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What You Need to Get Started

- A high-speed internet connection to your computer. A hard line (ethernet cable) is preferred over WiFi.

- An external webcam or built-in camera on your computer.

- The built-in microphone on your computer will work, or for better sound, an external USB microphone or a USB headset can be used.

- You do not need to have a Zoom account to join a Zoom meeting, but for the best user experience, we do recommend you at least download and install Zoom on your computer before your meeting. If you are on your browser (Chrome, Firefox, etc.) you will not have access to all Co-host controls.

- Although Zoom can be downloaded on Android and iOS devices, we strongly encourage you to use a laptop or desktop over a smartphone or tablet. This will give you a better viewing experience with more functionality.

Downloading and Installing Zoom

- You can download Zoom by clicking here: https://zoom.us/download
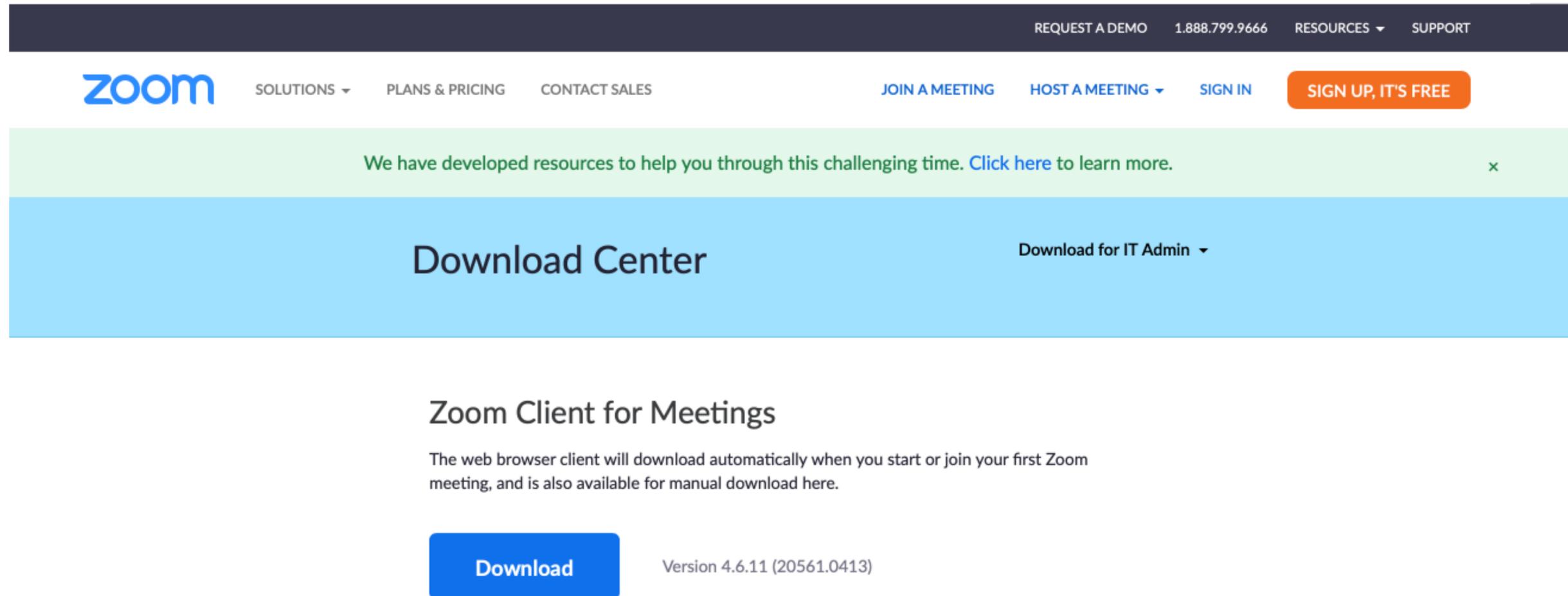
- In the Download Center, click on the *Download* button under Zoom Client for Meetings. Then locate and run the Zoom installer (the default location is the Downloads folder).

Zoom Desktop Application
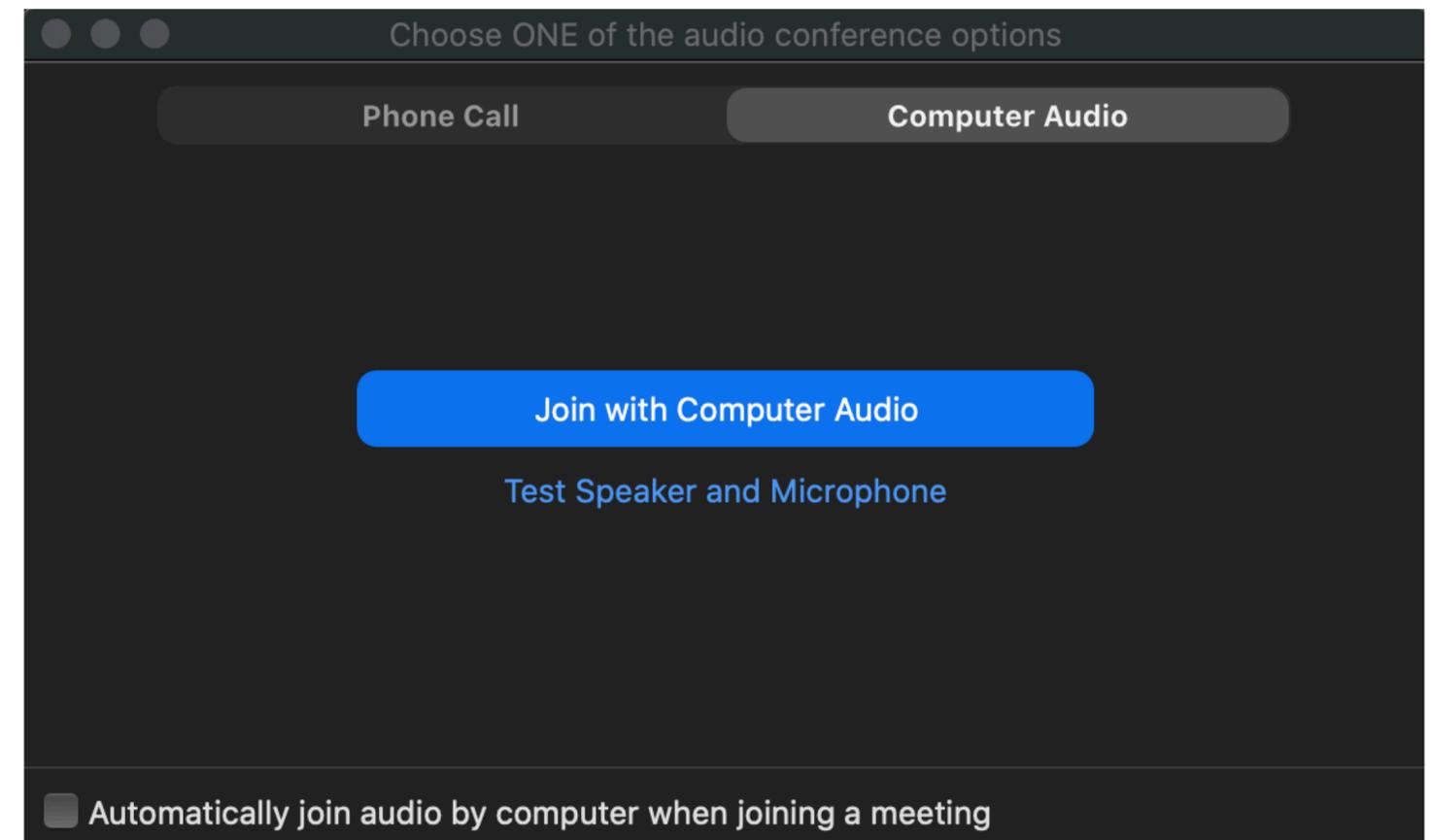
- The Zoom Desktop icon will look like this:

  and will be found in the Docking Station on your Mac or on the Desktop of your PC.

- Once you click on the icon the desktop application will prompt you with the following:
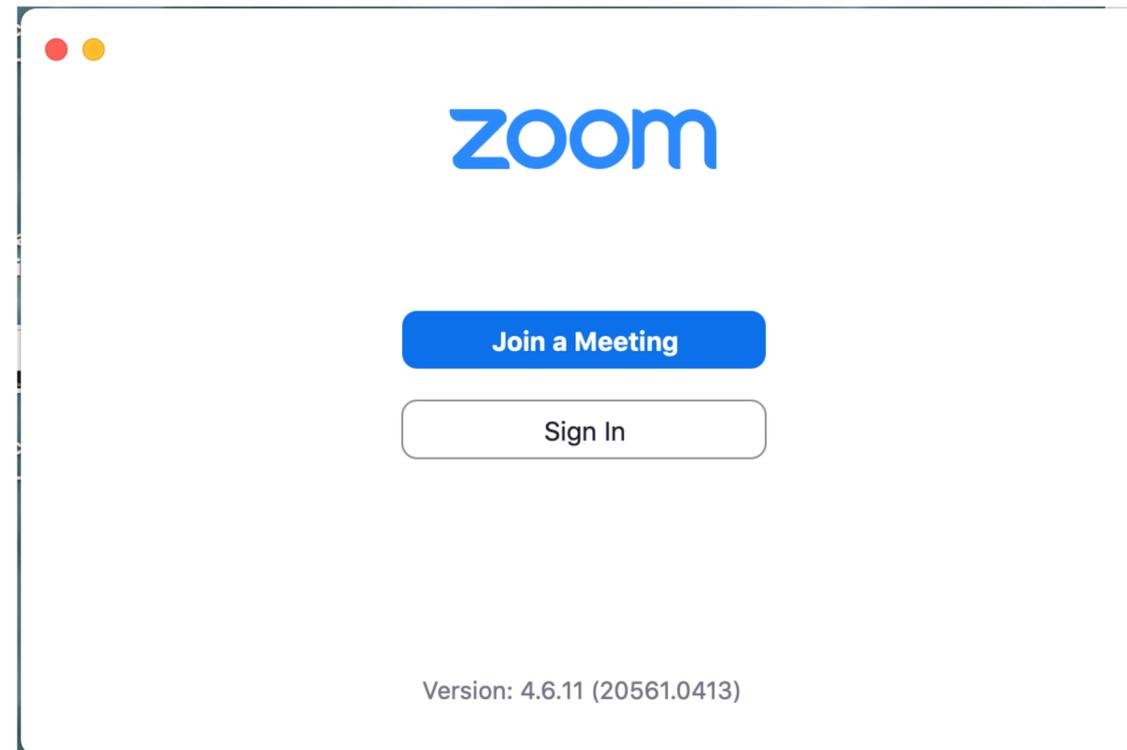
- You will not need to enter a meeting ID or password to join any meeting hosted by Confex. You might need this additional information if using Zoom for other purposes.

- If you do not already have a Zoom account, we recommend that you create a free one so you can sign in here. An account will give you more functionality and create a profile to customize how you appear to others in the Zoom meeting. It will also enable you to schedule your own Zoom meetings to connect with anyone directly.

Joining The Meeting

- Log in to the Online Program/ Meeting App with the same email you used to register. Find your session and click on the *Join Now* button. (It will appear 20 minutes before session start time).

- You may be prompted with a pop-up window, allow zoom.us to open.

- A pop-up will appear with the following choices. Choose *Test Speaker and Microphone* and follow the prompts to test your audio.

⭐ ➕ ✏️   🎥 SH041 Solar and Heliospheric Physics: General Contributions II

➕ **Join Now**   14 December, 19:00 - 20:00

Choose ONE of the audio conference options

| Phone Call | Computer Audio |

Join with Computer Audio

Test Speaker and Microphone

☐ Automatically join audio by computer when joining a meeting

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Join with Computer Audio or Phone Audio

The same pop-up window will allow you to *Join with Computer Audio* or you can dial in with your phone by choosing *Phone Call* in the top left corner. If you are experiencing audio issues with your computer, this is a great alternative. You can log in to the meeting on your computer while using your phone to speak and listen.


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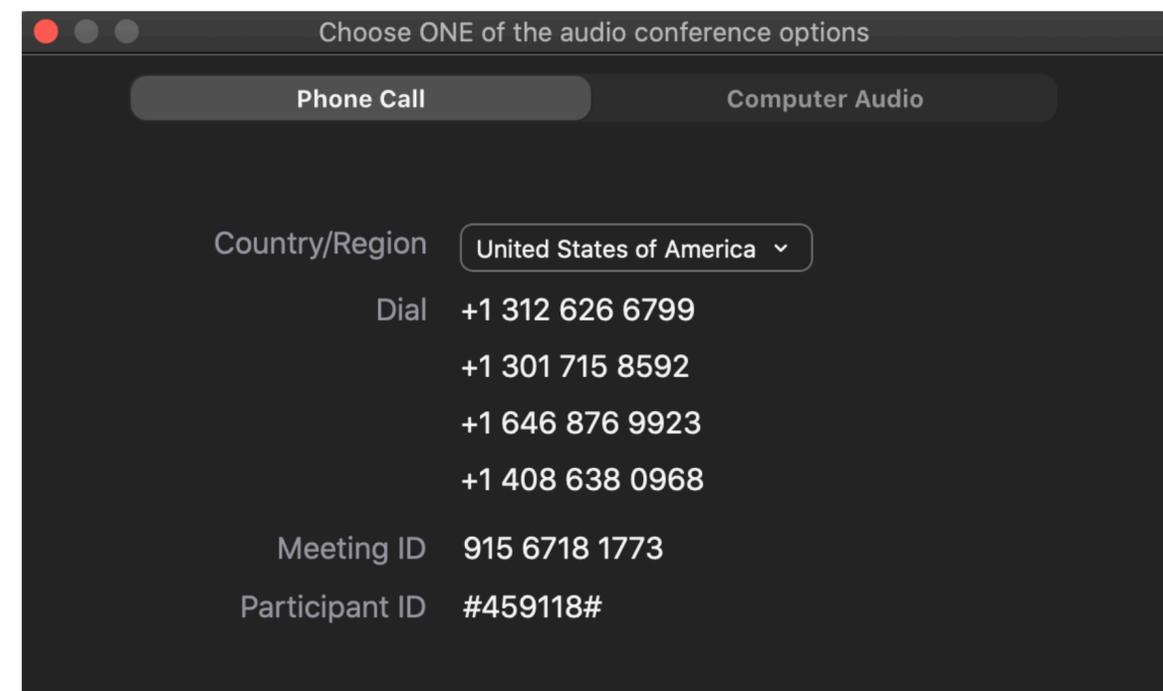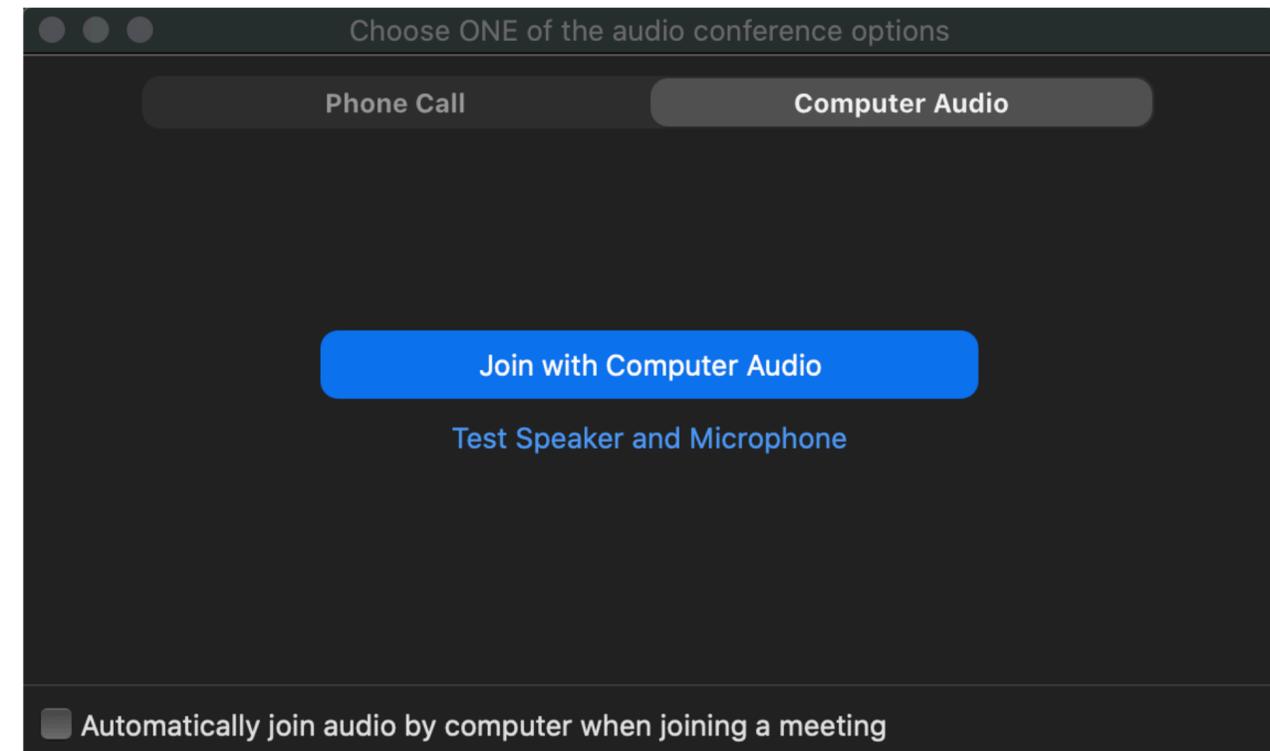
Testing Video

- Before turning on your camera (*Start Video*) you may want to preview your appearance and check your video settings. Do this by clicking on the up arrow located next to the symbol *Start Video* and choose *Video Settings.*
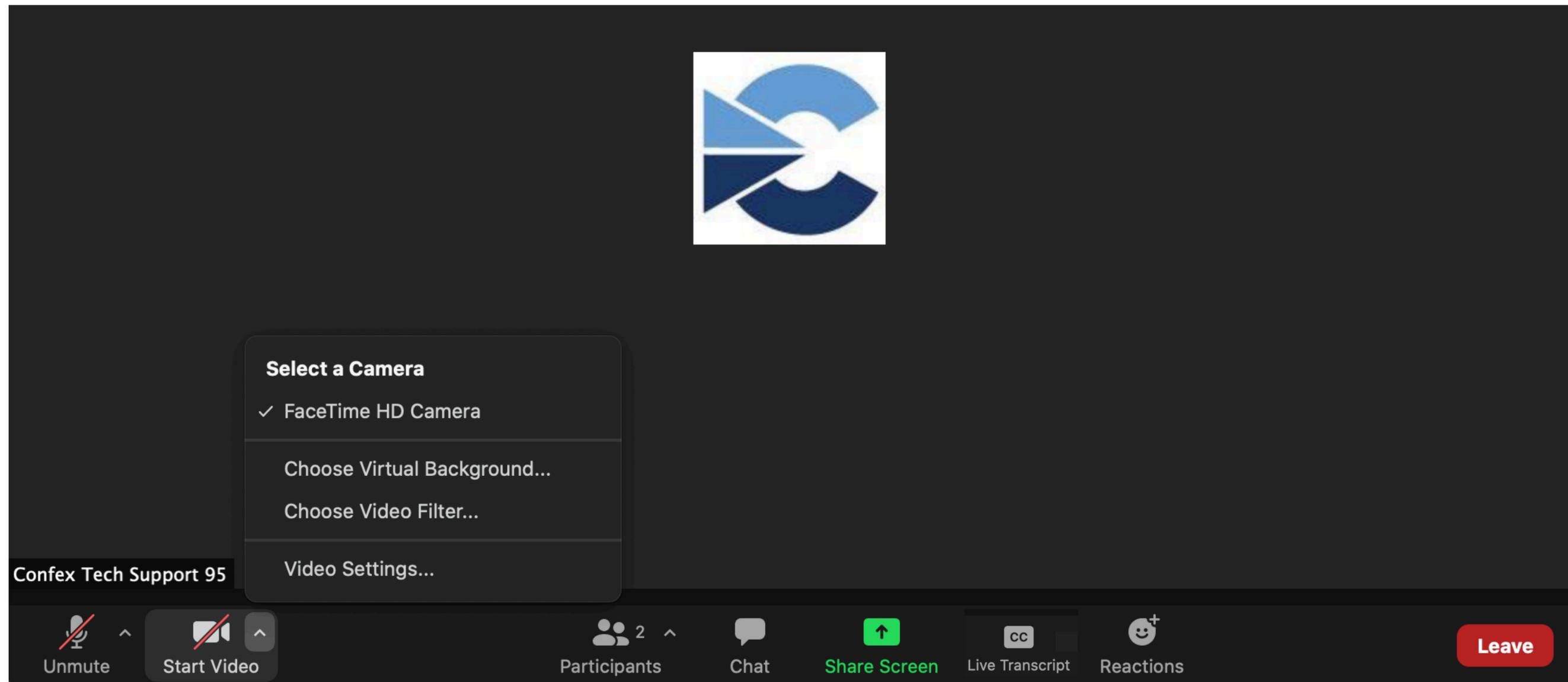
Video Settings

- Here you have the opportunity to see exactly how you will look before you join the meeting. You can also use the *Touch up my appearance* setting.

- If you have trouble finding an aesthetically pleasing environment for your meeting, you can choose a virtual background or insert a background provided to you by your organization. Click *Background & Filters*.


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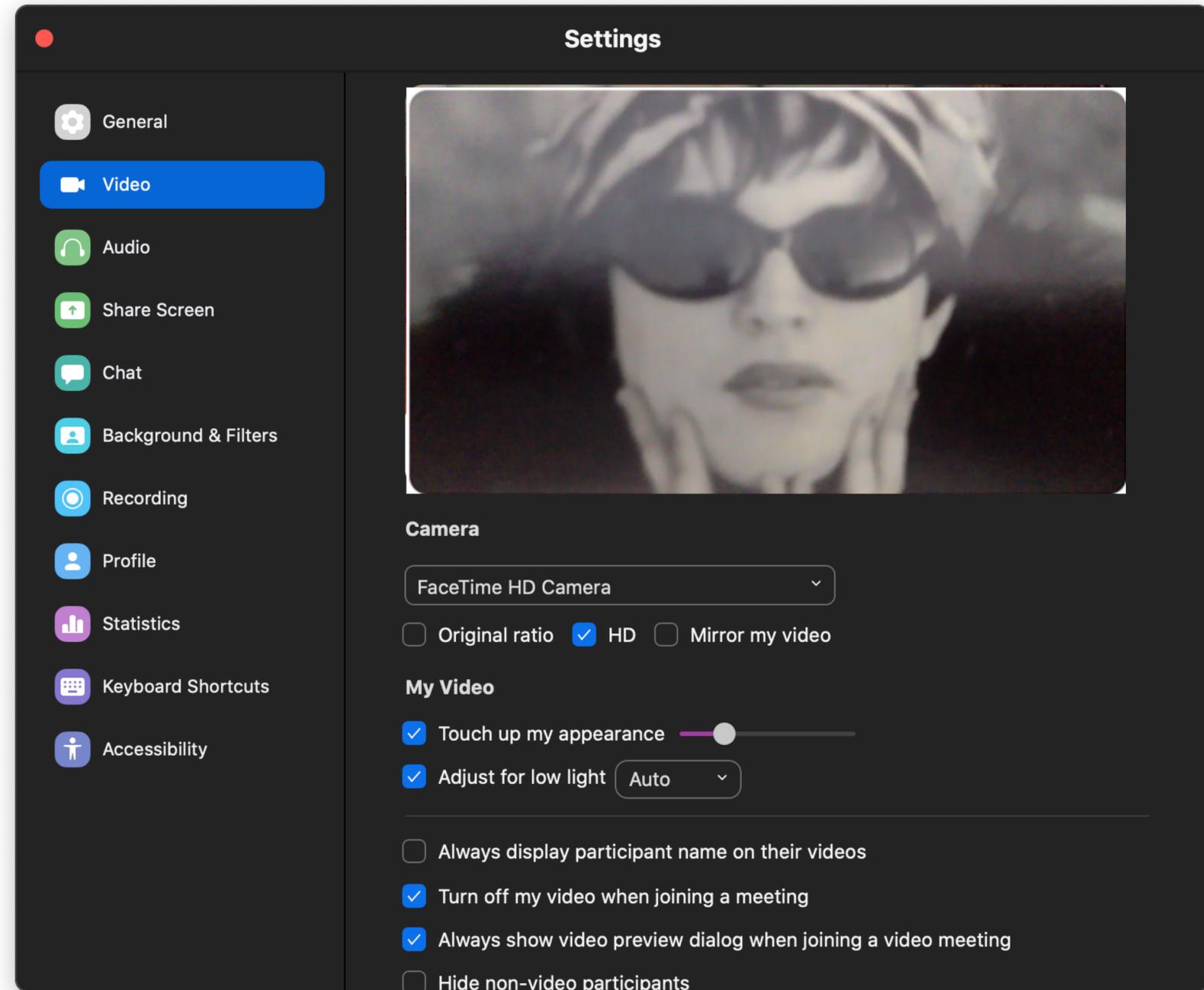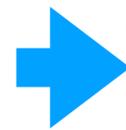
Zoom Meeting Interface

- Once you have chosen to join with or without computer audio, your Zoom meeting screen will appear:

- This is an example of what you will see if no one is currently sharing their screen, a session title slide, or their video.
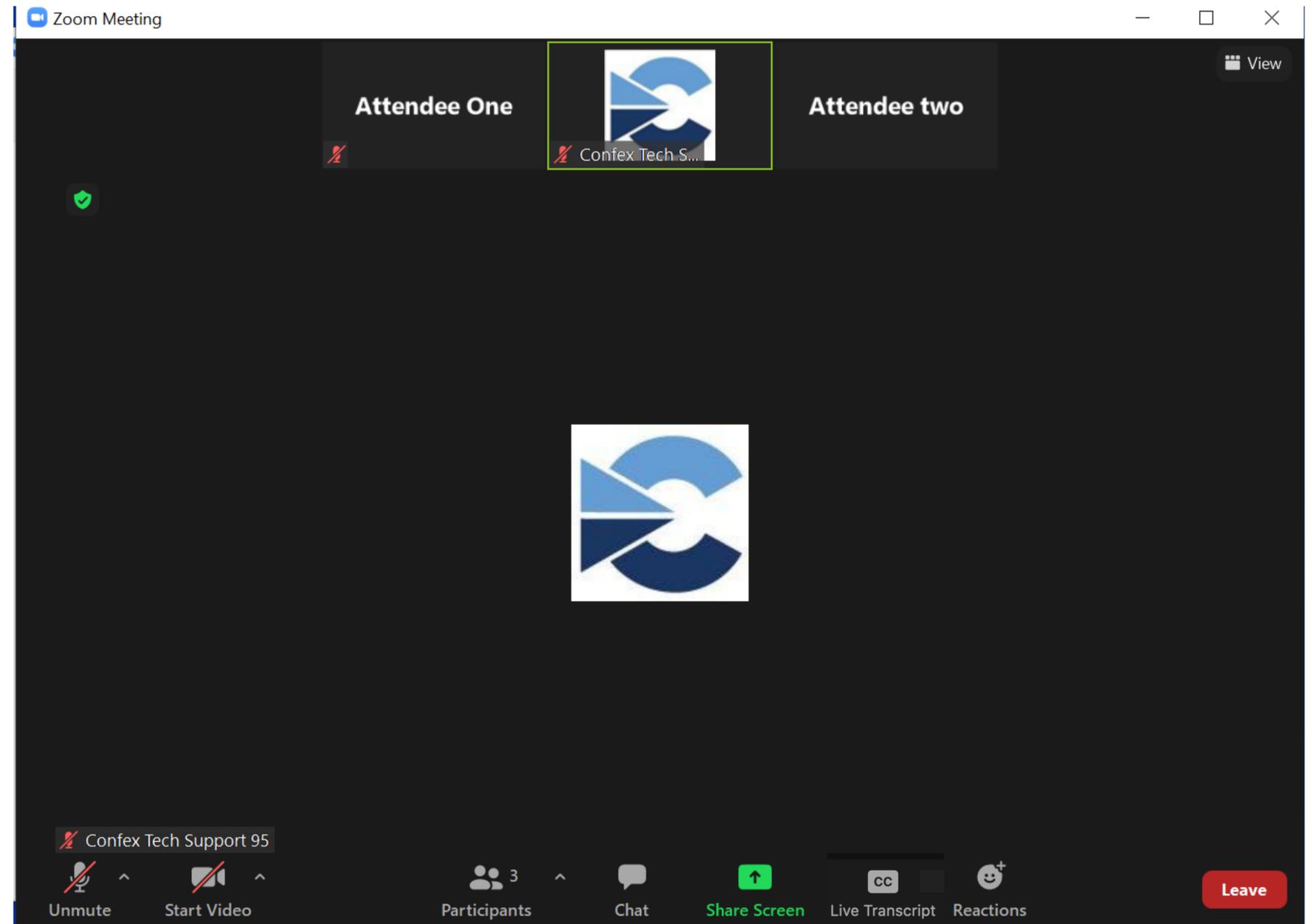
Zoom Controls Available to Participants & Presenters in the Meeting

- These are the controls available to you in a meeting. You can find them at the bottom of your screen.
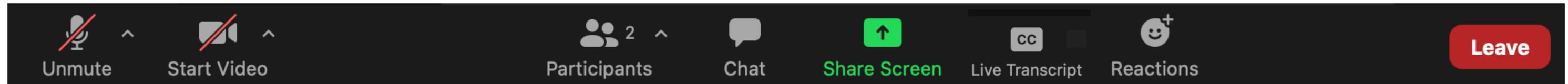

- *Microphone*: Mute and unmute your own microphone.

- *Camera*: Start and stop your video camera.

- *Participants*: Click here to show the names of each attendee in the meeting, along with controls that allow participants to raise and lower a virtual hand.

- *Chat*: Here, you can send a message to Everyone or send a Direct message to an individual.

- *Share Screen*: This will give you a window to select which application or desktop you want to share.

- *Live Transcript*: If enabled by the host, you can turn on/off subtitles (CC), transcription, and adjust subtitle settings.

- *Reactions*: You can choose from various emojis which appear briefly in your camera window after you've made your selection.
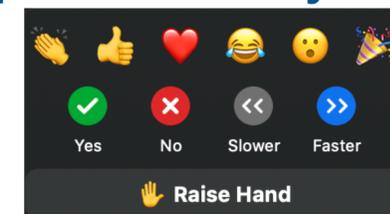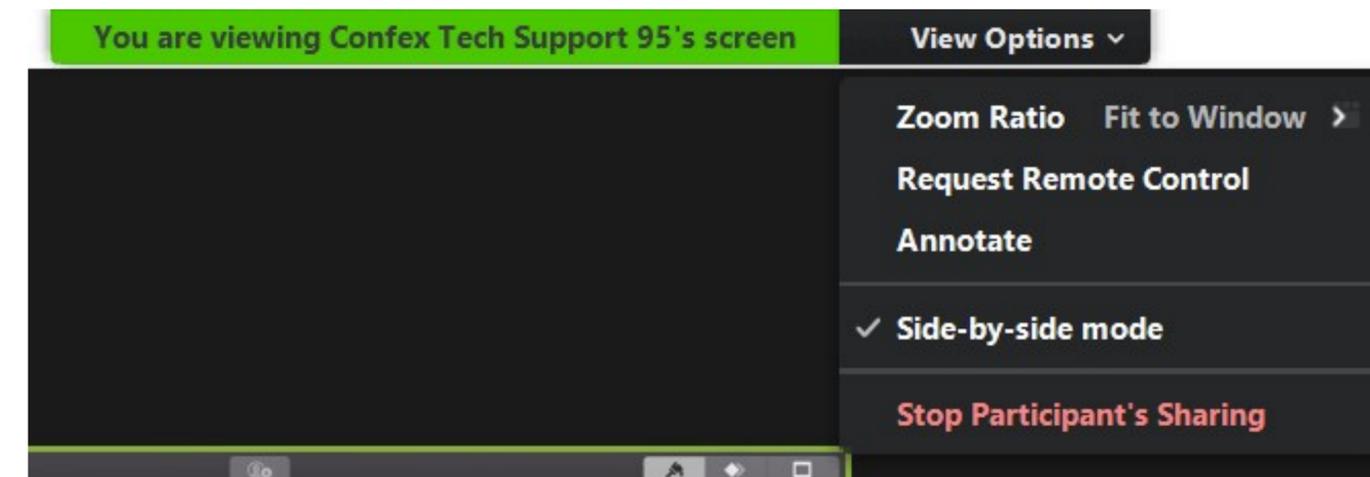
View Options

- Click *View* on the top right of your screen and select other viewing options:
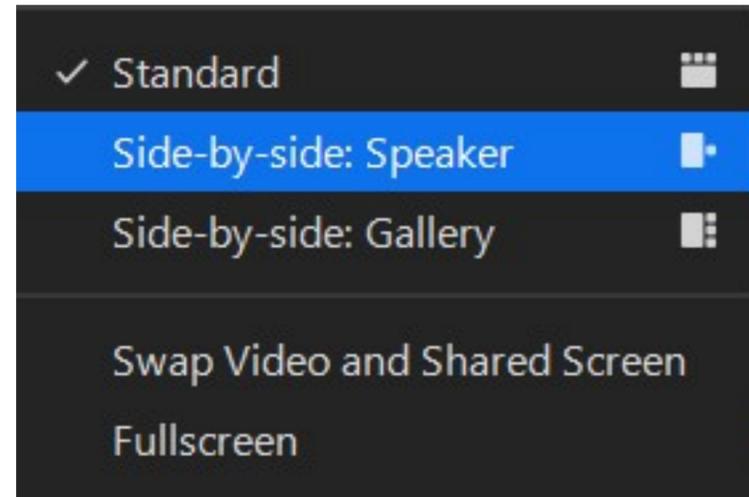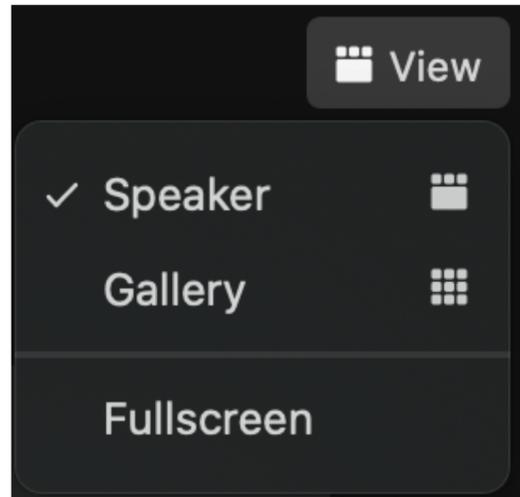
- When you view someone else's shared screen, you can choose where you will see them (if they have their camera turned on). Click *View Options* from the top of the screen. Choosing *Side-by-side Mode* will bring your Video panels to the right side of the full-sized shared screen.

Live Transcript (Closed Captions/ Subtitles) Page 1
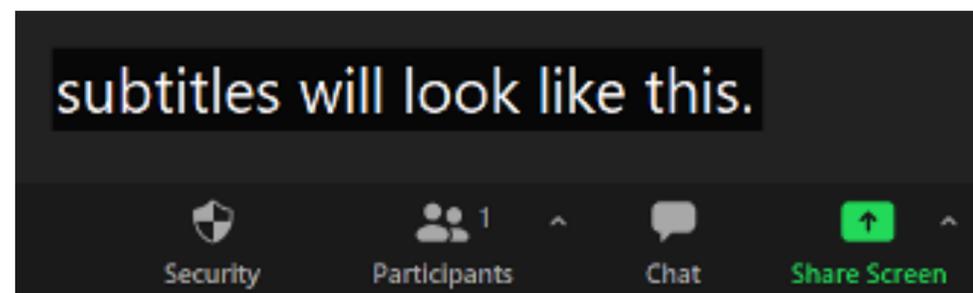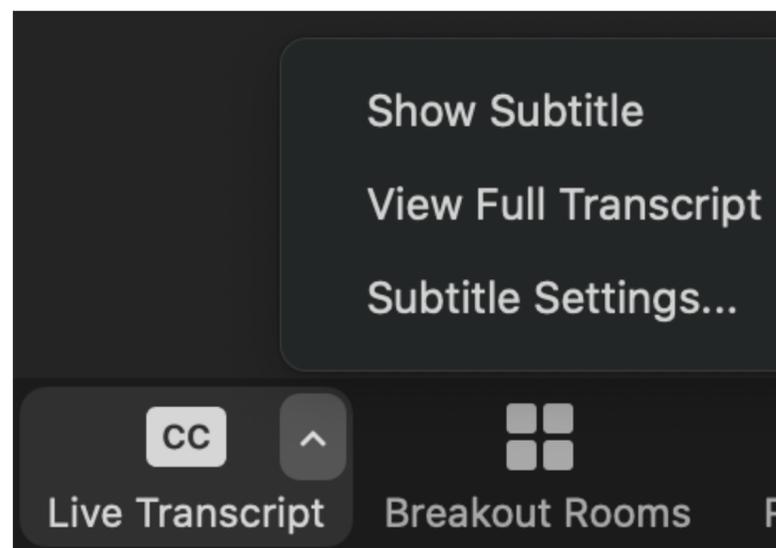
Your meeting will have automatic closed captioning enabled. Windows computers will enable subtitles automatically. On Mac computers, you will need to turn them on.

To manage closed captions, click the *Live Transcript* in the Zoom toolbar at the bottom of your screen.

To turn closed captions on, click *Show Subtitle*.

To turn closed captions off, click *Hide Subtitle*.
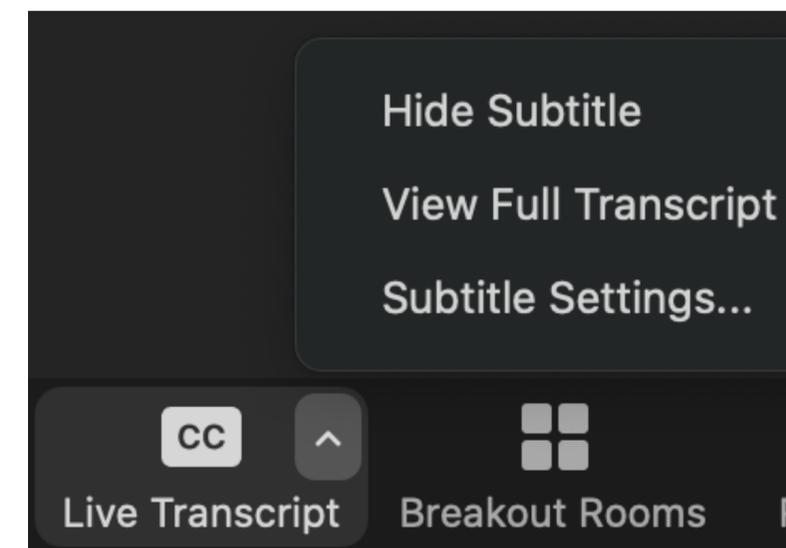
Live Transcript (Closed Captions/ Subtitles) Page 1

To change the font size for your closed captions, click *Subtitle Settings*.

This will open the *Accessibility* tab of your Zoom settings.

To view a live transcript denoting each speaker, click *View Full Transcript.*
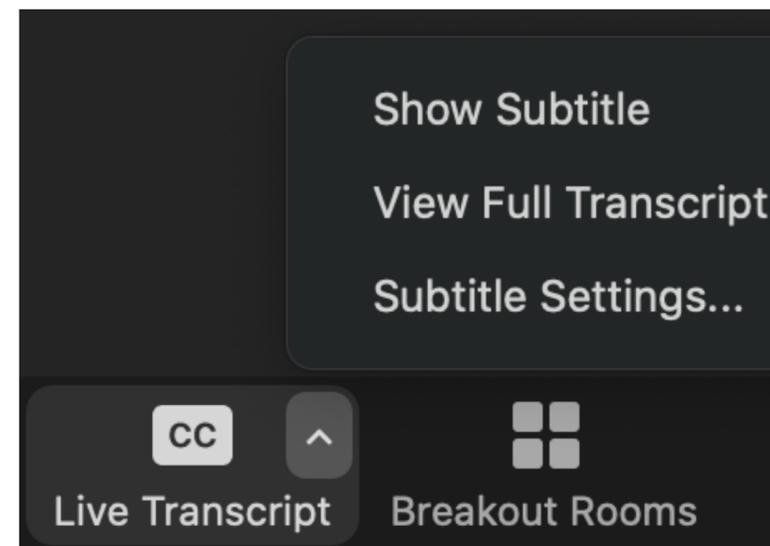
It will appear on the right side of your screen.

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When you join your meeting click on the *Participants* and *Chat* buttons which will open windows on the right side of your screen.
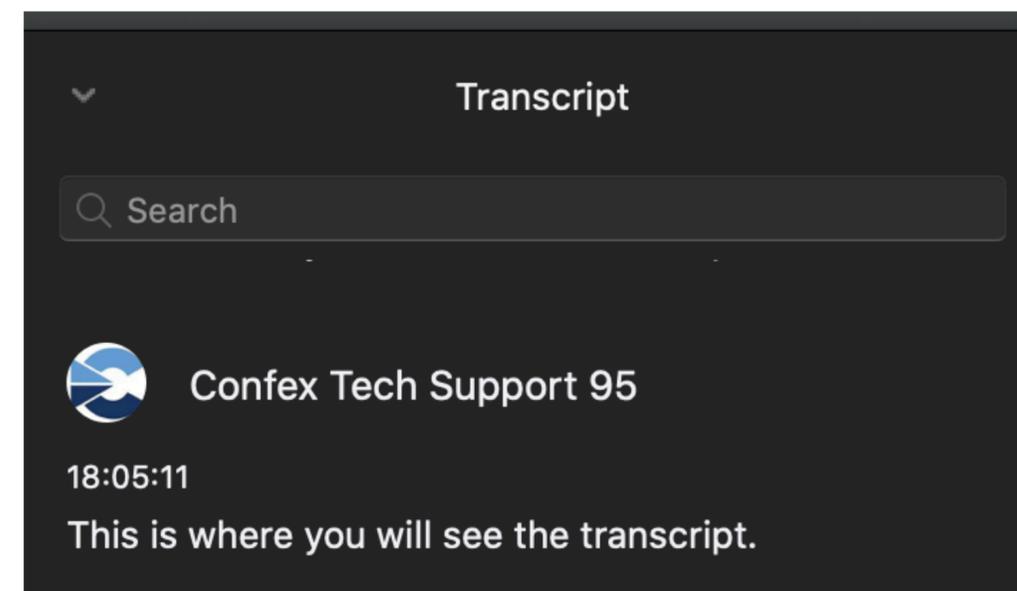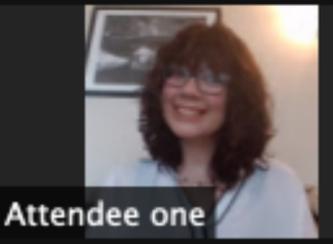
Participants (4)

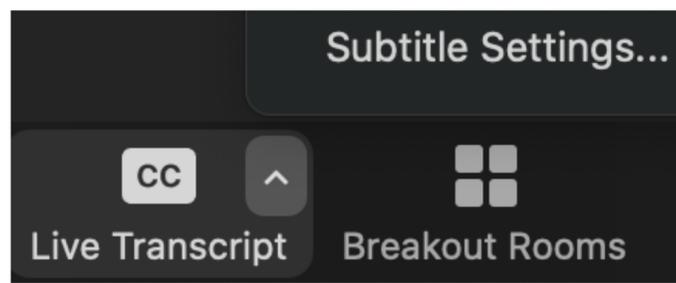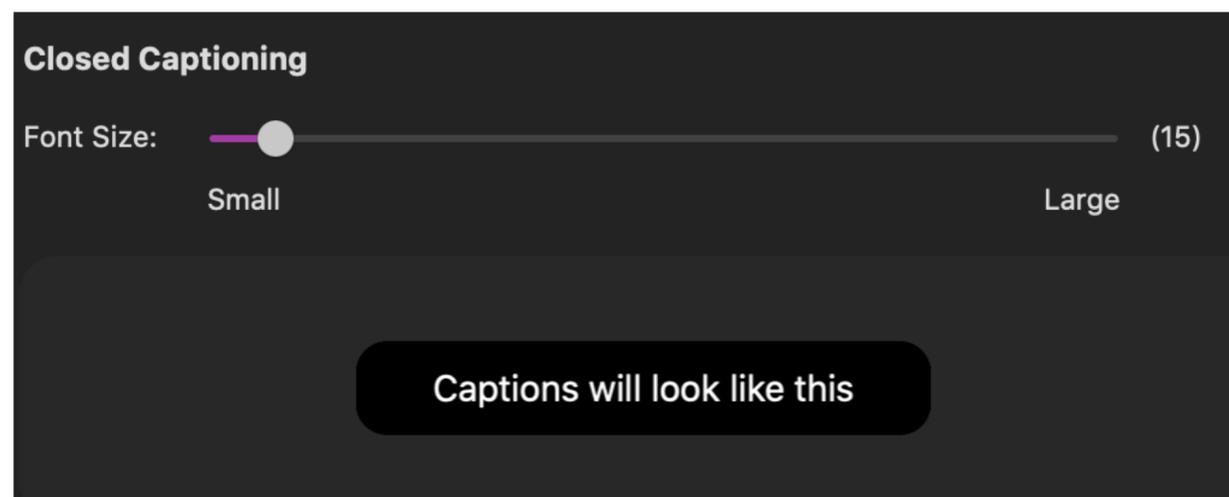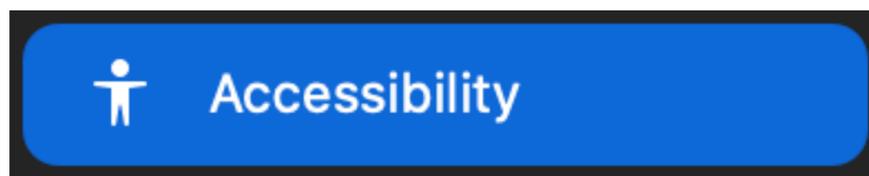Confex Tech Support... (Host, me)

Confex Tech Support 09 (Co-host)

Attendee one (Guest)

At Attendee two (Guest)

yes   no   go slower   go faster   more   clear all

Invite   Mute All   More

Chat

Confex Tech Support 09 to Everyone   6:17 PM
Hi Everyone! So glad to see you

Me to Everyone   6:18 PM
Really interesting meeting

Attendee one to Everyone   6:19 PM
how do I turn on my camera

To: Everyone ▾   File   ...

Type message here...

Attendee two

Confex Tech Sup...   Confex Tech Sup...   Attendee one

View

Confex Tech Support 09

Mute   Start Video   Security   Participants 4   Chat   Share Screen   Polling 17   Reactions   More   End

Co-host Controls: Chat

The easiest way to chat with someone directly is to simply click on that person's name in the participant's list. This will select their name in the *To:* field at the bottom of the *Chat* window. You can also click the *To:* field and choose the participants name from the list.
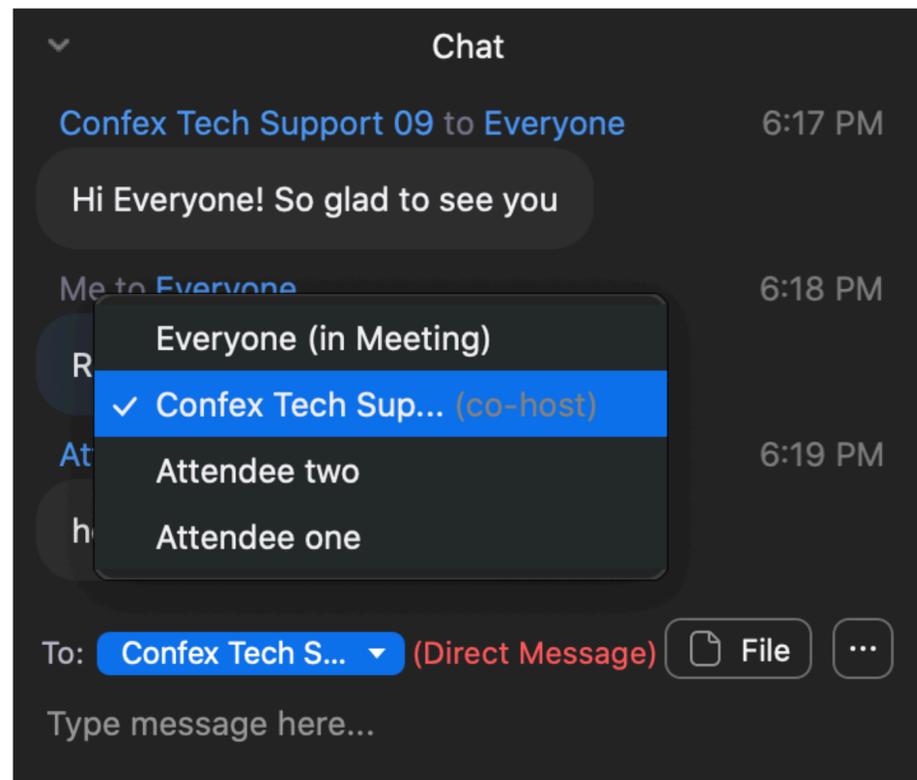
* Always look at the *To:* field to ensure you're chatting with the right participant.

To manage who participants can chat with click the *"..."* in the *Chat* window next to the *File* button.
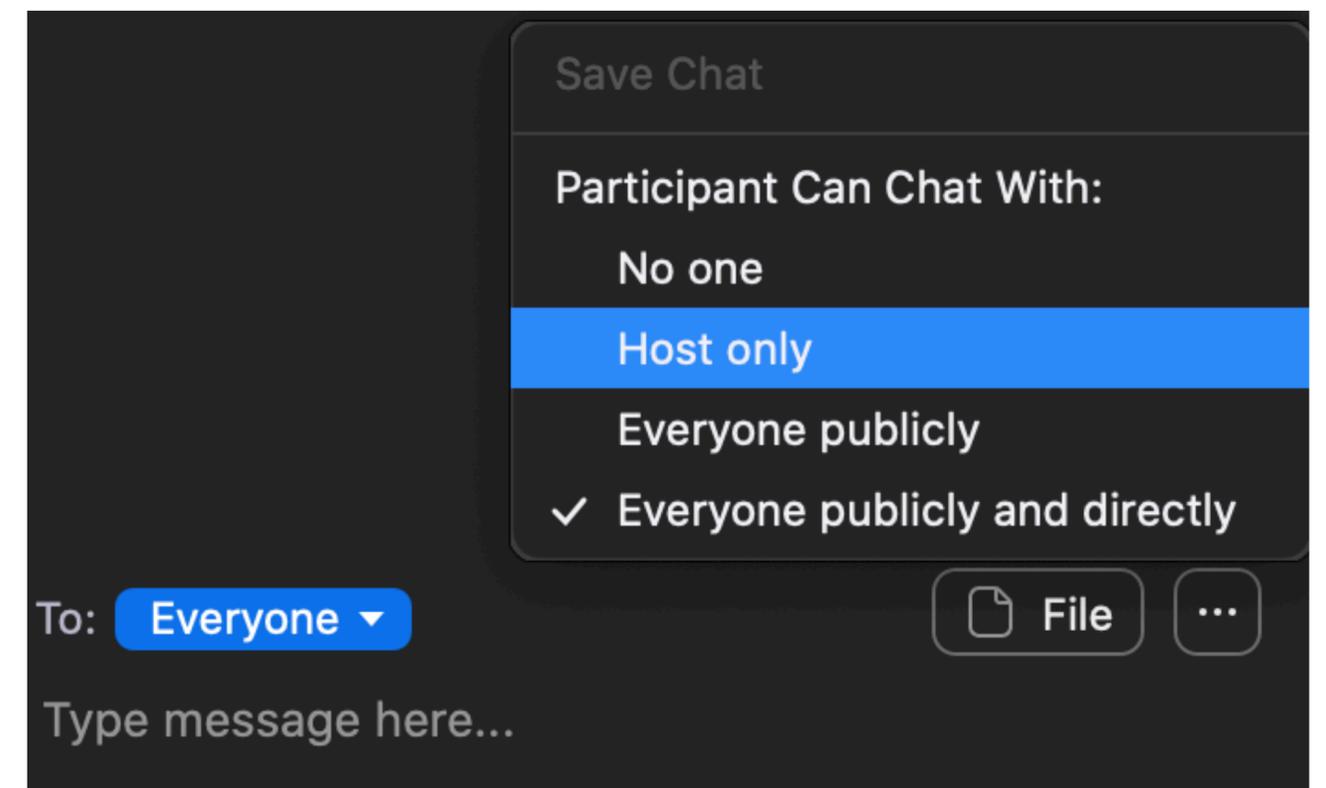
Co-host Controls: Participants

At the bottom of the Participants window you will see a *More* button on a Mac and a light grey square with **"..."** on a PC. Selecting that will bring up the drop-down menu which will give you options such as muting, renaming, and starting video cameras.
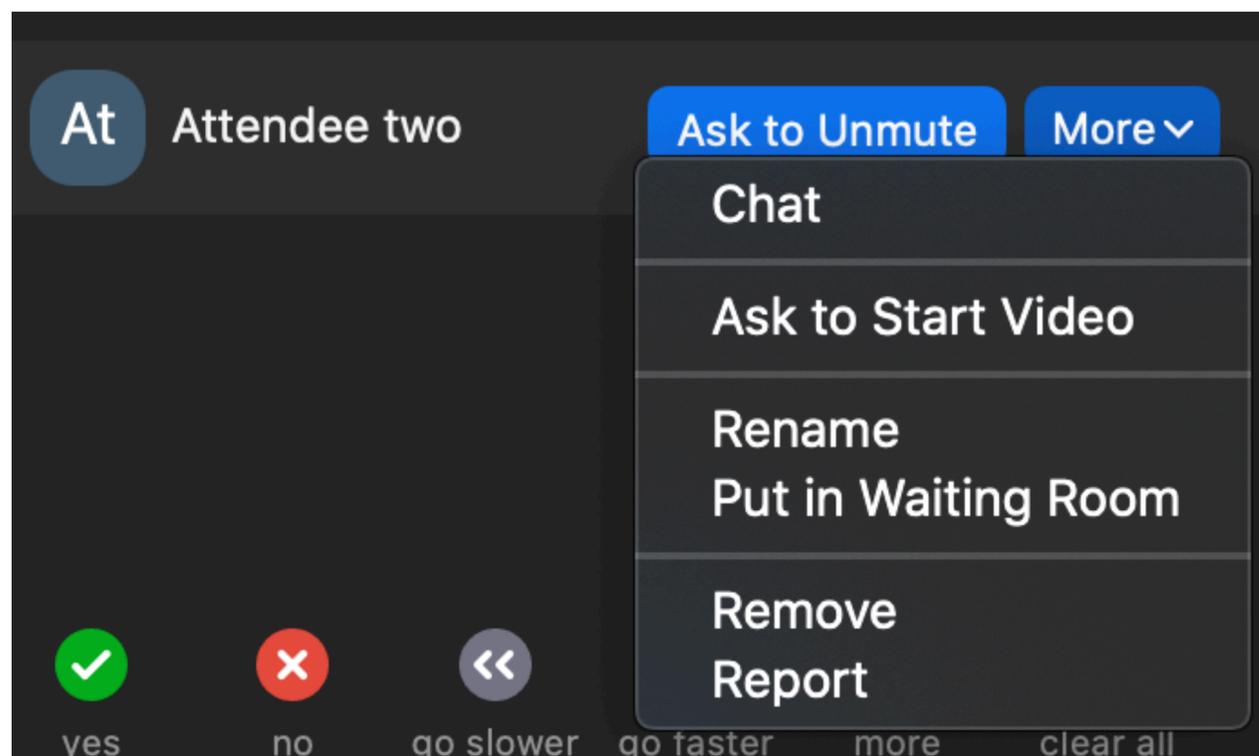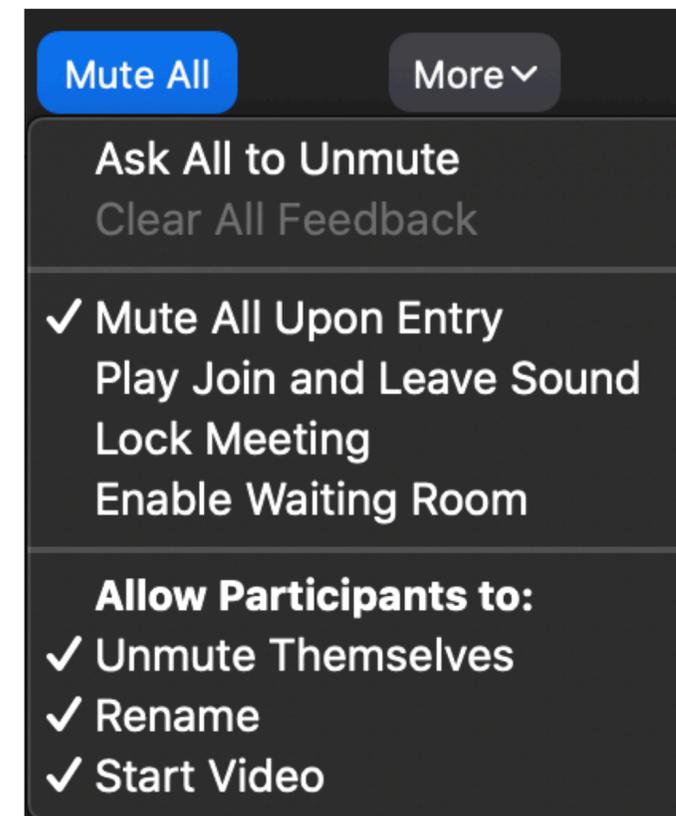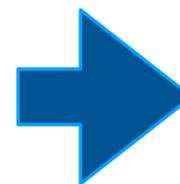
You will also see another *More* button when you hover over an individual name. Clicking here will bring a drop-down menu to the right of each name that shows options pertinent to you like *Chat* with them directly or *Remove* them from the meeting.

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Co-host Controls

Controlling external noise and disruptions in your meeting

If you're finding a lot of background noise in your meeting, you can either remind all participants to keep their mic muted until they wish to speak, or manually *Mute All* at the bottom of the *Participants* window. When you click *Mute All*, a pop-up window appears with the following option:
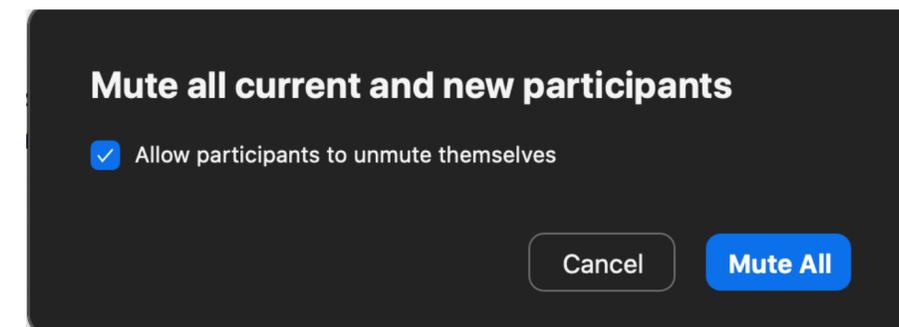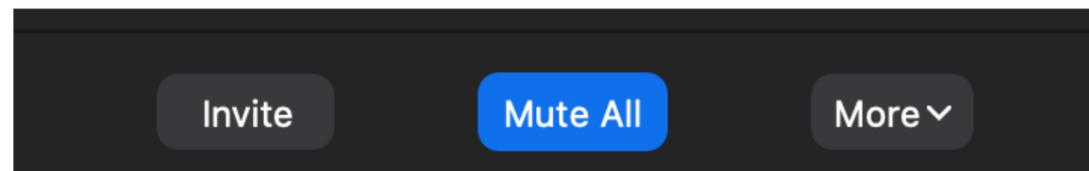
You can choose to keep all participants muted and unmute each participant as each one virtually raises a hand to ask a question.

Hover over their name in the *Participants* panel and a blue *Ask to Unmute* button will appear.
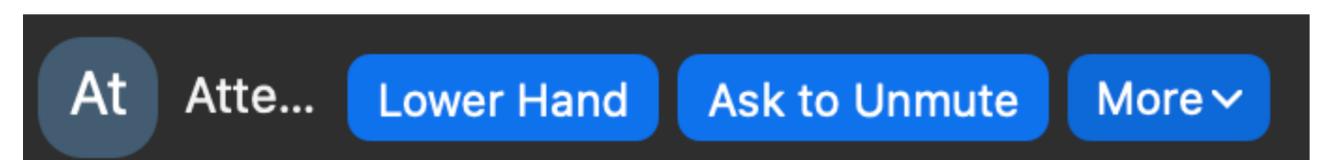
Co-host Controls: Waiting Room

The *Waiting Room* will only appear if there is someone in it. It will appear in the *Participants* panel.

To admit someone, click the *Admit* button in line with their name

A few minutes before the meeting, admit attendees into the meeting from the waiting room by clicking *Admit All*.

Then disable your waiting room by clicking *More* (or the "*...*") at the bottom of the *Participants* window and then click *Enable Waiting Room* to uncheck/disable it.
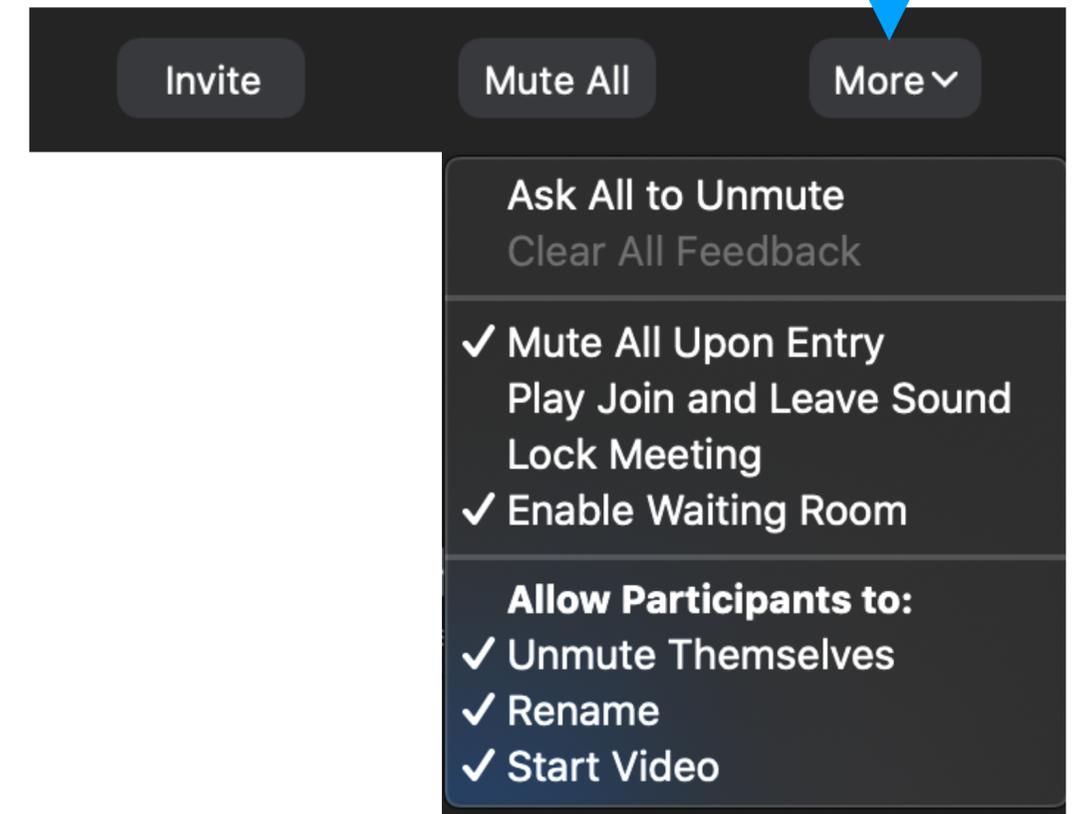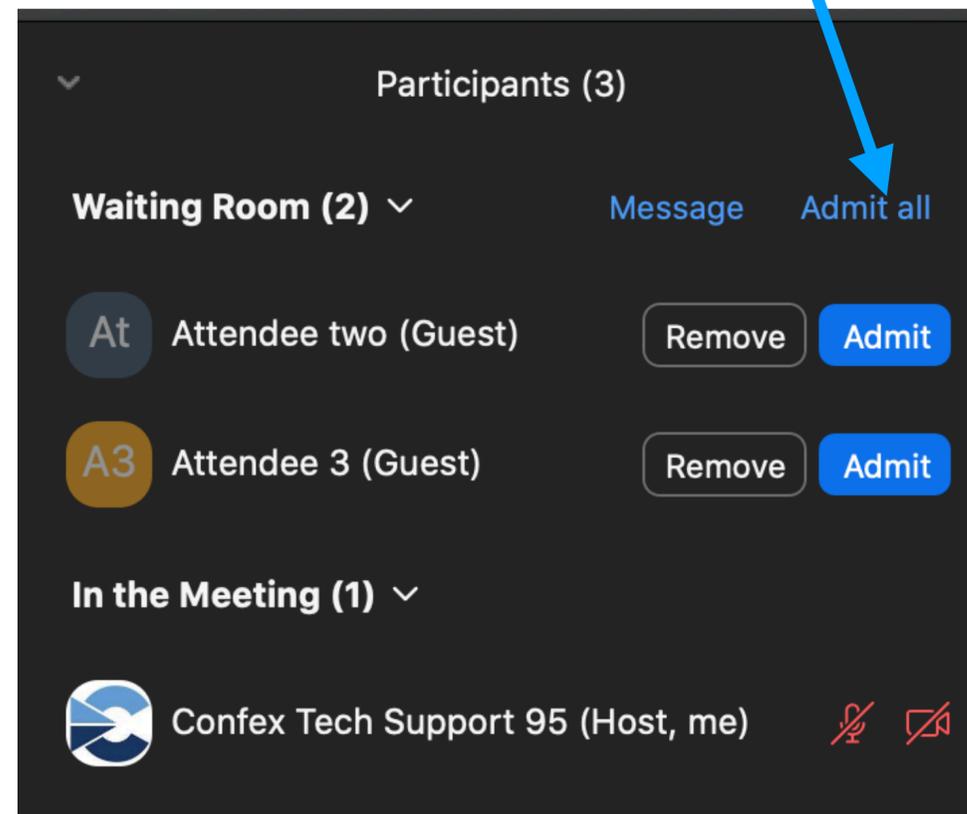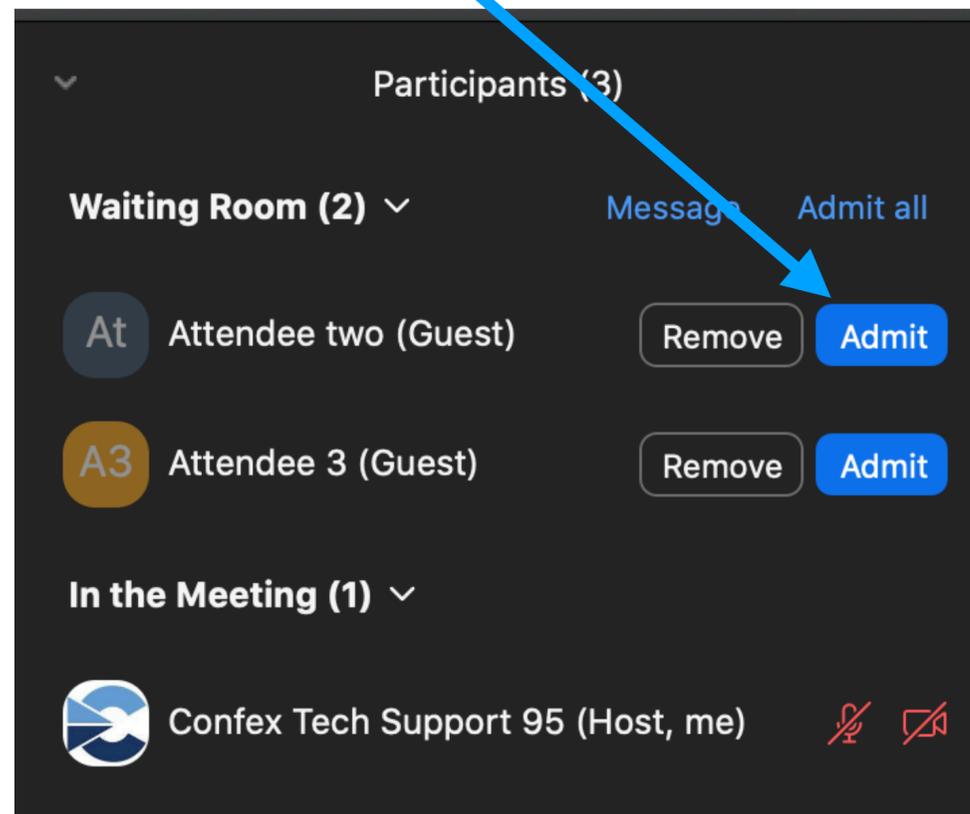
Co-host Controls: Spotlighting Page 1

You can *Spotlight* a participant from the *Participant* panel or from their video window.
The option to *Spotlight* a participant will only be visible if their camera is turned on.
Once spotlighted, they will continue to be spotlighted even if they turn their camera off.

To *Spotlight* from the *Participant* panel, hover over their name and click on the *More* button. Select *Spotlight for Everyone* or *Add Spotlight* from the list.

To remove the *Spotlight* hover over their name, click the *More* button and click *Remove Spotlight*.
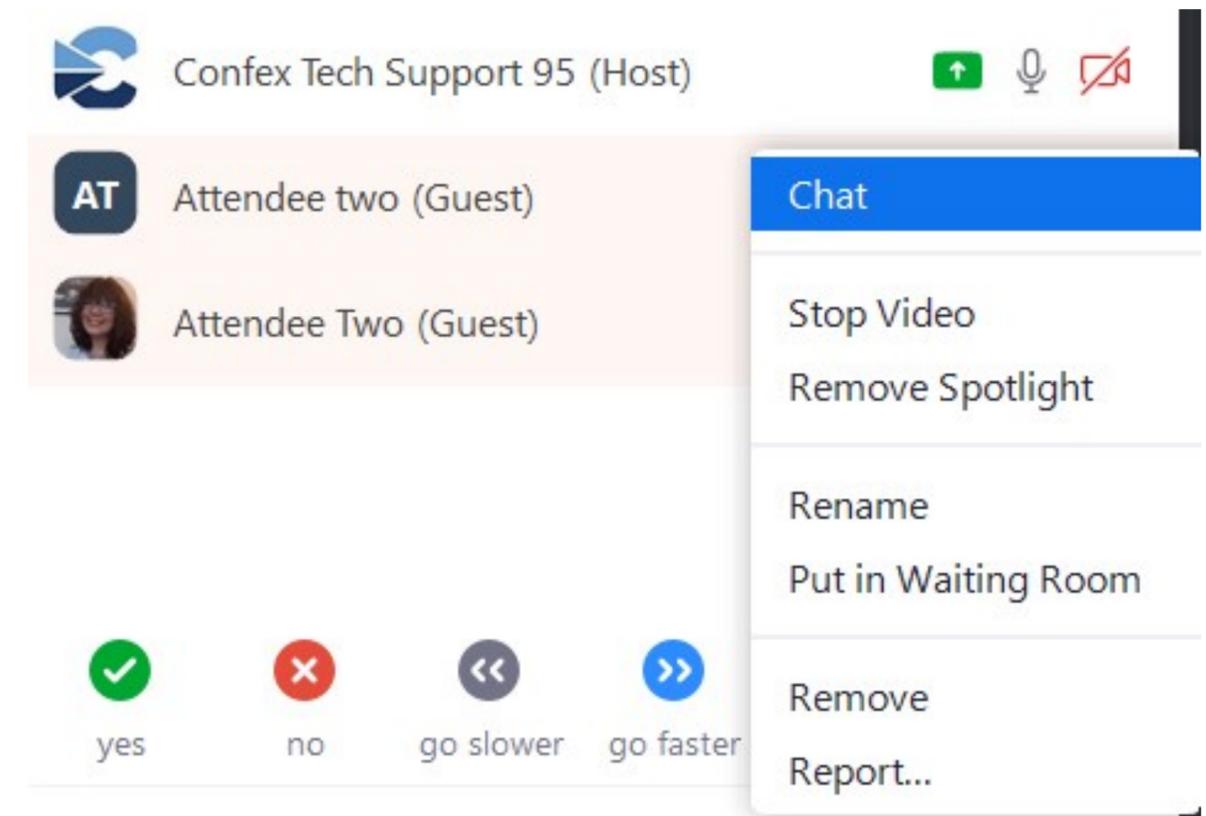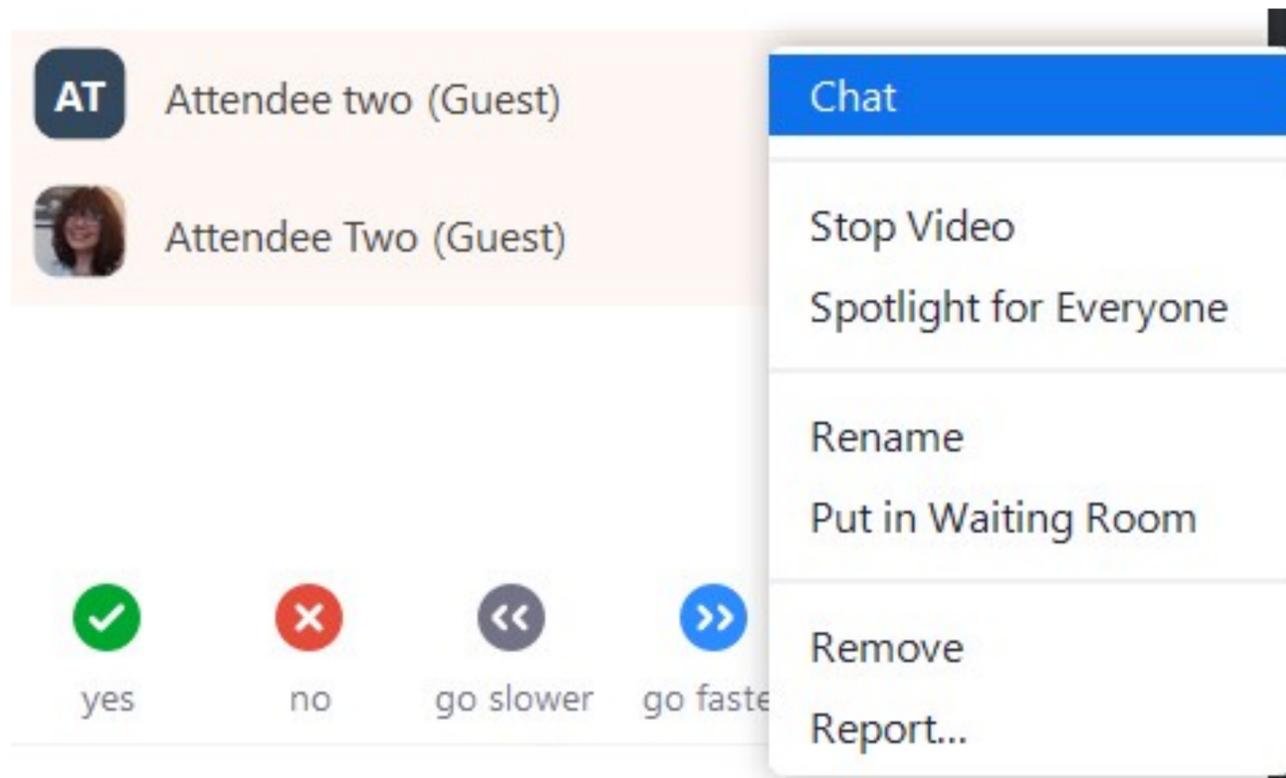
Co-host Controls: Spotlighting Page 2

To *Spotlight* from the participants video window, hover over the top right of their window, click the **"…"**, and select *Spotlight for Everyone* or *Add Spotlight* from the list.

To remove the *Spotlight* hover over their video window, click the **"…"** and select *Remove Spotlight*.
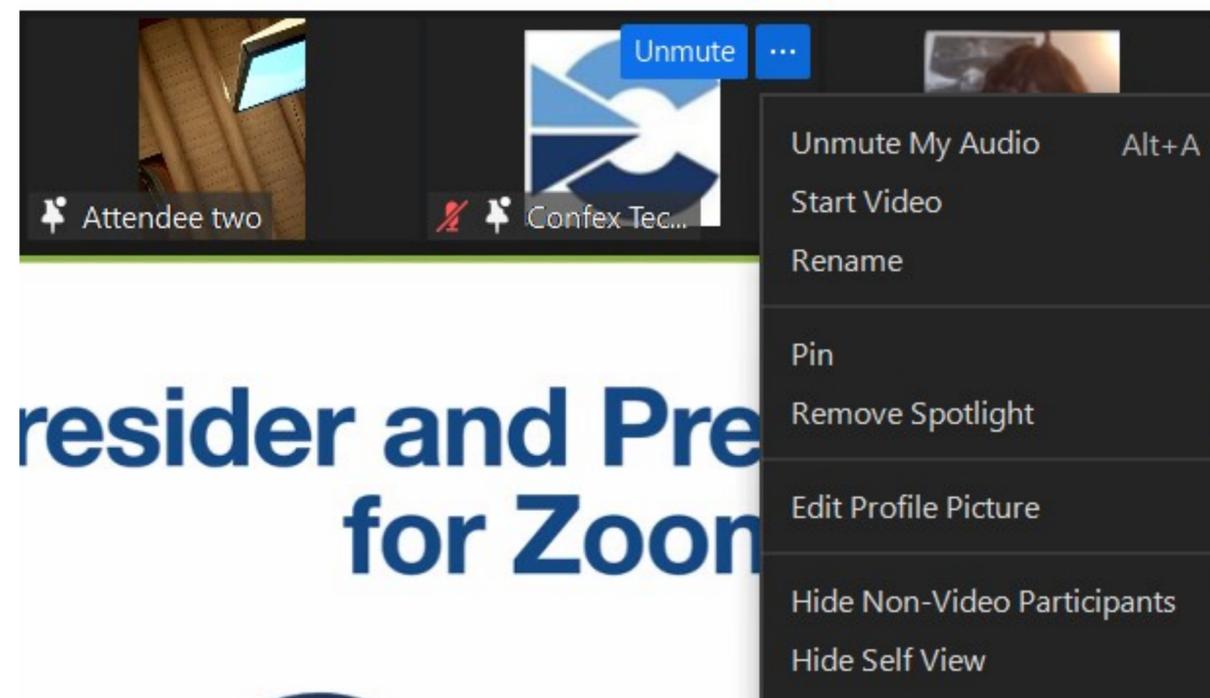
Once the participant has been successfully spotlighted, the *Spotlight* icon will appear in the lower left corner of their video window.

Share Screen Page 1

- Be sure your presentation is open and ready to be shared before you begin to share your screen. Nothing else should be open on your desktop. Click on *Share Screen*. This will bring up a window giving you several options for screens/applications to share.
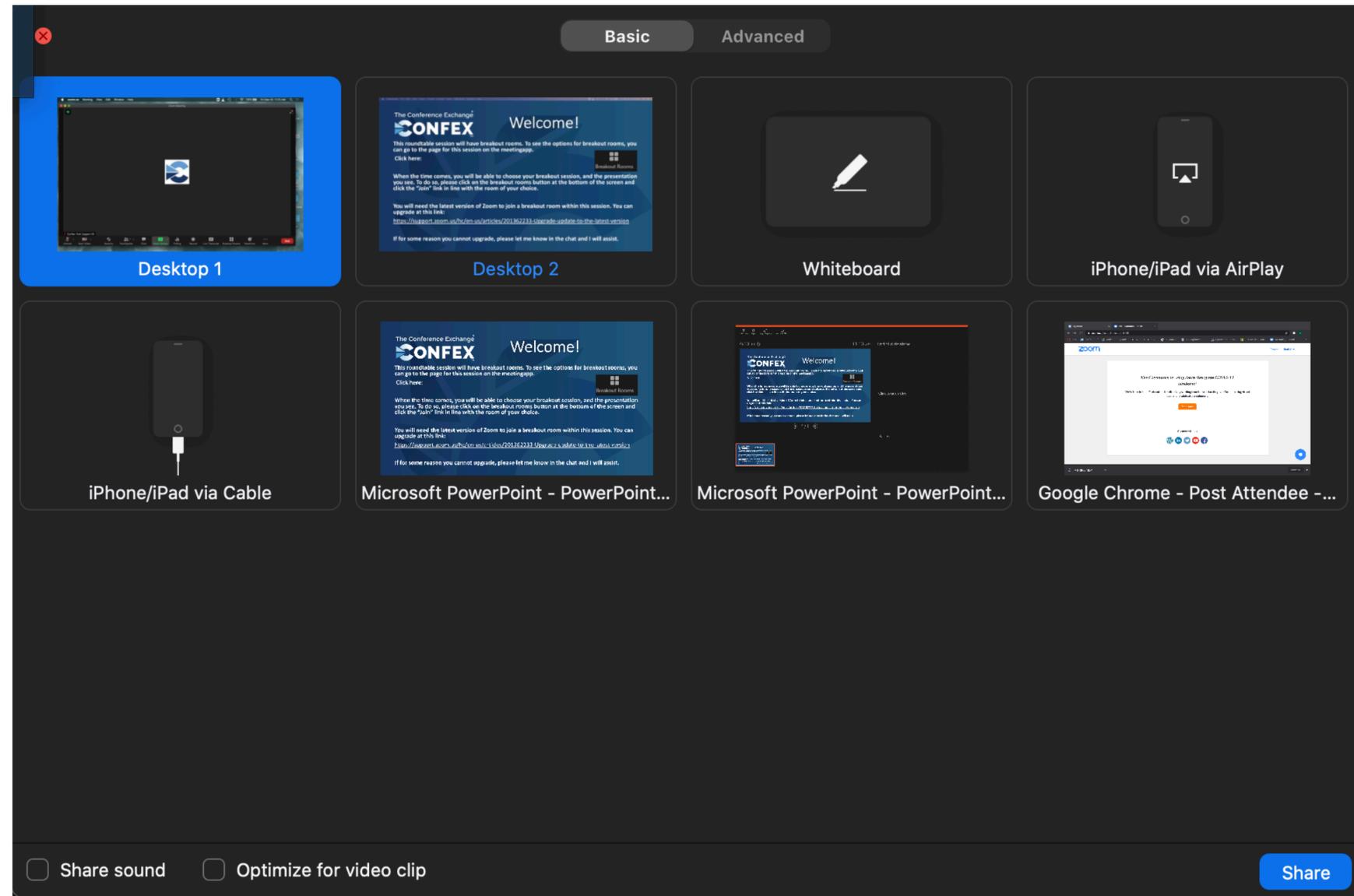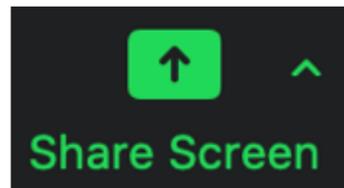
- Once you've made your choice click *Share* and then bring your presentation to fullscreen if you haven't already done so.

Share Screen Page 2

If you need to share more than one application, have all applications open and use *New Share* for a seamless transition from one application to the next. This button is found at the top of your screen while you are sharing your screen. Similarly, If you have a link in your presentation, open it before you present, click *New Share,* and select the window that contains your opened link, then click *Share* in the lower right.
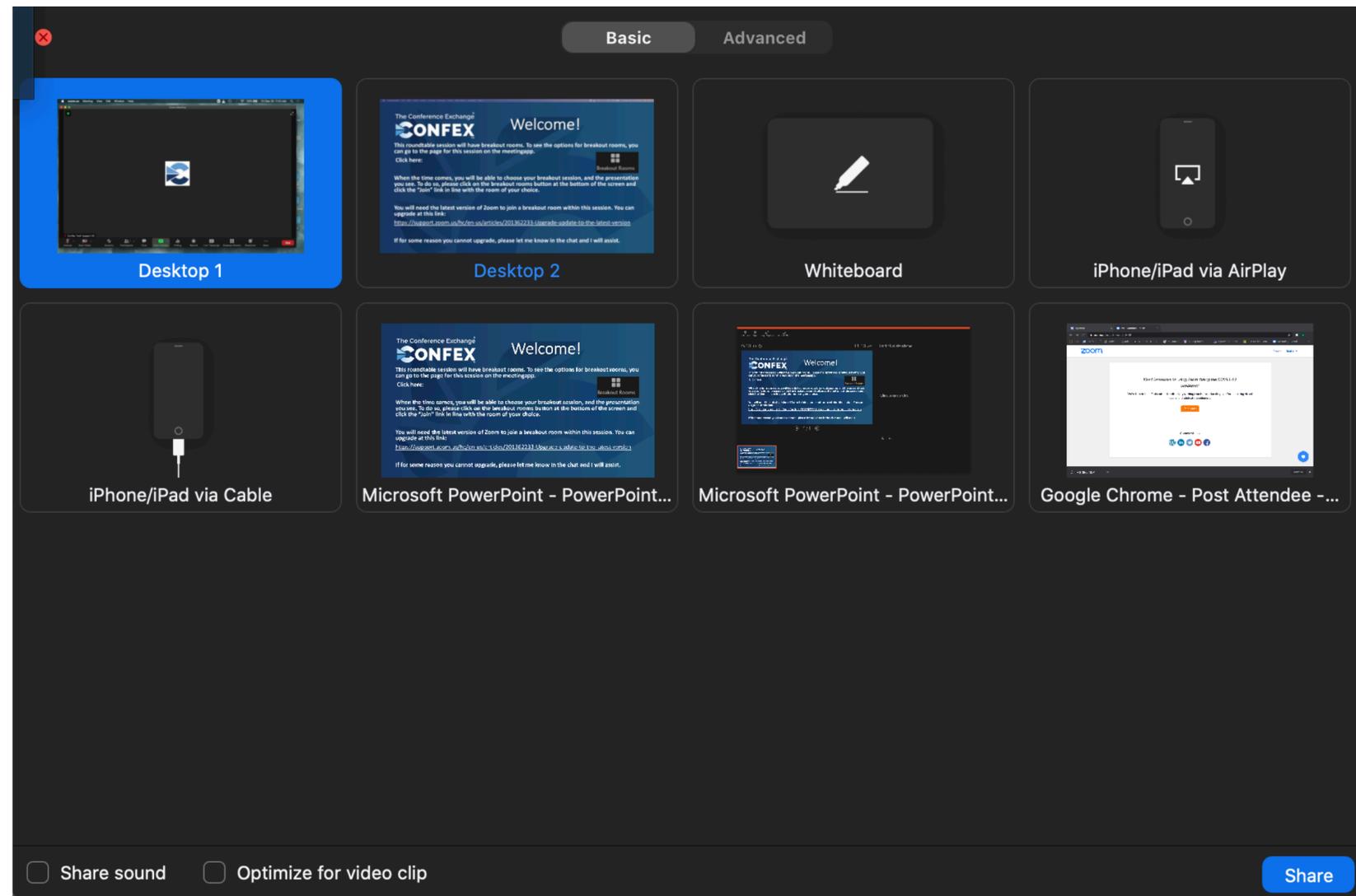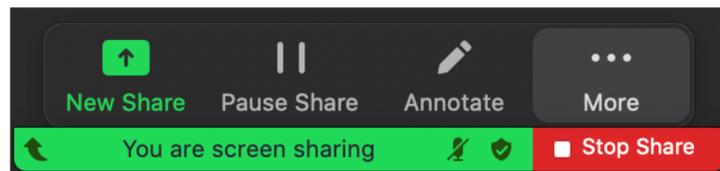
Share Screen Page 3

- If you have audio/video in your presentation, click *Share sound* at the bottom left of your screen before you click *Share.* It is highly recommended that you practice playing your video through a free or paid Zoom account prior to the meeting. Have another person join you in the meeting and ask for their feedback on their viewing experience. Alternatively, you can join on a different device and see what they will see during the meeting.

- When you're finished with your presentation and taking questions, click the red *Stop Share* button in your meeting control bar at the top of your screen. This will allow the next presenter to share their screen as this meeting is configured to allow only one participant to share their screen at a time.
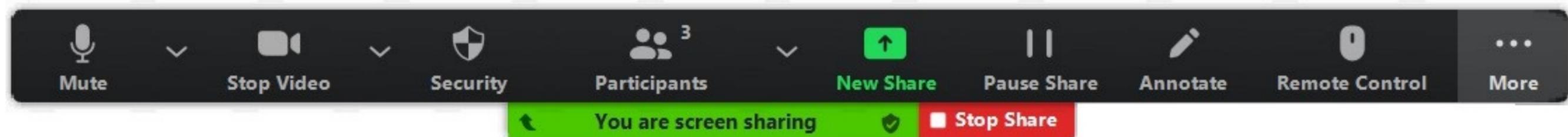
Step-by-Step Instructions for Presiders in a Zoom Meeting Page 1

- Arrive to your meeting 20 min. before the start time. If your meeting utilizes the waiting room, you will be in a virtual waiting room until your host lets you in. Test your audio and video.

- Confex Tech Support will let you into the meeting and make you a Co-host. They can assist you with any questions you may have before or during the meeting.

- Click *Participants* in your meeting toolbar at the bottom of the screen. Then click *Chat.* You can now see all attendees and any communication occurring during the meeting. Leave this viewable to you at all times.

- Keep an eye on the *Participants* panel for your presenters entering the meeting. To admit someone, click the *Admit* button in line with their name.

Step-by-Step Instructions for Presiders in a Zoom Meeting Page 2

- Begin rehearsal: ask the presenters to practice sharing their screen. They can test their microphone by reading the first slide of their presentation. If they have audio in their presentation, they need to check *Share Sound* in the *Share Screen* window. Encourage presenters to have their camera on during their presentation, or at the very least, during the Q&A.

- Ask all presenters and any ASL interpreters to turn their cameras on. *Spotlight* all of them.

- A few minutes before the meeting, admit attendees into the meeting from the waiting room by clicking *Admit All*.

- Then disable your waiting room by clicking *More* (or the "***…***") at the bottom of the Participants window and then click *Enable Waiting Room* to uncheck/disable it.

Step-by-Step Instructions for Presiders in a Zoom Meeting Page 3

- When it's time to start the meeting, turn on your camera and mic and welcome participants to your session. Remember to make an announcement to your audience that their microphones should be muted throughout the presentation(s). Let them know that if they need technical assistance, they can send a direct message to Confex Tech Support in the *Chat*.

- Also, let them know how you would like to handle any questions. Confex recommends using the chat feature to invite attendee questions. You can:

  - Select questions from the chat and read them to presenters aloud

  - Invite specific participants to ask their chat questions live

- As you introduce the presenter, they will then share their screen/ turn on camera and mic. Alternatively you can begin with everyone's cameras on. Continue introducing the presenter and let the presentation begin. Presiders and presenters should always have their cameras and mics on when speaking, and off when not participating in the discussion.

- When the meeting has ended, thank your presenters and attendees and then click *Leave.* The Host (your Confex tech or a staff member) will end the meeting for all.

Step-by-step Instructions for Presenters in a Zoom Meeting

- Log into your meeting 20 min. before the start time. You may be put in a waiting room upon arrival, your presider will let you in shortly.

- Test your audio and video.

- Once in the meeting, rehearse with your presider. Practice sharing your screen, make sure the presider hears you speaking for at least 10 seconds.

- To begin the meeting, the presider will stop sharing their session title slide/ walk-in loop (if they have one) and will give introductions.

- When it's time to present, click *Share Screen*, choose your application window, click *Share* and put your presentation in Slideshow Mode. If your presentation has audio be sure to check the box for *Share Sound.* When done, click *Stop Share* in the Zoom toolbar at the top of your screen.

Tips for a Successful Zoom Meeting Page 1

- Choose an uncluttered location inside, quiet, and free from interruptions.

- When possible, connect with a hard line ethernet cable to obtain the fastest and most stable connection or ensure you have a strong and secure Wifi connection.

- Before joining the meeting, close all unnecessary applications so all processing power can maximize the quality of your Zoom experience. Also, turn off all sound notifications (on your computer/ cell phone/ tablet, etc.) to avoid any audio or visual disruptions.

- Pay attention to the lighting in the room. Too much light behind you will make you appear like a dark figure. Make sure you have a good source of light in front of you.

- Test your microphone and computer audio before the meeting. If you are using a headset with a built-in microphone, be sure to test this well in advance of the meeting. Be conscious of any external noise close to your microphone, such as your hair or rustling papers.
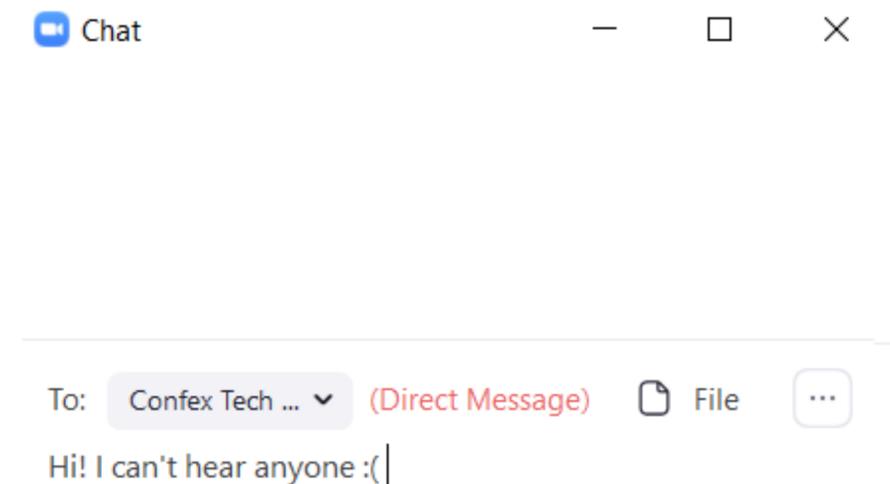
Tips for a Successful Zoom Meeting Page 2

- Use a professional virtual background with your organization's logo if it's available and your computer can support it.

- Know the phone-in information for the Zoom meeting you are attending. When you enter the meeting, you will be asked to Join by Computer Audio or by Phone Call. Click Phone Call to see the dial-in information.

- If possible, practice presenting with a friend in a Zoom meeting through a free (or paid) Zoom account.

- If you are using an external monitor, be sure you are very confident screen sharing your presentation/application through this monitor before you present.

- Look into your camera! Even if you need to look at your notes on a separate screen or a piece of paper, just as if you were at the podium, your audience is still out there and looking for your eye contact and engagement to feel included in the conversation.

Tips for a Successful Zoom Meeting Page 3

- Think about your actions on camera. Remember that everyone can see and hear you at all times when your microphone is unmuted and your camera is on.

- Explore Zoom Video Settings, such as *Touch up my appearance.*

- Your meeting will have the best audio experience if all participants mute their microphone until they are ready to speak.

- If you are a presenter have a glass of water nearby.

- Make sure no one in your location is using a lot of your internet bandwidth.

Communicating with Confex Staff During a Confex Tech Supported Zoom Meeting

- If you need help troubleshooting **Zoom** or working out audio or video issues in your meeting, contact Confex Tech Support:

  - Confex Staff will be in the meeting with you. Look for *Confex Tech Support* in *Participants* and send them a direct message through *Chat*.

- For issues with the **Online Program/Meeting App** click Technical Help on the home page or in the menu. You will receive a response at the email address you provide. For immediate help dial the number listed between the hours of 8:30 AM and 6:00 PM EST.


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Troubleshooting Zoom Page 1

- **Screen Sharing**: If you have trouble sharing your screen, check your Security & Privacy Settings or Sharing Settings in your System Preferences on your computer.

- **Audio Issues**:

  If you can't hear the participants in a meeting make sure your computer speaker volume is turned up. Ensure your speakers are selected for the active output in Zoom. Do this by clicking on the up arrow next to the microphone icon in the Zoom toolbar. Click on *Audio Settings* and then click on the *Test Speaker* button. If you hear audio this is set up correctly. If you do not hear audio, use the drop- down menu to select a different output and *Test Speaker* again. Repeat this step until you hear audio.

Troubleshooting Zoom Page 2

Audio Issues Continued
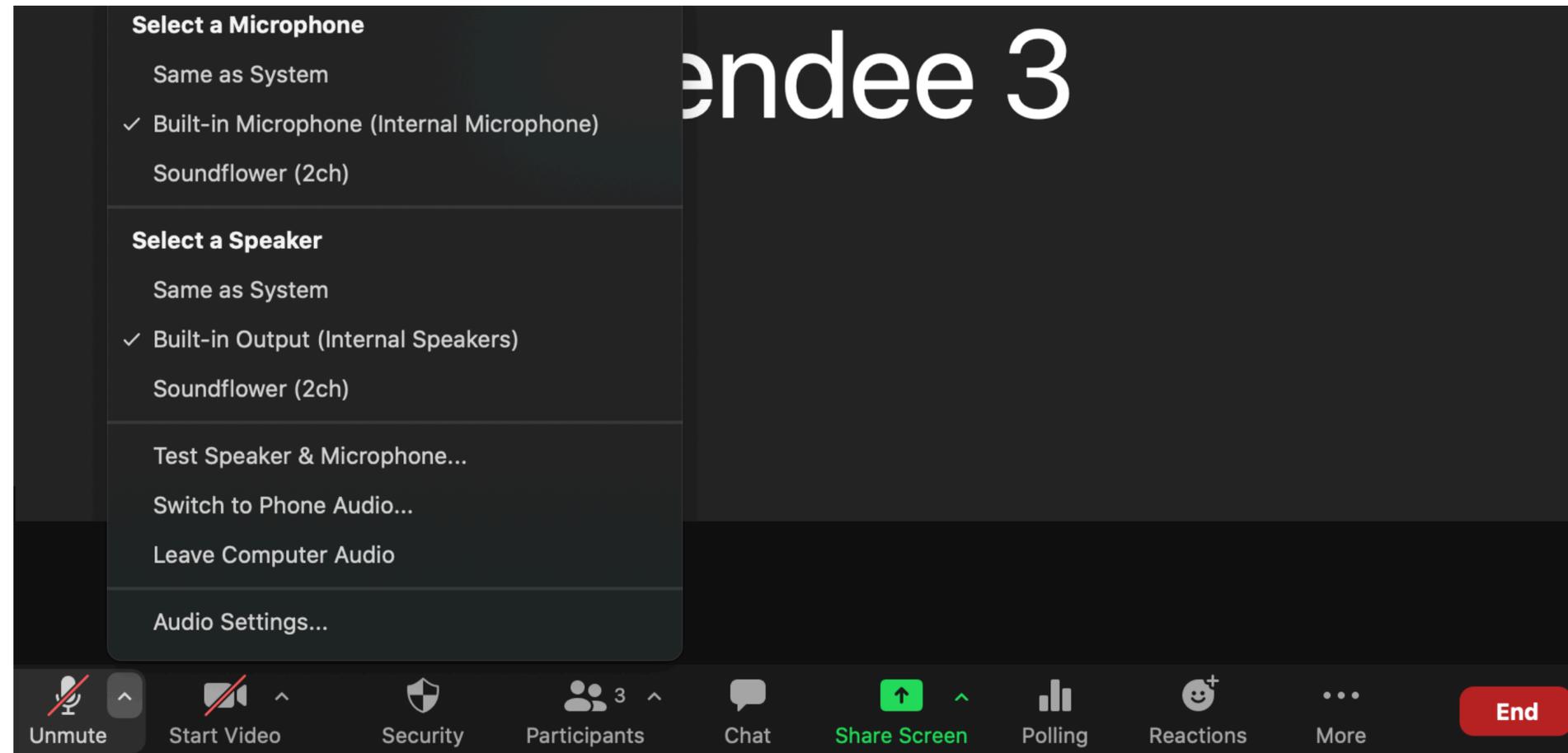
If other participants can't hear you make sure you have the correct internal/external microphone set up in Zoom. Click on the up arrow next to the microphone symbol in the Zoom meeting toolbar and click *Audio Settings*. Click the test mic button; you should see movement in the volume meter next to Input Level, and your test recording will be replayed through the speakers. If you do not see activity in the volume meter or hear the recorded audio test, use the drop-down menu, select another microphone and repeat the process.

Audio Settings

Joining a Meeting By Phone

If you continue to experience audio issues, you can join a Zoom meeting by calling in from your phone:

Click the up arrow next to the microphone symbol in your meeting toolbar and choose *Switch to Phone Audio*.

The following window appears:

Here you will find the phone numbers, Meeting ID, and Participant ID. Dial the call-in number with the area code closest to your location and follow the prompts.

Choose ONE of the audio conference options

| Phone Call | Computer Audio |

Country/Region United States of America ⌄

Dial +1 312 626 6799
+1 301 715 8592
+1 646 876 9923
+1 408 638 0968

Meeting ID 915 6718 1773

Participant ID #459118#

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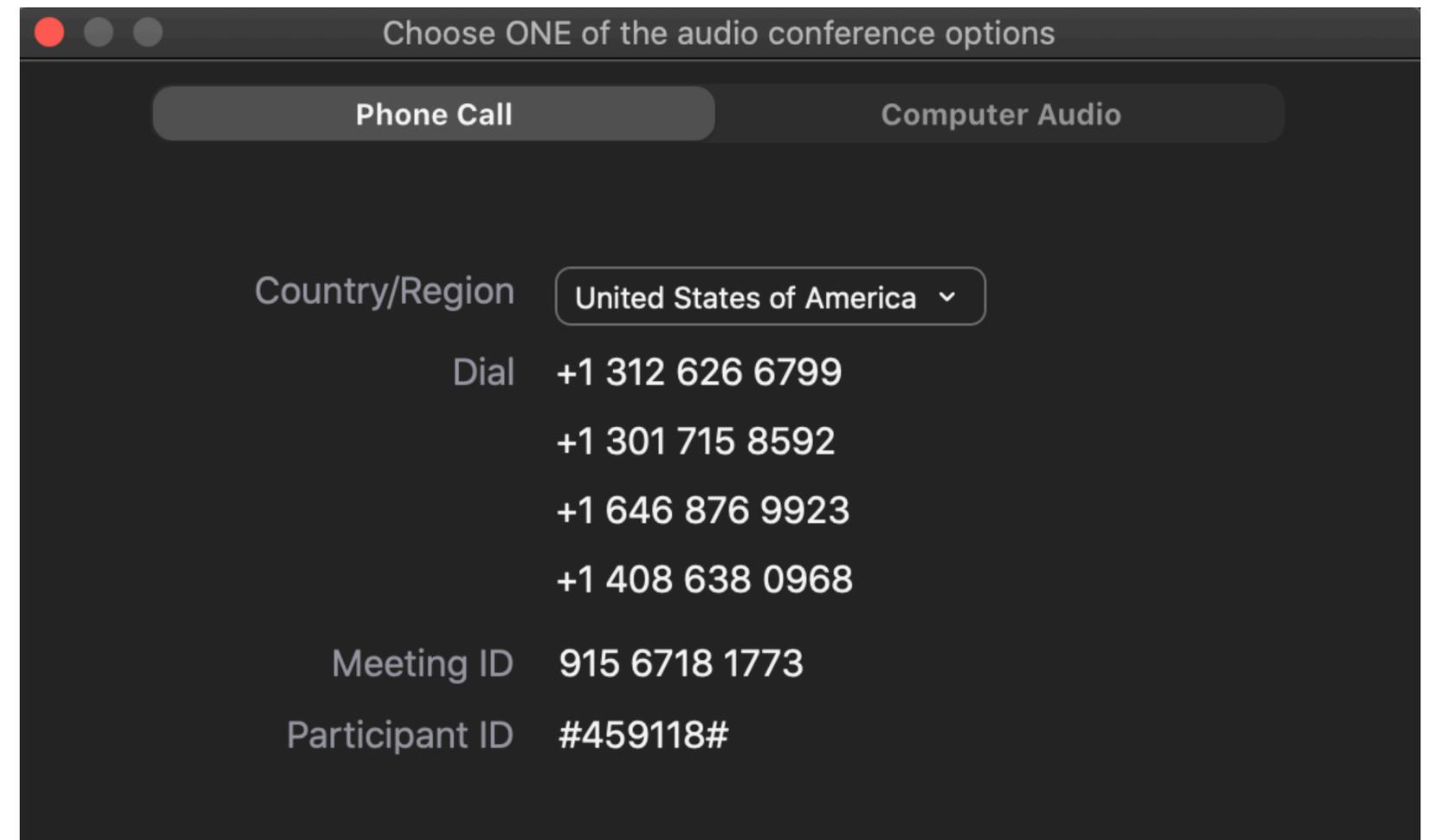
Video Issues: Camera

- Can the other participants see you? Ensure your camera is turned on (or plugged in if using an external webcam) and selected in Zoom. In the Zoom meeting, click the up arrow next to the camera symbol and choose *Video* Settings. Make sure your camera is specified in the Camera selection. If it is not, use the drop-down menu to select the correct camera. If the camera is turned on, make sure nothing is blocking the camera view. If using an external web camera, try connecting to a different USB port, and repeat steps to select the correct camera. If you continue to experience difficulties, try restarting your computer/device.

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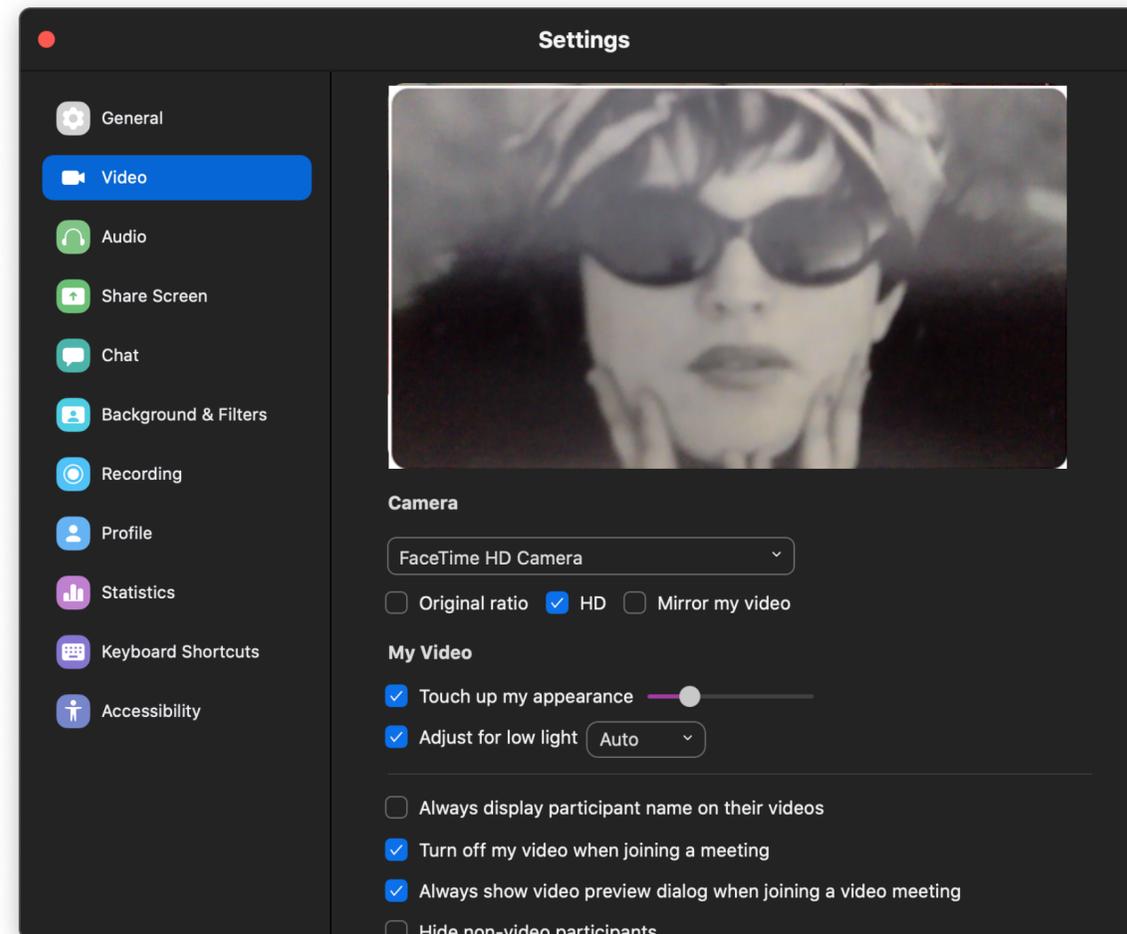
Video Issues: Playing Videos

Choppy Video or Audio

Probably: Internet connection. If you do not have a strong internet connection, Zoom can have difficulty live streaming your video sharing. Try directly connecting your computer to an internet source with an ethernet cable, rather than using WiFi. If you still experience issues, another colleague may have better internet and be able to share the video on your behalf (or on behalf of the presenter).

Low or No Audio volume

Probably: The audio setting on your computer or your video player. Make sure you are not on mute, and your volume is set to high on both your computer and your video player. Participants can also try to turn up their audio (sometime participants have their audio low on their computers!)

Other

Probably: The original video OR your computer's compatibility. Check the original video file to make sure it was saved correctly and the file was not corrupted. If audio or visual is missing from the original video, for example, you may want to try re-downloading the video or reaching out to the presenter to obtain a new file.

Zoom Resources

- The following video gives you brief instructions on how to join a Zoom meeting:

https://support.zoom.us/hc/en-us/articles/201362193-How-Do-I-Join-A-Meeting-

- More information on the various functions within Zoom can be found here:

https://support.zoom.us/hc/en-us

- To download Zoom:

https://zoom.us/download

Connecting with Colleagues: Continuing the Conversation

Connecting through the Online Program/ Meeting App:

- To initiate a conversation with a speaker or an organizer, use the asynchronous Q&A form located below the session or presentation. Scroll down to the box with red letters in it that says: *Have a question or comment? Enter it here.*

- To connect with someone privately, click on their name and then use the [CONNECT] button: You can do this in the speaker index, the attendee index, or any session or paper page. Clicking on that button will pop up a text box in which you can type a brief note to that person. Confex emails that note to the intended person, thus conveying the note and giving the recipient the email address of the person who initiated the connection. Either party could request a Zoom Meeting. The recipient can:
  - Block further messages from that person
  - Respond in kind, thus giving their own email address to the attendee who initiated the connection.
  - Respond via email or by any other method suggested in the original note

Connecting with Colleagues within the Zoom meeting:

- Use the *Chat* button during the meeting to send them a direct message, exchange email addresses or phone numbers.
- If you have someone's email address and would like to text or video chat with them via Zoom, outside of an event scheduled by the organization, click the Contacts button in the Zoom app, then the [+] button to add them to your contacts and send them an invitation.