documents with your participants (see messy notes in word document).

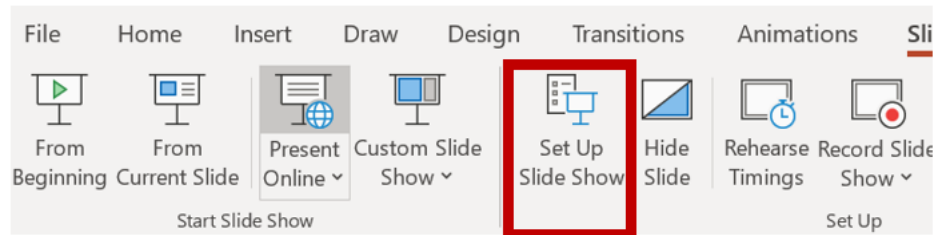


- Zoom provides details on how to enable the single monitor set-up with adjusted presenter settings (window) (Option #2) [here](#). If those instructions aren't detailed enough, more are below:

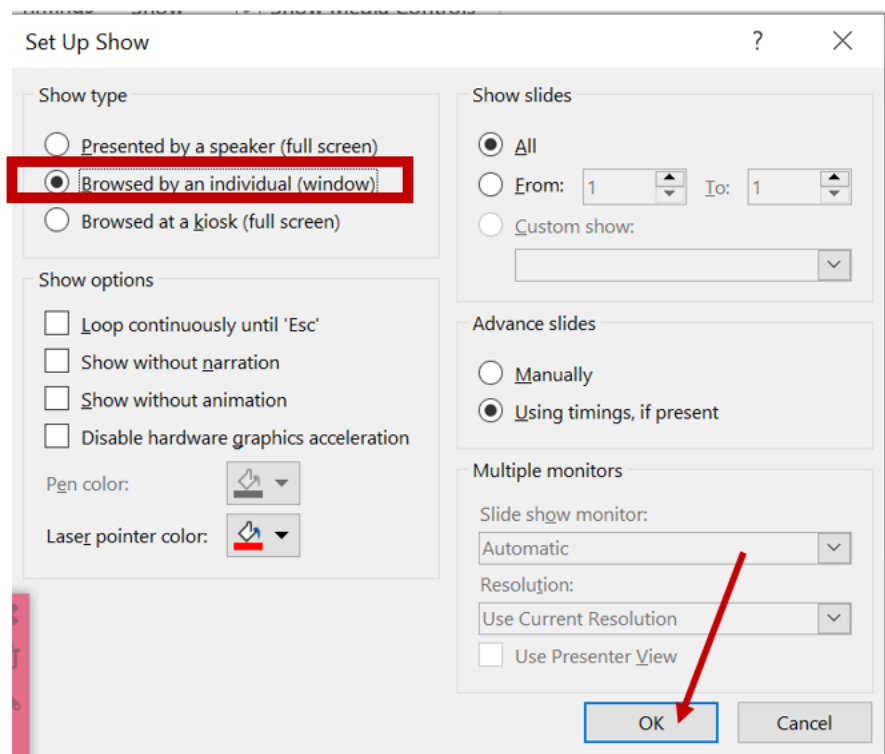
- **Step 1:** In **powerpoint**, Go to “slide show” in your powerpoint toolbar



- **Step 2:** In the slide show settings select “set up slide show”



- **Step 3:** Select “browsed by an individual” and click ok.



- Share your powerpoint in presenter mode. You can either first start your slide show, and then share this **window** (not screen) in Zoom or start sharing the powerpoint **window** (not screen) in Zoom, and then start the slide show. More on window vs. screen sharing is [above](#).