



Zoom Guide for Organisers – 12 Oct 2020

This document is aimed at those involved in managing Zoom meetings. Please see also '*BBandO Zoom Guide for Participants*' which is on the website.

PLEASE NOTE – This guide provides basic information assembled by the BB&O Media Team. It should be taken as a starting point rather than precision details. More information can be found on the Zoom Help Centre at <https://support.zoom.us/>. Other links in the document may prove useful, but they cannot be guaranteed, and there may be other useful information on the internet.

Zoom can be used from a downloadable app, or via a browser. There is no charge for participants – only the host.

The area holds a Zoom account (57693362) registered under the email address meetings@bbandoflowers.org.uk and with identity 'Meetings bbandoflowers'. The account can be used for area meetings, workshops, demonstrations etc. Access to the account password for scheduling and starting meetings is limited to the area chairman, treasurer, media officer and JDSE officer. However once a meeting has started control can be transferred to someone else.

Clubs, tutors, demonstrators etc may wish to pay for their own Zoom account, or may wish to use the free version. The first one or two free sessions may be extended by Zoom to an unlimited time period to get you hooked. After that the session is normally closed down after 30-40 minutes, although it may be possible for participants to reconnect using the original link and/or Meeting ID and password. Not all options described below are available on the free version.

Occasional use of the area account, for say a club AGM or workshop, may be requested by emailing chairman@bbandoflowers.org.uk or media@bbandoflowers.org.uk. One of the management team would need to schedule and start the meeting.

The way Zoom is used will vary slightly depending on the scenario:

- A. Committee meetings where a small group will be very interactive.
- B. Large meetings, such as council meetings, where most participants will be listening but some interaction is appropriate. The BB&O account has a limit of 100 participants.
- C. Demonstrations (including workshop demonstrations) where the focus will be on the demonstrator with limited interaction from participants.
- D. Workshop review sessions where the focus is likely to be on images on a shared screen, but with interaction from participants.

Roles

For all meetings, but particularly demonstrations and workshops it is useful to assign roles. In some scenarios an individual may take on >1 role. Roles are highlight in this document by red/underlining.

- The [Zoom host](#) is the facilitator – scheduling, managing participants, muting and unmuting, initiating spotlighting, recording, screen sharing etc.
- The [meeting coordinator](#) should deal with meeting correspondence, monitor chat, watch timing etc. The coordinator needs to share the list of expected participants with the Zoom host.
- The [demonstrator/tutor](#) needs to concentrate on what they are doing. Planning is required to ensure the environment is appropriate:
 - No strong light or sunshine in the background
 - Have light in front, which could be just a table lamp
 - Uncluttered background
 - Ensure there is no unnecessary background echo/noise
 - Experiment to get the camera directed on the plant material and design
 - Wear clothing that will form a suitable backdrop for the planned plant material. For example, if lots of the plant material is dark, do not wear a black outfit.

If you have any queries regarding the practicalities of Zoom for workshops or demonstrations please email jdsesecretary@bbandoflowers.org.uk.

Some of the features and functions described below will be common to all meetings but others will be specific according to the scenario. How the features are accessed varies according to the type of device being used.

Scheduling a meeting (via the app)

The [host](#) schedules a meeting. Currently only the area chairman, treasurer, JDSE officer and media officer have access to the account to schedule a meeting. If you require one-off access to the area account please email chairman@bbandoflowers.org.uk or media@bbandoflowers.org.uk.

Those scheduling a meeting on the BB&O account should first look at the 'Meetings' tab on the Zoom app to avoid clashes with other scheduled meetings.

The following options are recommended:

- Video - Host On, Participants Off
- Audio - Telephone and Computer Audio
- Calendar Outlook.

Meeting ID and Passcode: As a security feature all Zoom meetings must have either Passcode or Waiting Room enabled. This is to facilitate control over who can join the meeting. One or both features can be enabled by the scheduler.

The default Meeting ID for the area account is 649 424 3827 with passcode 6WRP1T. Scheduling using these defaults will always generate the same link. Ideally though, if passcode is enabled then a more meaningful passcode should be used, for example 'FandGP'

For meetings such as workshops, particularly if charges are being applied, it is probably appropriate to select the option 'Meeting ID - Generate Automatically'. For the area account this generates a default passcode 698116, but could be set to something meaningful, for example 'Oct Workshop'.

NOTE – the Passcode does not give access to schedule a meeting – it is used to control who can join a meeting.

Meeting Title should always be changed to something meaningful, For example: BB&O September 2020 Council Meeting.

All Advanced Options are recommended to be unset.

Sending Invites

The meeting coordinator should send advance warning of a meeting to expected participants, along with relevant information, such as agenda, worksheet etc.

The host needs to schedule the meeting using the Zoom app. Ignore the draft email that pops up - instead click on Meetings, then the relevant meeting and Copy Invitation to the clipboard. In Outlook create a new email: paste the meeting information from the clipboard into the contents field; delete all the unnecessary information, keeping only the key information - date/time, title, link, meeting ID and password.

The host should send details to the meeting coordinator who should prepare an email for participants, with appropriate subject and any other useful text. Add email addresses to the TO and BCC fields. Individual invites can be emailed to each participant but a better option is to send to a list, either as a distribution list, or by copying a set of cells from a spreadsheet. Remember to use the BCC field unless the meeting is for a closed group.

The information to participants should advise them to rename themselves, as some join with weird names like 'ipad', 'joint' etc. Refer participants to the '*BBandO Zoom Guide for Participants*' document on the website.

Ideally only send out the Zoom invitation about 2 days ahead, otherwise the email may be a long way down in a participants Inbox. Some individuals are prone to joining the meeting as soon as they get the invite, so advise them to only join the meeting just before the appointed date/time, rather than as soon as they get the invite.

If an email containing the meeting invite is forwarded the blue underline on the link may disappear, but the link will still be effective so CTRL/Click should still join the meeting.

Hosting

Shortly before the start time the host should start the meeting.

The host will have many more options than a participant.

At any time it is possible to Switch Host by the host clicking on the relevant participant, then More, then Make Host. If the host attempts to leave the meeting they will be asked to transfer the host to someone else.

When participants attempt to join the host needs to Admit them, assuming the Waiting Room enabled option had been selected when the meeting was scheduled.

Managing participants

Someone, the host or another organiser, should ask participants to rename themselves to something meaningful and relevant to the meeting. For example: for a council meeting the following would be appropriate.

Greys Flora - Irene Manson
Area Media Officer – Shirley Sexton

For more information on renaming see '*BBandO Zoom Guide for Participants*' document on the website. Alternatively the [host](#) can rename a participant by clicking on that participant then More, then Rename – but this assumes the host knows the individuals, and in any case it is not practical for large meetings.

For demonstrations and large meetings it will usually be appropriate for the [host](#) to mute everyone - click Participants, then Mute All. As and when appropriate, Unmute All to allow discussion. Individual participants can unmute themselves, but the host can mute them again if they do not do this themselves.

For large meetings not all participants may be visible on the screen, even in Gallery View. Scrolling is possible but it may be appropriate for one person to be nominated to monitor them to see when they have raised a hand or initiated a reaction.

The [host](#) should click Participants to bring up the list on the right-hand side of the display to make it easier to see who is muted, has raised a hand, has video off, etc.

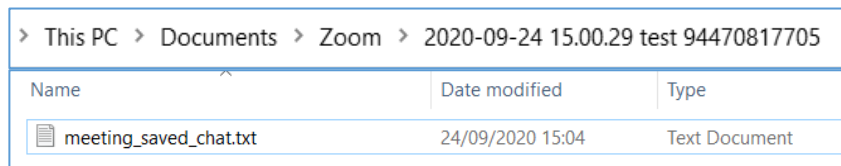
The [host](#) should use the list to continually monitor if anyone is waiting to be admitted. Occasionally a participant may lose their link and need to be re-admitted.

Zoom Chat

This is useful when participants wish to raise a comment or question without interrupting the proceedings. Participants can use the Chat icon (More on an iPad) to initiate text conversation. Pressing return sends the text. The default is that Chat goes to Everyone, but an individual could be selected if appropriate. For more information see '*BBandO Zoom Guide for Participants*'.

Anyone can see what has been chatted by clicking on Chat. Ideally one person at the meeting should monitor Chat to ensure comments are acted on.

Anyone can record the chat by clicking on Save Chat. By default it is recorded onto the participants device. On a laptop/PC it is saved as something like this:



The screenshot shows a file explorer window with the following path: > This PC > Documents > Zoom > 2020-09-24 15.00.29 test 94470817705. Below the path is a table with three columns: Name, Date modified, and Type. One file is listed: meeting_saved_chat.txt, with a date modified of 24/09/2020 15:04 and a type of Text Document.

Name	Date modified	Type
meeting_saved_chat.txt	24/09/2020 15:04	Text Document

Zoom Reactions

If participants want to speak they can use the Reactions button to raise a hand. This brings up a brief hand image, and on the [host](#)'s participants list it also shows that a hand has been raised.



This is a useful reminder that someone is waiting to speak. This hand icon stays until the [host](#) chooses Lower hand.

The [host](#) can unmute the participant at an appropriate time.

See '*BBandO Zoom Guide for Participants*' for more information.

Spotlighting and Recording

For demonstrations, including workshop demonstrations, it will often be appropriate to put the focus on the demonstrator. This can only be done by the [host](#) right clicking on the

relevant participant and then clicking Spotlight Video. This brings the [demonstrator](#) as the main image on everyone's screen. Participants should be in Speaker View with the image iconized to make the most of this situation.

For workshop demonstrations it will often be appropriate to record the demonstration. The [host](#) should click Record AFTER setting the spotlight on the demonstrator, and only at the start of the actual demonstration – rather than including any administrative aspects at the start of the meeting. The recording should be stopped after the demonstration or whenever seems appropriate.

Recording should be done to the cloud. About 10 minutes after a meeting ends an email will be sent to meetings@bbandoflowers.org.uk with the link. For workshop recordings the [host](#) should email the recording link to the [meeting coordinator](#) who can then pass it on as appropriate.

NOTE: The BB&O Pro account has limited space for recordings so they should be downloaded and/or deleted when no longer required to make space for new recordings. When a recording is no longer required in the cloud it could be saved locally (or made into a YouTube video) and deleted from the cloud. To delete the recording the account holder should go into the Zoom app, click Meetings, Recorded, then Open. This prompts you to sign in again via a web browser. Once signed in, you can see the recording and next to it will be icons to download, copy a shareable link or to delete.

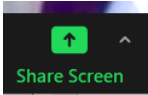
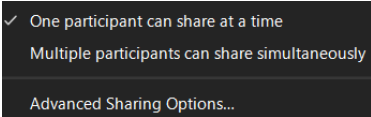
Screen Sharing

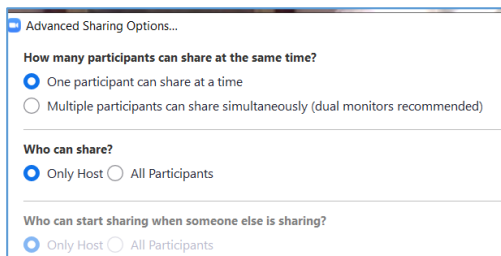
Screen sharing is used in situations where it is appropriate for all participants to be viewing the same window on one person's device. It is useful for small meetings when information needs to be shared, but is particularly relevant for Zoom workshop reviews when images need to be shared.

For area workshops the first session involves the tutor demonstrating the design(s), with spotlighting and recording on as described above. Participants are given a worksheet (usually beforehand), and after the demonstration they are given about a week to prepare their own version(s) of the design(s). They should take 1-4 photographs of the designs - for example: from different angles; at different stages; or maybe with different flowers. The photographs should then be emailed to photos@bbandoflowers.org.uk for uploading to the Flickr album on the area website. These photographs will then form the basis of the review session. The photos may also be loaded onto the area Facebook.

In the workshop review session the [tutor](#) shares a screen displaying the photos. The [tutor](#) can then direct comments on the photos using his/her pointer.

a) By default only the [host](#) can share a screen, but this can be changed by the [host](#) by

clicking on ^ on the  button to give  then Advanced



On Advanced Options:
Allow All Participants, and
Only one participant at a time.

- b) The tutor or person wishing to share information should click on 'Share Screen'. They can share the whole screen or just a selected window, in which case it should ideally occupy a large portion of the screen. The person sharing the screen can move his/her cursor to direct other participants to interesting points.

It is not essential, but for sessions where a large amount of information is to be shared the person sharing their screen could join the meeting as a separate participant for the images/information. Use a browser to access the area Flickr account. Hide or reduce the menu bar at the top of the screen. Ensure this window is maximized and full screen (F11 on Laptop/PC). It would be advisable to rename this participant as *Images* or *Presentation*, and have the camera and speaker disabled on that device to minimize feedback. The tutor could then have another session on an iPad with camera and speaker enabled.

- c) Participants will get a message to say a screen is being shared and may need to adjust their own settings to get a full view of the shared window. Participants should be recommended to use Speaker View. See '*BB&O Zoom Guide for Participants*'.

If you have any comments on this document, or wish to suggest improvements please email media@bbandoflowers.org.uk

BB&O Media Team

12 October 2020