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
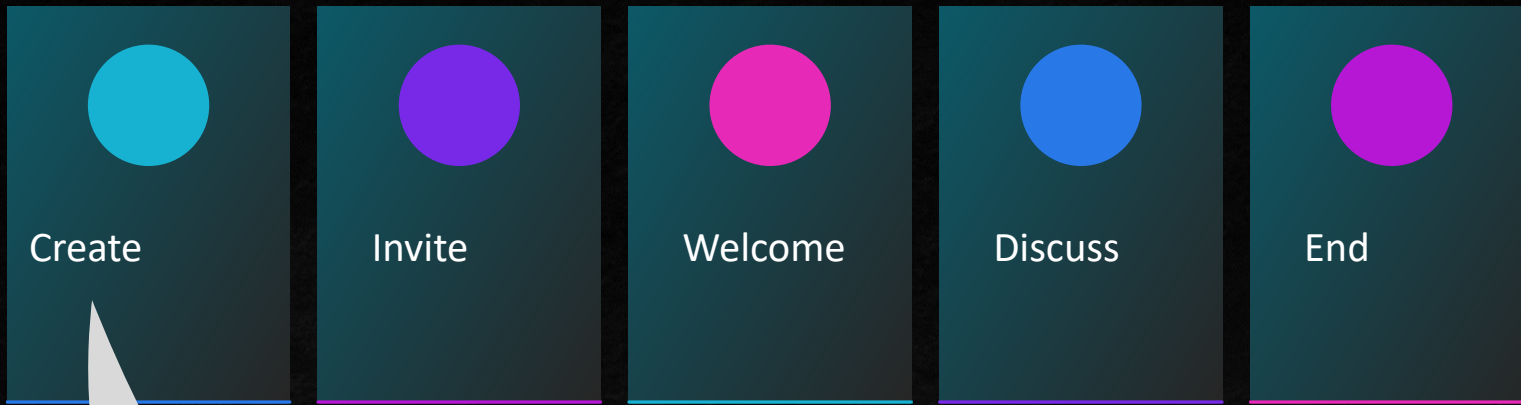Tell participant how and when to join.

Welcome
Watch the waiting room.

Discuss
Ask your questions.
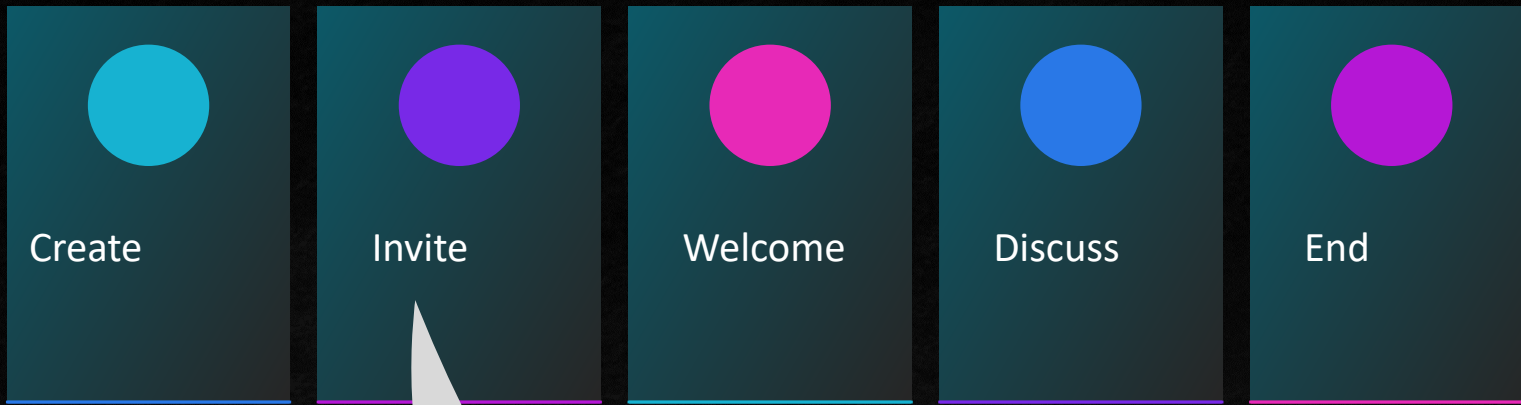
End
Thanks and goodbyes.

| Create | Invite | Welcome | Discuss | End |

- 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"

| Create | Invite | Welcome | Discuss | End |

- '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

| Create | Invite | Welcome | Discuss | End |
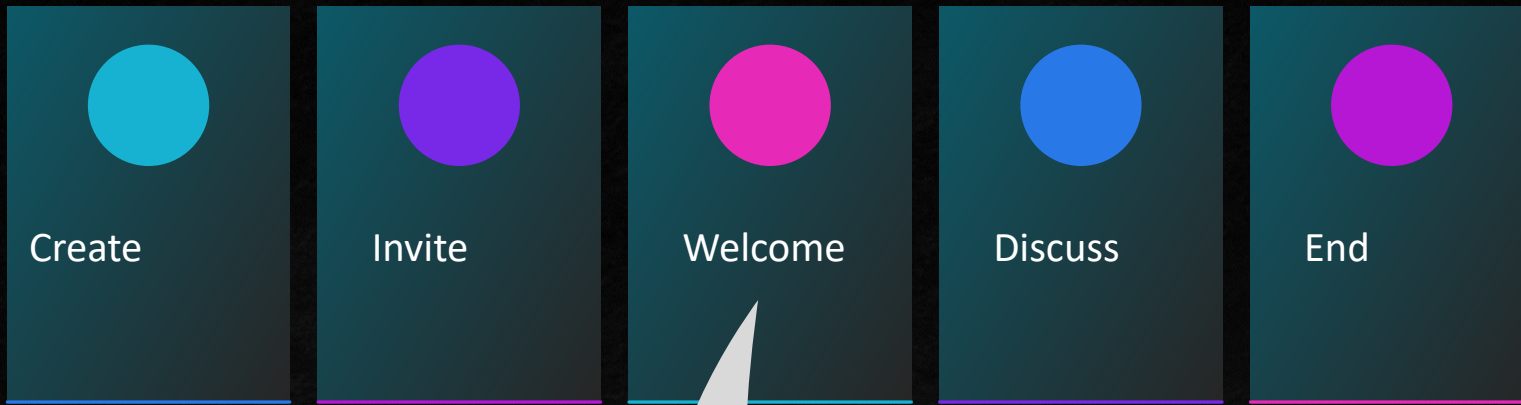
- Part of hosting a meeting may be helping a participant use Zoom for the first time

- This can take a lot more time than anticipated

- Having a backup contact method, like a phone number, can be helpful for coordinating

Create	Invite	Welcome	Discuss	End
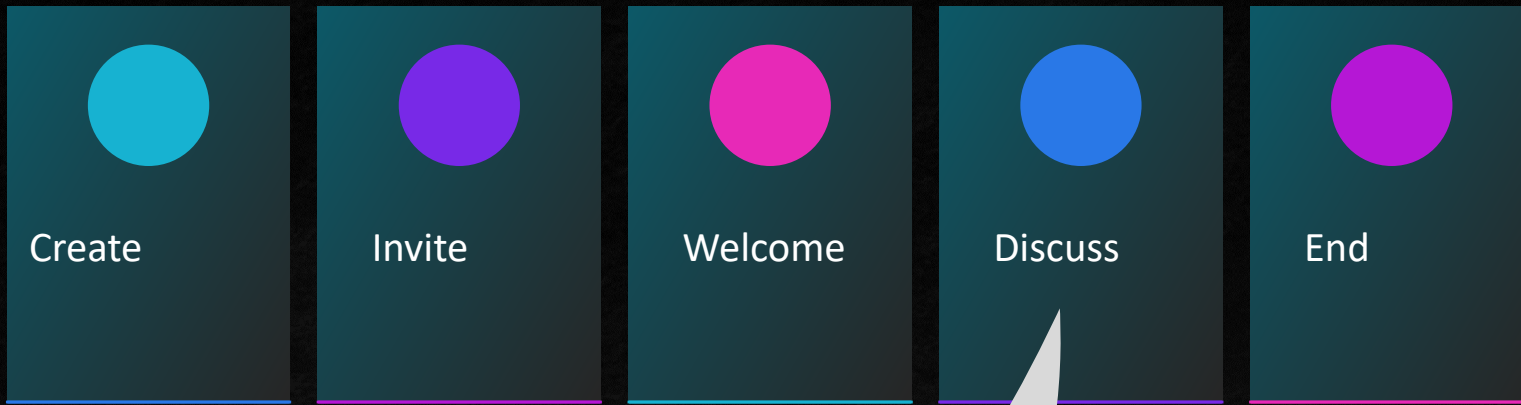
- The "Welcome" is when things are most likely to go wrong for the Participant

- 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.
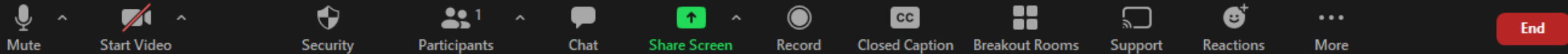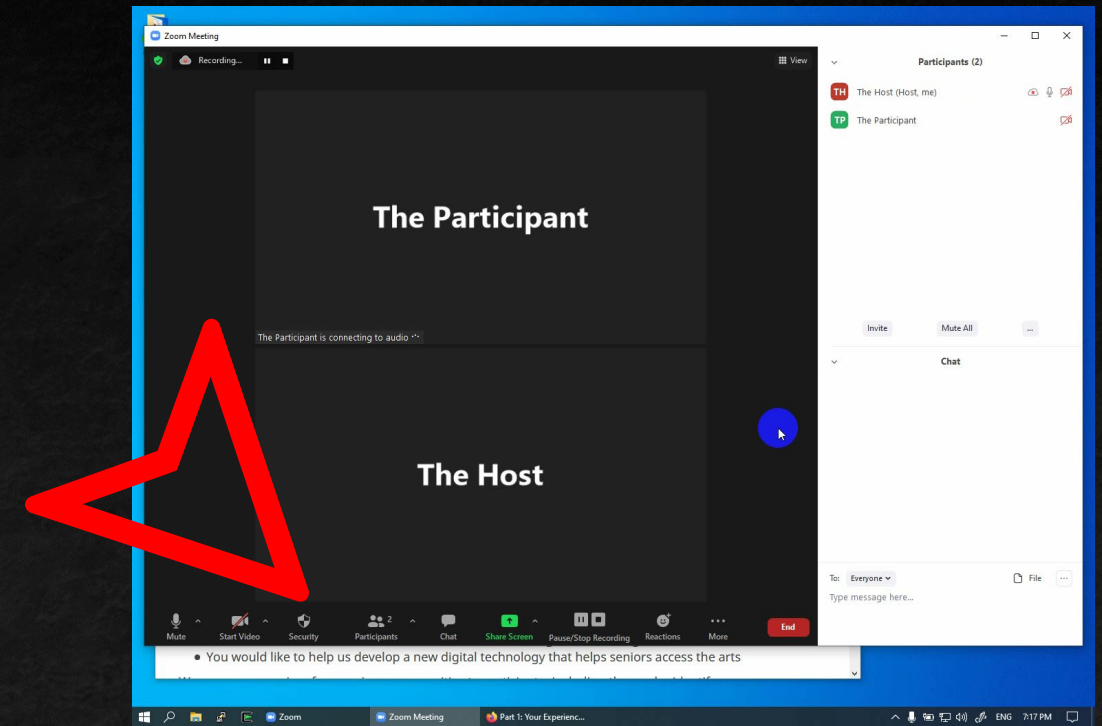
Create	Invite	Welcome	Discuss	End
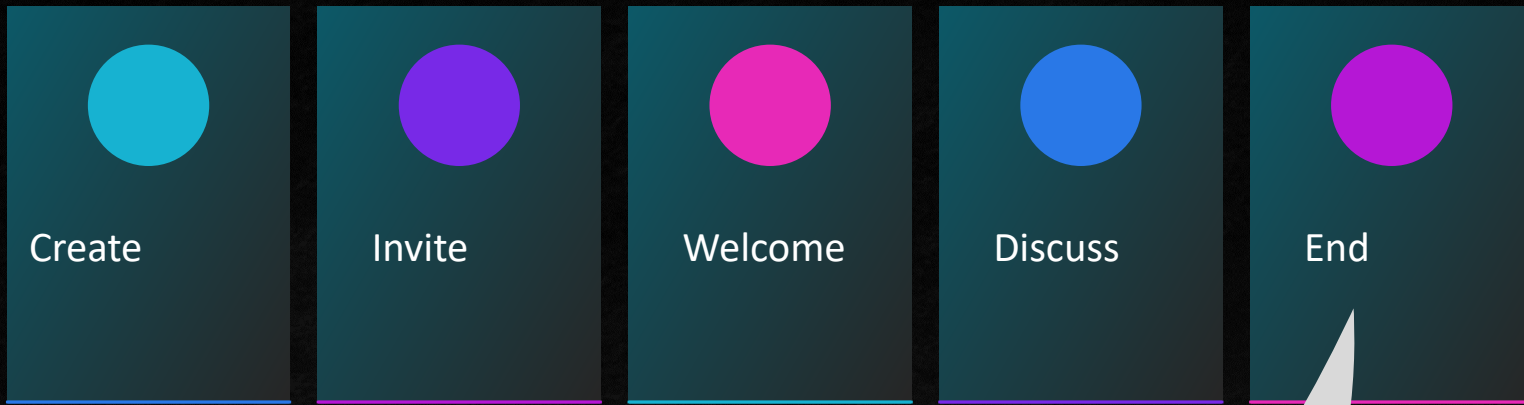
- Make sure everyone's happy with what's happened

- Make sure everyone knows what to expect next

- Be decisive about closing the meeting when done!
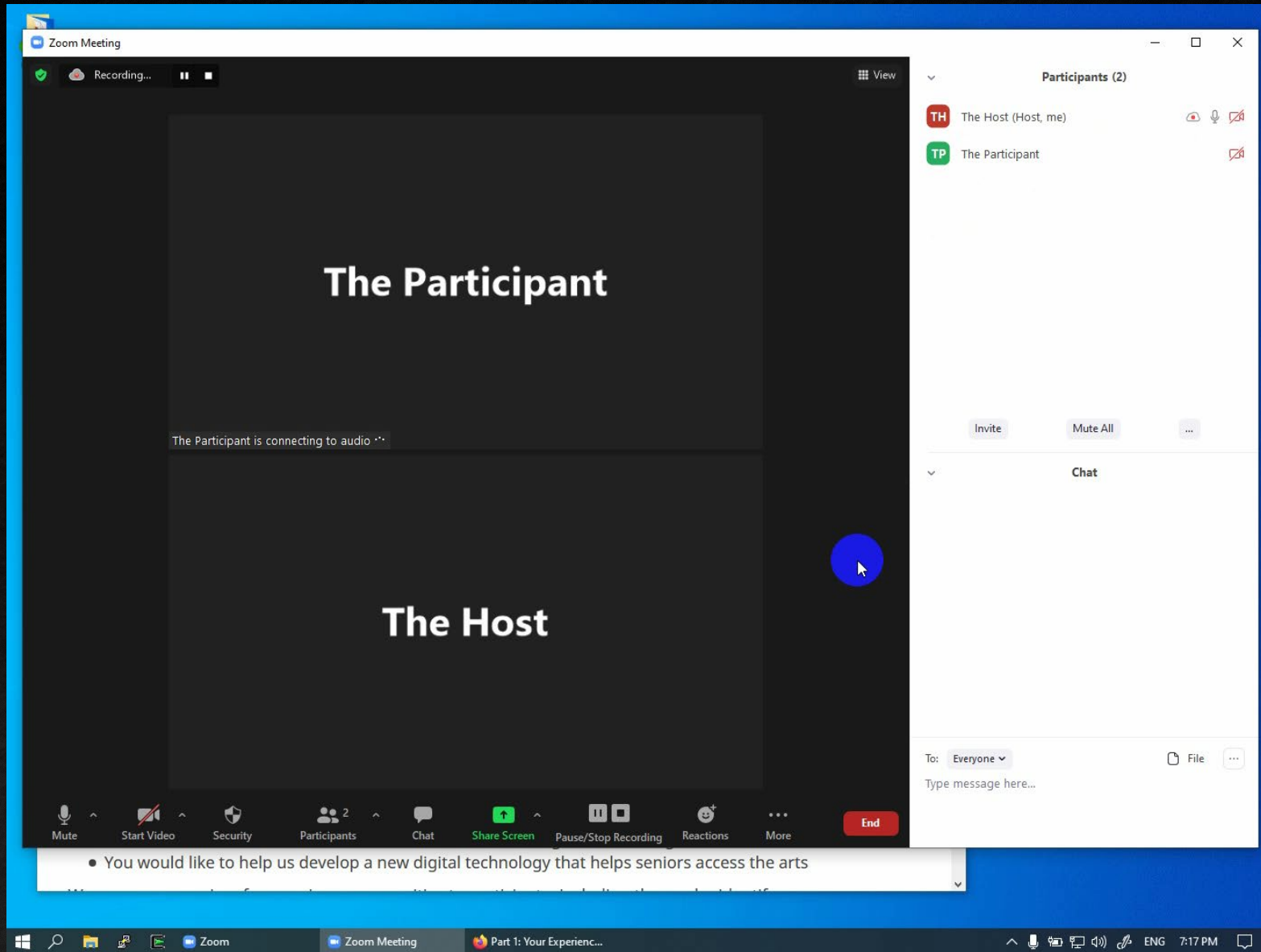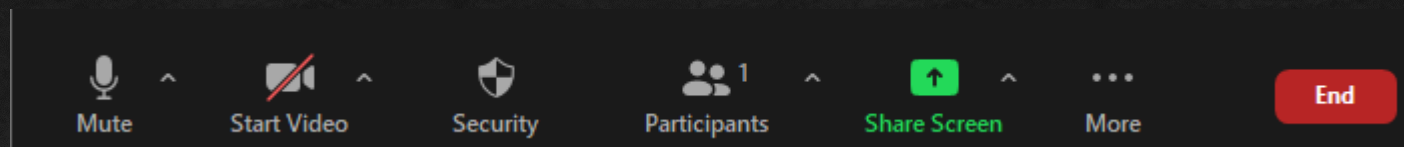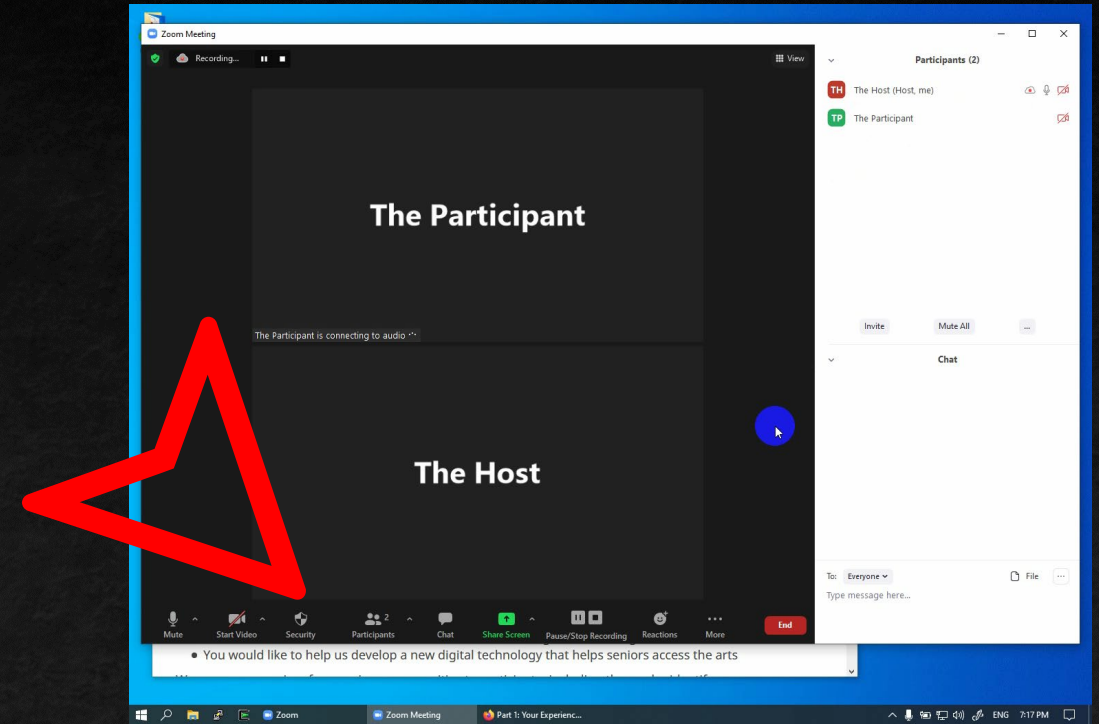
Zoom on a Desktop or Laptop

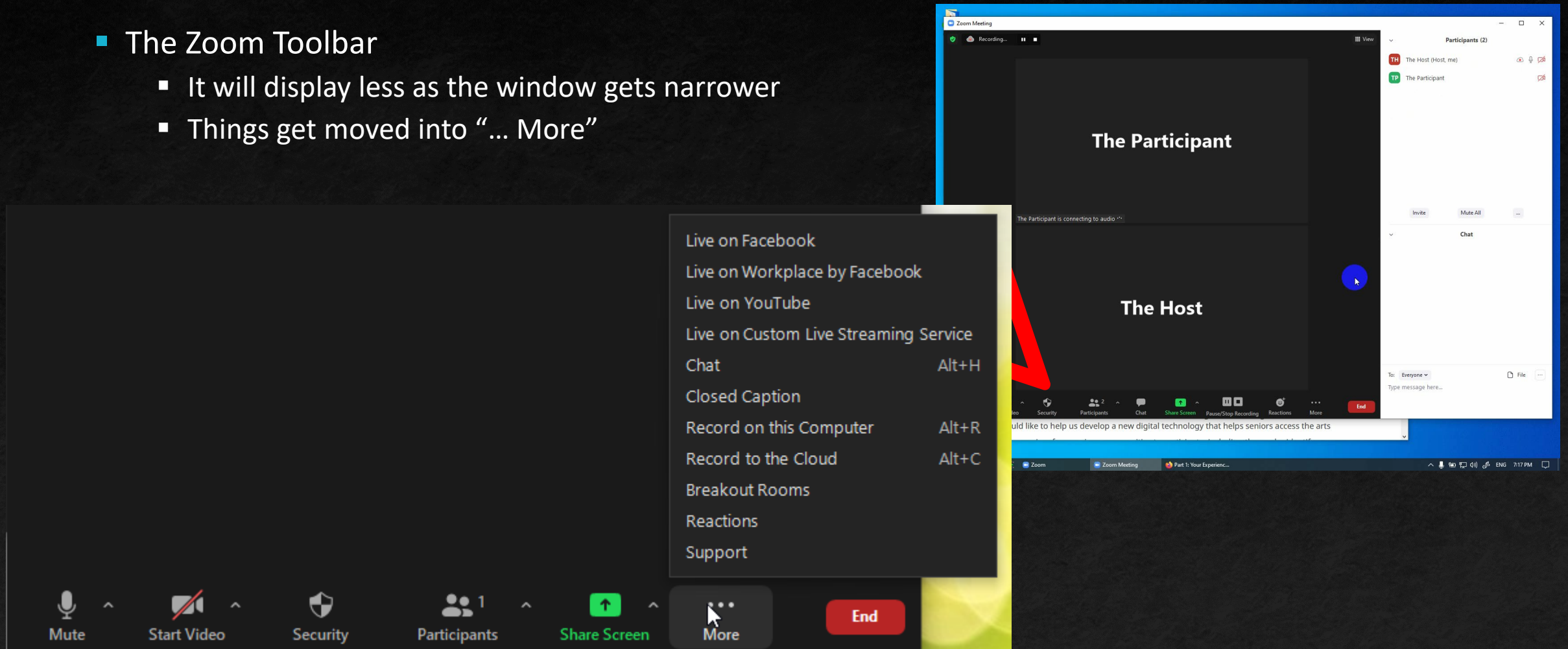# Finding Things in Zoom

- The Zoom Toolbar

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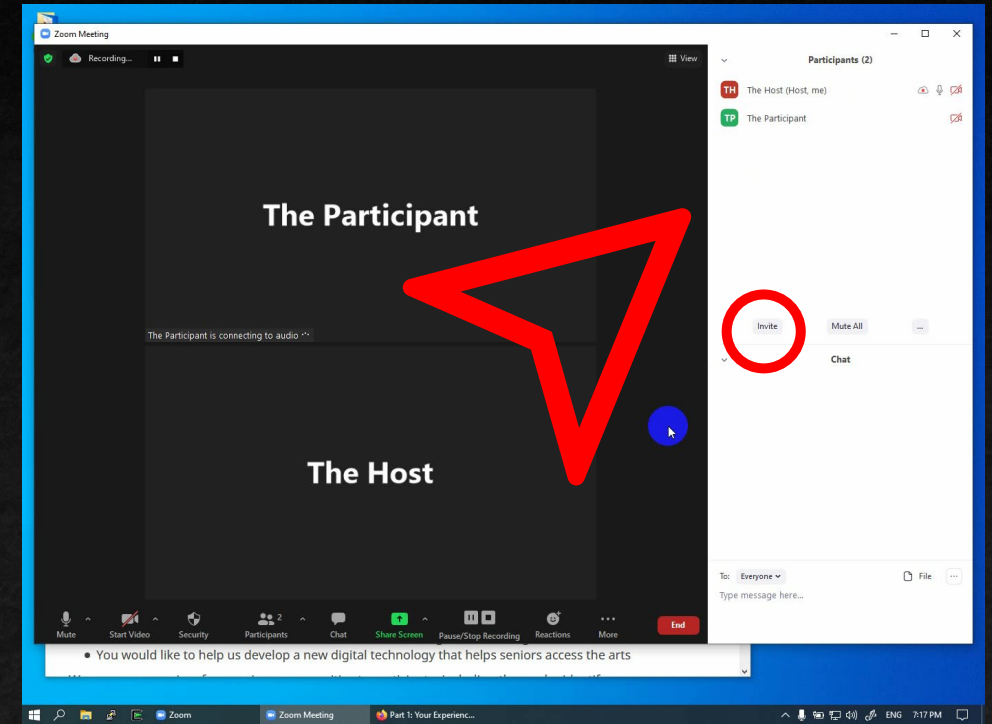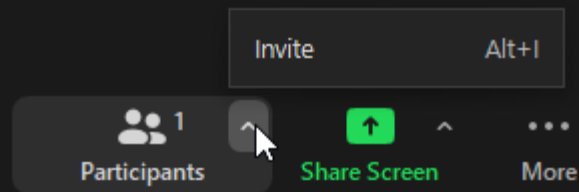 - It collapses when you share your screen
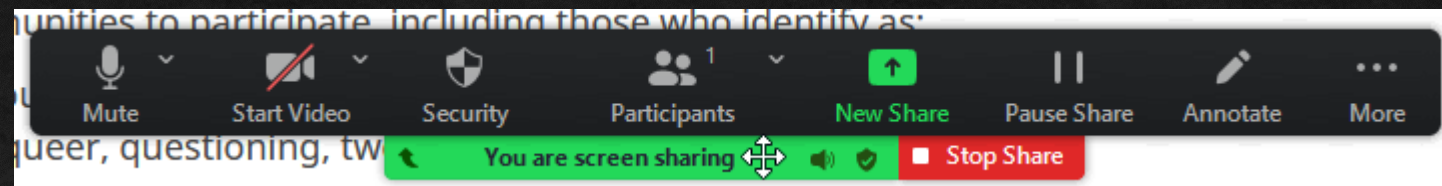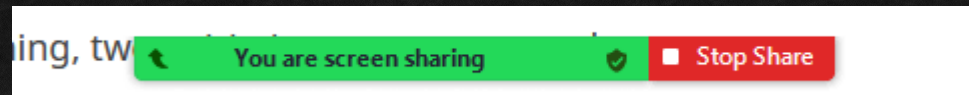
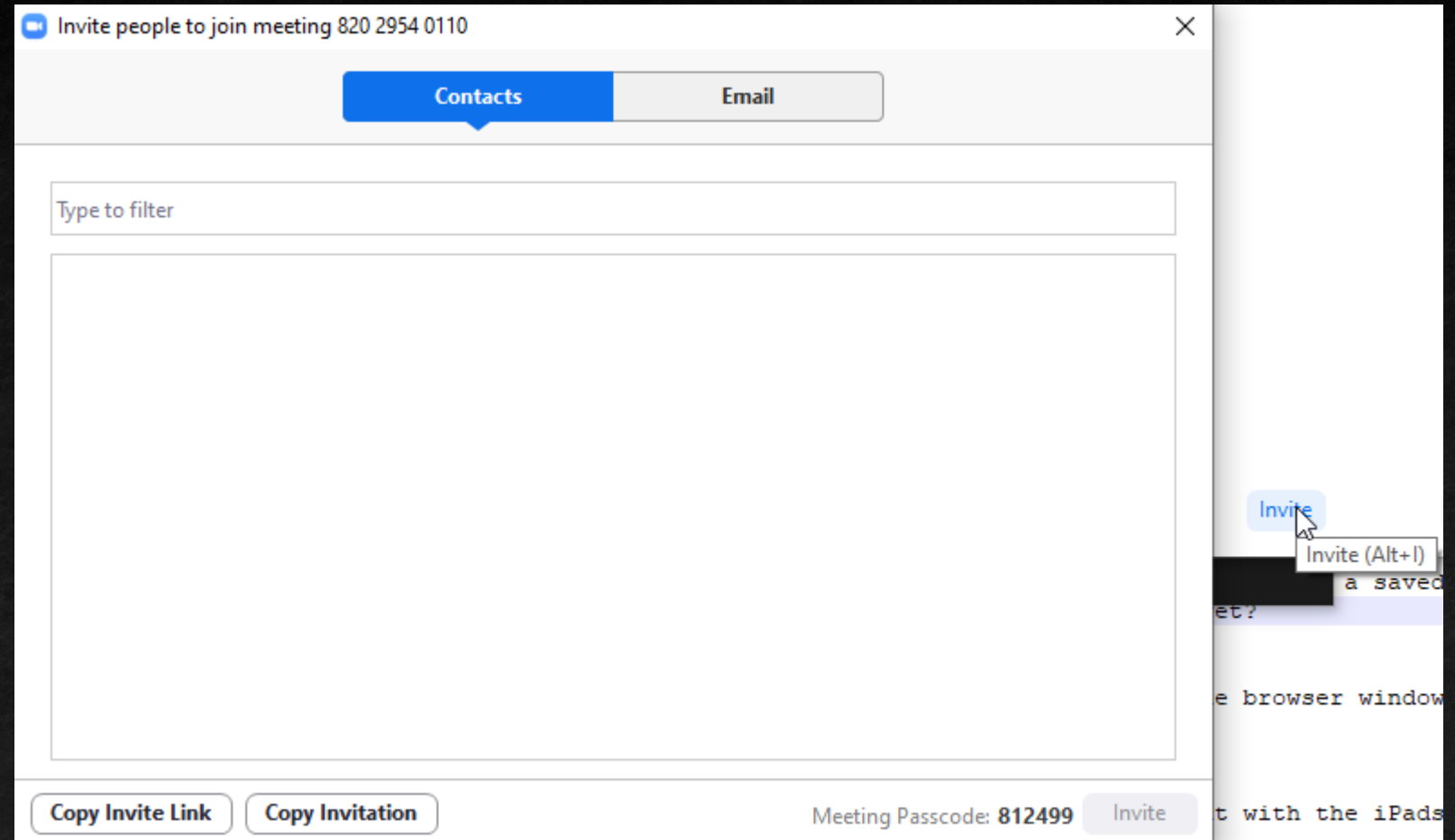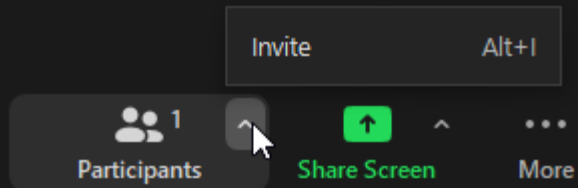# Finding Things in Zoom

- The participant panel
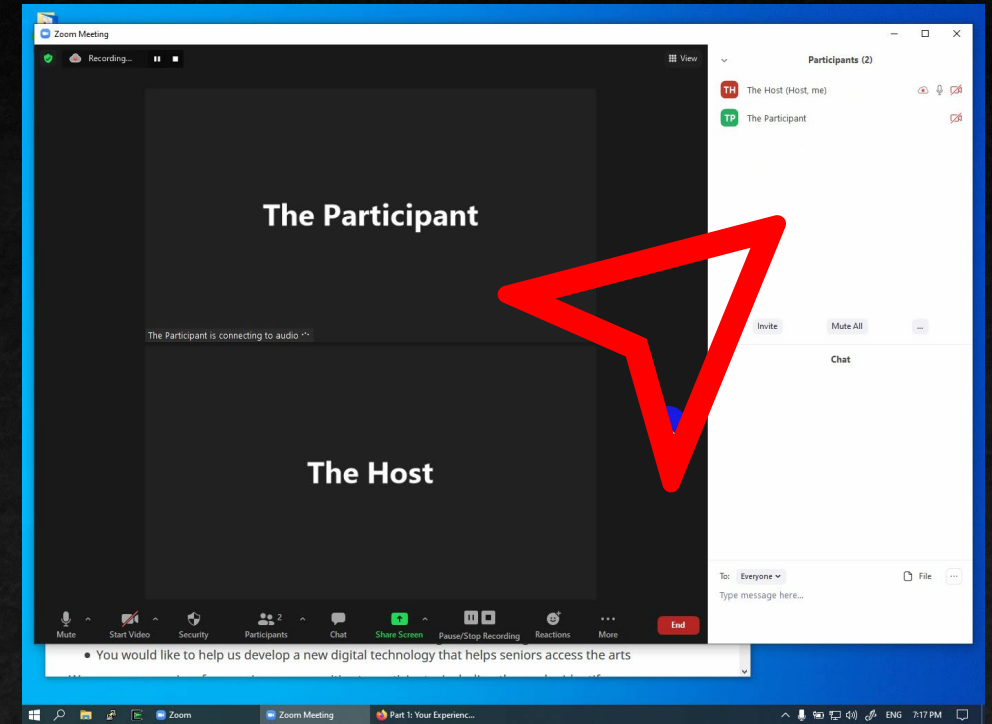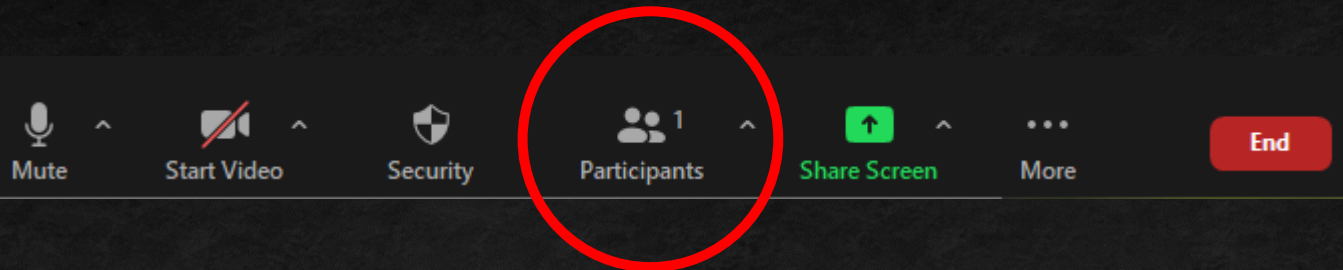
Finding Things in Zoom

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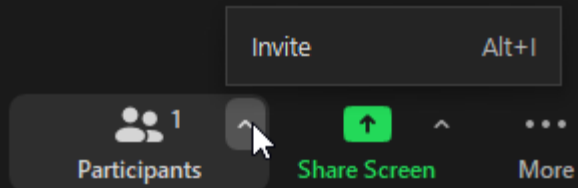 - In the ^ button
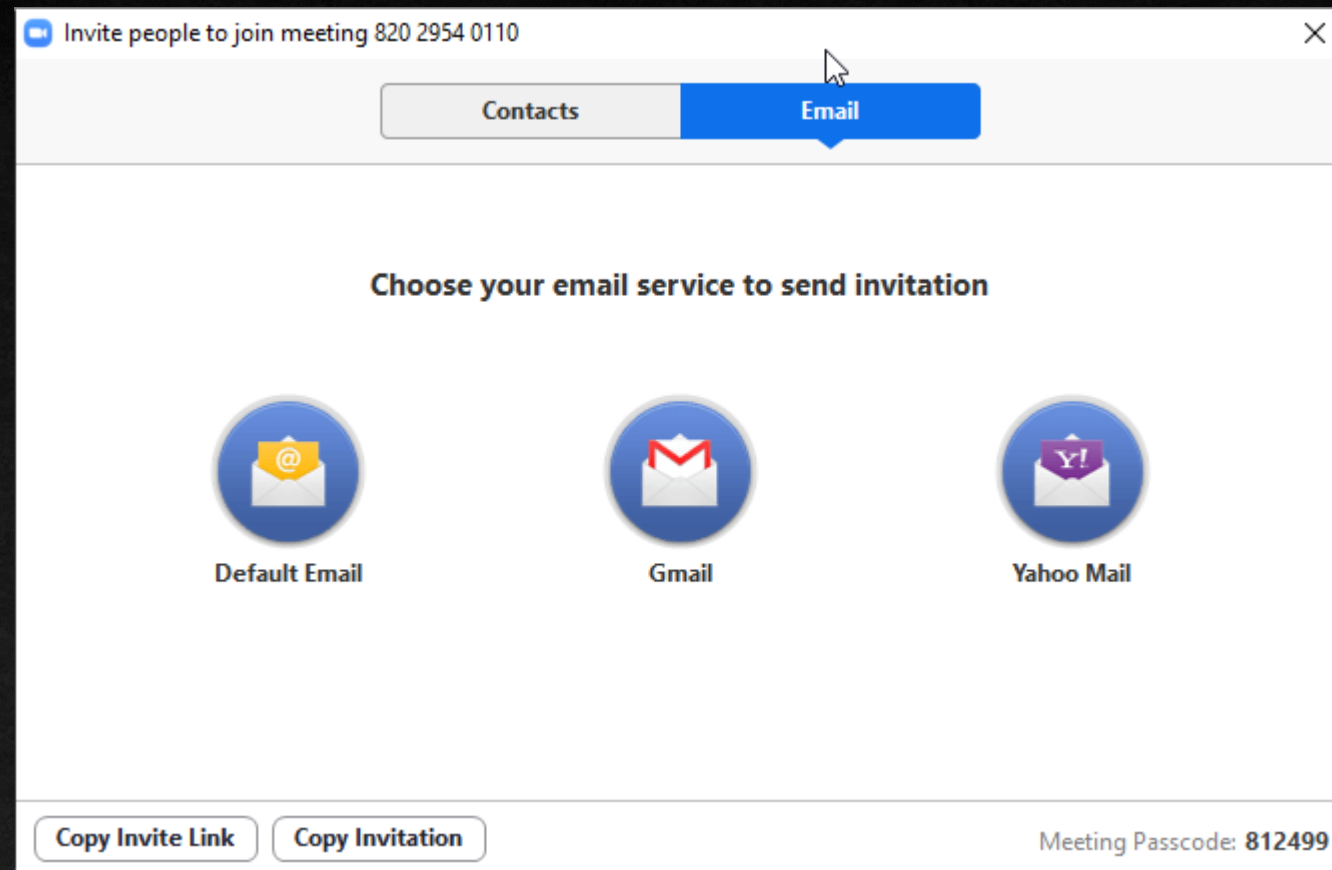 - At the bottom of the panel

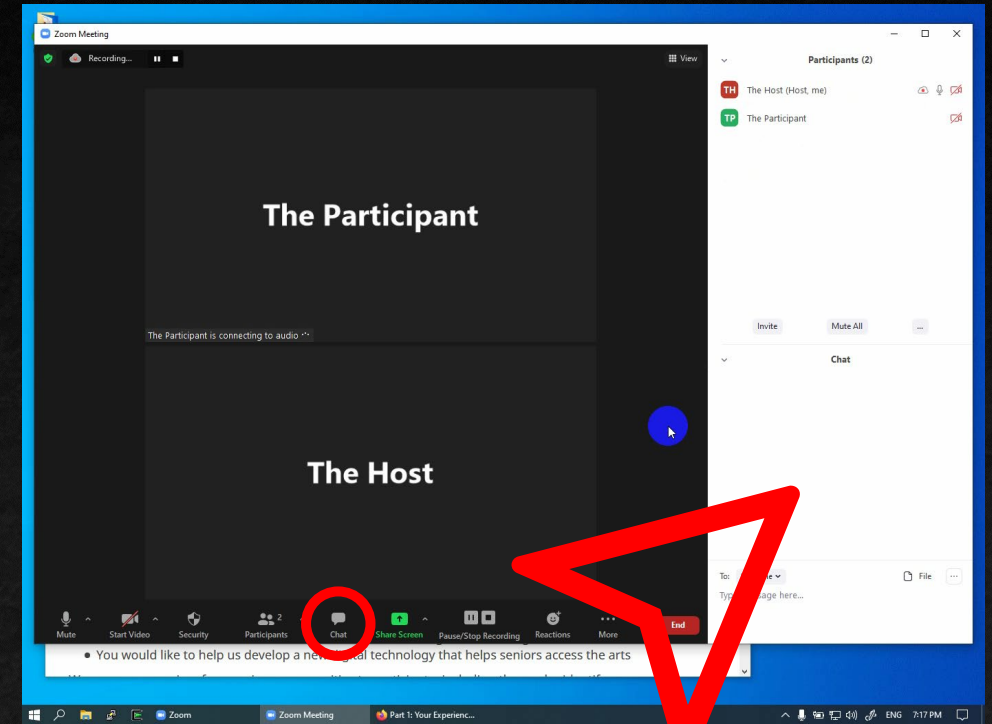# Finding Things in Zoom

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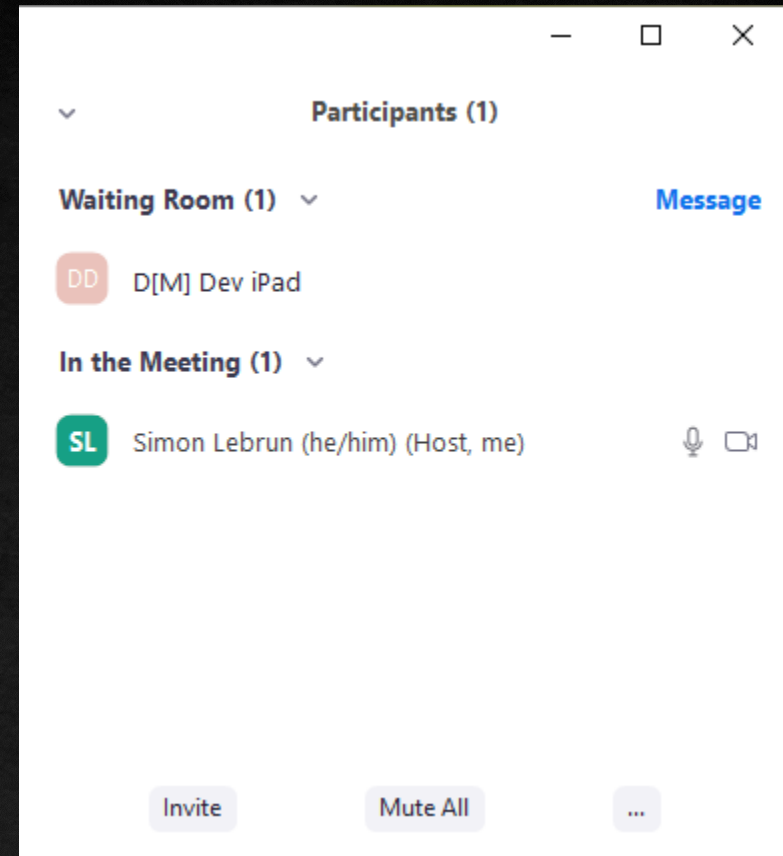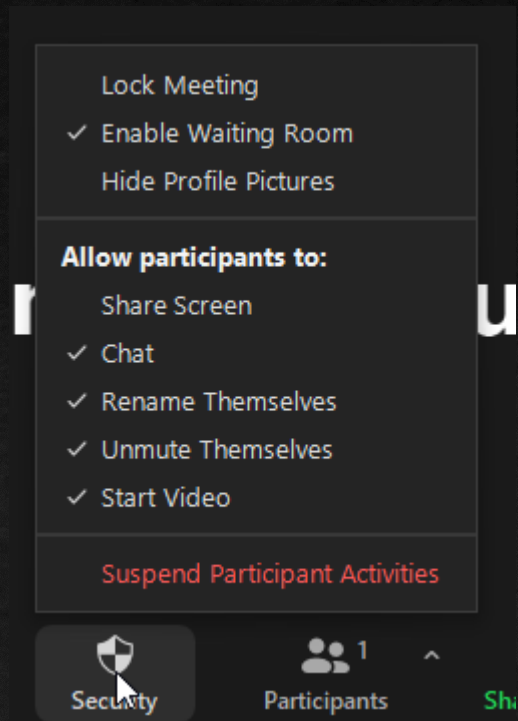# Finding Things in Zoom

- The invitation panel

Finding Things in Zoom

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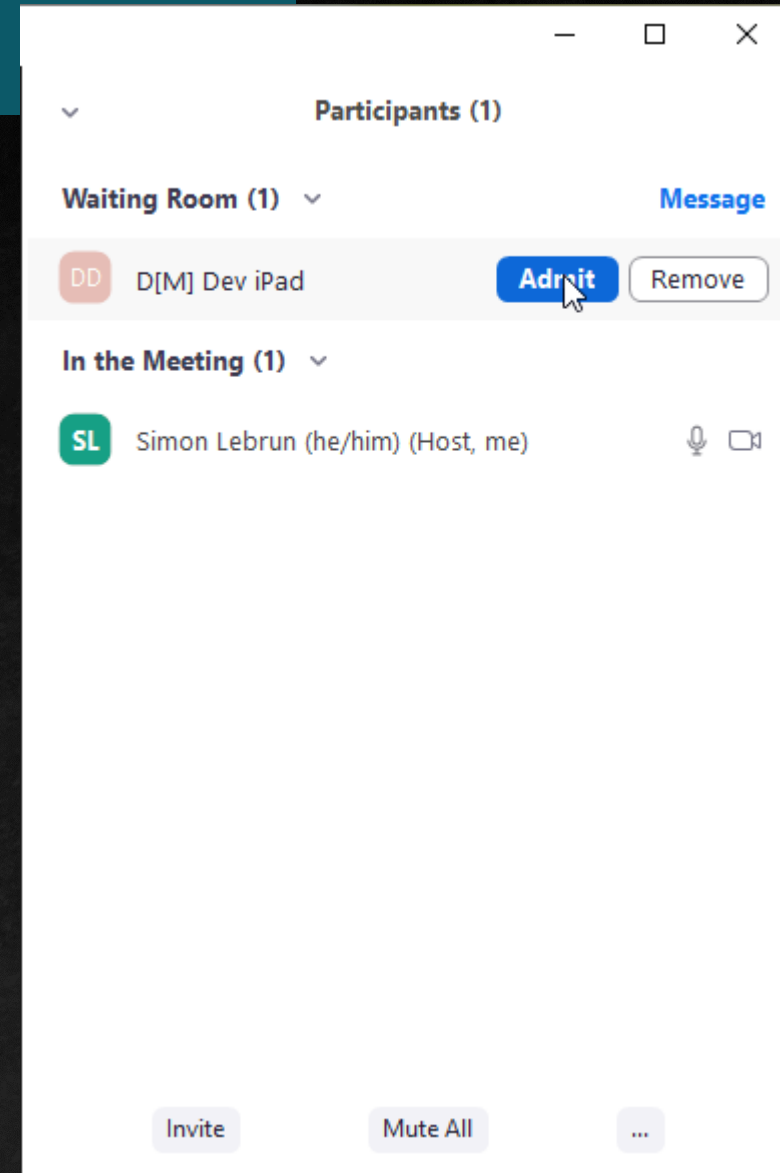 - Can be 'undocked' and will float around screen

Only For The Host

- The Waiting Room

Only For The Host

- The Waiting Room
  - Put mouse over name to let someone in
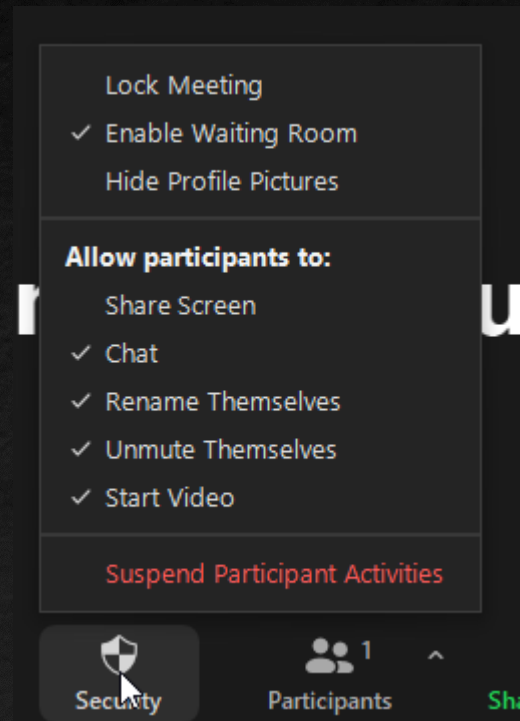
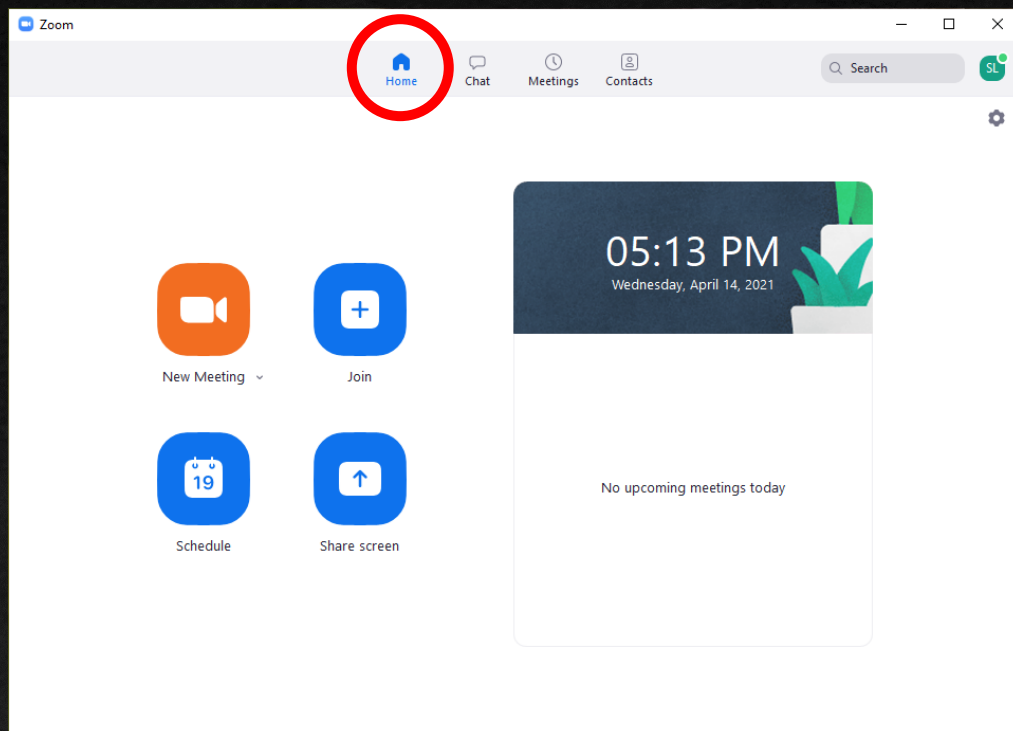# Only For The Host

- Control who can do what

Only For The Host

- Set up the meeting

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Recording in Zoom

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- Indicators that the recording is happening

Pause/Stop Recording
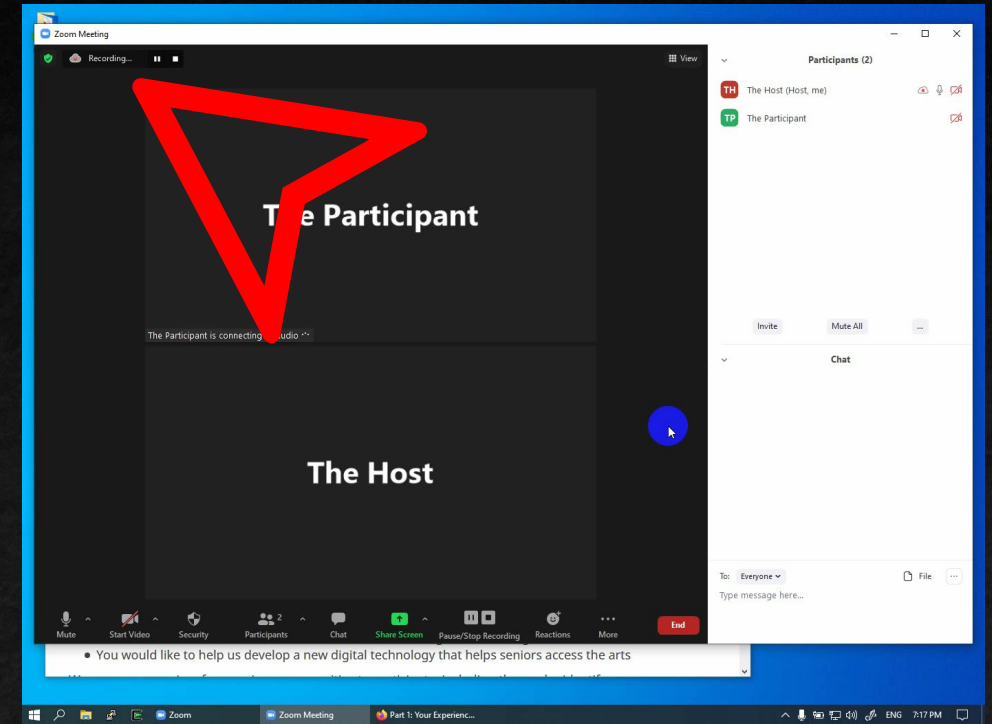
What does it look like from both sides?

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
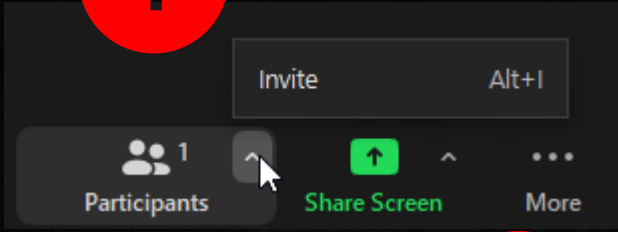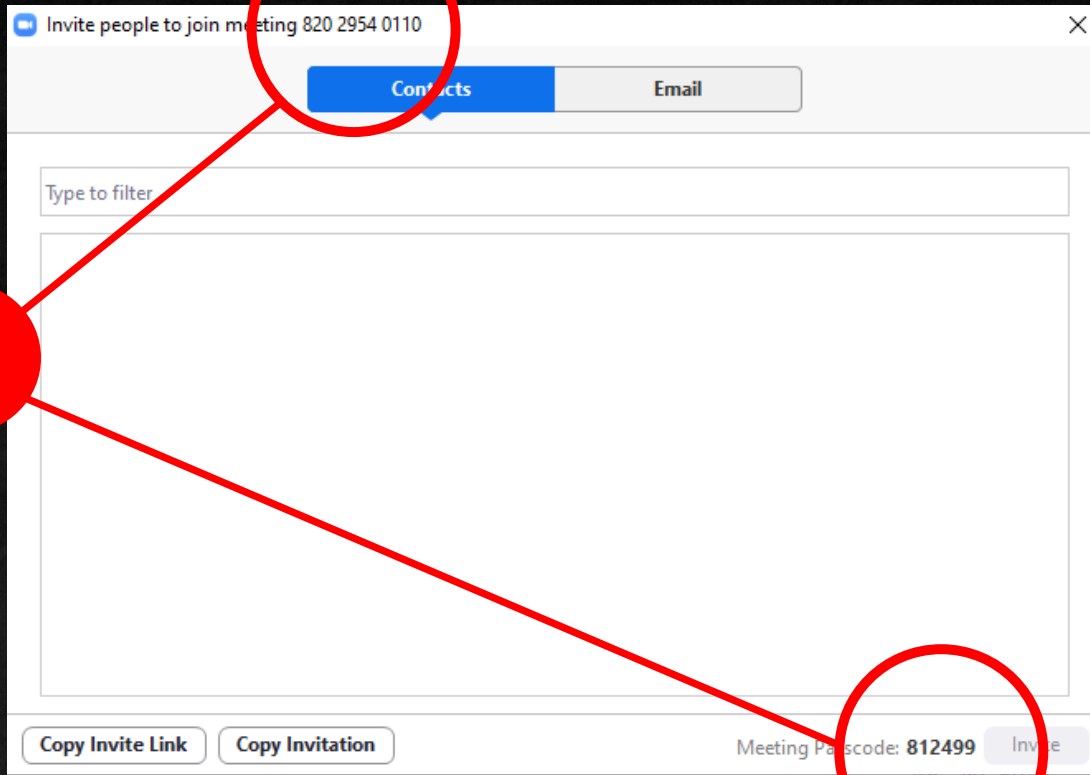
Getting Help

- Email
- Text
- Read out

A Survey Session

You (the Host)

The Participant

Preparation before meeting

Contact participant

Agree to meeting time
Receive iPad
(training?)

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

Part 1 meeting

Open Part 1 in browser
Open zoom room
Start recording

Connect to room

Admit to room
Welcome
Share screen, no video mode

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

Share Some Hints

- 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?"