



Zoom for Survey Facilitators

Hosting & Helping During a Zoom Meeting

Today's Goals



The Stages of a Zoom Meeting



Where Does Zoom Hide Everything?



What a Host Can See and Do



Invite, Wait, Welcome, and Record



Screen Sharing

What is your current
comfort level?

Stages of a Zoom Meeting



Create

Set up the meeting.



Invite

Tell participant
how and when
to join.



Welcome

Watch the
waiting room.



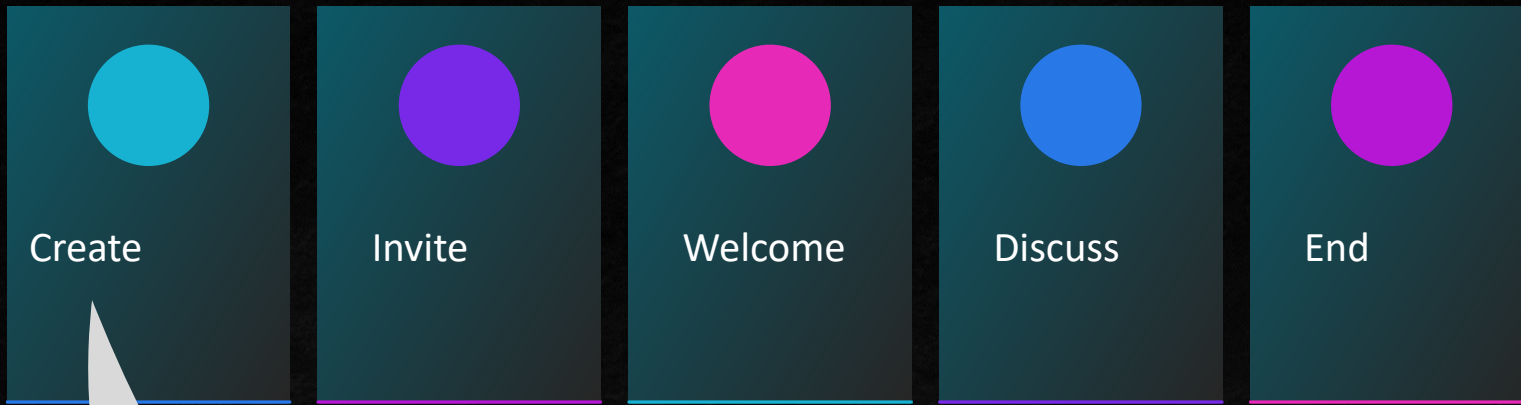
Discuss

Ask your
questions.

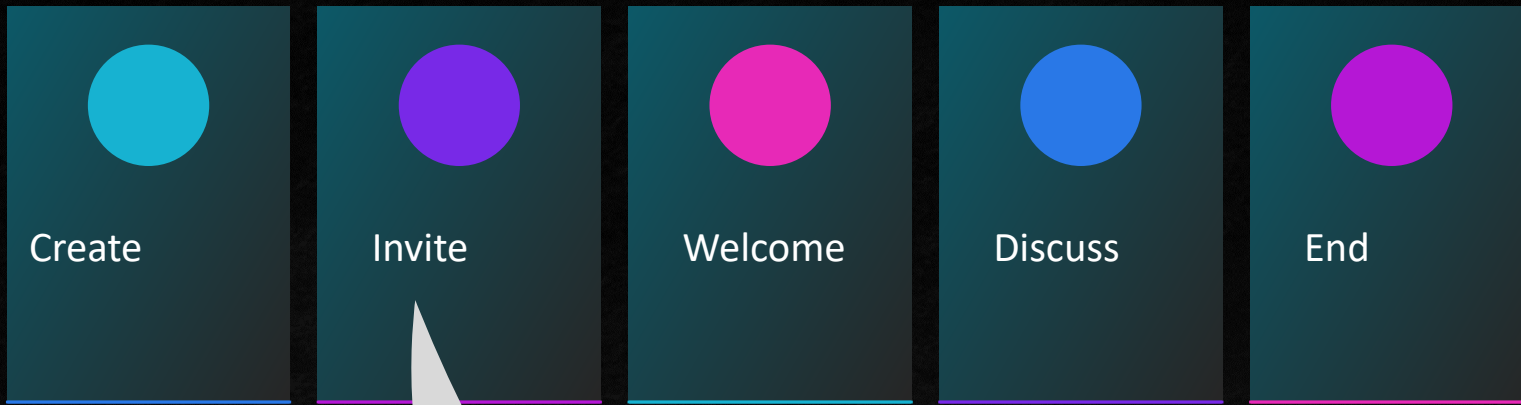


End

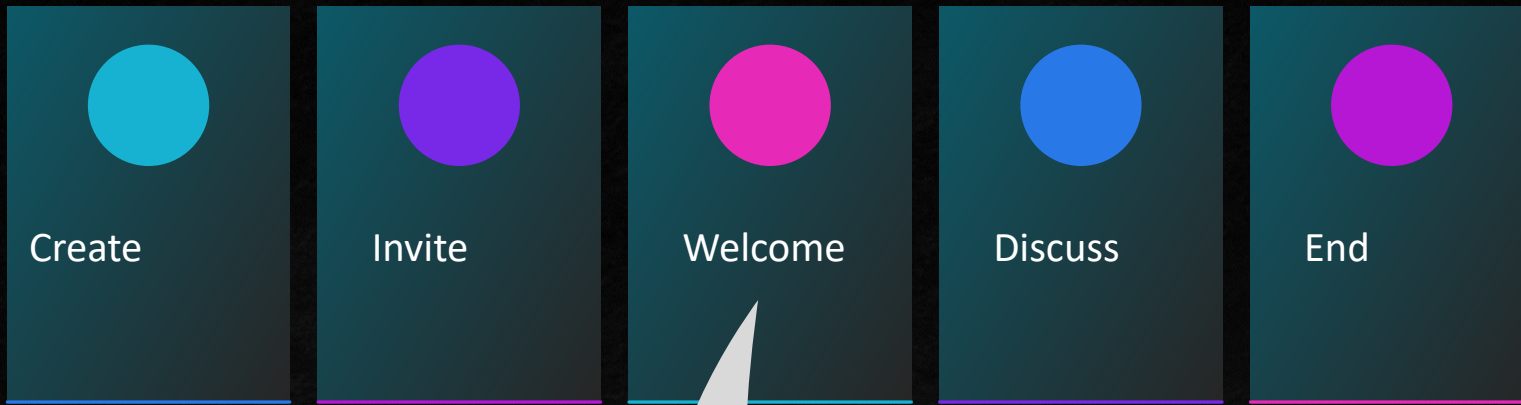
Thanks and
goodbyes.



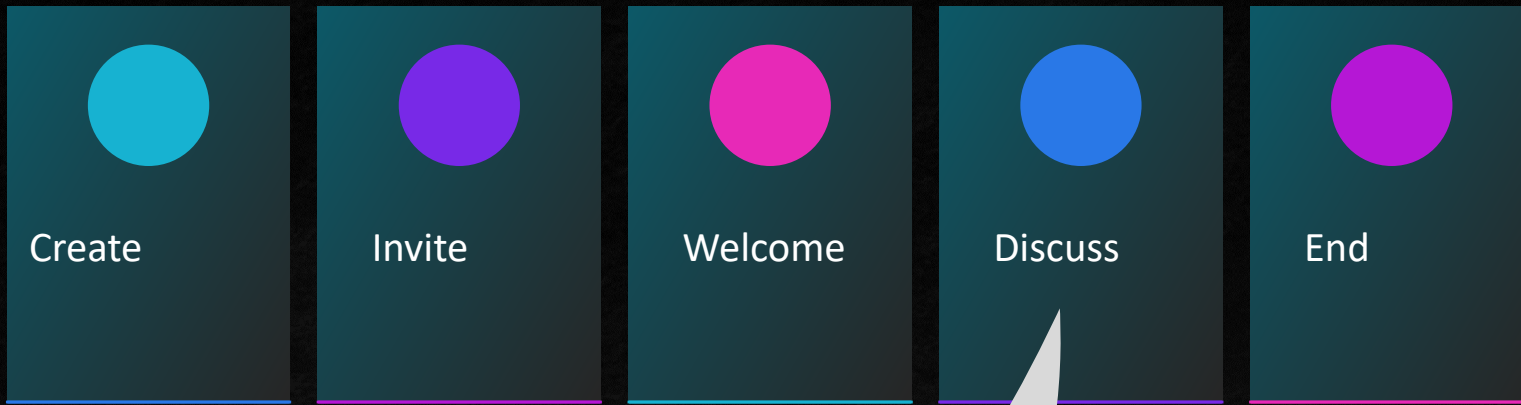
- The host “creates” the Zoom meeting room
- This can happen ahead of time or when the meeting starts
- A zoom meeting:
 - has a numeric Meeting ID
 - may have a numeric passcode
 - combines these into a “long ugly link”



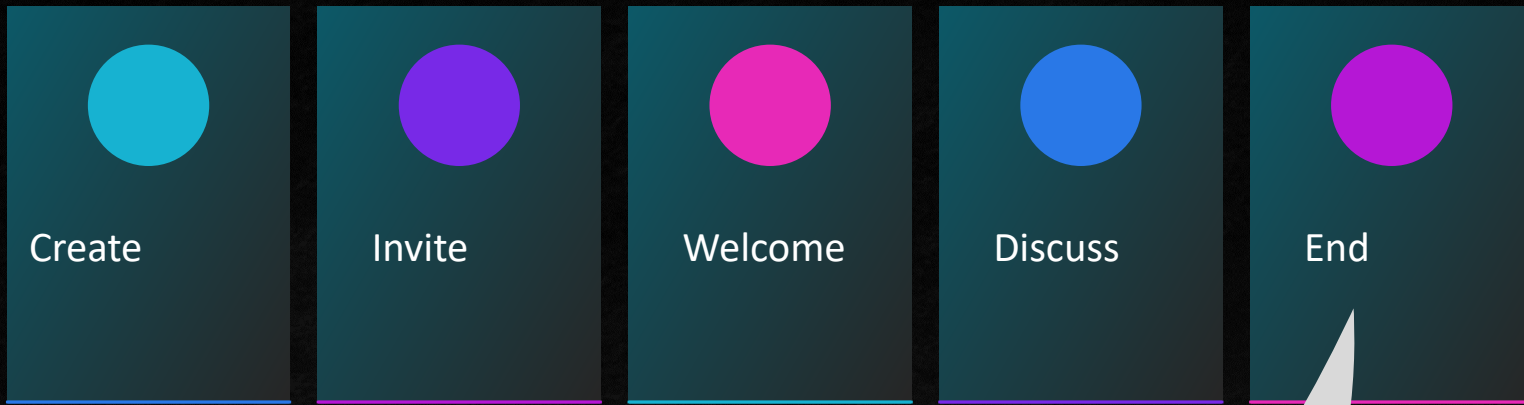
- 'Inviting' is getting the Zoom information to the other participant
- A link is easy to share, but easy to lose track of and require an email address destination
- Meeting IDs are long but easier to read out



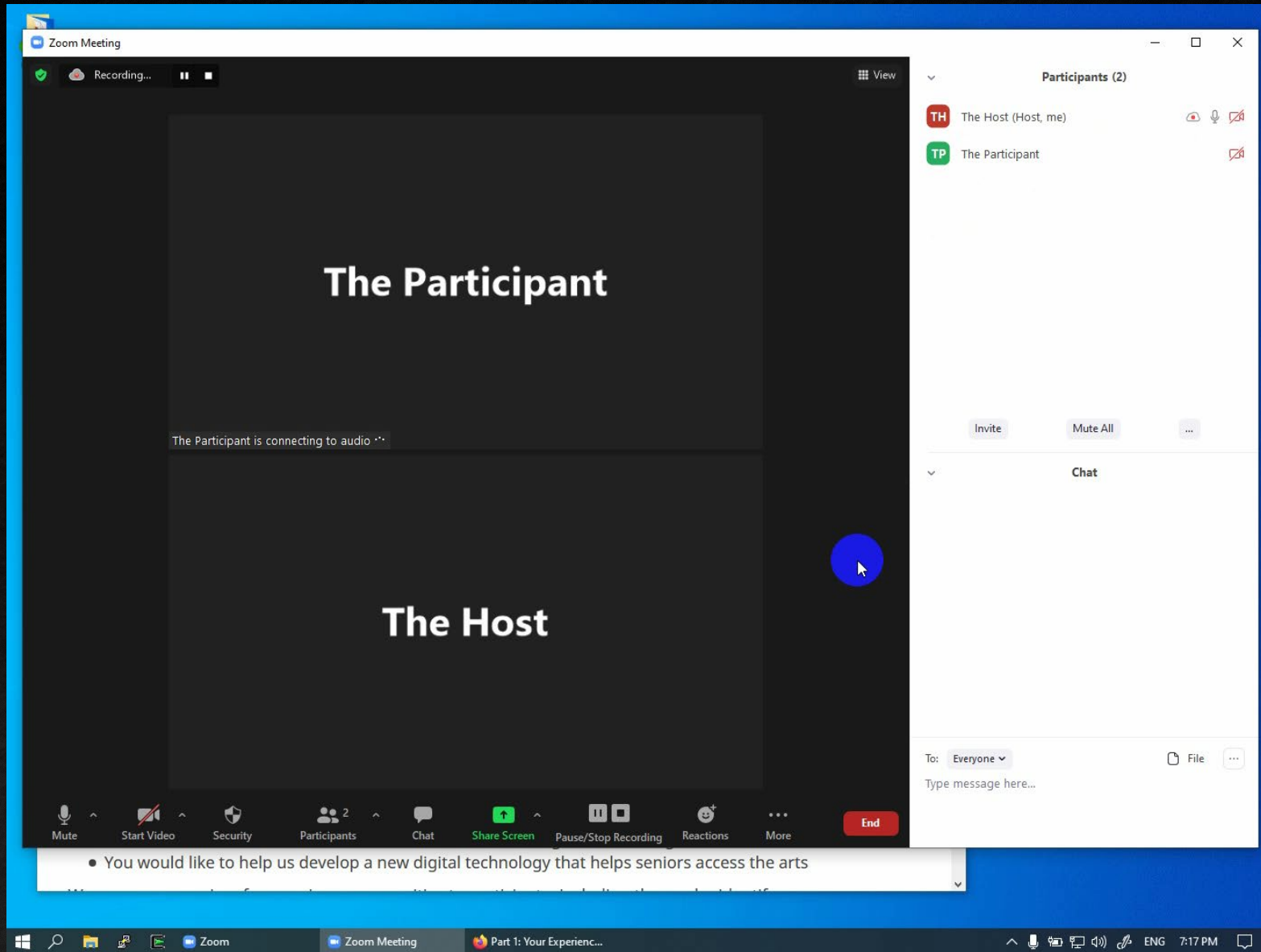
- Part of hosting a meeting may be helping a participant use Zoom for the first time
- This can take a lot more time than anticipated
- Having a backup contact method, like a phone number, can be helpful for coordinating



- The “Welcome” is when things are most likely to go wrong for the Participant
- The “Discussion” is when this are most likely to be frustrating for the Host!
- This is where screen sharing, good internet connection, being able to hear clearly can be barriers to overcome.



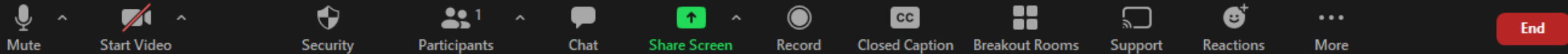
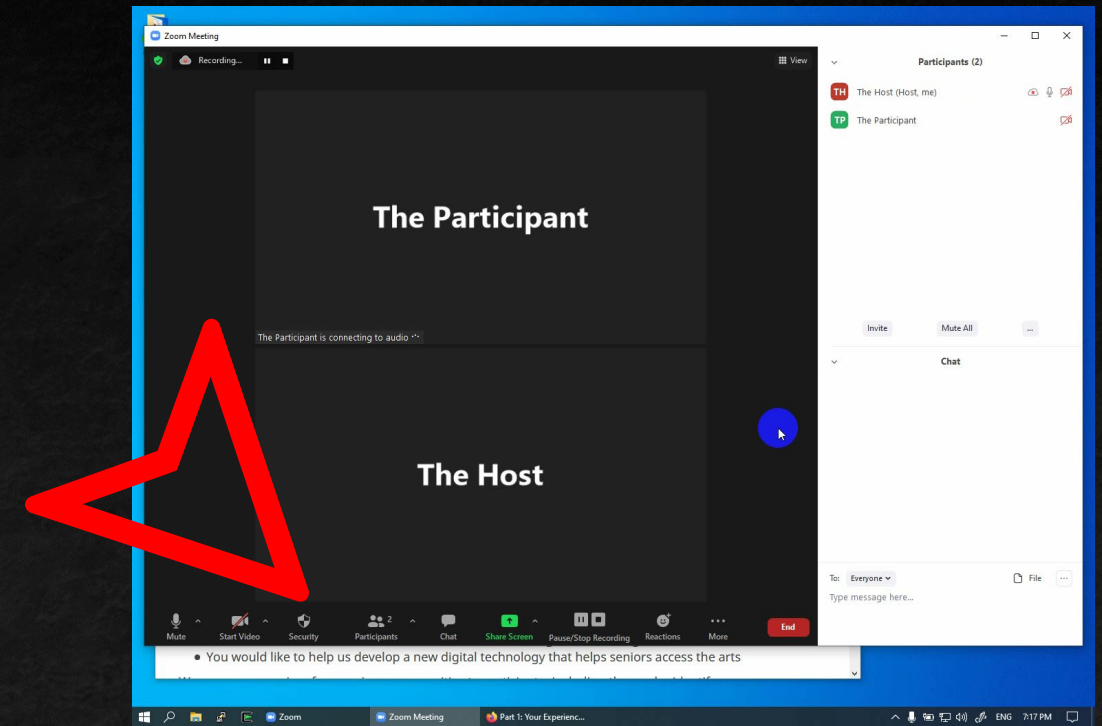
- Make sure everyone's happy with what's happened
- Make sure everyone knows what to expect next
- Be decisive about closing the meeting when done!



Zoom on a
Desktop or
Laptop

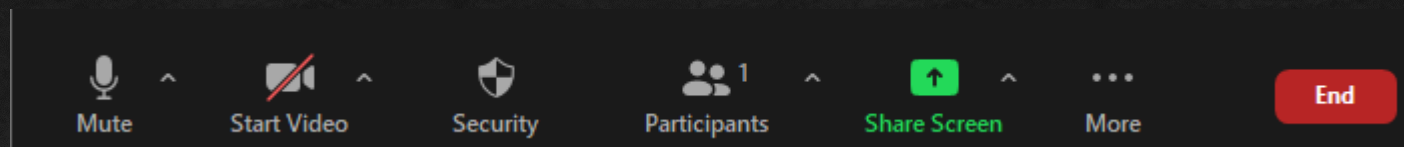
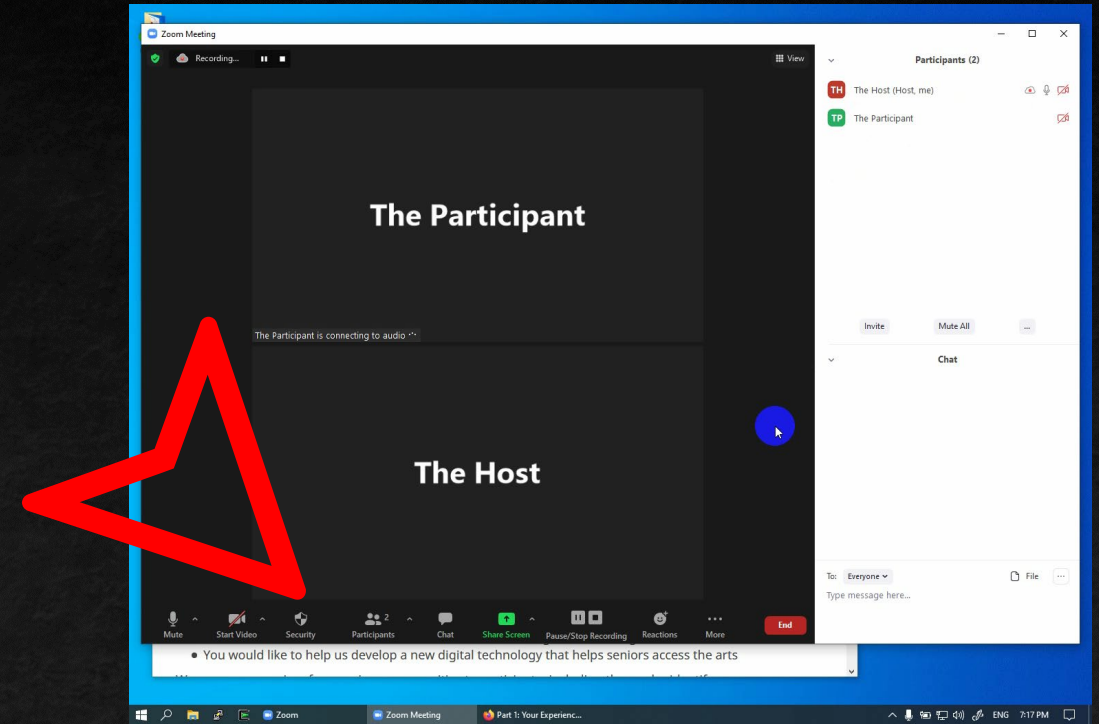
Finding Things in Zoom

- The Zoom Toolbar



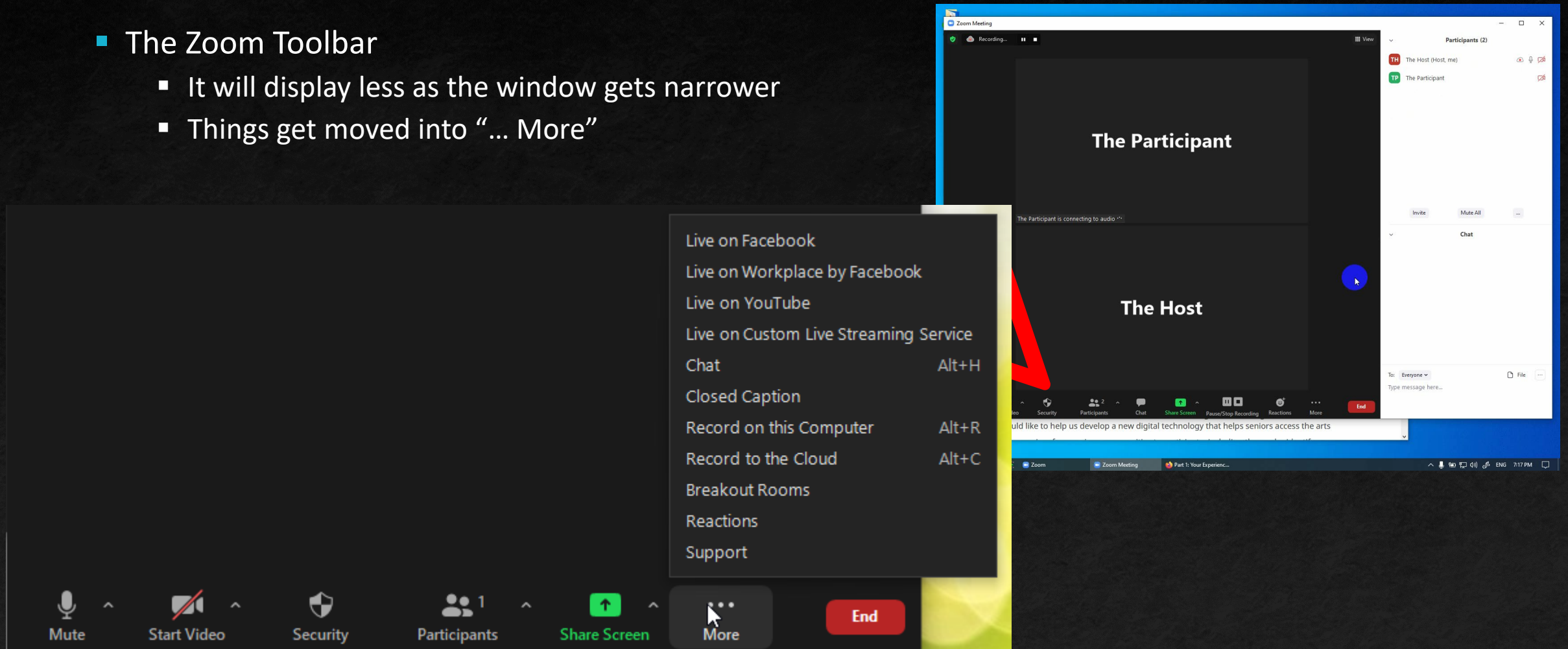
Finding Things in Zoom

- The Zoom Toolbar
 - It will display less as the window gets narrower



Finding Things in Zoom

- The Zoom Toolbar
 - It will display less as the window gets narrower
 - Things get moved into “... More”



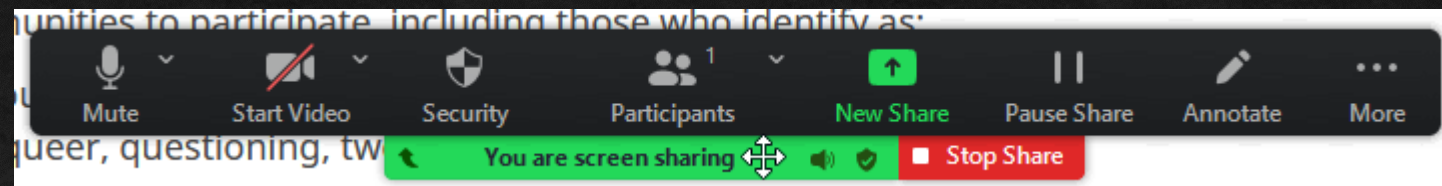
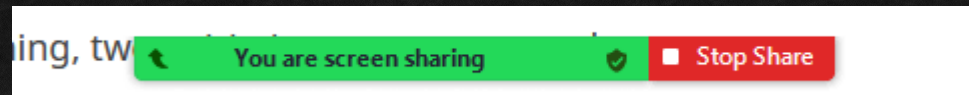
Finding Things in Zoom

- The Zoom Toolbar
 - It will display less as the window gets narrower
 - Things get moved into “... More”
 - It goes away when you’re not looking!



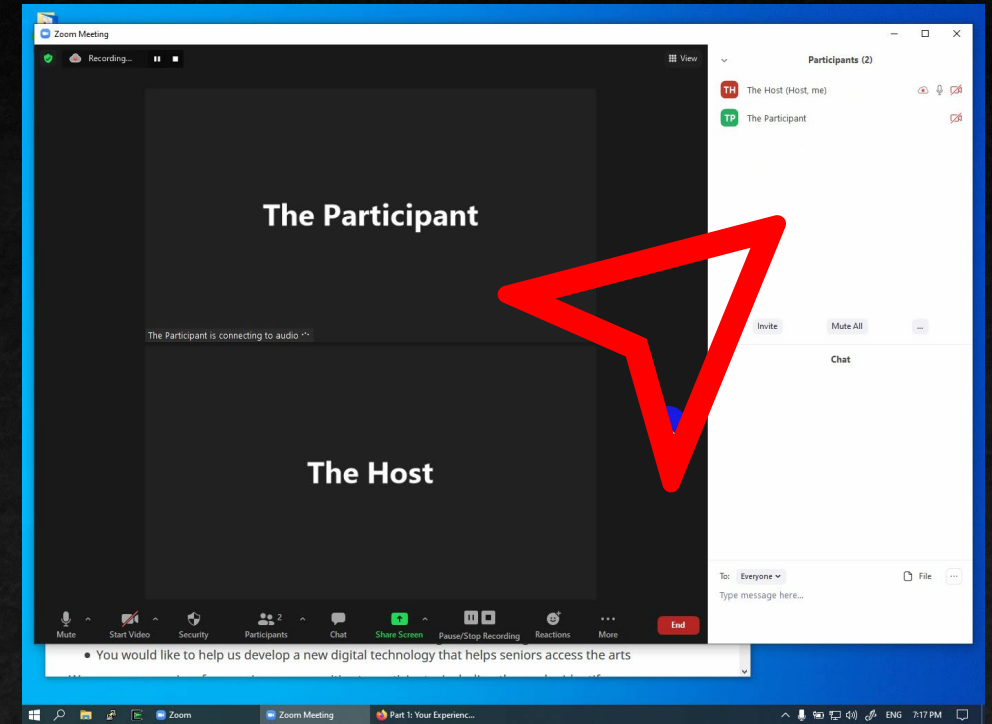
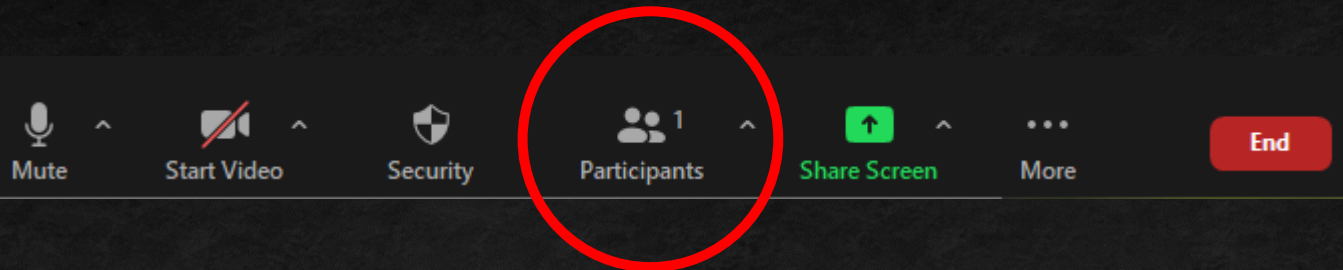
Finding Things in Zoom

- The Zoom Toolbar
 - It will display less as the window gets narrower
 - Things get moved into “... More”
 - It goes away when you’re not looking!
 - It collapses when you share your screen



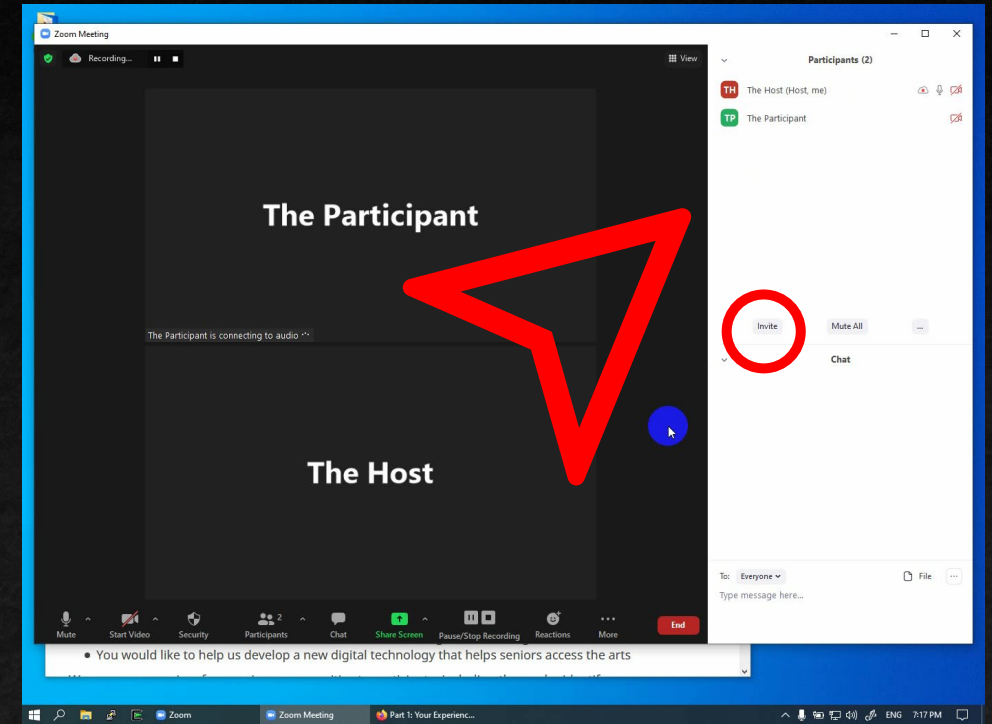
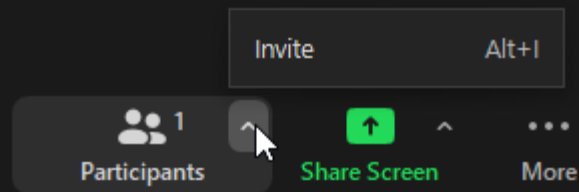
Finding Things in Zoom

- The participant panel



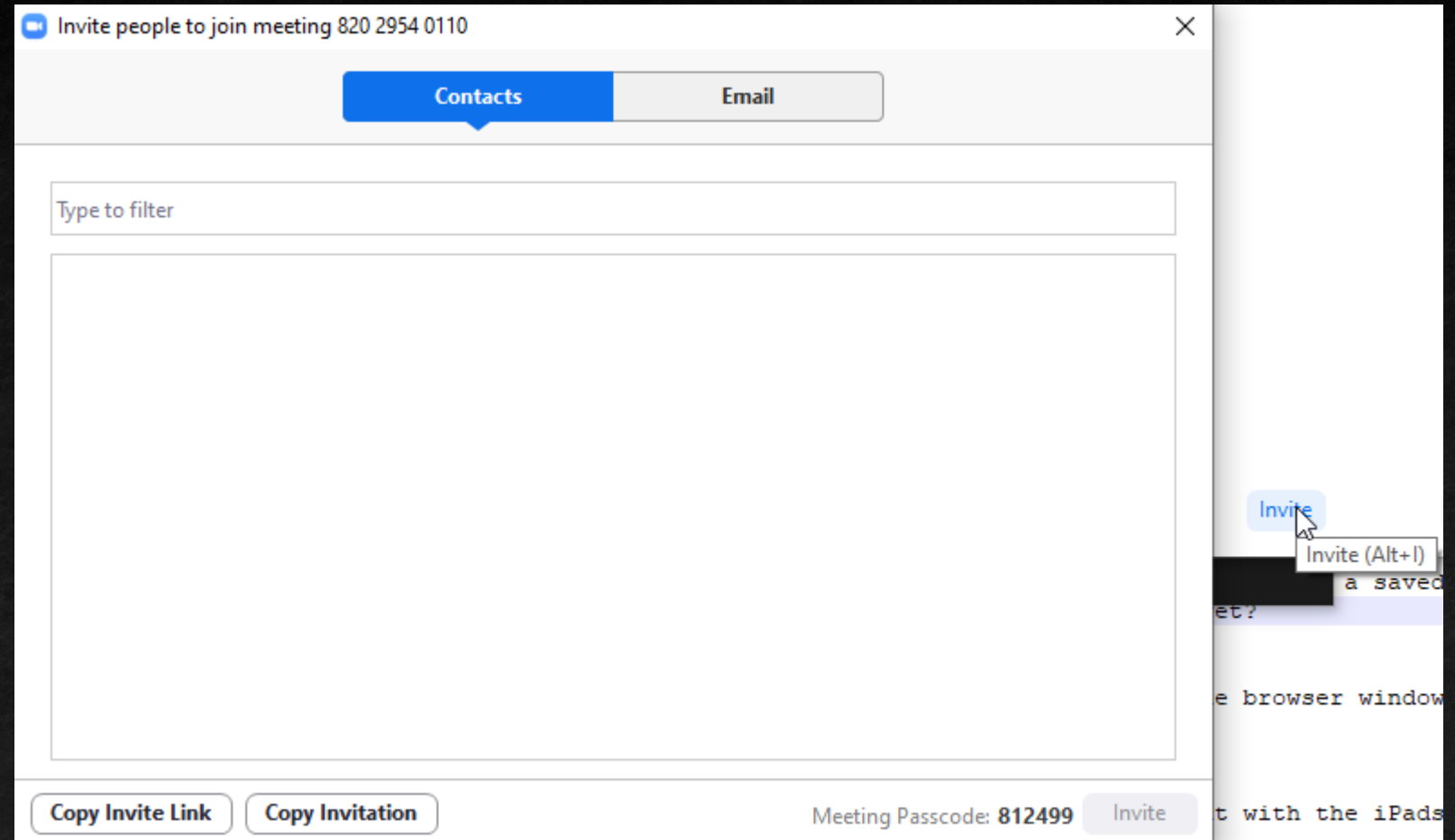
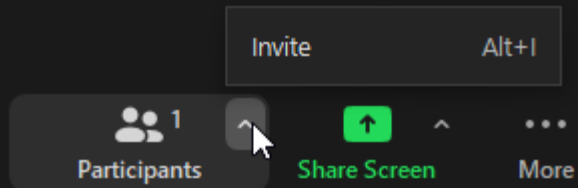
Finding Things in Zoom

- The participant panel
 - Contains the 'Invite' information
 - In the ^ button
 - At the bottom of the panel



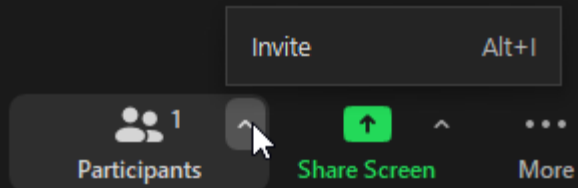
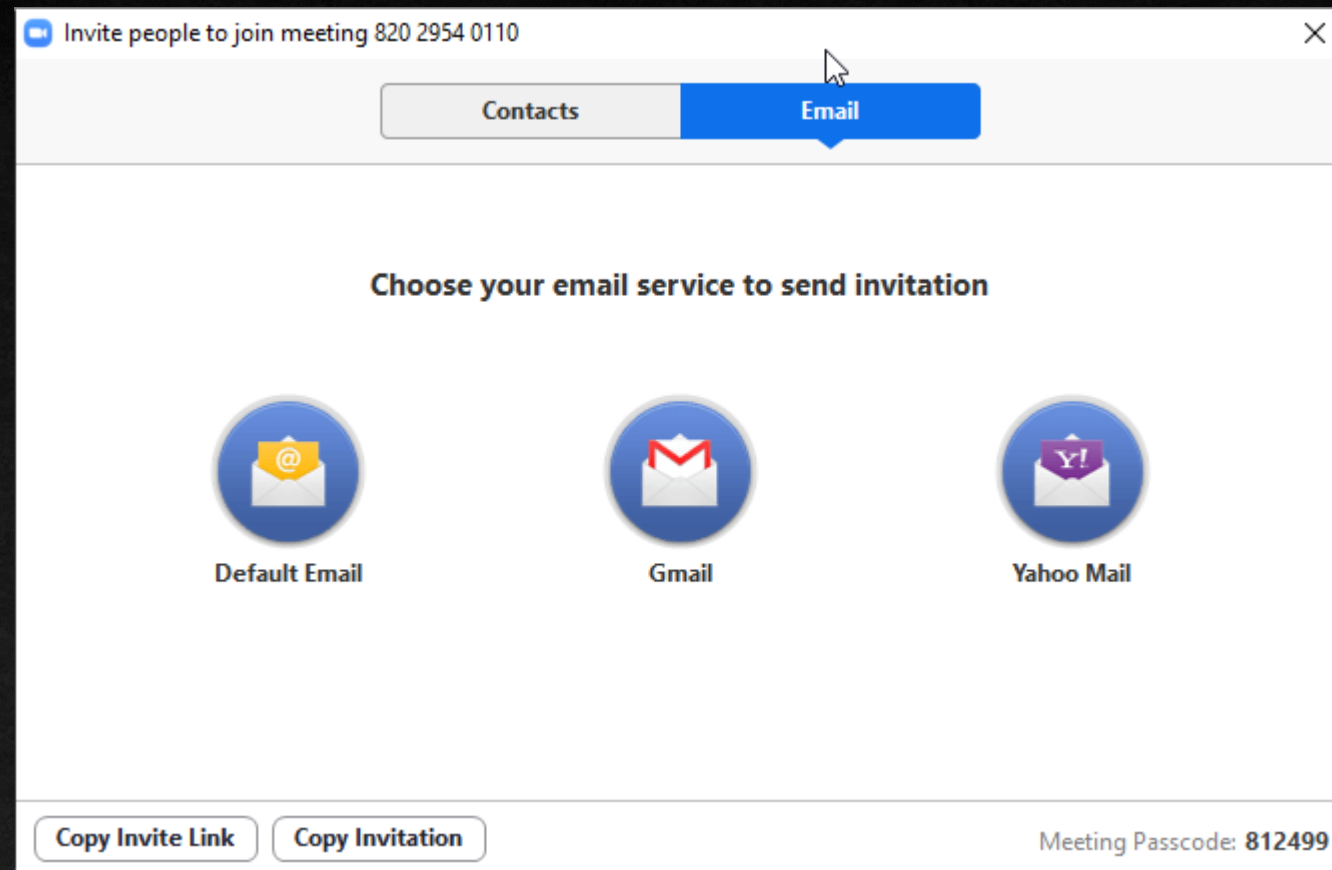
Finding Things in Zoom

- The invitation panel



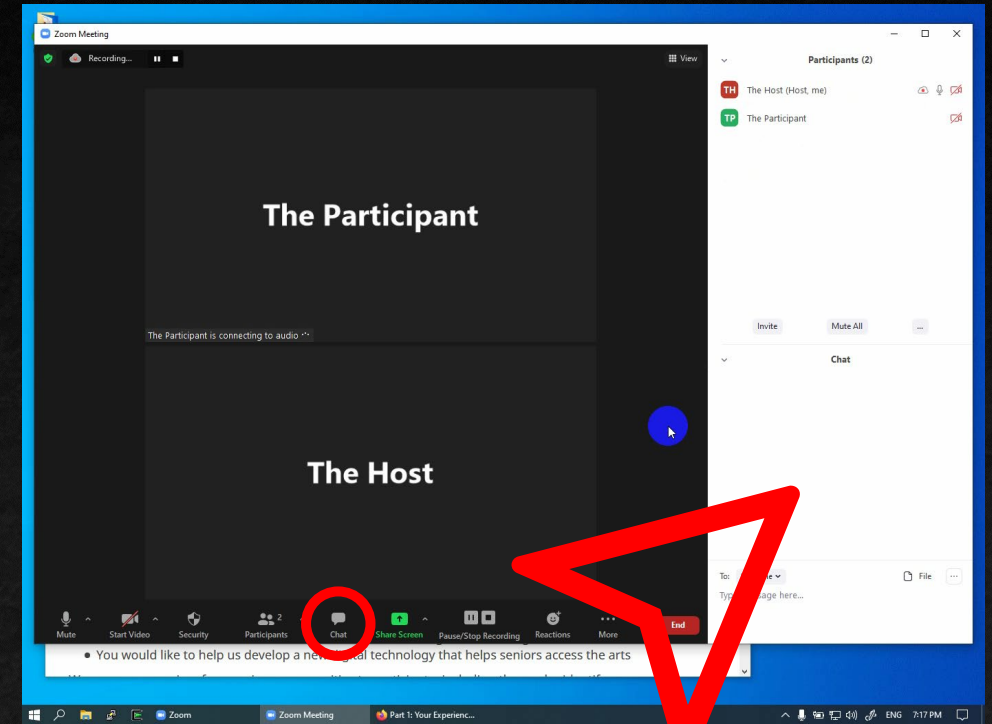
Finding Things in Zoom

- The invitation panel



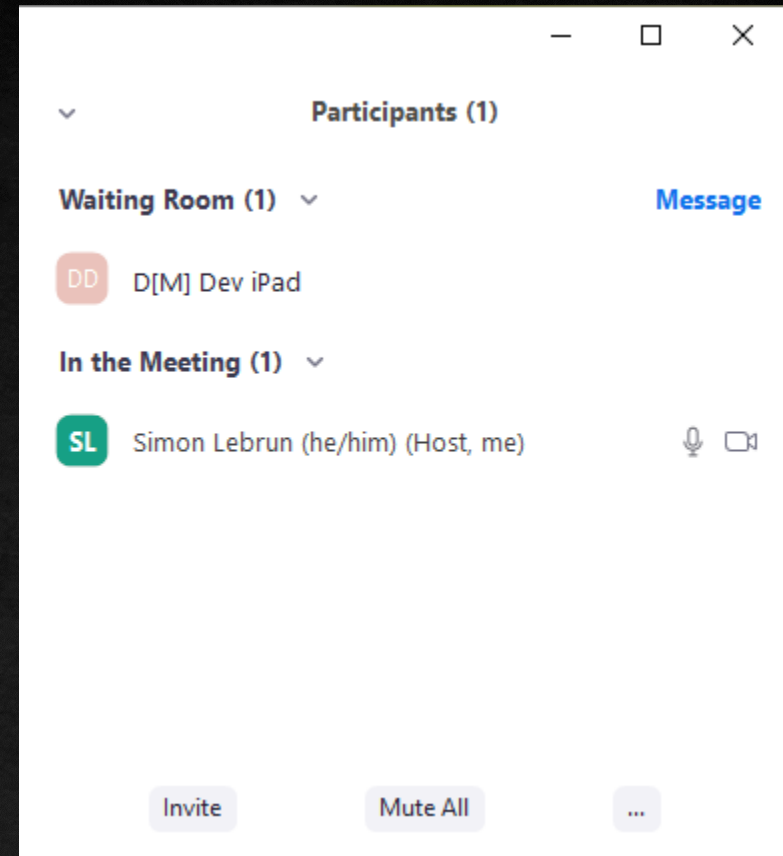
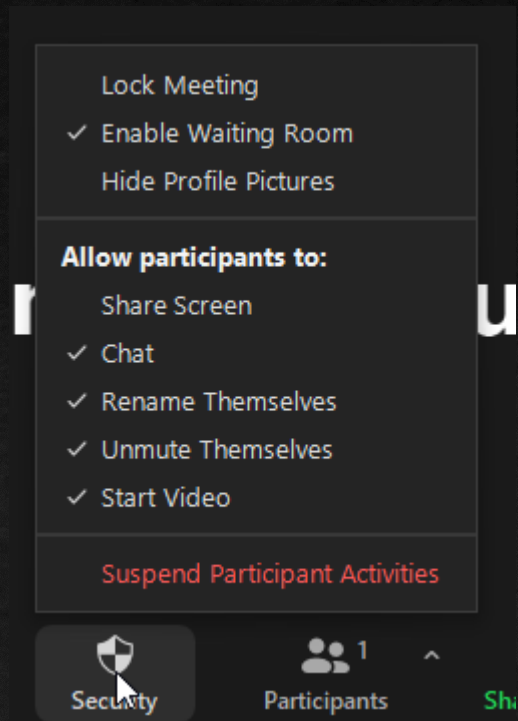
Finding Things in Zoom

- The chat panel
 - Easy way to share text like links
 - Harder to access when sharing screen
 - Can be 'undocked' and will float around screen



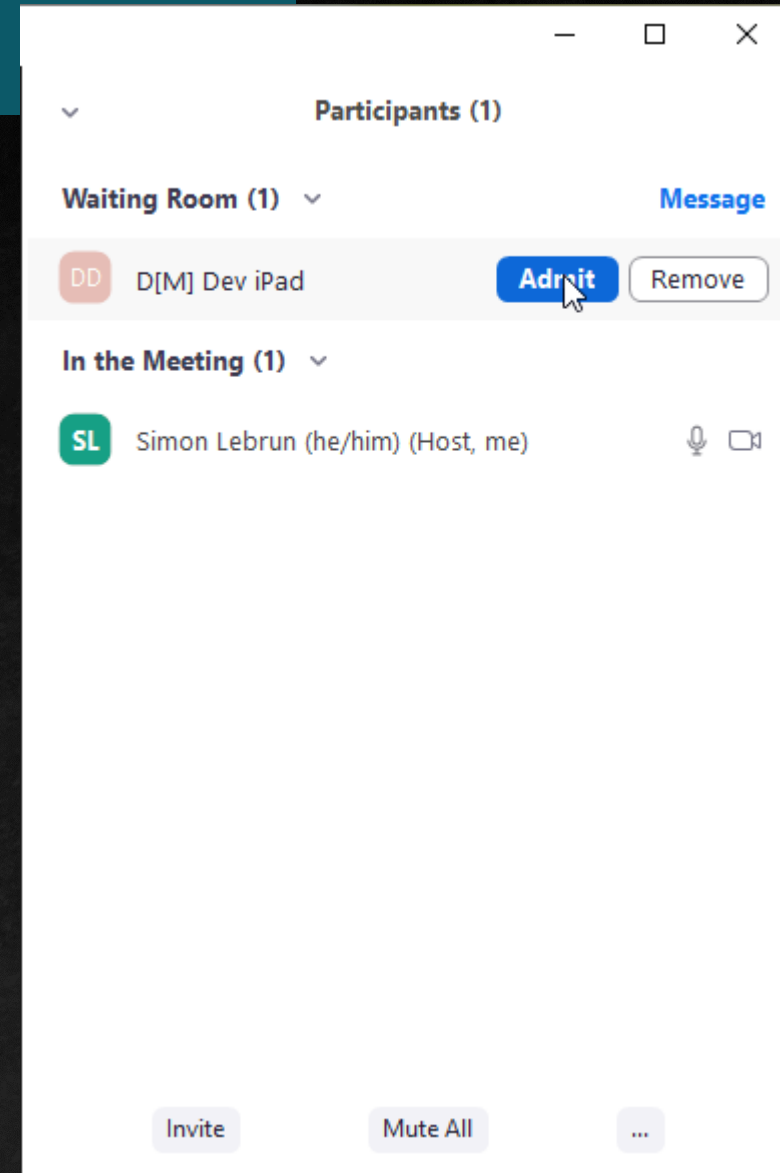
Only For The Host

- The Waiting Room



Only For The Host

- The Waiting Room
 - Put mouse over name to let someone in



D[M] Dev iPad entered the waiting room

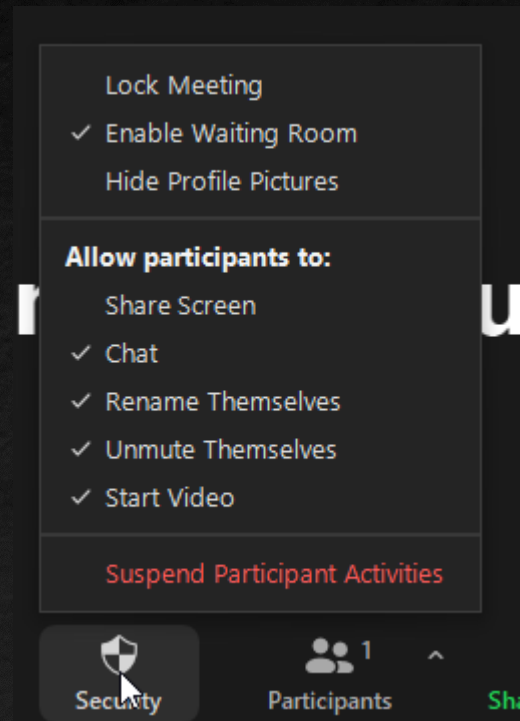
Admit

View

×

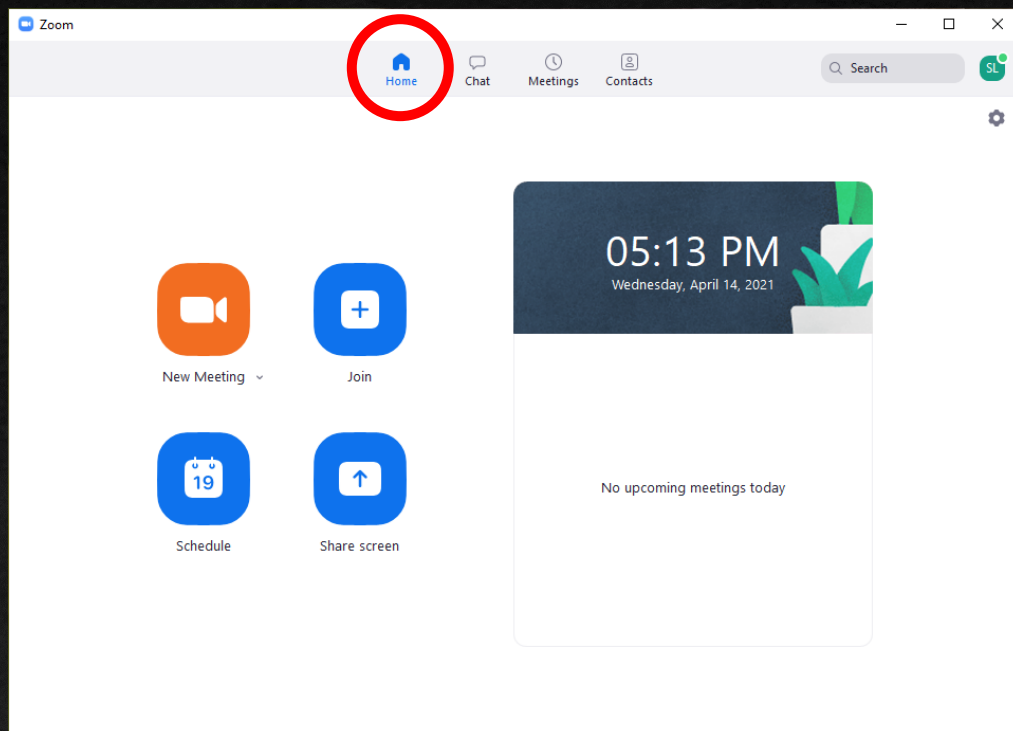
Only For The Host

- Control who can do what



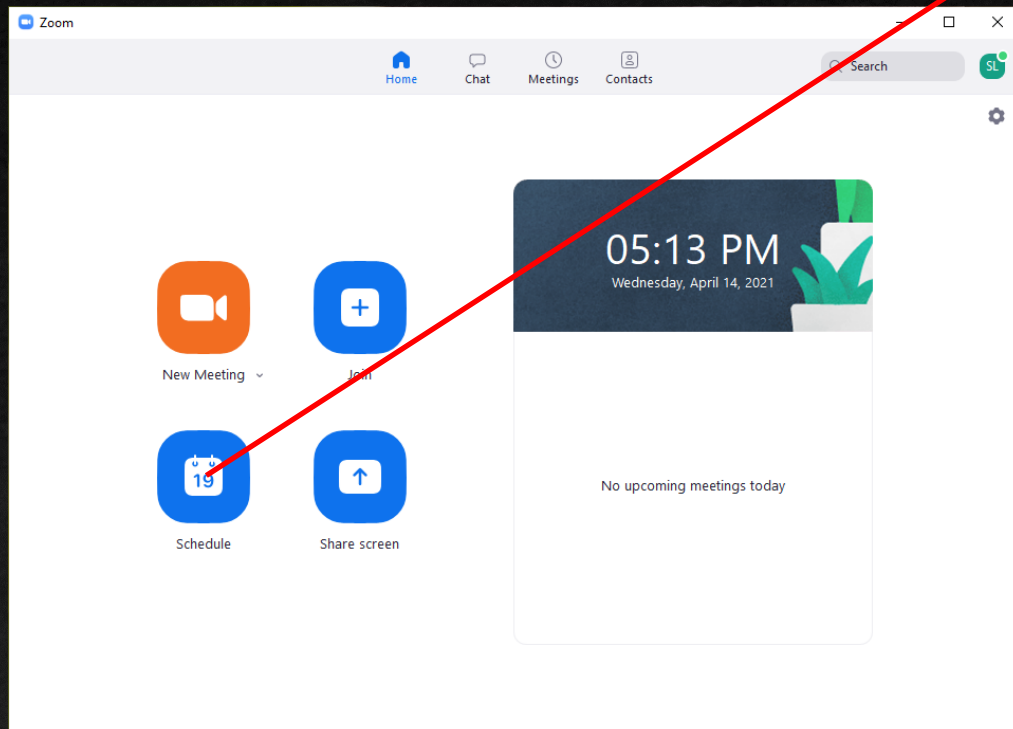
Only For The Host

- Set up the meeting



Only For The Host

- Set up the meeting



Schedule Meeting

Topic

Start: Thu April 15, 2021 11:00 AM

Duration: 1 hour 0 minute

Recurring meeting Time Zone: Eastern Time (US and Canada)

Meeting ID

Generate Automatically Personal Meeting ID 475 874 8424

Security

Passcode 710578
Only users who have the invite link or passcode can join the meeting

Waiting Room
Only users admitted by the host can join the meeting

Only authenticated users can join: Sign in to Zoom

Video

Host: On Off Participants: On Off

Audio

Telephone Computer Audio Telephone and Computer Audio

Dial in from Canada and United States [Edit](#)

Calendar

Outlook Google Calendar Other Calendars

Only For The Host

- Set up the meeting

Calendar

Outlook Google Calendar Other Calendars

Advanced Options ^

Allow participants to join anytime

Mute participants upon entry

Request permission to unmute participants

Automatically record meeting

Locally In the cloud

Approve or block entry for users from specific countries/regions

Alternative hosts:

Only For The Host

- Set up the meeting

Calendar

Outlook Google Calendar Other Calendars

Advanced Options ^

Allow participants to join anytime

Mute participants upon entry

Request permission to unmute participants

Automatically record meeting

Locally In the cloud

Approve or block entry for users from specific countries/regions

Alternative hosts:

Zoom - Schedule Meeting

Your meeting has been scheduled.

Click the button below to copy the invitation to clipboard.

Simon Lebrun (he/him) is inviting you to a scheduled Zoom meeting.

Topic: Simon Lebrun (he/him)'s Zoom Meeting
Time: Apr 15, 2021 11:00 AM Eastern Time (US and Canada)

Join Zoom Meeting
<https://us02web.zoom.us/j/81231830485?pwd=QzNUck1lbEhFYXZrL0FJUzhjelUwdz09>

Meeting ID: 812 3183 0485
Passcode: 710578

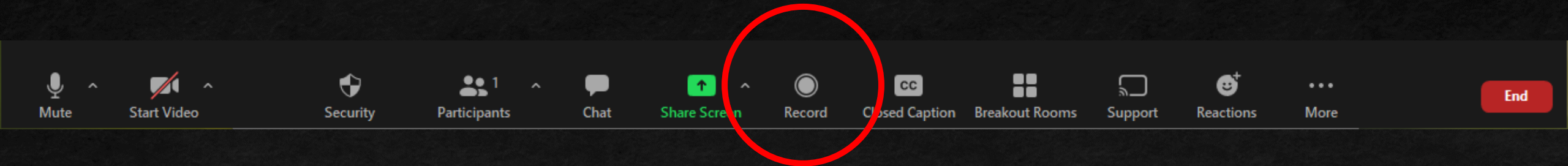
One tap mobile
+17789072071,,81231830485#,,,,*710578# Canada
+12042727920,,81231830485#,,,,*710578# Canada

Dial by your location

- +1 778 907 2071 Canada
- +1 204 272 7920 Canada
- +1 438 809 7799 Canada
- +1 587 328 1099 Canada
- +1 647 374 4685 Canada
- +1 647 558 0588 Canada

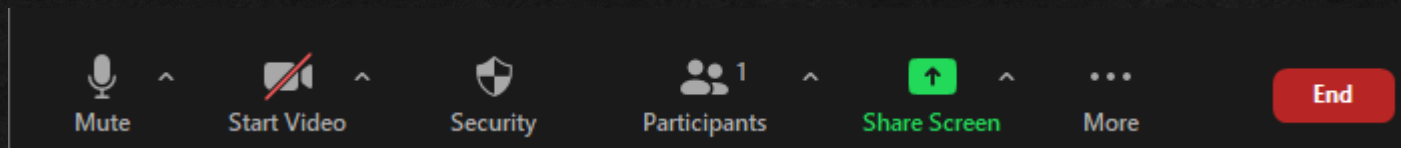
Recording in Zoom

- A button in the toolbar to start recording



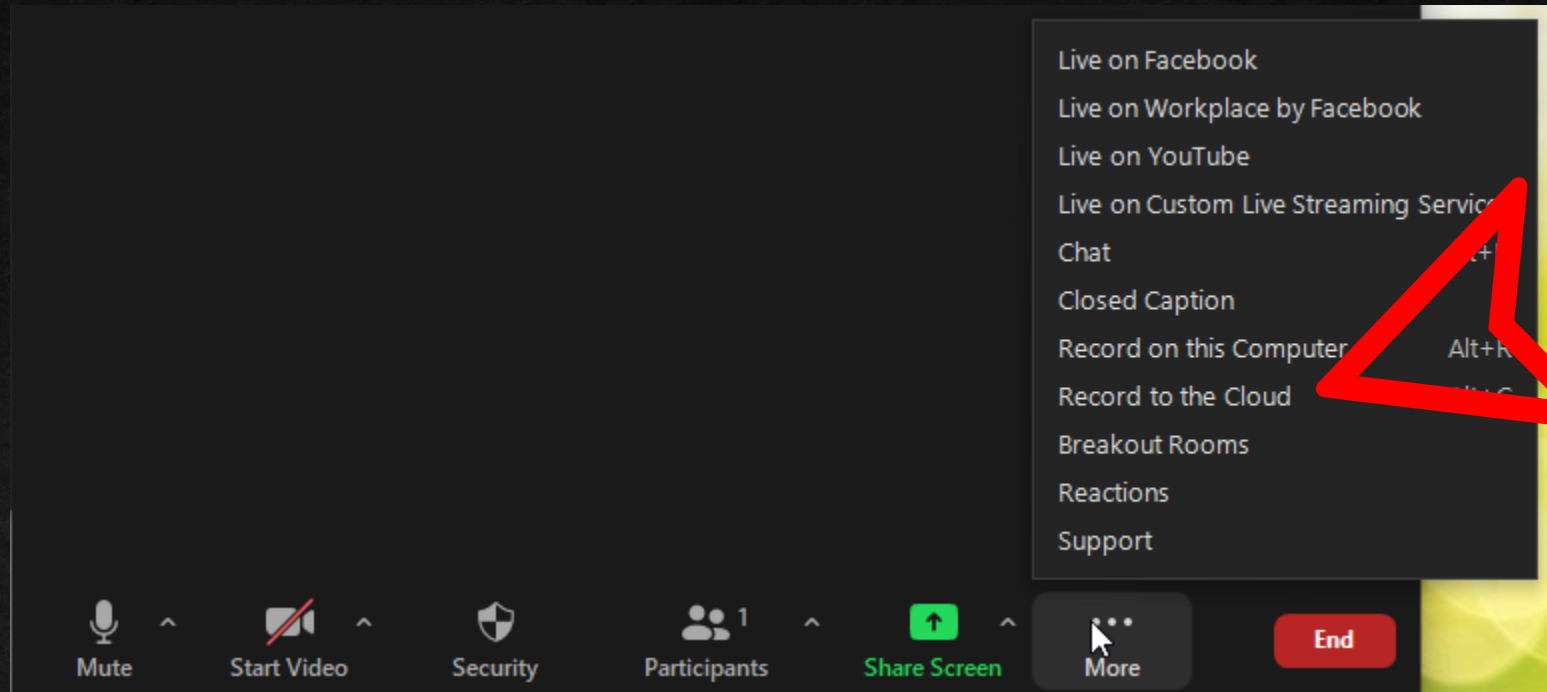
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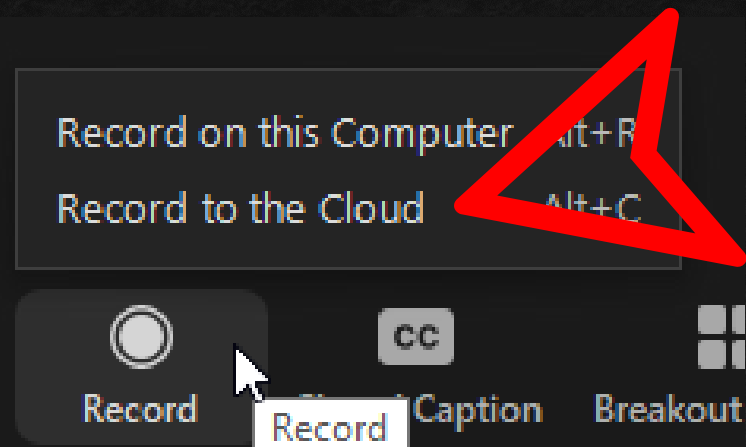
Recording in Zoom

- A button in the toolbar to start recording



Recording in Zoom

- A button in the toolbar to start recording
- Record to Cloud, not “on this Computer”
- Could be the first thing you turn on, even when the participant isn't there yet

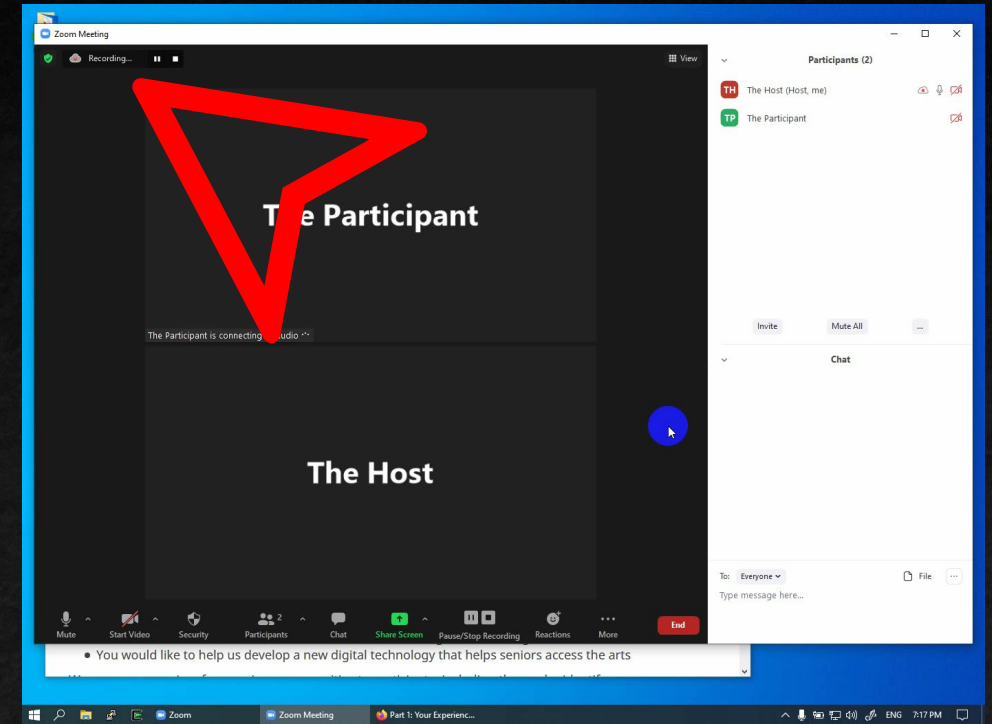


Recording in Zoom

- A button in the toolbar to start recording
- Record to Cloud, not “on this Computer”
- Could be the first thing you turn on, even when the participant isn't there yet
- Indicators that the recording is happening



Pause/Stop Recording



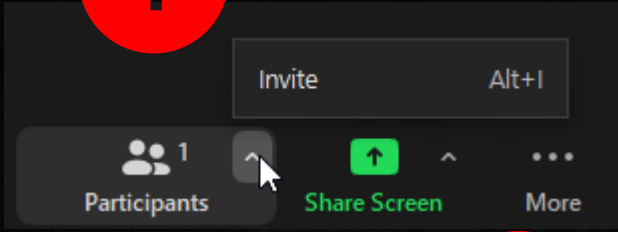
What does it look
like from both sides?

Sharing the Screen

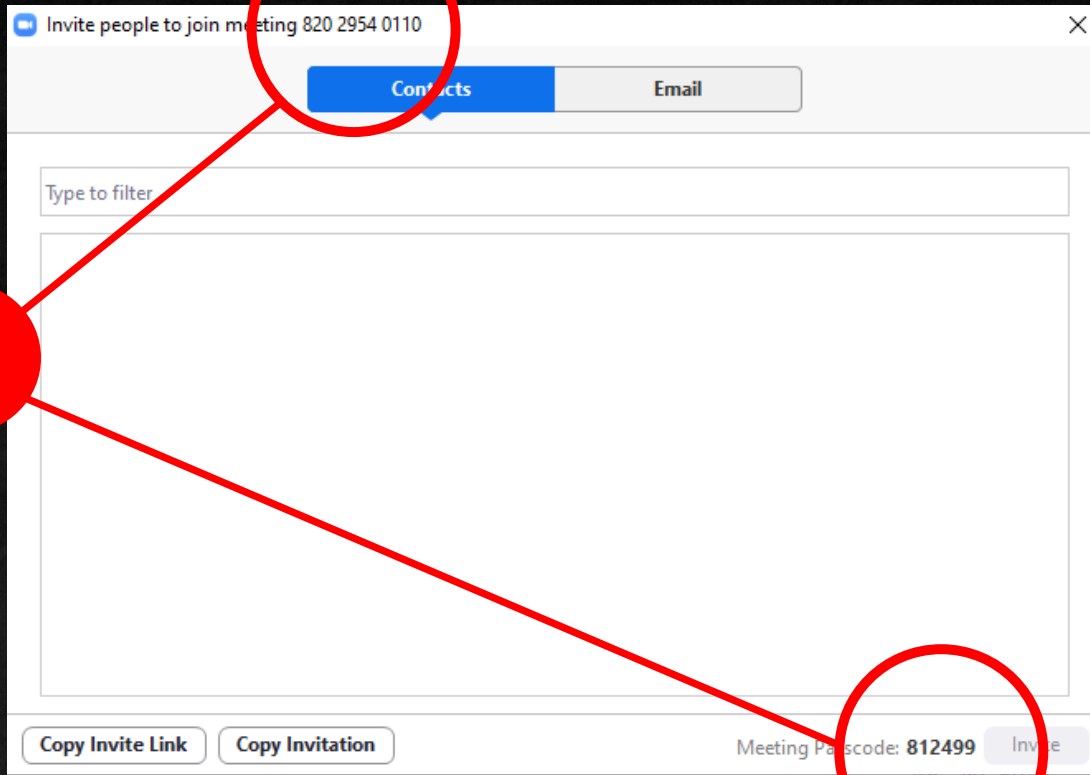
- Starting
 - Choosing what to share
 - Knowing what's showing
 - Sharing video
- Stopping
 - Where is the Zoom Toolbar?
- Permission to Share
- Permission to Control

Getting Help

1



2



3

Getting Help

- Email
- Text
- Read out

A Survey Session



You (the Host)



The Participant

Preparation before meeting

Contact participant

Set up zoom room
Share zoom room
ID/passcode or link

Agree to meeting time
Receive iPad
(training?)

Part 1 meeting

Open Part 1 in browser
Open zoom room
Start recording

Admit to room
Welcome
Share screen, no video mode

Connect to room

A Survey Session



You (the Host)

Control the survey
Ask questions
Type/click answers

Go through consent questions
Go through Part 1 questions

Agree on time for Part 2
End meeting



The Participant

See the survey
Hear questions
Speak answers

Agree on time for Part 2

After Part 1 meeting

Log time and recording for
researchers

A Survey Session



You (the Host)



The Participant

Part 2 meeting

TBD

Part 3 meeting

TBD, share with videos and interactivity

Workshop Access Facilitation

TBD

Part 4 meeting

TBD

Final Tasks

TBD

Alternative 1: Participant Views Direct Links



You (the Host)

Reach an interactive or video question in the survey
Send link to gallery/video in chat

(can't see this)

Move on to questions about gallery/video



The Participant

Open chat
Click link
Use gallery/watch video
Return to zoom

Speak answers

Alternative 2: Participant Drives Survey

(Types answers, runs
gallery and video)



You (the Host)

After sharing screen, use Remote Control to give keyboard/mouse access to participant. Survey still runs on host computer. Both can type.



The Participant

Control the survey on Host's computer.

- OR -

Prompt and support participant in sharing their screen. Host can't type or click during survey.

Open survey in a browser, share the browser window or desktop, and type/click while talking.

Alternative 3: Telephone Interview



You (the Host)



The Participant

Parts 1, 2, and 4

Don't use zoom.
Open survey in browser and
present it orally.
Connect through NoNotes to
record conversation.

Answer questions in phone
call.

Part 3

For gallery and video
questions, prompt user to
watch the direct links prior to
answering questions orally.

Answer questions in phone
call. Have an internet-
connected device to interact
with gallery and watch videos
using direct links.

Workshop Participation

TBD

Questions

- Do a full dry run with a friend
- Isolate your microphone and your speaker (e.g. with a headset)
- Turn off anything you don't want to accidentally share, like email programs
- Have backup plans when folks get frustrated, like “why don't you try calling in to the Zoom call today?”

Share Some Hints