

Compassionate Friends of Canada: Zoom Guidelines for Facilitators

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Setting up Zoom

To get started, go to [Zoom.us](https://zoom.us), or download the app if you're using an [iOS](#) or [Android](#) device.

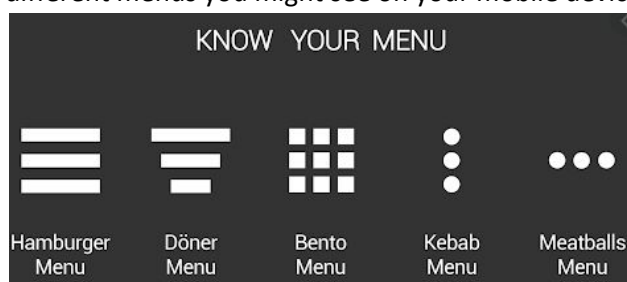
From the opening screen, click Sign Up for Free to create a free account. You can sign up using an email address, or with your Google or Facebook account. Once you complete the application and verify your account, Zoom will automatically download the app to your computer. Follow the prompts to install the app, and then sign into the app itself.

Note: Although you do not need a Zoom account to join a meeting, it is highly recommended to create one. Otherwise, you'll miss out on key features, such as hosting meetings or having a profile.

The basic version of Zoom is free to use, but it is somewhat restricted. Your meetings will be limited to forty minutes, with a maximum of 100 participants. However, once 40 minutes are up, you can immediately remake or rejoin the meeting. You can also purchase a subscription that removes these limits and adds other features, such as advanced meeting controls and cloud storage of your video recordings.

Device Screens and Options

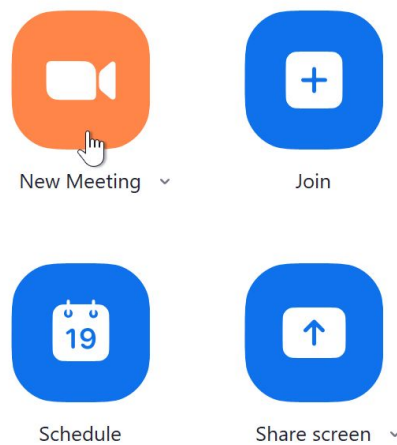
Please note that it is recommended that you use a desktop or laptop computer when hosting and/or attending a Zoom meeting. You can certainly use a mobile device such as a tablet, iPad, or smartphone. If you are using a mobile device, you will need to touch the screen of your device to see some of these options. On your mobile device, most options are visible when you touch the screen on your device and then touch the meatball menu for additional options. Below is an overview of the different menus you might see on your mobile device.



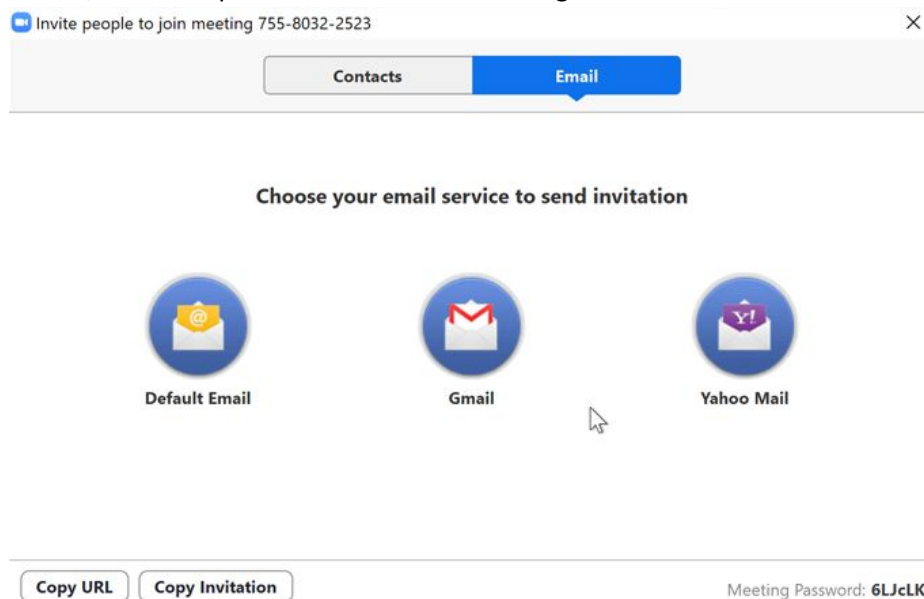
Hosting a meeting

Hosting a Zoom meeting of your own is pretty straightforward. Unlike joining a meeting, you must have a Zoom account and the Zoom app in order to host.

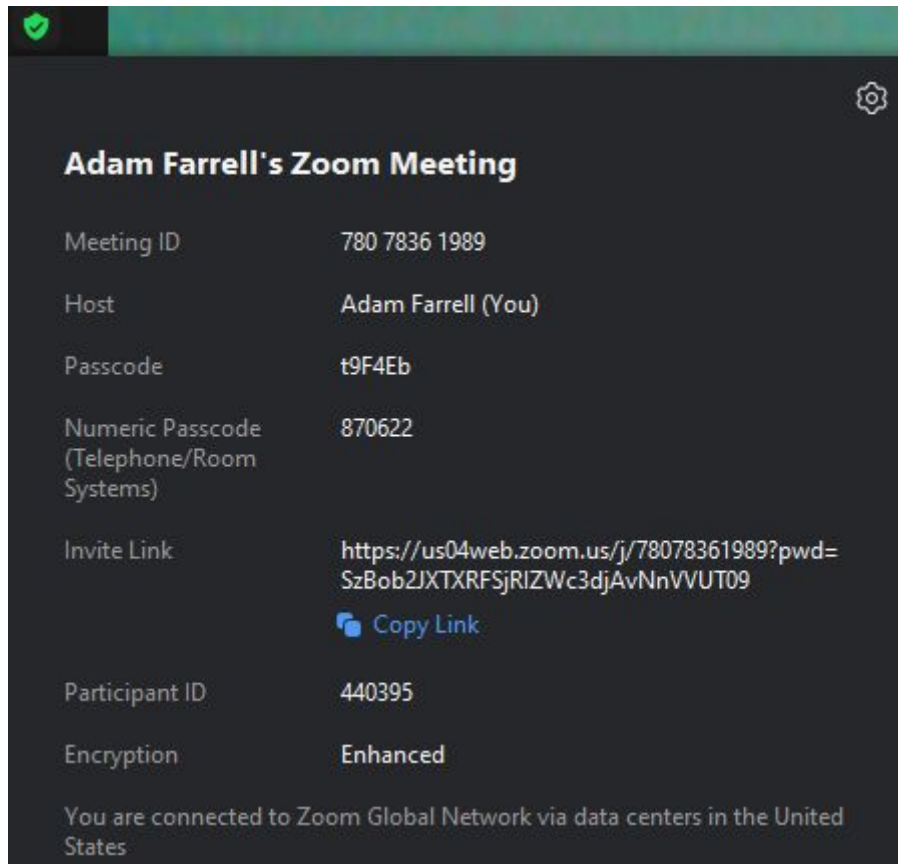
Start your meeting by clicking *New Meeting* on the main Zoom screen. You may need to give Zoom permission to use your camera and microphone if this is your first time using the app. After that, your meeting will begin.



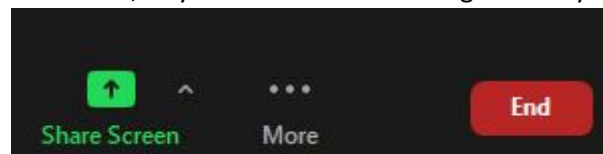
To invite someone to your meeting, click *Participants* at the bottom of the window, then select *Invite* in the *Participants* box. You can send an email through your email client such as Gmail or Yahoo Mail, copy the meeting URL, or share the Meeting ID and password. The ID is found at the top of the Invitation window, while the password is in the bottom-right corner.



Note: Zoom automatically generates a new password for every meeting by default. In addition to the Invitation window, you can find the password by clicking the information icon in the top-left corner of the meeting screen.



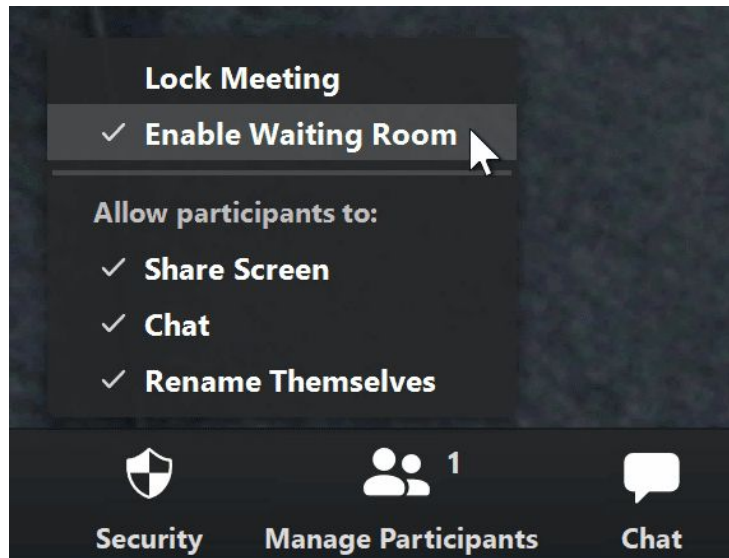
When you want to end the meeting, click *End Meeting* in the bottom-right corner. You can either assign someone else to be the host, or you can end the meeting for everyone.



How to better secure your meetings

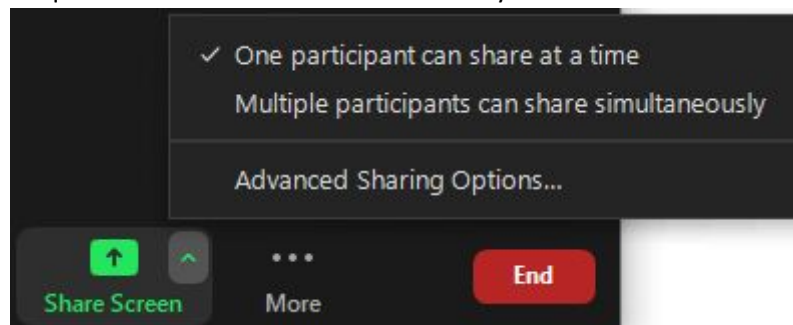
Although Zoom aims to be user-friendly, you will still need to take a few precautions. Let's go over a few settings and features that can help keep your Zoom experience safe and orderly.

Waiting Room: Whenever someone tries to join a meeting, they are first placed in the Waiting Room by default. They will not be able to enter the meeting until the host approves them. This can help you filter out uninvited guests and control the flow of participants. You can enable or disable the Waiting Room by clicking *Security* and selecting *Enable Waiting Room*.

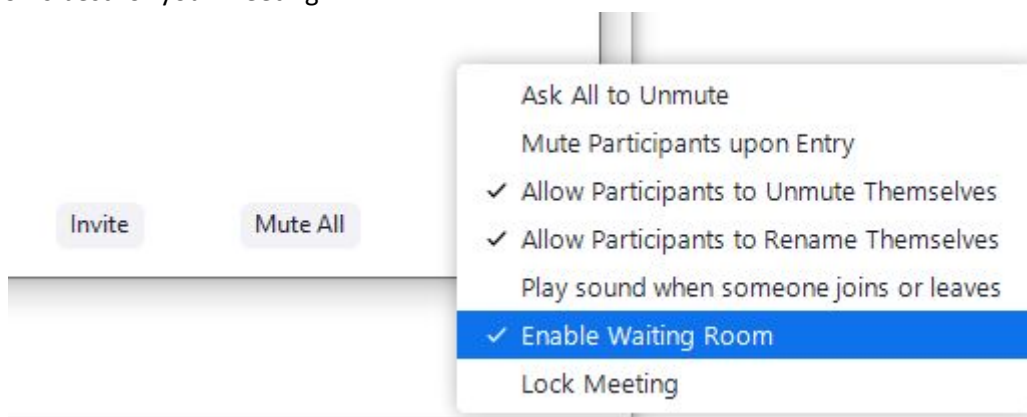


Gallery View: When many people are in one meeting, Gallery View can organize everyone in a grid layout. Just click Gallery View in the top-right corner to activate it.

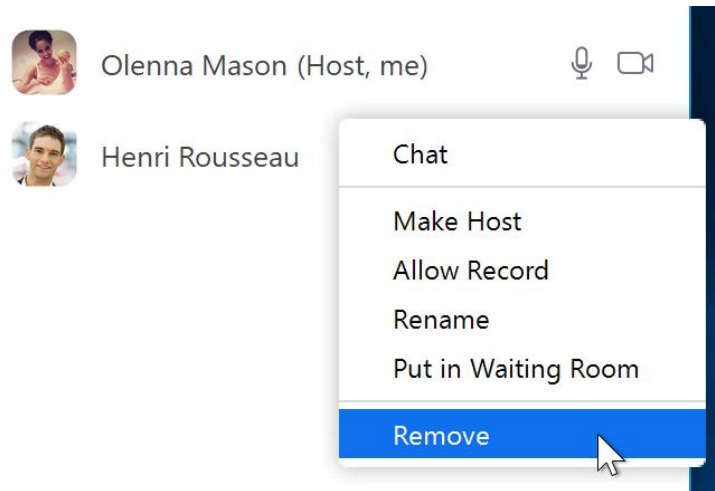
Screen sharing restrictions: Screen sharing lets a participant display the contents of their screen to the entire meeting. However, uninvited guests often take advantage of this feature to try and cause chaos. To restrict screen sharing, click the arrow beside Share Screen, and select Advanced Sharing Options. Under the question “Who can share?” select Only Host.



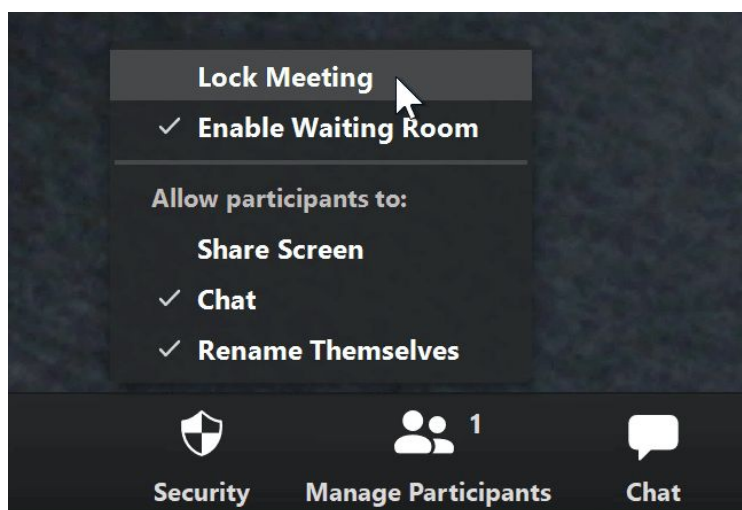
Mute a participant: If you need to mute a participant, click the Participants button, then review the Participants box on the right for the person of your choice. Hover over their name and select Mute. You can unmute them using the same method. You can also *Mute All* participants, which might be easier. The bottom menu of the *Participant's* screen gives you many options you can choose from that works best for your meeting.



Remove unwanted guests: You can kick a participant out of your meeting if you desire. Hover over their name, click *More*, and select *Remove*. By default, that participant will also not be able to rejoin the meeting.



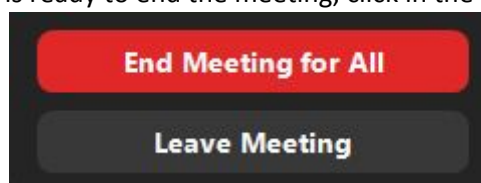
Lock the meeting: If you don't want anyone else to join your meeting, you can lock it and keep newcomers out. Just click *Security*, then select *Lock Meeting*. You can unlock the meeting using the same method.



Aside from video chat, Zoom contains several useful features, such as file sharing, meeting transcripts, and webinars. Although it's fine to use for more casual conversations and discussions, we recommend not using Zoom for anything that involves sensitive information.

Ending the meeting:

When the host is ready to end the meeting, click in the bottom right of the screen and choose *End Meeting for All*



Meeting for All. This will end the meeting for all participants. They do not have to log out individually.

Facilitator Notes and Guidelines:

- **The key is to use muting.** Either the facilitator mutes everyone, and only unmutes a participant when a participant raises their hand to speak (or pick up their bear, per Cathy Sosnowsky), or all participants may be asked to mute, and only unmute themselves when the facilitator says it is their turn to speak.
- **Speak personally:** Share stories of lived experiences and personal values rather than set opinions.
- **Be inquisitive:** Ask thoughtful questions and listen openly to the answers.
- **Differentiate between intent and impact:** Some words come with good intention but can have a negative impact on other participants, especially within difficult circumstances like Covid19.

Before the meeting:

- Be sure you have [downloaded the most current version of the Zoom app](#). You do not need to create a Zoom account. Anyone can join a meeting using the Zoom mobile app or desktop application for Windows and Mac (the app uses 3 MB of space for first time users).
- Be sure your browser is up to date (older browsers can be problematic and not necessarily built for video or other Zoom features).
- [Test your audio ahead of time.](#)
- [Test your video ahead of time.](#)
- If you have a Zoom account, you may wish to Choose a Zoom virtual background (or an image of your choice), if desired. This is available to all Zoom accounts, free or paid. See below: [Virtual Background Set-up](#)

During the meeting:

- Set your preferred [view](#) of video participants (e.g. gallery view, active speaker, mini, etc.)
- If you happen to get dropped from the call, simply reconnect to the meeting using the link and/or meeting ID and password.
- Minimize background noise:
 - When not speaking, “mute” yourself to reduce background noise
 - If possible, wear earbuds or a headset (wired is quietest)
 - If on your phone, “dock” it. Any movement will come across as noise for the other participants.

Troubleshooting Tips:

- [Connection Issues](#)
- [Joining a Meeting](#)
- [Join a Test meeting](#) (to familiarize yourself with Zoom)
- [Test your audio](#)
- [Test your video](#)
- [Echo during meeting](#)
- [Video/Camera not working](#)
- [Video Layout](#)
- [Virtual Background set-up](#)

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