



## **The Silver Lining Café**



## **Using Zoom in an Adult LBS Setting**

### **Zoom Video Conferencing**

#### **Section 1:**

Getting Started: Setting up an Account

Scheduling a Recurring Meeting

Sending an Invite

Joining a Meeting

# Acknowledgment

MTML would like to thank the many weekly contributors and participants who not only made the Silver Lining Café possible but contributed so much to its success. Contributors included:

## **Silver Lining Facilitators**

Susan Lefebvre, MTML Executive Board Member, Silver Lining Café Creator

Anjali Chaudhri, MTML, Project Manager

Tracey Mollins, AlphaPlus, Organizational Development Consultant – Education and Technology

## **Supporters**

Trish Samuels, ESU Toronto District School Board

Monika Jankowska-Pacyna, AlphaPlus, Organizational Development Consultant – Education and Technology

**This manual was developed by MTML.**

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## **Silver Lining Café Participants and Organizations**

### **Alexandria Park Neighbourhood Learning Centre**

Margaret Griffiths

Jason To

Kim Wilson

### **Centre of Learning and Development**

Camila Geo de Oliveira

### **Dixon Hall**

Maxine Brown-Simpson

### **Frontier College**

Denise Dennis

Jared Ross

### **LAMP**

Anita Dhanjal

### **Learning Centre for Georgina**

Kristin Saunders

### **Literacy Council York-Simcoe**

Magda Debney

### **Parkdale Project Read**

Mary Brehaut

### **West Neighbourhood House**

Annie Mahoney

### **Street Haven**

Gloria Snoddon

### **Toronto Catholic District School Board**

James Black

Gaby Jolie

### **Toronto District School Board**

Alison Clarke

Susan Long

Shelley Lynch

Carol Olson

Hellen Pantis-Tassis

Smita Parpani

Grace Pasquino-Liotti

Judy Perry

Trish Samuels

Stephanie Schwartz

Ruth Smith

Rosemarie Bridgemohan

Danielle Sprange

Margaret Postlethwaite

### **Toronto Public Library**

Susy Guadagnin

### **YMCA**

Ambreen Ahmad

Tara Pishghadam

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# Zoom Video Conferencing Tools

There are many video conferencing platforms being used by LBS agencies such as Google Meet, Skype, WhatsApp, Webex and Zoom. We will only cover the Zoom platform as it's the most commonly used video conferencing tool used by literacy programs, and also by the Silver Linings Café.

In this manual, we provide information on how to use Zoom as well as highlight some of the features that Silver Lining Café participants have told us are useful in making the most of their Zoom meetings with learners. You will find step-by-step instructions and **practitioner tips**.

There are six sections to this Zoom manual:

**Section 1: Getting Started: setting up an account, scheduling meeting, sending an invite, joining a meeting**

Section 2: In Meeting Controls and Video layouts (Gallery/Speaker views)

Section 3: Whiteboard, Screen Sharing and Annotation Tools

Section 4: Breakout Rooms

Section 5: Polling

Section 6: Preparing for Remote Learning, Building Community & Engaging Learners, Online Resources

For the history of the Silver Lining Café project and outcomes, refer to the companion report: "Silver Lining Café" Report, September 2020.

Please note that Zoom updates are frequently available. Some features discussed in this manual will not be possible to use without uploading the most recent version of Zoom. Also note that not all of the features are available to use when starting a meeting from the web portal without being logged into the desktop client as well.

The information in this manual is accurate as of December 2020. Features and steps to using them may change with future downloads. Consult [support.zoom.us](https://support.zoom.us) for more resources and information.

Language note: **Click** and **select** are used interchangeably here. This guide is for desktop or laptop users. There is a separate mini manual for mobile device users (phones and tablets).

*Happy Zooming!*

*Susan and Trish (December 2020)*

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# Creating a Zoom Account

There are several levels of Zoom accounts including free and paid subscriptions. Go to [zoom.us](https://zoom.us) and follow the step-by-step instructions to choose the account that serves your agency. Typically, the free account has a 40-minute time limit; however, Zoom has waived this restriction for education during the pandemic.

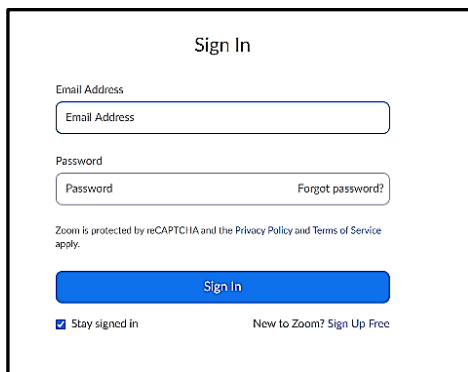
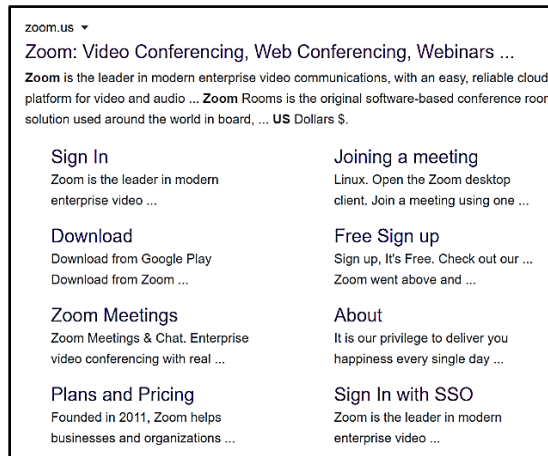
## Signing Into Your Account (Zoom Web Portal)<sup>1</sup>

To sign into your account from the Zoom web portal:

Type **Zoom.us** into Google,

**Or** use the address bar to go to the Zoom website directly.

Select **Sign In**



Enter the **Email Address & Password** you chose when you created your account.

### Practitioner Tips:

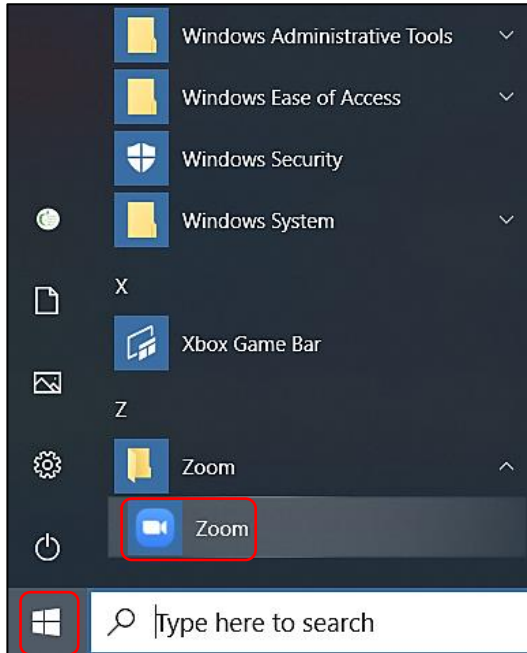
If you share your account with colleagues, **sign out** of Zoom when you finish so that they are not locked out of the account. Avoid using the **Stay signed in** option to prevent the same issue.

Sign in again before you start your next session as there are some Zoom features that require desktop sign-in to access. (Stay signed in if you are the only Zoom user on the device.)

<sup>1</sup> There are two ways to sign in, change settings, start meetings, etc. – through the web portal ([zoom.us](https://zoom.us) website) and desktop client (Zoom app on your computer, accessed from the icon on your taskbar/desktop). The portal is mostly used to change your profile and meeting settings, scheduling (and viewing/editing) meetings but you can do these things from your desktop as well. (Unfortunately, some settings can only be adjusted from one or the other.)

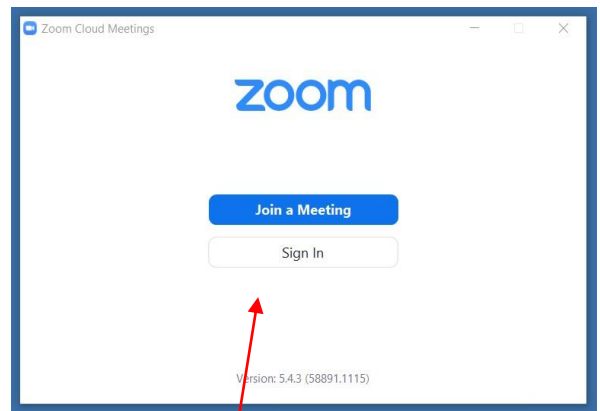
# Signing into Your Account (Desktop Client)<sup>2</sup>

To sign into your account from your desktop, select the **Zoom icon** from the taskbar at the bottom of your screen.

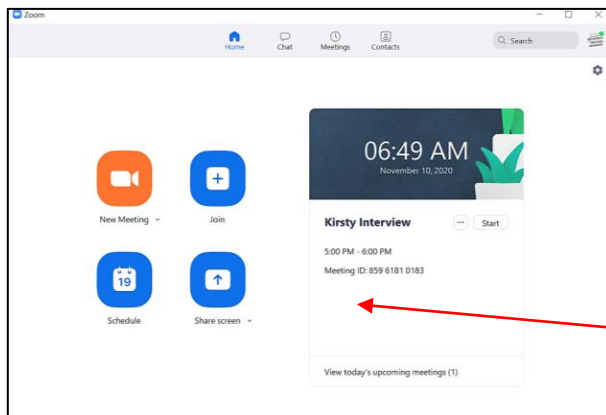


If the Zoom icon is not on the taskbar, pin it there:

Select the **Start icon** > scroll down > click the **arrow** by the Zoom folder > click and hold mouse > drag the **Zoom icon** to the taskbar.



The pop-up window above will appear on your desktop).



If you are already signed in, it will look like the window on the left with four icons (**New Meeting, Join, Schedule, Share screen**) and the time and date.

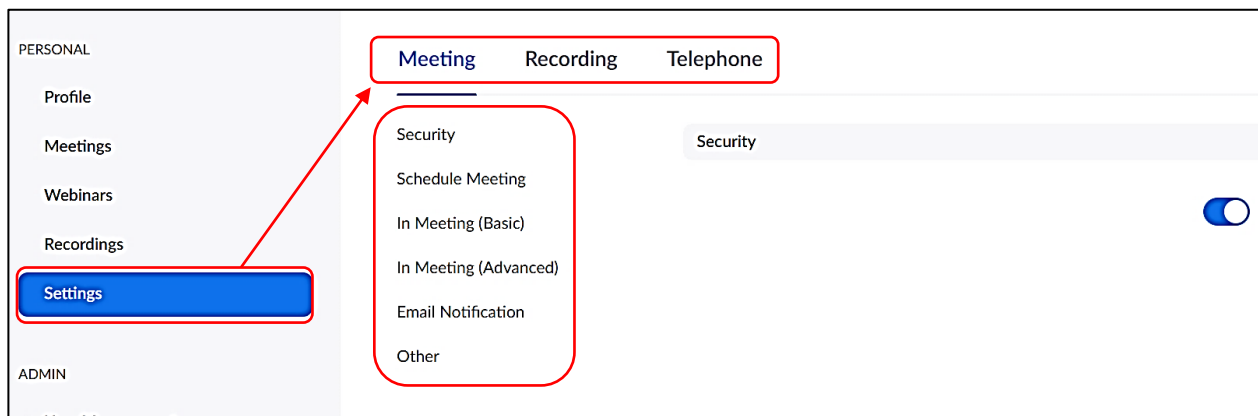
<sup>2</sup> See footnote 1 on previous page re web portal vs desktop client.

# Choosing Your Settings (Web Portal)



Zoom settings provide you with the ability to customize your preferences and enable or disable features. You can set your default preferences for meetings here – new meetings will keep the settings you choose.

In your account, click on **Settings** on the left menu. Under **Settings**, you'll notice there are three headings (across the top):

- Meeting
- Recording
- Telephone



There are literally dozens and dozens of preference options! Most of them you won't be concerned with. You will want to enable specific features for all meetings. Select **Settings** and scroll through the categories to enable or disable features that suit your program. Click the toggle to **disable** the feature (grey, slides to left). Click again to **enable** it (blue, slides to right).

 Grey = disabled                      Blue = enabled                      

If you cannot enable/disable a feature, check with your administration. They may have chosen to lock the feature.

**Practitioner Tip:** We surveyed LBS practitioners to find out which preferences they found most helpful to manage online classes and enhance learners' experience. Most of the feature preferences they reported changing were under the category of **Meetings**. Their recommendations are on the next three pages:

## Choosing Your Settings (Web Portal)

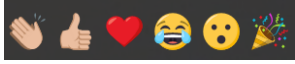
Security	
Feature	Details
<input type="radio"/> <b>Waiting Room</b>	Good security feature → see who is joining your session. Learners are first placed in a waiting room. You must admit them.
<input type="radio"/> Require a <b>passcode</b> when scheduling new meetings	Learners must enter <b>passcode</b> before joining meeting. Passcode gets sent with meeting invite. Revise your passcode to a word or number rather than the number/letter combination assigned automatically – easier for learners to enter. No upper/lower case!
<input type="radio"/> Require <b>passcode</b> for participants joining by phone (this is for dial-in by landline)	Extra layer of security.
<input type="radio"/> Embed passcode in invite link for <b>one-click join</b>	No need for learners to enter passcode. It's embedded in invite. Select this if confident learners won't share meeting link.
<input type="checkbox"/> Only <b>authenticated users</b> can join meetings from Web client	If this feature is enabled ( <b>blue</b> ), then most learners will be <b>unable</b> to join your meeting. Make sure this feature is disabled ( <b>grey</b> ).
Schedule Meeting	
Feature	Details
<input type="radio"/> <b>Host (that's you!) video</b>	Start meetings with your video on.
<input type="radio"/> Audio Type <input type="radio"/> Select, <b>Telephone</b> and <b>Computer Audio</b>	Good for learners with audio issues/lacking computer speakers. Can use desktop/laptop for video and phone/tablet for sound.
In Meeting (Basic)	
Features	Details
<input type="radio"/> <b>Chat</b> <input type="radio"/> Private chat <input type="radio"/> Auto saving chats	Allowing learners to use chat feature keeps them engaged, gives introverts opportunities to express opinions. Can share links, images, documents, activity instructions, etc. Learners can put questions in the chat while someone else is speaking. Saving chats can keep track of issues.



## Choosing Your Settings (Web Portal), Cont.

<ul style="list-style-type: none"> <li>☐ <b>Sound notification</b> when someone joins or leaves, play sound for everyone</li> </ul>	Sounds like a <b>doorbell chime</b> . Good way to be alerted to latecomers when busy! (Note: some practitioners find the sound annoying.)
<ul style="list-style-type: none"> <li>☐ <b>File transfer</b> (through chat)</li> </ul>	You & learners can <b>upload and share files</b> and/or <b>web links</b> through in-meeting chat.
<ul style="list-style-type: none"> <li>☐ <b>Co-host</b></li> </ul>	Allows you to <b>add co-hosts</b> . Could be advanced learner or volunteer. They have the same in-meeting controls as the host except they cannot start or end a meeting.
<ul style="list-style-type: none"> <li>☐ <b>Polling</b></li> </ul>	Great way to <b>engage learners</b> & get lesson or discussion feedback. You can use polls to answer lesson questions too (multiple choice). Post poll during or after sessions. You can create poll before meeting. ( <b>Polling feature unavailable on basic [free] accounts.</b> )
<ul style="list-style-type: none"> <li>☐ Always show <b>Meeting Control Toolbar</b> (In-Meeting Controls)</li> </ul>	Important for learners new to Zoom as they can get confused and not know how to <b>find their controls</b> . Tap <b>Esc</b> (escape) on toolbar to show it again. Then change settings to enable.
<ul style="list-style-type: none"> <li>☐ Show <b>Zoom windows</b> during screen share</li> </ul>	Useful for teaching learners to use Zoom features. Can turn off within meeting if not needed (under <b>Share Screen settings</b> ).
<ul style="list-style-type: none"> <li>☐ <b>Screen sharing</b>, all participants</li> </ul>	Major feature that promotes <b>participation</b> during lessons. Allows you & learners to <b>share screen content</b> during meetings.
<ul style="list-style-type: none"> <li>☐ <b>Annotation</b></li> <li>☐ Allow <b>saving</b> of shared screen with annotation</li> </ul>	You & learners can use <b>annotation tools</b> to add info to any screen shared documents, like reading passages or math sheets. You can annotate a PDF, word doc, image, web page or anything you see on your screen.
<ul style="list-style-type: none"> <li>☐ <b>Whiteboard</b></li> <li>☐ Allow <b>saving</b> of whiteboard content</li> <li>☐ <b>Auto save</b> whiteboard content when sharing is stopped</li> </ul>	Anyone can <b>share a whiteboard</b> during lessons. A whiteboard is the virtual version of a class-room whiteboard (or chalkboard). Great tool for math lessons, brainstorming, or writing language experience stories.
<ul style="list-style-type: none"> <li>☐ <b>Remote control</b></li> </ul>	Allows learners to control your shared content.
<ul style="list-style-type: none"> <li>☐ <b>Nonverbal feedback</b></li> </ul>	Learners can give nonverbal feedback & express opinions/communicate by selecting <b>Participants</b> on controls and then clicking on <b>icons</b> Yes/No/Thumbs Up/Down etc.

## Choosing Your Settings (Web Portal), Cont.

<ul style="list-style-type: none"> <li>Meeting reactions (emoji)</li> </ul> 	<p>Learners can communicate without interrupting by reacting with emoji that shows on their video. Reactions disappear after 10 seconds. It's a simple way to check in with learners during your class.</p>
<ul style="list-style-type: none"> <li>Allow participants to <b>rename</b> themselves</li> </ul>	<p>Good option if learners are using someone else's device or a phone.</p>
<b>Meeting: Advanced</b>	
<ul style="list-style-type: none"> <li><b>Breakout room</b></li> <li>Allow host to <b>assign participants</b> to breakout rooms when scheduling</li> </ul>	<p>Allows you to split learners into separate, smaller rooms. This is an advanced setting. Practitioners use this to help individual learners with math problems or to administer Learning Activities or Milestones.</p>
<ul style="list-style-type: none"> <li><b>Virtual background and filters</b></li> </ul>	<p>Customize your <b>background/filters</b> to keep environment private/stimulate discussion. If using an older computer/tablet/ laptop, this feature might not work.</p>
<b>Telephone</b>	
<b>Features</b>	<b>Details</b>
<ul style="list-style-type: none"> <li>Choose where most participants call into or call from to join the meeting.</li> <li><b>Global Dial</b> in countries/regions</li> </ul>	<p><b>Select Canada</b> from the dropdown menu for both options. Note: learners won't be able to see anything or use video – they can only listen and talk in your lesson from a landline.</p>

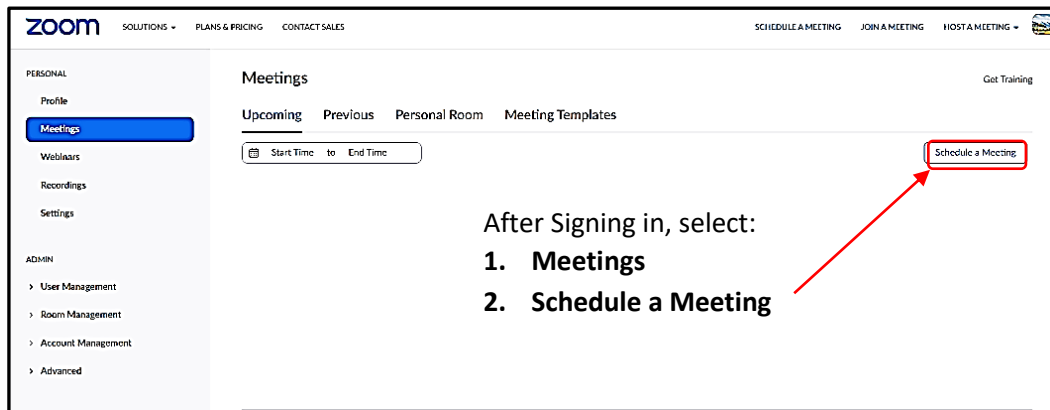
**Practitioner Tip:** Check out the Zoom blog for tips on managing and securing your classroom while sharing content with participants at:

<https://blog.zoom.us/best-practices-for-securing-your-virtual-classroom/>



# Scheduling Recurring Meetings (Web Portal)

Most practitioners find it both simpler and a time saver to create recurring meetings since they meet regularly with the same group of learners (even if the times vary from day to day). Scheduling a recurring meeting is also easier for learners as they will have only one link to save (and passcode to remember, if they ever need to enter it).



1. Rename the **Topic** something meaningful to learners.

2. Check **Recurring meeting**.

3. Select **Weekly** to check a box for each day the group meets.

4. Select **End Date** (e.g. end of semester /year).

5. You must select one or both **Security** options (depending on your program requirements – check with your program to confirm whether you need a passcode). Change the passcode to one that learners can easily remember. Tip: it doesn't have to be six digits. Don't use a mix of upper and lower case letters.

## Scheduling Recurring Meetings (Web Portal), Cont.

The screenshot shows the Zoom meeting settings interface. The 'Video' section has 'Host' and 'Participant' both set to 'on', with the 'on' radio buttons highlighted by a red box. The 'Audio' section has 'Both' selected. The 'Meeting Options' section has 'Allow participants to join' set to 'Anytime' before start time. 'Mute participants upon entry' is unchecked, and 'Request permission to unmute participants' is checked. Other options like 'Require authentication to join', 'Breakout Room pre-assign', and 'Automatically record meeting' are unchecked.

Your current setting (on or off) appears blue (either because it's the default or you set it this way in the past).

Learners new to Zoom often have challenges unmuting themselves, so unchecking **Mute participants upon entry** may be helpful.

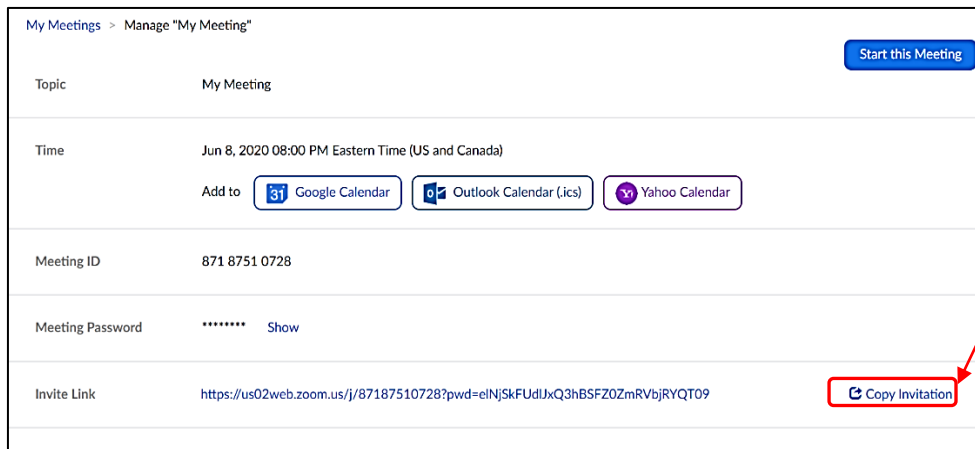
If you enable this feature, you can **unmute learners** in current and future meetings after they initially consent the first time, without them having to struggle to find the mute icon.

Scroll down to the bottom of the page.

Select: **Save**.

The screenshot shows the bottom of the Zoom meeting settings page. The 'Audio' section has 'Both' selected. The 'Meeting Options' section has 'Mute participants upon entry' checked and 'Enable waiting room' checked. The 'Save' button is highlighted with a red box.

# Sending Learners a Meeting Invitation (Web Portal)



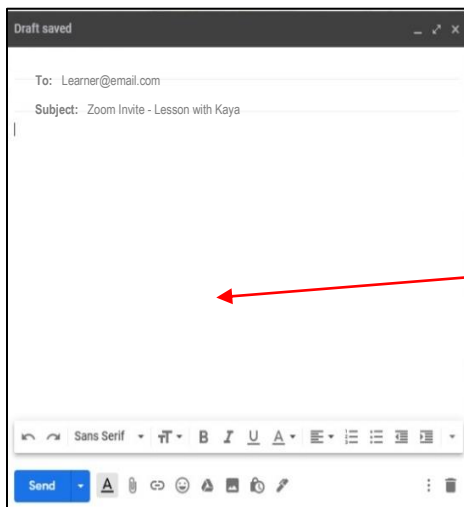
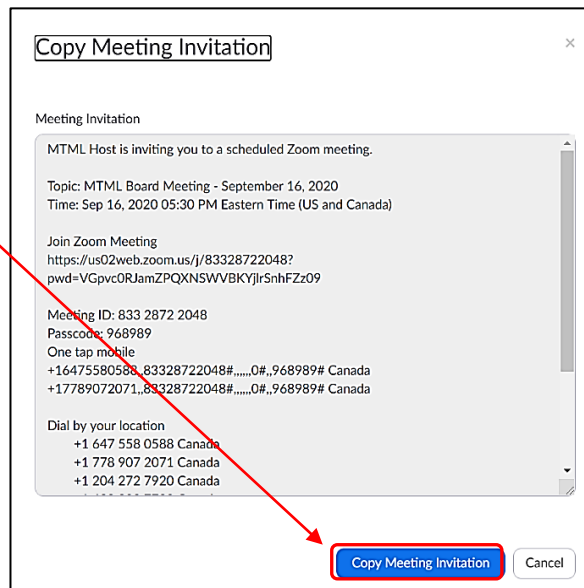
After saving the scheduled meeting, this screen appears.

Select **Copy Invitation** (which you will paste into an email invite shortly).

After clicking **Copy Invitation**, you will see this window pop up.

By selecting **Copy Meeting Invitation**, all important meeting details including **meeting link**, and **passcode** will copy onto your computer's clipboard

Then paste it directly into a document or email.



Open your email and compose a message. Enter the learner's email address in the **To:** field at the top.

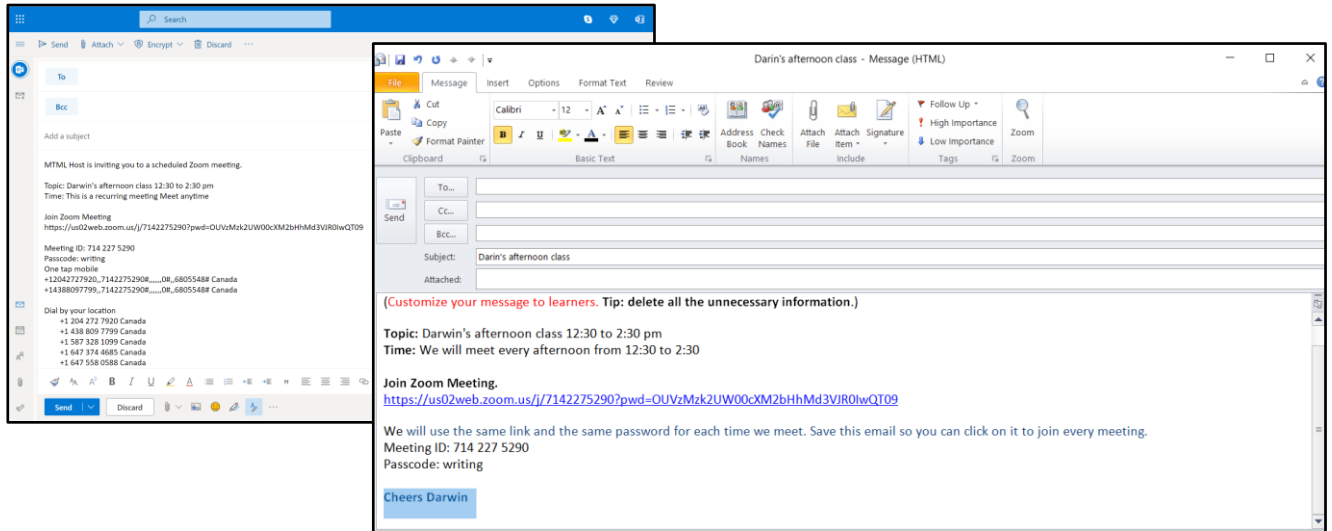
Paste the invitation into the body of the email with **ctrl (Control) + P** on your keyboard

or

**Right Click** on the mouse and select **Paste!**

# Editing the Meeting Invitation

You can customize your invitation. Delete unnecessary words and edit the email, so learners can easily find key information. Unless you have learners who call in to listen to your lessons (who will not have video or be able to see your screen), you can delete all the phone numbers.

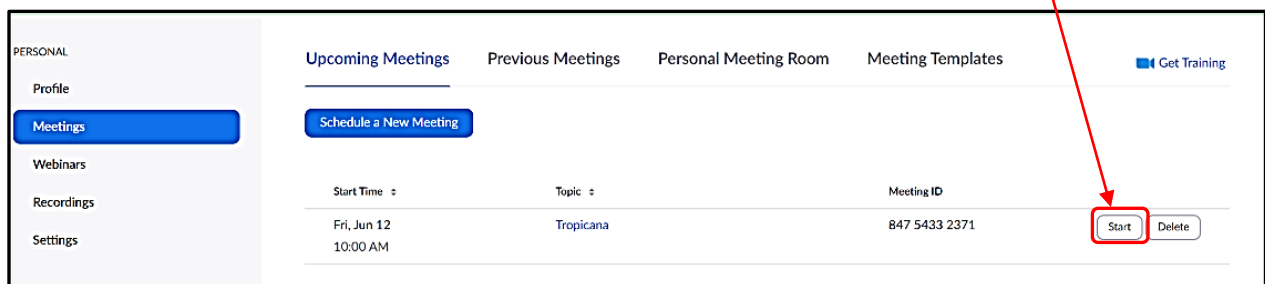


**Practitioner Tip:** When you send a meeting invite, make sure the link is live or hyperlinked (blue/underlined) so learners can click on it to join the meeting. If it's not, place the cursor after the last character in the link address and press **enter** on your keyboard. It should turn blue.

<https://tds-ca.zoom.us/j/93228306086?pwd=NTFEb0JyNkF1VkRlcnJmVWdKR1JWUT09>

# Starting a Meeting from the Web Portal (desktop)

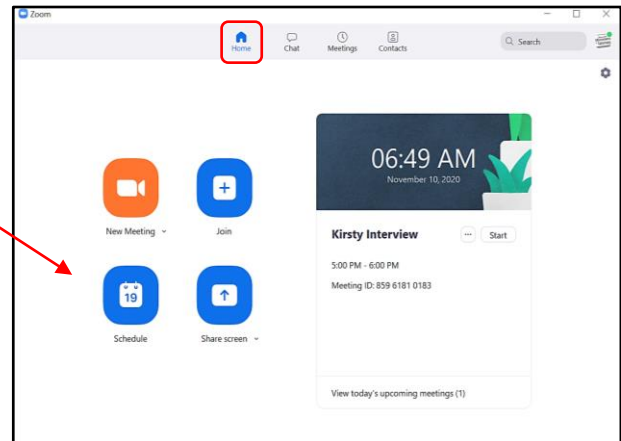
On the day of your session, log back into the Zoom web portal shortly before the meeting starts. You will see a list of **Upcoming Meetings**. Select the meeting and click Start.



# Scheduling Recurring Meetings (Desktop Client)

Follow the instructions on page 2 for signing into through the Desktop Client.

From the Home page, you will see this popup window. Click **Schedule**



Schedule meeting

## Schedule Meeting

**Topic**  
Darwin's afternoon class 12:30 to 2:30 pm

**Recurring meeting**  
Remember to check recurrence or repeat in your calendar invitation

**Meeting ID**  
 Generate Automatically  Personal Meeting ID 714 227 5290

**Security**  
 Passcode (writing)  Waiting Room

**Video**  
Host:  On  Off Participants:  On  Off

**Audio**  
 Telephone  Computer Audio  Telephone and Computer Audio  
Dial in from Canada [Edit](#)

**Calendar**  
 Outlook  Google Calendar  Other Calendars

**Advanced Options** ▾

**Save** **Cancel**

When you select recurring meetings, the **Start** and **Duration** options will disappear.

When enabling features, follow the same suggestions in the [Scheduling Meetings \(Web Portal\)](#) on page 7.

Select **Advanced Options**:

Click **Allow participants to join Anytime** (or choose 5, 10 or 15 minutes before start) if you want learners to be able to join ahead of time.

You can also request permission to unmute participants here if you've enabled it in your settings.

After you choose your options,

Click **Save**.

**Advanced Options** ^

Allow participants to join Anytime before start time

Mute participants upon entry

Only authenticated users can join

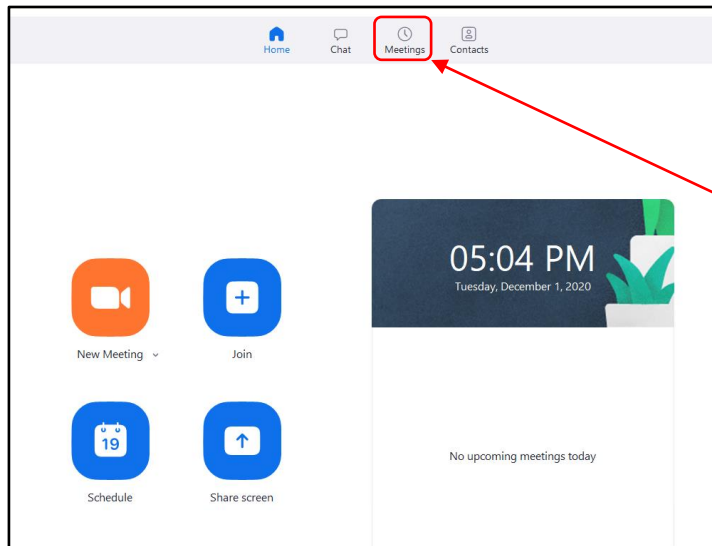
Request permission to unmute participants

Automatically record meeting

Alternative Hosts:  
john@company.com

**Cancel** **Save**

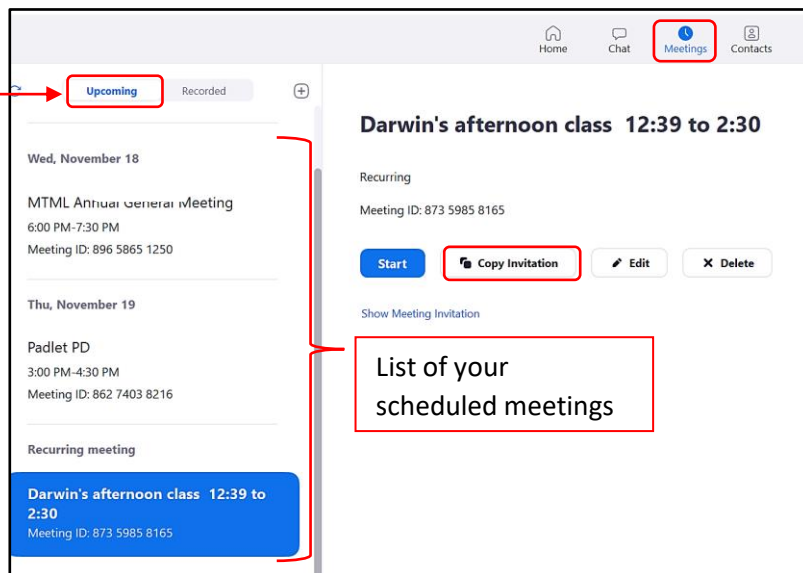
## Inviting Learners (Desktop Client)



Open the desktop client (and follow instructions on page 2 to sign into the desktop client if you're unsure how to sign in).

To invite learners to a meeting, select the **Meetings** icon from the top menu.

Then you will see this window below:



1. Select the recurring meeting you want (e.g. in this example, **Darwin's afternoon class**) from the **Upcoming** menu on the left.

2. Click **Copy Invitation**.

The invitation will be copied onto your clipboard. Open your email and paste it into the email body (see page 9 above if you are unsure how to send the invitation).

Follow the same editing suggestions outlined on page 9.

## Starting a Meeting (Desktop Client)

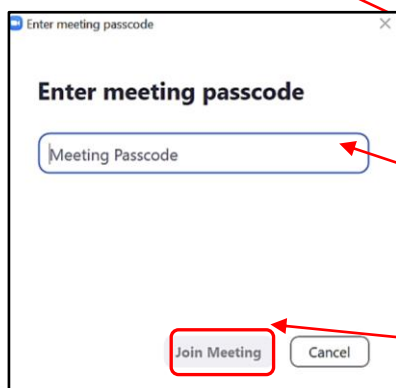
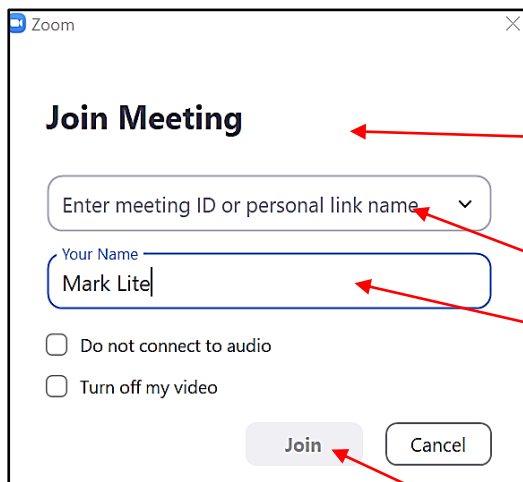
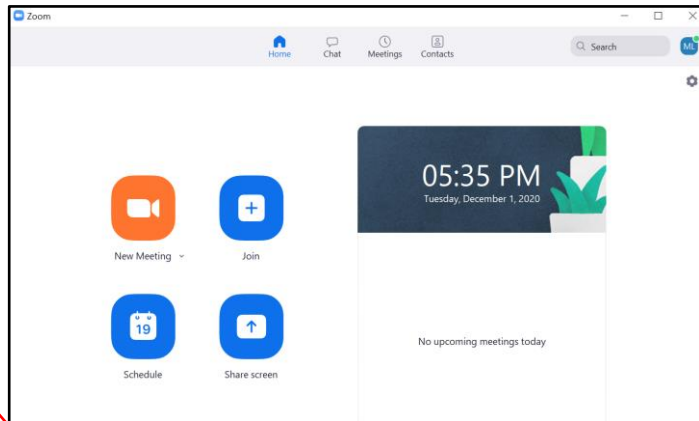
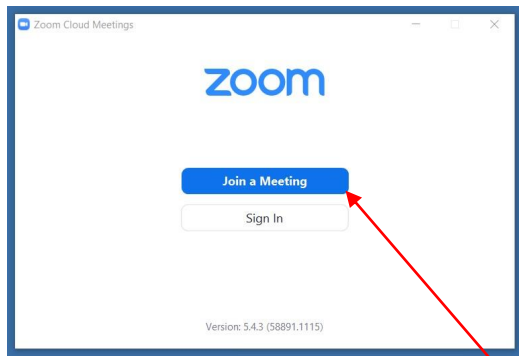
When you are ready to start your meeting, select the **Zoom** icon from your taskbar.

Scroll down your list of the **Upcoming** meetings & select the desired meeting. Then select **Start**.



# Joining a Meeting from the Computer (Desktop Client) - Learners

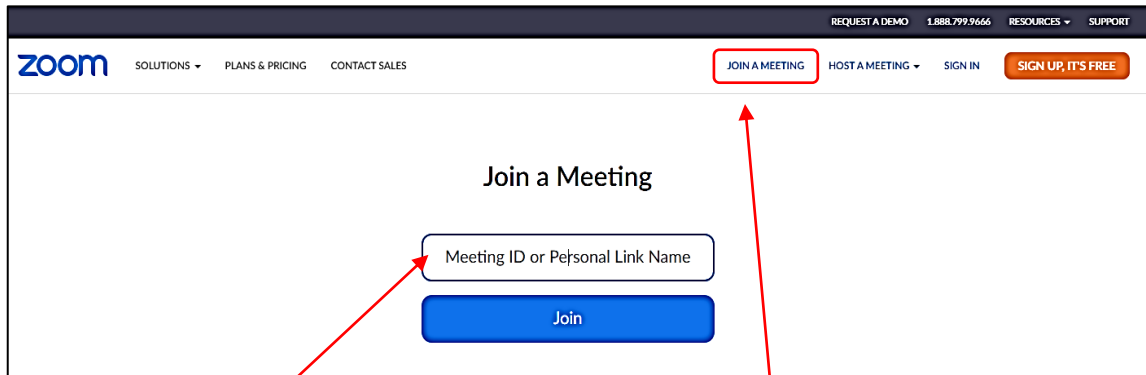
The easiest way for learners to join your meeting is by clicking on the invite email link you sent. If they have accidentally deleted or cannot easily find your email invite, they can join through the desktop client by clicking on the Zoom icon on their taskbar or desktop.



Then do the following:

1. Click **Join a Meeting** (above left)
2. **Join Meeting** pop-up window appears (left). Unless they are signed in, in which case they will see the above right window.
3. Enter the **Meeting ID**.
4. Type name in **Your Name** box as want it to appear in the meeting (it will stay this way unless you change it).
5. Select **Join** (once selected, it turns blue).
6. Then follow the prompts to enter the **Passcode** in the next window.
7. Click **Join Meeting**.

# Joining a Meeting from a Computer (Web Portal) - Learners



Enter the **Meeting ID** from the meeting invitation here. They will then be prompted to enter the meeting **Passcode**.

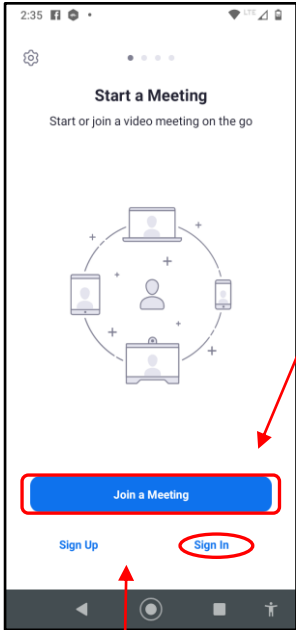
Learners can join a Zoom meeting from **zoom.us** by selecting **Join a Meeting** in the menu.

# Joining a Meeting from a Mobile Device - Learners

Surveys tell us that learners use a variety of devices to connect to online conferencing platforms. Up to 50% of learners use their mobile phones.

You do not need to create a Zoom account to join a meeting, but you do need to have the Zoom app installed on your mobile phone.

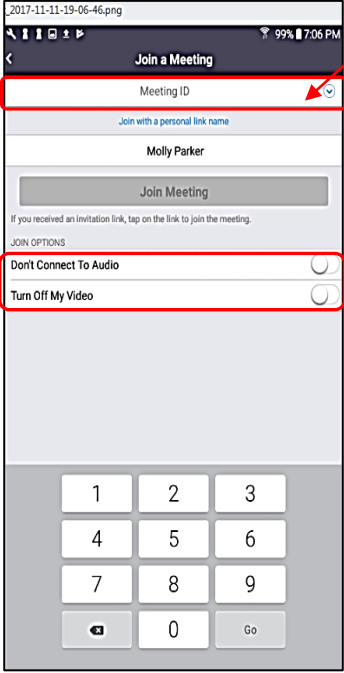
**1**



After installing the app, you see this screen.

- Select **Join a Meeting**

**2**

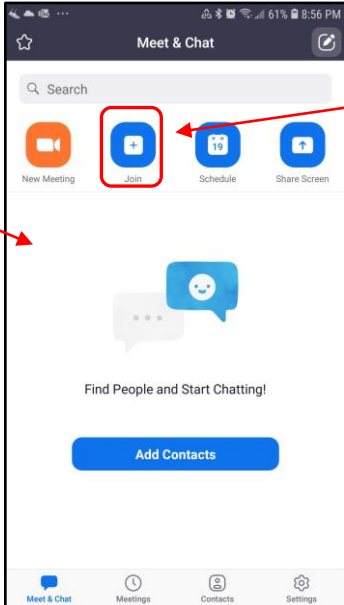


- Enter **Meeting ID**
- Ignore these buttons:  
**Don't Connect to Audio**  
**Turn Off My Video**

(They should be grey and toggled to the left.)

If learners have a Zoom account, **Sign into** the account.

This screen will appear:



- Select **Join**
- Follow the steps above