Florida Counseling Association

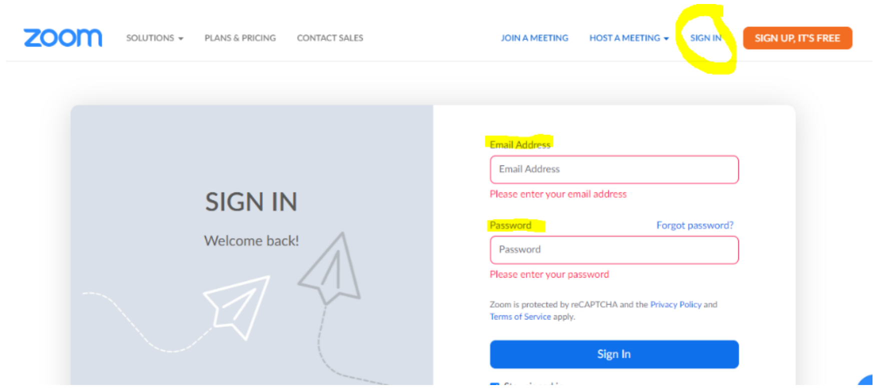
How-to Zoom – Facilitator Guide

TOPICS:

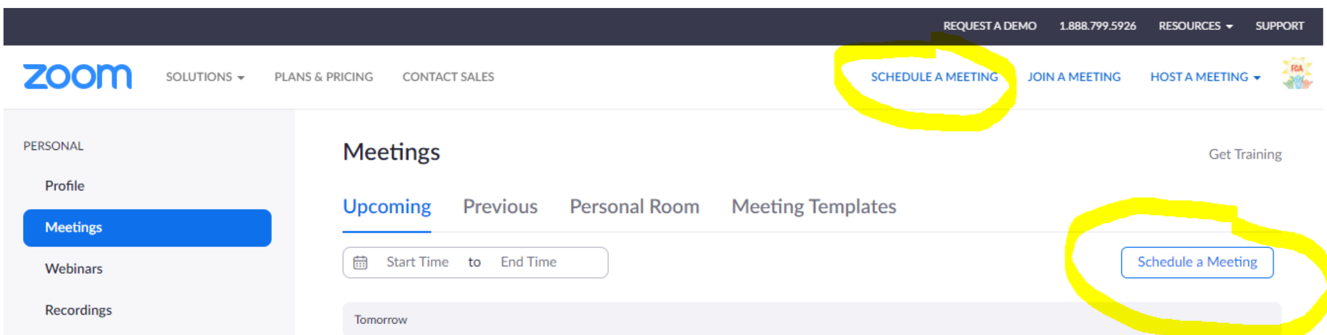
NOTE: Most of the functions and options available in Zoom detailed throughout this document require desktop client version 5.2.2 on Windows or macOS. Please review item 17 to ensure you have the most update version.

Click on the Home () icon on the bottom left corner of each page to return to this table of contents.

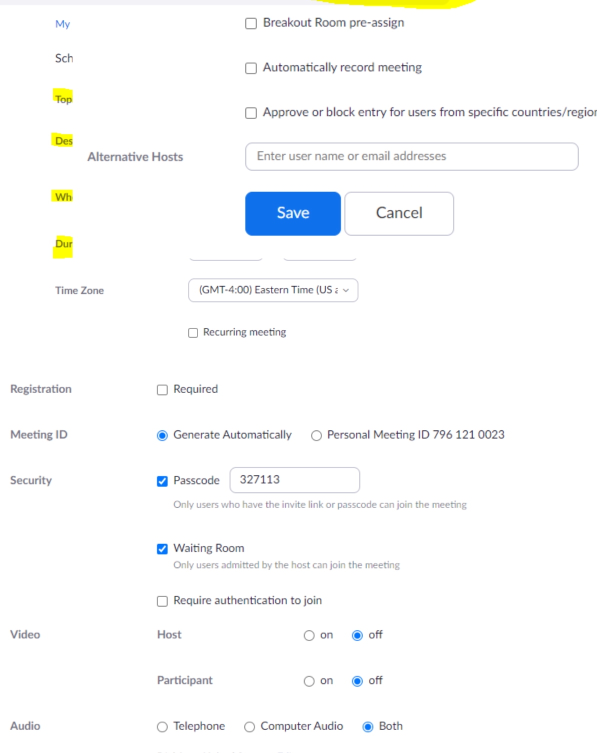
1. **Log into the FCA Zoom Account**
    a. Each division president has the username and password to log into the **FCA Zoom account**. If you are not the division president, please coordinate with them to complete these steps.



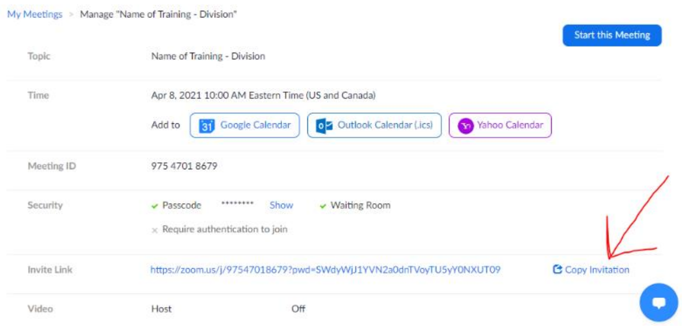
    b. Go to at https://zoom.us/ and select **Sign In** from the menu top left.
    c. Enter username and password and click the blue **Sign In**.
2. [**Create a Meeting**]()
    a. Log into the **FCA Zoom account** (*see item 1*).
    b. Click on **Schedule a Meeting** either from the top menu or in the meeting controls.



    c. Enter your meeting details. *Remember that **MEETING** is the Zoom name for any event scheduled. Your training or webinar is still scheduled as a **meeting** in **Zoom**.*
    d. Meeting Information:
        i. **Title** and **description**, select **day**, **time AM/PM**, and **duration**.
        ii. **Recurring Meeting** should only be checked if this is a recurring division meeting.
        iii. Do not check **Registration – Required** (Registration is handled through the FCA Events page).
        iv. **Meeting ID** and **Passcode** will be automatically generated.
        v. Leave **Waiting Room** checked, keep video and audio turned off upon entry.
        vi. Leave **Mute Participants upon Entry** checked.

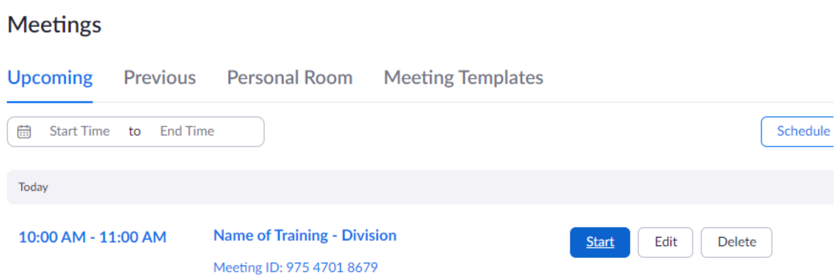


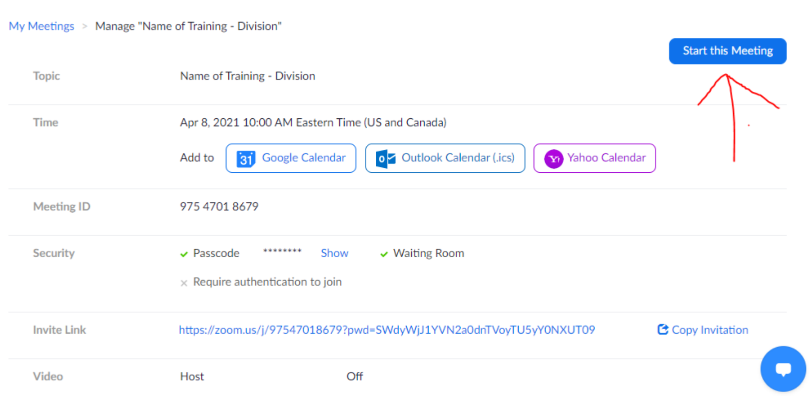
vii. Click **Save**.
viii. You should now see your saved meeting details.
ix. Click **copy invitation** and send meeting info to fcaoffice@flacounseling.org.



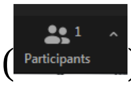
e. Take some time to review the various [ROLES](#) in a meeting to be familiar with functions of **host** vs. **co-host**.

3. **[Starting a meeting](#)**
   a. Log into the **FCA Zoom account** (*[see item 1](#)*).
   b. From **My Meetings**, find your training title. To the right you'll see a blue **Start** button appear when your mouse is hovering over your training. You can also click on your training title to open the meeting details and click **Start Meeting** from there.

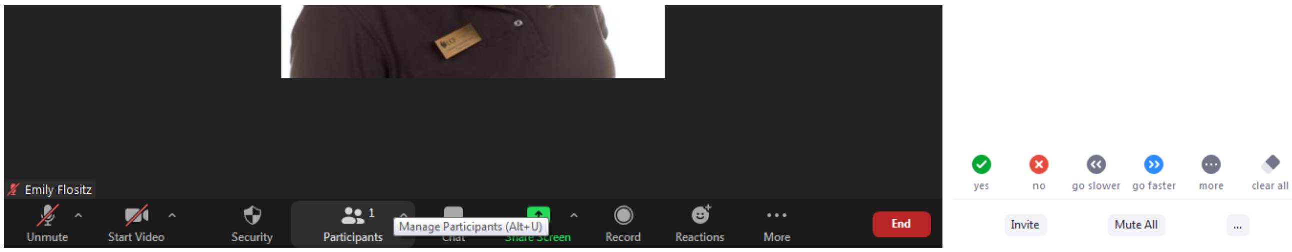




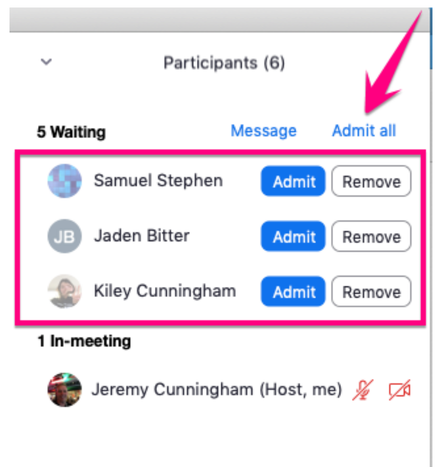
   c. Whoever **Starts** the meeting is the **Host**. The host can change additional participants into **Co-Hosts**. There can only be one **Host**, but there can be many **Co-Hosts** during a training (*[see item 5](#) on how to change a participant to a **Co-Host***). The **Host** can also transfer host privileges to anyone (however, that reverts the original host to participant).

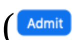
4. **Waiting Room**:
    a. The **Host** and **Co-Hosts** will need to monitor the **Waiting Room** to admit **Presenters** first for the session, then the **Participants** once the session starts.
    b. Click **Participants** (

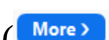
) on the bottom of your screen to view the **Participant list** on the right:



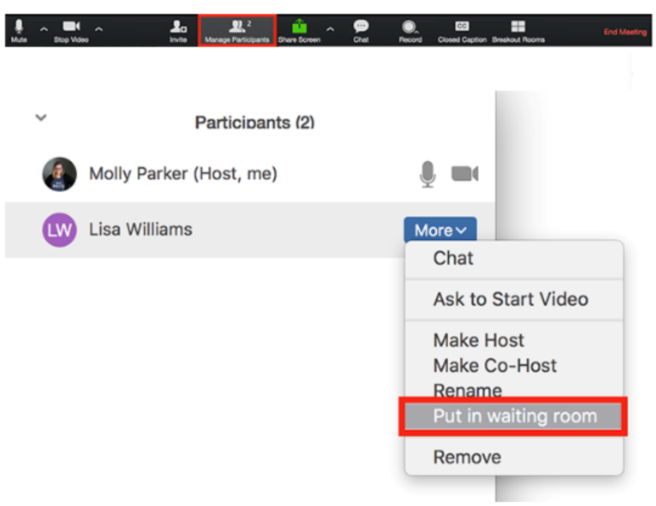
    c. When multiple people are in the **Waiting Room**, the **Participant List** will look like this →

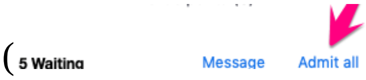


    d. When you see the name(s) of the session's presenter(s), admit them one at a time by clicking on the blue **Admit** (

) button next to their name.
    e. Change presenter(s) to **Co-Host** (*see item 5*) so they may be able to share their screen (*see item 9*).
    f. If there are additional leaders from your division supporting the event, change them to **co-host**, too.
        i. If any attendees join the session and somehow bypass the waiting room, you can send them to the waiting room by clicking the **More** (

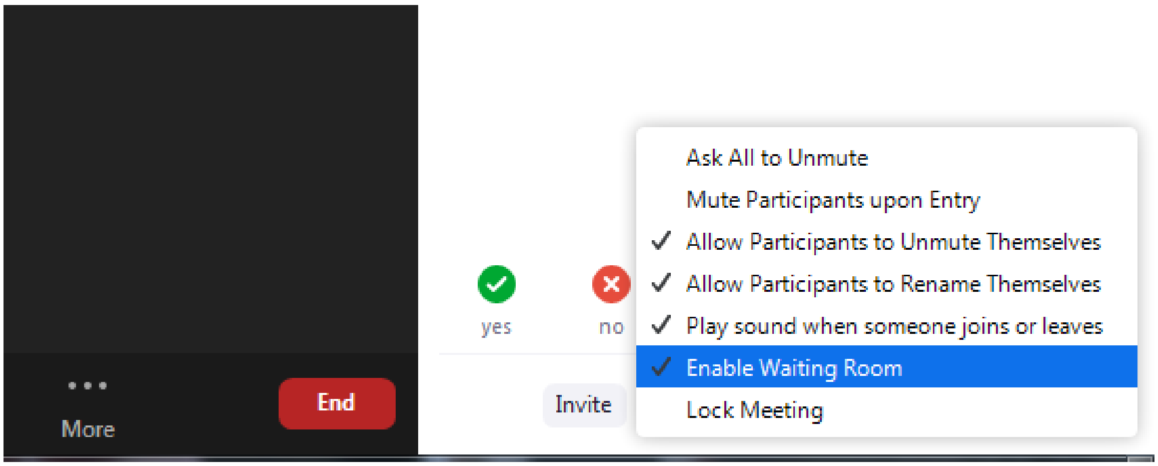
) button next to their name, and selecting **Put in Waiting Room**



g. When the session starts, click on **Admit all** located above the list of participant names (

) to admit all participants into the session.

h. **OPTIONAL:** Once session begins, you may choose to disable the waiting room. At the bottom of the Participant List window, click the **… ( )** button, and uncheck the option for **Enable Waiting Room**.



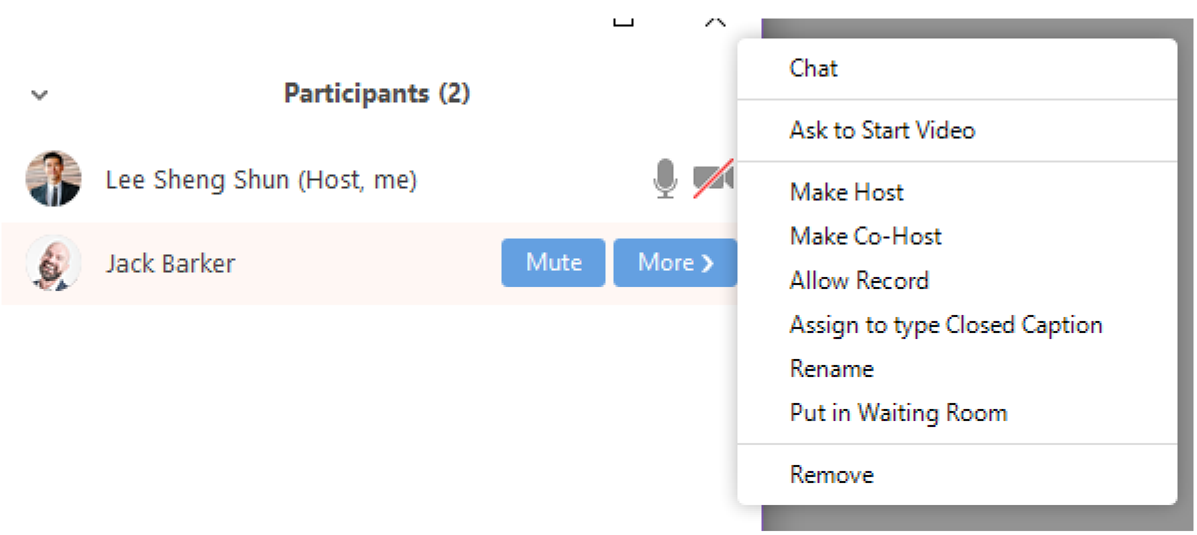
i. If you choose to keep the waiting room open, then uncheck **Play sound when someone joins or leaves** so the chime does not interrupt the presentation.

5. **<u>Change Participants (s) to Co-Host:</u>** Any additional FCA/division hosts and invited speakers will first join as a **Participant**. To provide them controls to share screen, manage participants, and adjust security settings, you will want to change presenters and any additional FCA/division representatives that are supporting the event to **Co-hosts.**

   a. Take some time to review the various **[ROLES]** in a meeting to be familiar with functions of **host** vs. **co-host**.

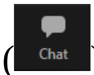
   b. In the **Participant List**, hover your mouse over the presenter's name (or FCA/division representatives) and click **More** (

).



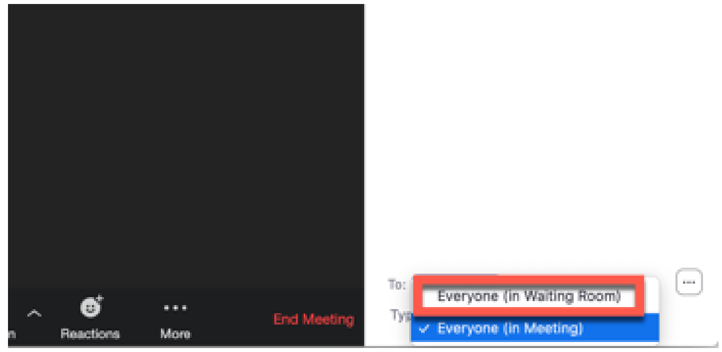
c. From the menu that appears, click **Make Co-Host**. Presenter will now be able to share screen. (*see item 9 on how to share screen*)

6. **Managing Chat:**

a. Click **Chat** (

) from the bottom zoom menu to view the chat window on the right

b. Prior to session start, you can communicate with participants in the waiting room to share updates. In the **Chat** window, find the **To:** drop down menu, select **Everyone (in waiting room)**. Type message and submit.

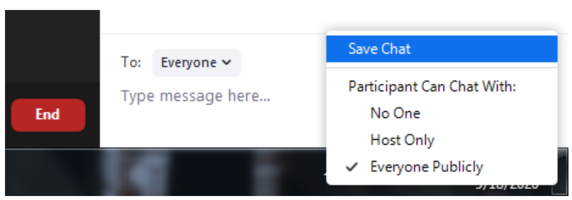


c. Determine with your Presenter(s) how they want to receive questions (they monitor the chat themselves, you ask them questions as they come in, or save all questions until the end).

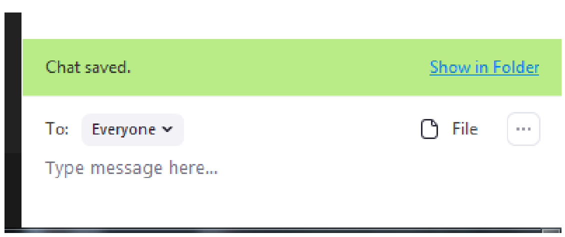
d. To chat with all participants once session starts, find **To:** drop-down menu in the **Chat** window, select **Everyone** or **Everyone in meeting**. Type your message and submit.

e. If your session is for CE's, you'll need to save and send the chat to the **FCA Office**.

i. Once the session is over, open the **Chat** window, click on the ellipses **…** ( ) and click **Save Chat**.



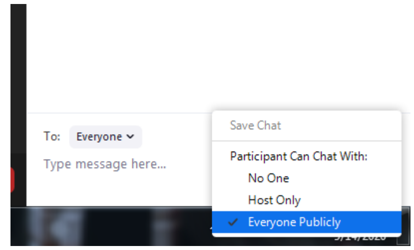
ii. A green ribbon will appear notifying you that the chat was saved. Click **Show in Folder** to open file location on your device.



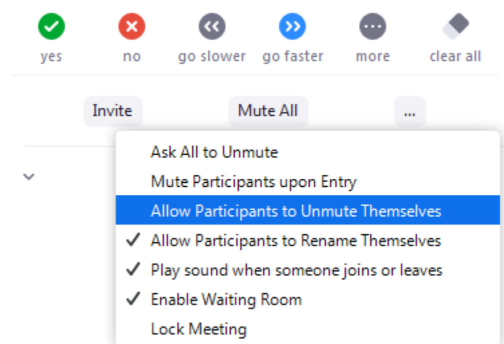
iii. Rename file to **[Division] – [Date] – [Session Title].** Email this file along with attendance list to fcaoffice@flacounseling.org.

7. **Recommended security settings:**

a. <u>Chat with everyone publicly:</u> Click **Chat** ( ) from the bottom zoom menu, then in the **Chat** window on bottom right screen click the ellipses **…** ( ) to see options, and check off only **Participant can chat with: _ Everyone Publicly**



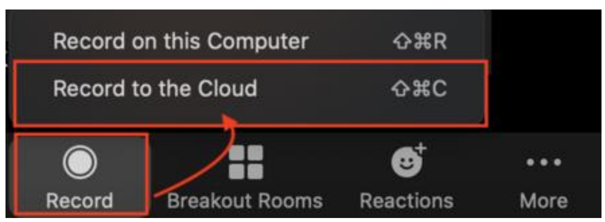
b. <u>Participant not allowed to share screen:</u> Click **Security** and ensure option **Allow participants to: _ Share Screen** is **unchecked:**



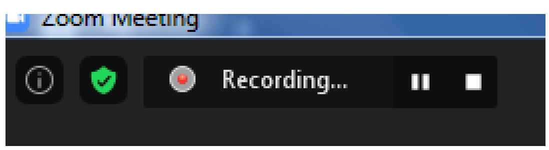
c. <u>Do not allow participants to unmute themselves:</u> In the Participant List window, find the **…** ( ) button and uncheck **Allow Participants to Unmute Themselves** (This feature can be turned back on should presenter desire participants to ask/answer questions out loud).

8. [**How to Record your Session**]: It is recommended for your training to be recorded to the cloud on the **FCA Zoom account**.

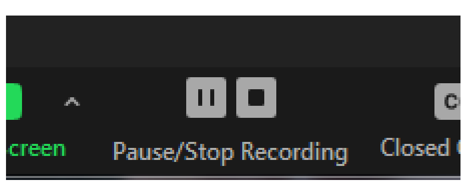
   a. Before you introduce the speakers, click on the **Record** ( ) button from the bottom of your main room menu, then click on **Record to the Cloud**.



   b. Once you begin recording you will see on the top left this indication.



   c. To pause for any reason, or to stop recording once the presentation concludes, the bottom menu will have **Pause/Stop** buttons for you to click.

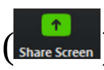


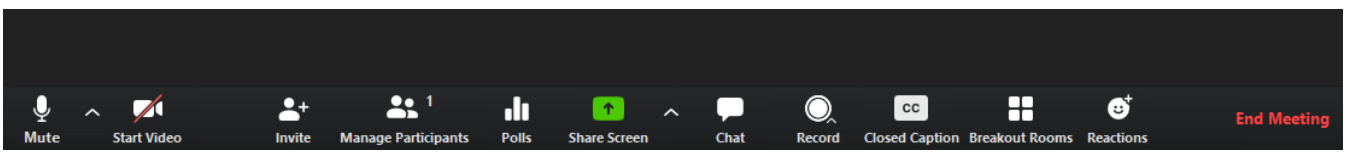
   d. The recording will be saved to the **FCA Zoom account** for download by the Technology Committee in order to be processed and included in the FCA Recording Library on the website.

e. If you choose to record locally to your computer instead, please coordinate with the FCA Technology Committee at fcatechnologychair@gmail.com with regard to sending them the file for processing and including on the website's Recording Library.

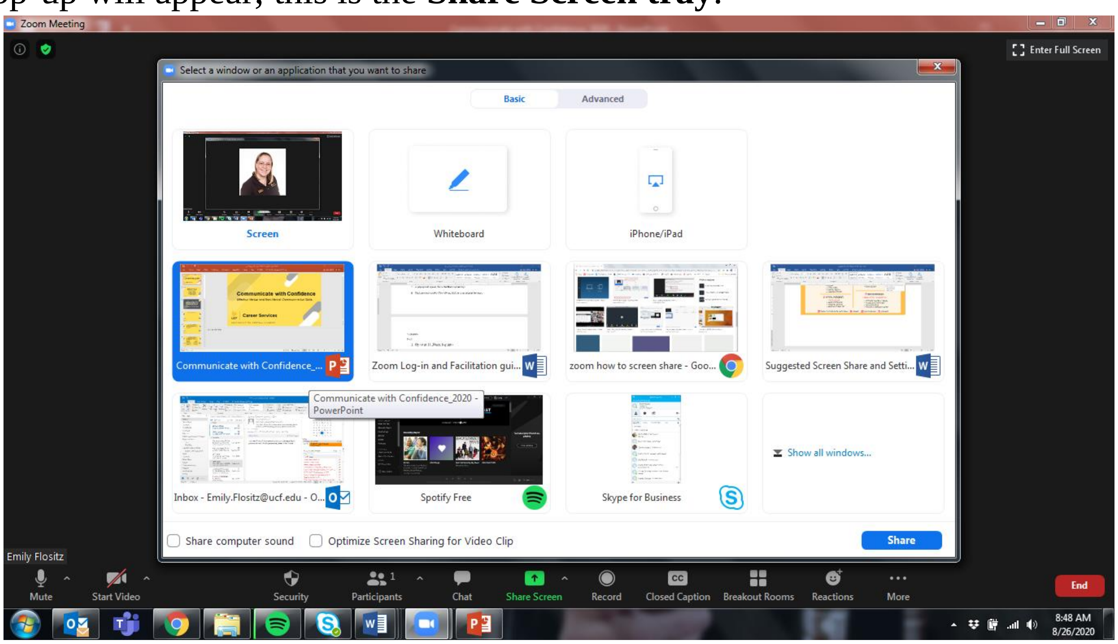
f. **NOTE**: If you are including breakout rooms in your session, your recording options are limited. If the meeting is being cloud recorded, it will only record the main room, regardless of what room the meeting **host** is in. If local recording is being used, it will record the room the participant who is recording is in. Multiple participants can record locally. As **host**, if you are including breakout rooms, you may want to **Pause** recording during this time and **Resume** when all participants return to the main area. (*see item 11 for more on managing breakout rooms*)

9. **How to Screen Share:** If you are the presenter of your division's training, follow these steps to screen share effectively. Remember that only **Hosts** and **Co-Hosts** can share screens (unless you choose in **Security Settings** to allow participants to share screens). Review item 5 to learn how to change participants to **Co-Hosts**. For external speakers, you may want to have a copy of your assigned presenter's presentation as back-up. Keep this open in case they experience any technical difficulty with screen sharing. Or, you can use the following steps to help guide your presenter with how to screen share.

   a. From the main room, locate the green **Share Screen** button () on the bottom horizontal menu.



   b. A pop-up will appear; this is the **Share Screen tray**.



c. Find the presentation file (PowerPoint, PDF, or in an internet browser) and click the blue **Share** button on the bottom right.
   i. **Tip:** It is recommended to only share your presentation file, not your entire screen.

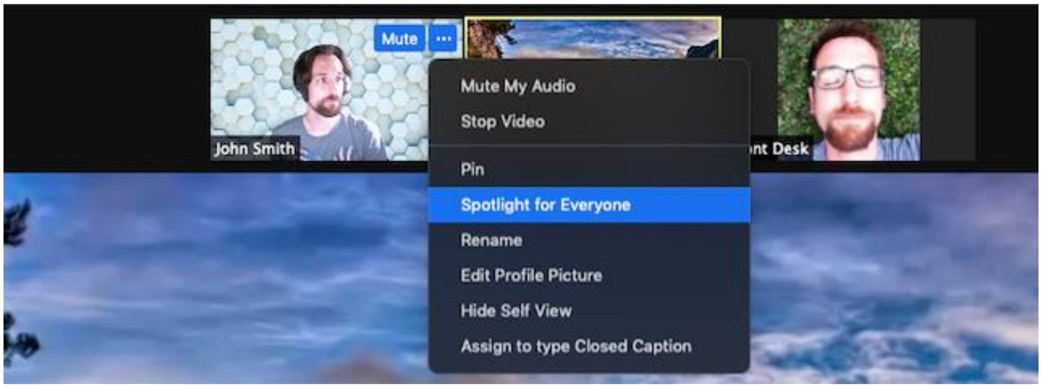
d. You will now be sharing your file; Presentation controls will appear as a floating menu on the top. You can move it around if needed. Click on the **…More** button option in the menu to view additional features like the chat, recording options, computer sounds, etc. On the bottom left, you will see the left and right arrows to advance the slide. You should also be able to click anywhere on the slide to advance.

e. To complete your presentation, click the red **Stop Share** button from the floating Meeting Controls menu. This will return you to the main room where you can see all participants.

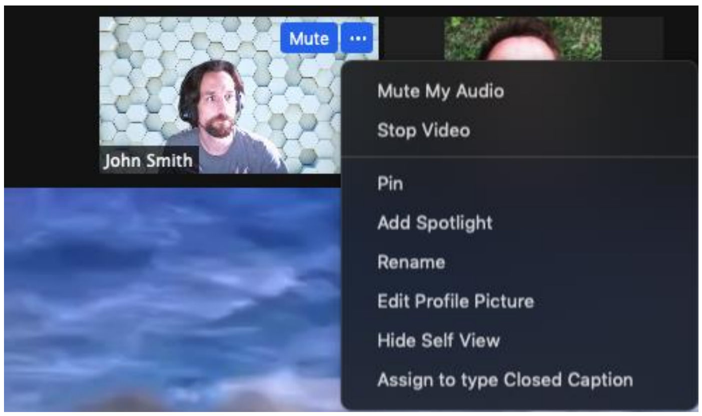
10. [**How to Spotlight Video**]: During the training, you may want to spotlight the video(s) of the speaker(s). This is particularly useful for events featuring a panel of speakers or a keynote speaker. **Hosts** and **Co-Hosts** can spotlight up to 9 participant videos which will feature their videos prominently for all participants, rather than the gallery view which shows thumbnails of all participants. **NOTE:** Spotlighting multiple videos requires desktop client version 5.2.2 on Windows or macOS

    a. At the top of your screen, hover over the video of the participant you want to spotlight and click **...** ( ) button.

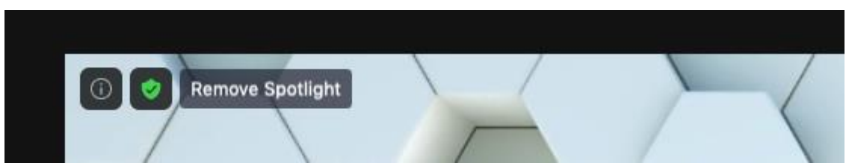
    b. From the menu, choose **Spotlight for Everyone**.



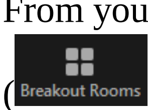
c. (Optional) To spotlight additional participants (up to 9 total), follow steps A and B again as needed, clicking on **Add Spotlight** instead.



d. To Cancel a Spotlight, click **Remove Spotlight** in the upper-left corner of the video area.



11. [Creating Breakout Rooms](): For small group discussions, the Host and Co-Host can create/manage breakout rooms for participants.

a. From your zoom controls menu at the bottom of your screen, click **Breakout Rooms** (
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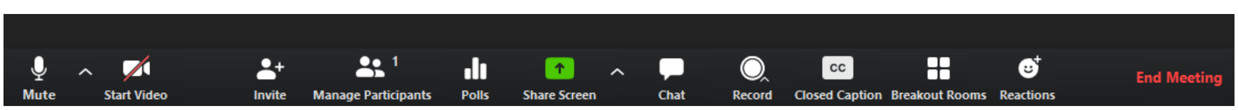
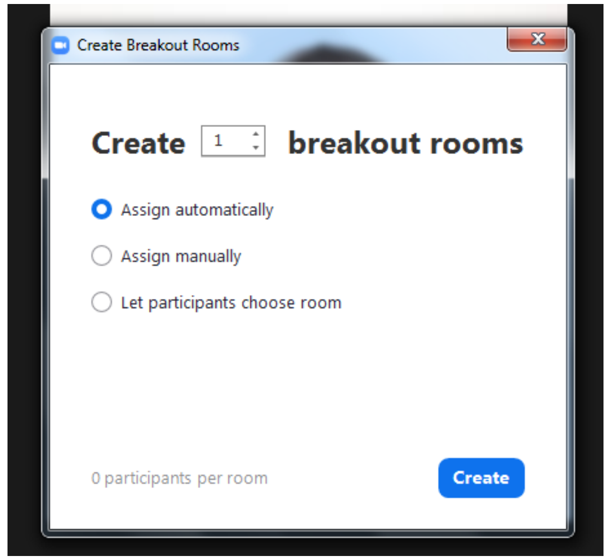


b. A pop-up will appear asking how many rooms and how to assign participants:

   i. **Assign Automatically**: Automatically sorts and assigns participants into rooms based on number of rooms and number of participants

   ii. **Assign Manually**: Gives Host and Co-Hosts control of assigning participants into breakout rooms one-by-one

   iii. **Let Participants Choose Room**: Allows participants to self-select their breakout room and to move from one room to another throughout the breakout room timeframe. **NOTE**: For participants to self-select, they must have Desktop client or mobile app: version 5.3.0 or higher.



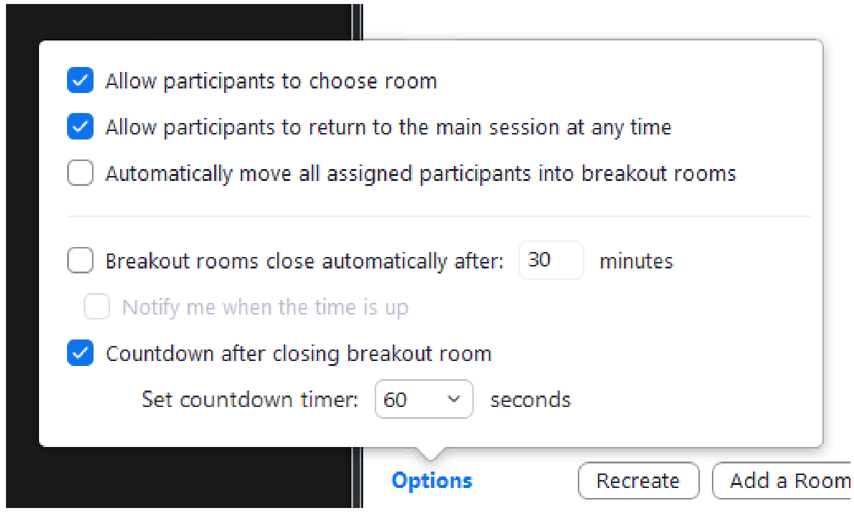
c. After you've created the number of rooms and chosen how to sort participants into them, click **Create** and another pop-up will appear which allows you to manage the breakout rooms:

   i. **Rename**: Allows you to rename the room to a title of your choosing

   ii. **Delete**: Remove any unused or extra breakout rooms

   iii. **Assign**: Allows you to assign participants to each room one-by-one

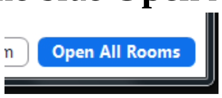
iv. **Recreate**: If you need to make new rooms or redo them, you can use this to start over



v. **Add a Room**: Use this to add additional breakout rooms

vi. **Options**: Reveals additional options to manage your breakout rooms:

1. Within **Options**, you can control whether or not participants can choose a breakout room, return to the main area anytime, move all assigned participants into rooms, set a timer to automatically close breakout rooms, display a countdown of your chosen length to warn closing of breakout rooms.

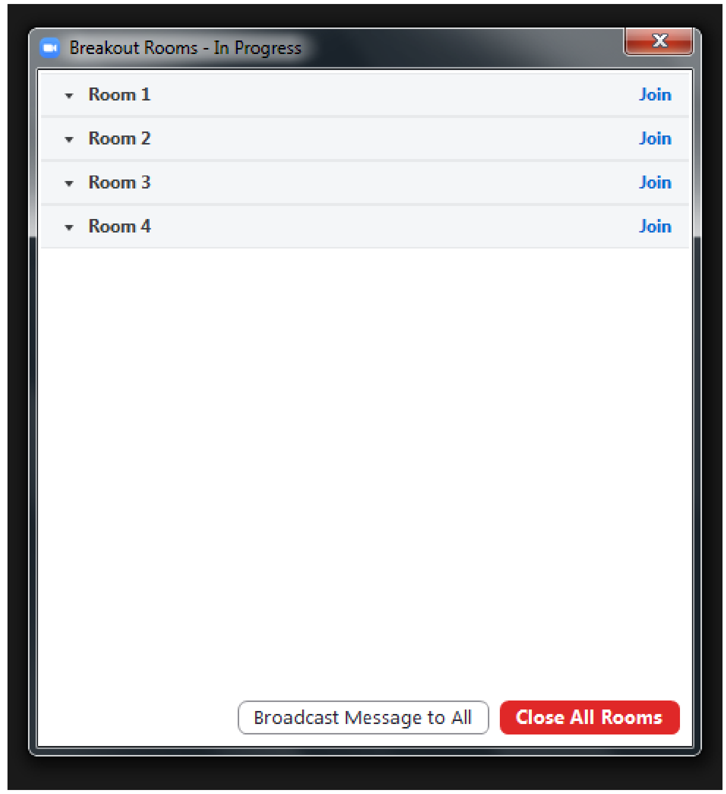
d. Once you've created breakout rooms to your liking and set your controls, you can click the blue **Open All Rooms** button to move participants into them when you are ready: 

e. While rooms are open, your Breakout Room manager pop-up will show the rooms and which participants are in them:

   i. **Join**: allows you to join the breakout room

   ii. **Broadcast Message to All**: allows you to type a brief message that will broadcast to all rooms

   iii. **Close All Rooms**: When you are ready, unless you have a timer set, you can **Close all Rooms**. This will give participants a 60 second warning that the rooms are about to close.



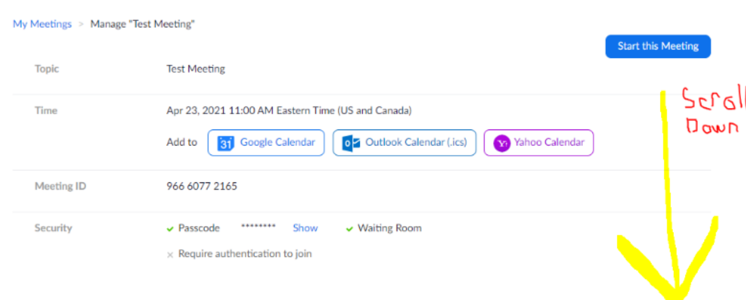
f. **RECORDING**: If you are recording your training, only the main area will be recorded locally or to the cloud if recording starts before the breakout rooms. You can pause your recording during breakout room times and resume when all participants return to the main area. If you want to record individual breakout rooms, someone in that room will have to record locally to their computer (breakout room recording cannot be done through the cloud). See item 8 for more info on recording your session.

12. **Using Polls**: In order to use polls during your session, you will need to set up your polling questions at the time of creating the meeting or by editing an existing meeting.

   a. Log into the **FCA Zoom account** (*see item 1*).

   b. Create your meeting if you have not done so already (*see item 2*).

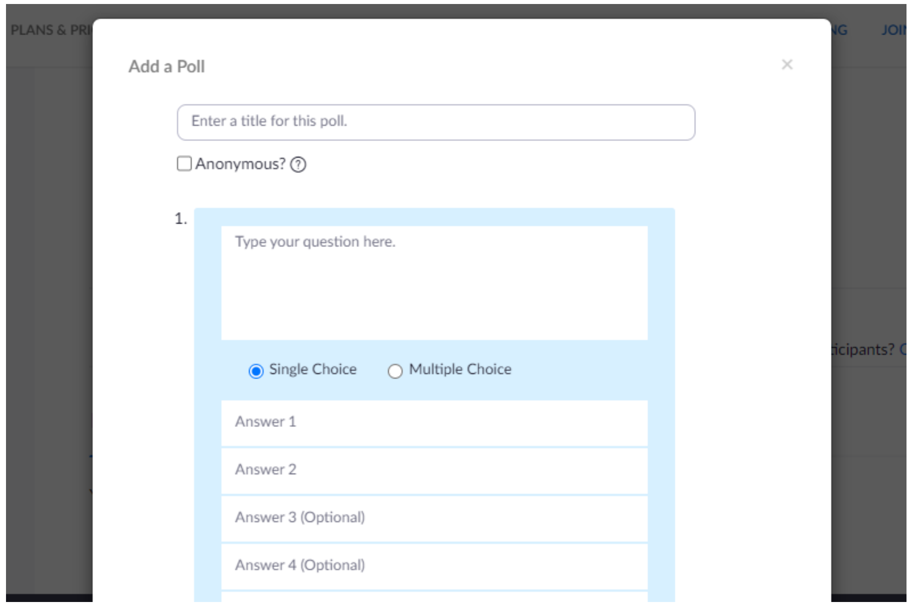
   c. Once saved, your meeting details should be displayed.



   d. **Creating Polls:**

      i. Scroll to the bottom of your meeting details and find the **Poll** section:

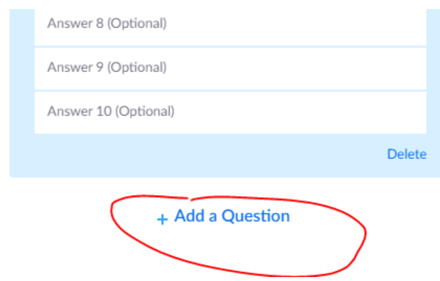
ii. Click **Add** on the bottom right to open the Poll Control pop-up window.



iii. Enter a title for you poll, choose whether you want responses to be anonymous, and then type your question.

iv. Select whether you want participants to choose one answer or multiple, then enter your answer options. You can add up to 10 answer options.

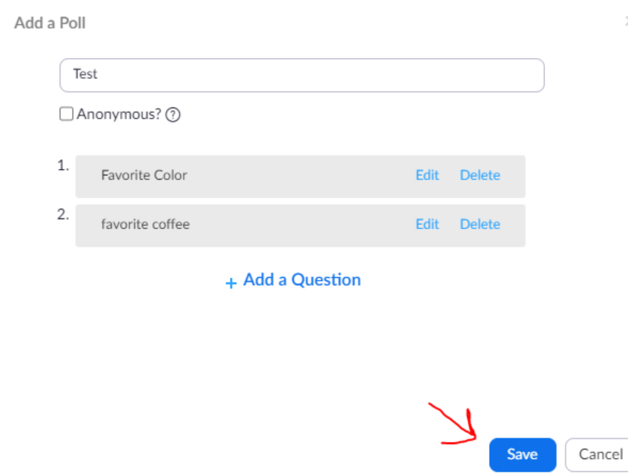
v. Scroll down slightly and click **+ Add a Question**.

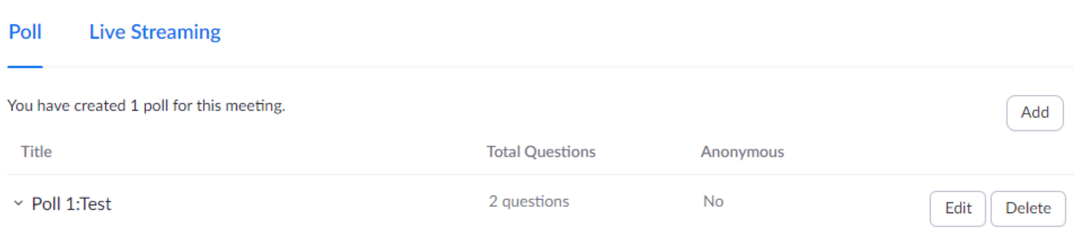


vi. You can also edit or delete questions from here.

vii. Once you've entered your poll questions, click the blue **Save** button on the bottom right.

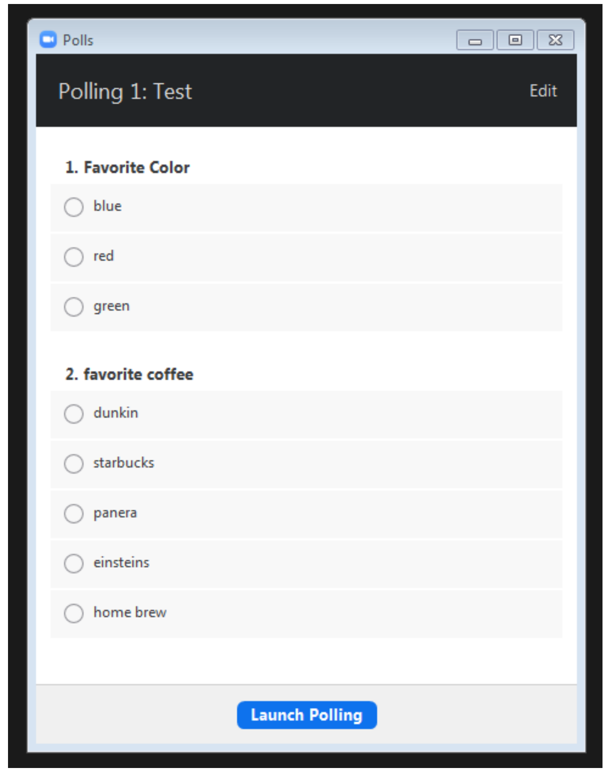
viii. Once saved, you will be brought again to your meeting details and can view your poll information at the bottom.

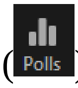


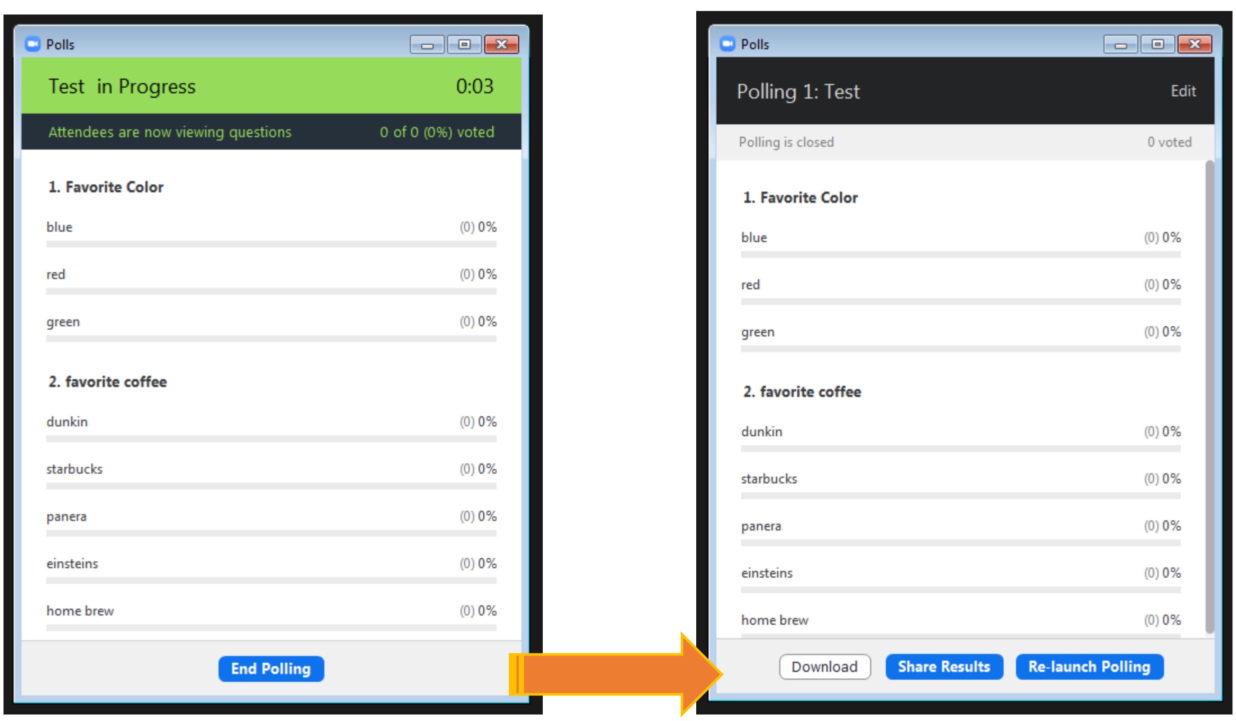


ix. You can also add another poll, edit existing polls, or delete the poll from here.

e. **Launching a Poll during a session**:



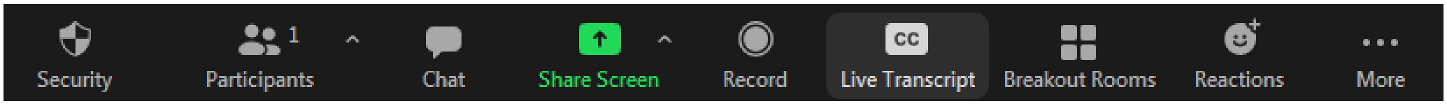
   i. Start your session (*see item 3*).
   ii. When you are ready to launch your poll, find **Polls** from your Zoom menu control bar (
). This will be in the bottom ribbon or in the top floating menu if screen sharing.
   iii. Your poll will open as a pop-up.
   iv. **NOTE**: Clicking **Edit** will open a web browser, ask you to log into the account, and edit the poll from your meeting details. It will not allow you to edit the poll in this pop-up menu during the meeting.
   v. When you are ready click the blue **Launch Polling** button.
   vi. The Poll pop-up control window will display your poll in progress and will show results live as participants make their selections:
   vii. When you are done, click the blue **End Polling** button.
   viii. Results will be displayed to Hosts and Co-Hosts only at this point:
      1. **Download**: Download your poll results to your computer
      2. **Share Results:** Allows you to share the results with your participants
      3. **Re-launch polling**: Launches the poll again and erases previous entries



13.**Providing Closed Captions**: Zoom now offers you the ability to provide closed captions to participants with live automated transcription. Disclaimer: This is an automated service, so captions may not be 100% accurate.

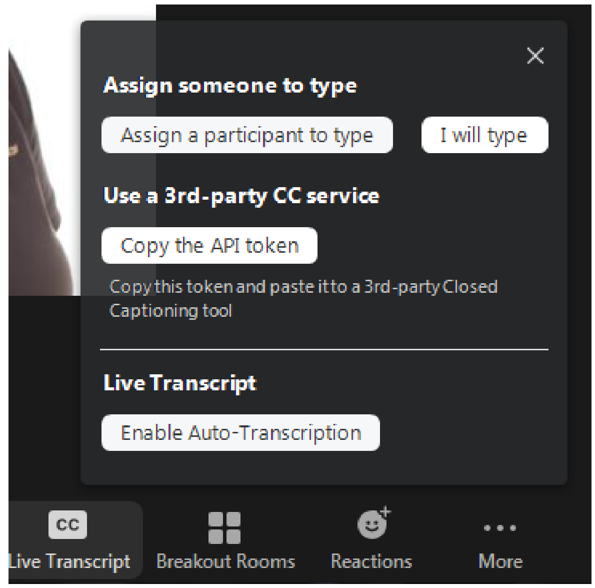
a. Start your session (*see item 3*).

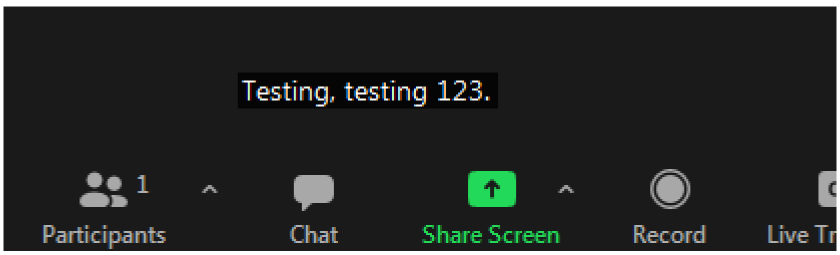
b. From the Zoom control ribbon on the bottom of your screen, select **Live Transcript.**



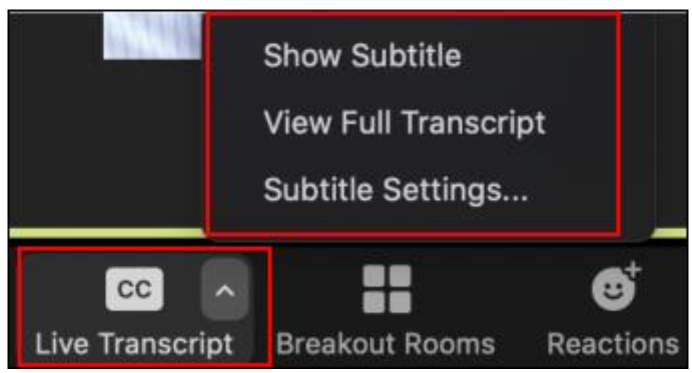
c. From the menu that appears, select Enable Auto-Transcription:

d. You will now see captions appear as you and other participants speak below your video window.

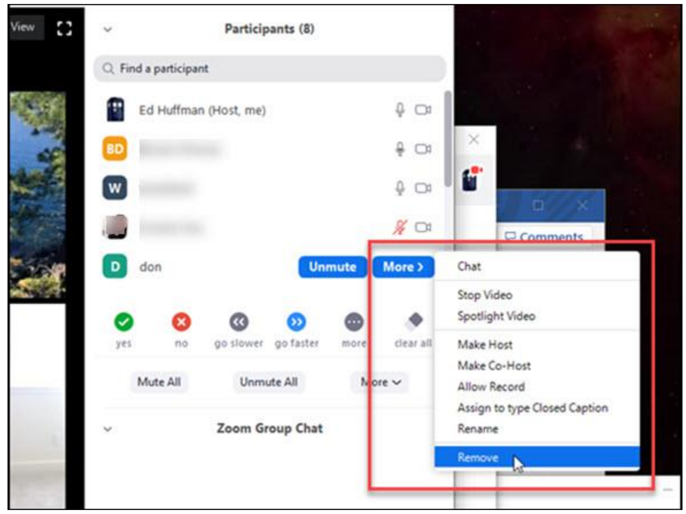




e. Participants will have the Live Transcript button available as well and can choose to turn subtitles on or off, or display them as a transcript along the right side of their screen by clicking **View Full Transcript**.

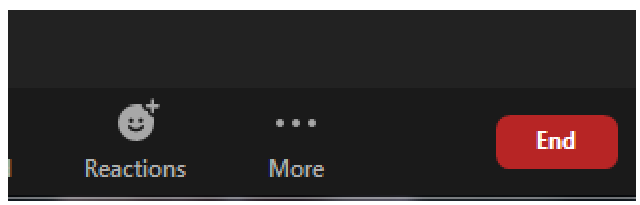


14. **[Monitoring your participants](#):** During the presentation, monitor your participants' mics and videos to ensure professionalism. You should have the option for them unmute themselves turned off. If not, then you can mute people individually should someone accidentally leaves their mic on and distracting background noise is heard. Also, participants will be advised to present themselves professionally. If you notice anyone dressed inappropriately or has an inappropriate background, you can turn their videos off. If necessary, you can also remove participants.

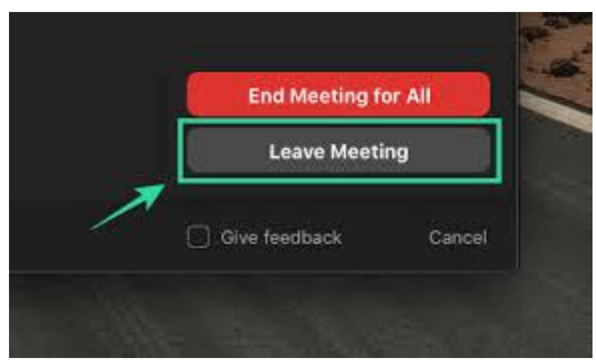


   a. In the **Participant List**, hover your mouse over the participant's name
   b. To turn their mic off, click the **Unmute** button next to their name (Unmute)
   c. To view other options, click **More** (More >)
      i. **Stop Video**: turns participant video off (they will need to request permission to turn their video back on)
      ii. **Remove**: removes participant from the meeting (once removed they cannot reenter)

15. **End Session**



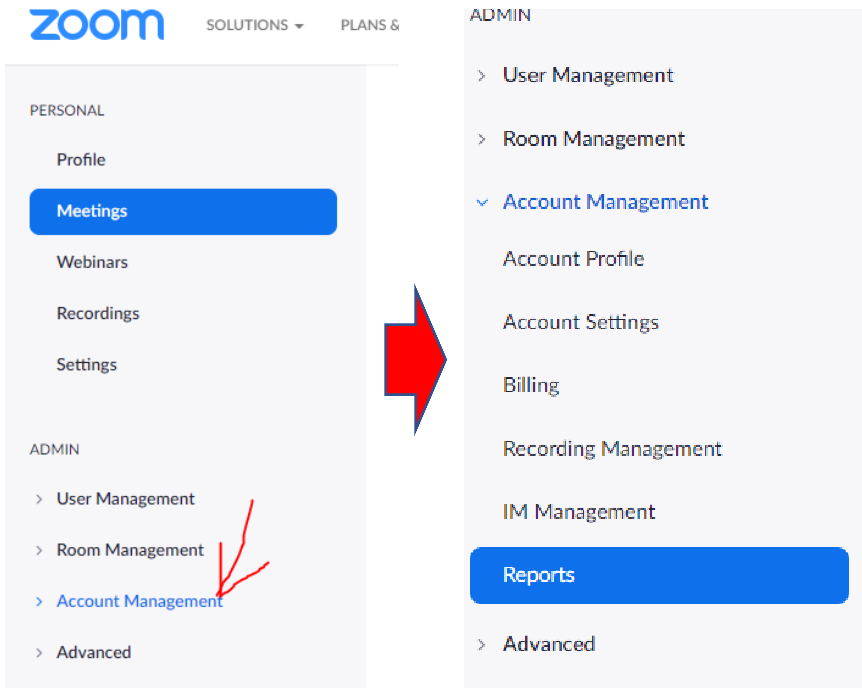
   a. Once session is over, click on the red **End** button to end the meeting.
   b. Depending on how many participants are still in the session, and if you are waiting for the next volunteer, two options may appear:



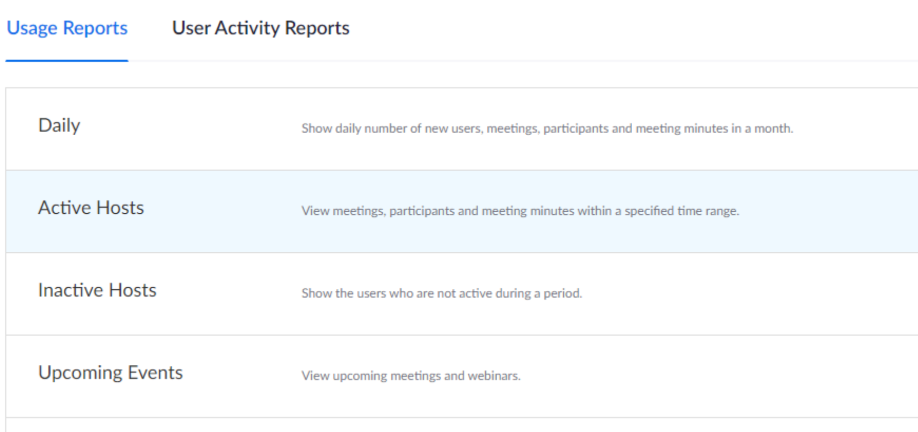
      i. **End Meeting for All**: This closes the meeting for everyone. Only do this if you the host and the meeting has officially concluded.
      ii. **Leave Meeting**: Choose this if you are leaving the session, but it will remain active for remaining co-hosts and participants.
         1. **NOTE**: if you have transferred your **HOST** privileges to the speaker or another division leader, you will automatically revert to being a participant, and the only option you should see if exiting is **Leave Meeting**.

16. **Download Attendance:** If your training offers CE’s, you will need to download your attendance report afterwards and send to fcaoffice@flacounseling.org so that participants’ session minutes can be verified. If your training does not offer CE’s, then you are not required to complete this step.

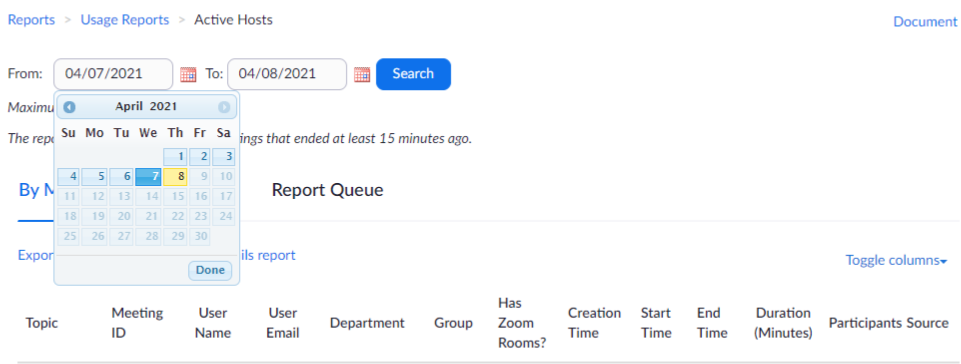
   a. Log into the **FCA Zoom account** (*see item 1*).
   b. On the left vertical menu, click **Account Management**, and then click **Reports**.



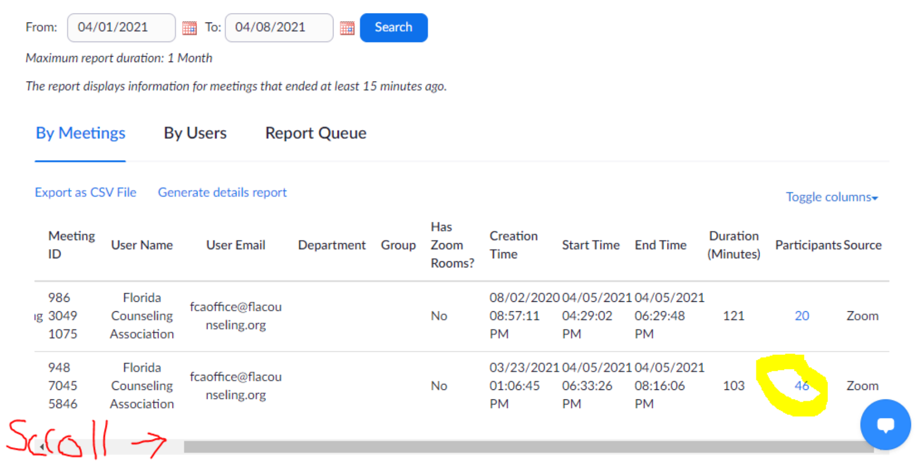
   c. Select **Active Hosts** from the list of **Usage Reports** options.



   d. Your meeting should appear as a recently completed meeting; however, you can use the calendar tool to locate your meeting if some time has passed.



e. When you find your meeting in the list, find the horizontal scroll button and scroll RIGHT. Then click on the blue number under the **Participants** column.



f. A pop-up will appear listing the attendees and their minutes. Click the blue **Export** button to download a .csv file. You may also elect to click the box for **Show Unique Users** for a condensed list (which combines multiple entry/leave times for a single participant into a total time of attendance).

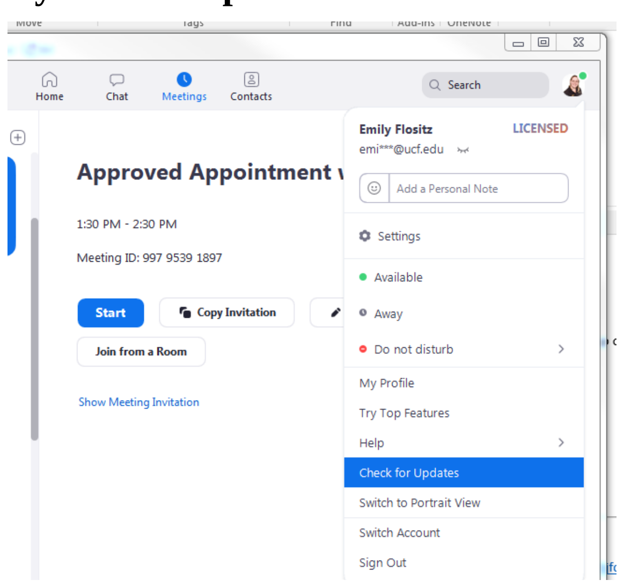
g. Send file(s) to fcaoffice@flacounseling.org for CEU verification.

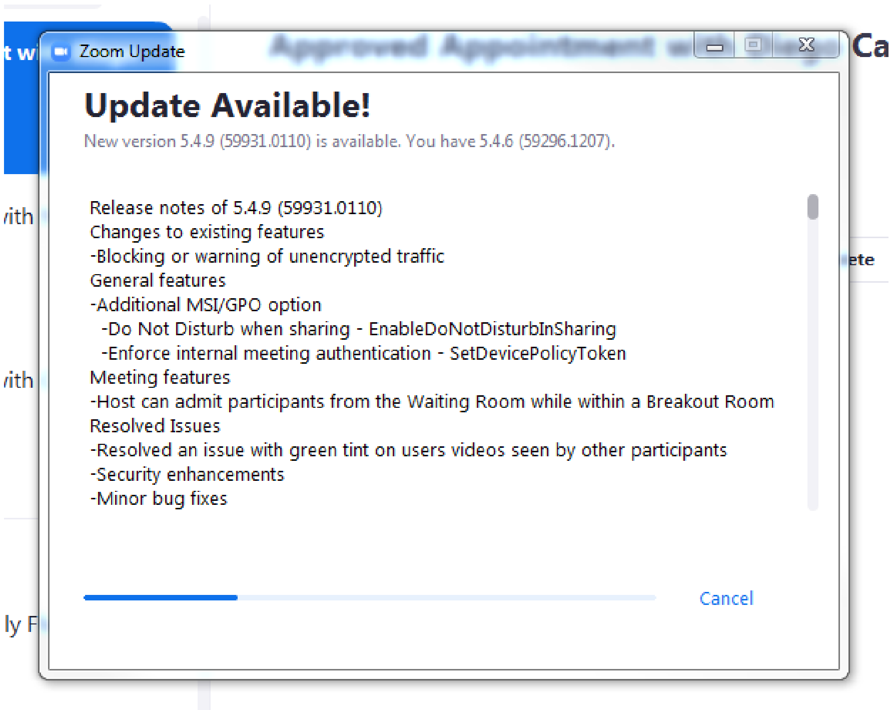
17. **How to find and update your Zoom version from your desktop**:

a. Open your Zoom program from your and log in.

b. Click on your profile photo/icon on the top right, and click on **check for updates** from the menu that appears.

c. A pop-up will appear that shows your current version and whether or not an update is available →.





d. If an update is available, it will automatically start downloading. Once downloaded, click **update** to finish.
e. The program may close and restart to refresh itself and load new features.