Step-by-Step Guide for conducting web conferences/meetings

Date: 06.04.22
• **End of support for Internet Explorer 11**
  Microsoft is ending support for Internet Explorer (IE) 11 on August 17, 2021. Based on this date, Zoom is ending support for IE on September 30, 2021. Users can still use Zoom on IE after this date but we will no longer be supporting IE, fixing issues related to IE, or offering any customer support related to IE.

• **Post-meeting survey**
  Meeting hosts can create a survey to launch at the end of a meeting. Meeting participants will be prompted with the survey once the meeting ends. This setting can be enabled or disabled at the account, group, or user level, and can be locked at the account or group level.

• **Disable use of Q&A**
  Disabled by default, this disables use of Q&A in webinars.

• **Install latest version automatically**
  Disabled by default, if a user’s version is lower than the newest available version, then the app will download the newer version automatically.

• **New policy settings**
  Account owners and admins can prevent users from using these features. This policy setting can be changed at the account level (multiple sites disabled), site level (multiple sites enabled), or phone user level.
  - Elevate a Call to a Meeting
  - Hand off call to Zoom Room
  - Switch call to carrier
  - Call delegation

About this guide

This guide gives you a quick and clear introduction to hosting meetings with the video conferencing tool Zoom.

Many pages contain clickable buttons to help you navigate through the document.

The blue Recommendation and Note boxes draw your attention to especially important aspects. This is one of them.

Furthermore, this guide contains red Legal note boxes. In these boxes, we refer to aspects that are problematic in terms of data protection and other legal issues and we make suggestions on how you can circumvent these aspects (that are known to us). Below, you find the first Legal note box.

Legal note: The RWTH takes the legal mandate to protect privacy and personal data seriously. This document, however, is no legal advice and it cannot substitute for individual legal advice. Therefore, this guide is not part of the corresponding information requirements referring to article 13 et seq. of the General Data Protection Regulation. It only illustrates the use of Zoom.

Please read carefully the legal notes in chapter 12.
About this guide

The CLS helps and guides you in the video-based digitalization of teaching and learning.

For guides on conducting meetings or webinars with Zoom please visit our homepage:

https://video.cls.rwth-aachen.de/

If you have any problems, please contact our helpdesk:

video@cls.rwth-aachen.de

Please note that due to constant updates, Zoom is in a dynamic change process. We kindly ask you to send us your feedback on change processes or experience reports that we can include in this guide. This way, we will be able to constantly update the guide. Please also note that the updated version of Zoom also requires an updated operating system.
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Part I: Basics for using Zoom
1 License acquisition

From September 9th, 2020, all RWTH members with TIM account can log in to Zoom using Single-Sign On (SSO) without having to request a license. Then, you can conduct meetings with up to 300 participants.

**Note:** Persons without RWTH TIM account (e.g. external lecturers) and lecturers requiring a license for more than 300 participants please request a license via video@cls.rwth-aachen.de.
The homepage of zoom Video Communications, Inc., provides you with a variety of instructions for use:

- [https://support.zoom.us/hc/en-us](https://support.zoom.us/hc/en-us)

For beginners, the "First Steps" are a good starting point:

First steps for **PC and Mac**

First steps for **Android**

First steps for **iPhone and iPad**
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3.1 Web conference or “webinar”?

RWTH Aachen has acquired a comprehensive Zoom license package. This package includes the following licenses:

- Personal licenses for **web conferences** with up to 300 participants for all RWTH lecturers, employees and students

- Licenses managed by the CLS for **web-seminars** (in the following we call them **webinars** as Zoom does) with up to 500 or 1000 participants

- Time slots managed by the CLS for webinars with up to 3,000 participants

The **web conference** licenses allow you to conduct meetings with up to **300 participants**. Web conferences can be used, for example, to present content to a group, hold (group) consultation hours, or perform oral examinations.
### 3.1 Web conference or “webinar”?

After giving their consent, every participant can participate in web conferences audiovisually, which allows for a synchronous communication between host and participants. Licenses are not assigned to one specific terminal device. Therefore, you can use your license on several devices - however, only on two devices simultaneously.

The main difference between webinars and web conferences is that webinars do not have an audiovisual return channel that allows for constant feedback from all participants to the speaker. Oral communication and video transmission are mostly unidirectional. However, participants can make written contributions.

**Note:** You need an additional license to organize webinars. If you are interested in such a license and need more information about the licensing process, please send an email to video@cls.rwth-aachen.de to register. You can find more information on webinars in our webinar guide in [https://video.cls.rwth-aachen.de/gebrauchsanweisungen/](https://video.cls.rwth-aachen.de/gebrauchsanweisungen/).
3.2 Client or browser?

The so-called zoom Client is available for the following operating systems:

- Windows
- macOS
- Android
- iOS / iPadOS

Zoom can also be used as a web application in different browsers, such as Chrome, Firefox, or Safari.

**Advice:** We recommend that you use the Client, as it gives you a more direct access to all the important features of Zoom and it allows you to manage your meetings through your own software. This version of the guide refers primarily to the Client for Windows.
3.2 Client or browser?

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Click here for the settings

Note: This guide mainly describes the features of the Client. If you don't find a feature when using the Browser, you may need to activate the feature in the settings, use another Browser or use the Client to use it.
3.3 Install Client

We recommend installing the **zoom** Client. Depending on the operating system, the name of the Client varies:

- Windows and macOS: **Zoom Client for Meeting**
- Android, iOS, iPadOS: **Zoom Client-App**

Please download the Client here: [https://zoom.us/download](https://zoom.us/download)


**Note:** Some settings are only possible via the browser before the meeting (e.g. setting an alternative moderator*) and some settings are also possible in the client during the meeting (e.g. setting the waiting room function*).

*The exemplary functions are explained in the following.
3.4 Updates

Please ensure that your Zoom Client is always up to date. For this, click on your profile in the top right corner of the start window of your client and choose *Check for Updates*. You can install a new update with one click (not during meetings). Zoom restarts after completion.

Please note that due to constant updates, Zoom is in a dynamic change process. We kindly ask you to send us your feedback on change processes or experience reports that we can include in this guide. This way, we will be able to constantly update the guide. Please also note that the updated version of Zoom also requires an updated operating system.
3.5 Use browser with zoom account

The Zoom web application can be found at:

- [https://zoom.us/](https://zoom.us/)

Register to start in the browser.
3.6 Use Zoom abroad

In most countries, you can use Zoom without any problems. However, there are some countries where users are unable to access Zoom.

- [https://support.zoom.us/hc/en-us/articles/203806119-Restricted-countries-or-regions](https://support.zoom.us/hc/en-us/articles/203806119-Restricted-countries-or-regions)

You can bypass this restriction by using the RWTH VPN connection. Please read the instructions on how to install the VPN:

- [https://help.itc.rwth-aachen.de/service/vbf6fx0gom76/article/b2150305019c438c867663ab28307d87](https://help.itc.rwth-aachen.de/service/vbf6fx0gom76/article/b2150305019c438c867663ab28307d87)

When using the application “Cisco AnyConnect”, it is of utmost importance that you select the option “RWTH-VPN (Full Tunnel)” in the field “Group/Gruppe” (see description on the linked site). This allows you to make regular Zoom calls from restricted countries to the RWTH.
3.6 Use Zoom abroad

**Note:** During peak times, it is possible that the RWTH VPN connection doesn’t continuously provide the required bandwidth. In this case, you have the following options:
1. Deactivate the transmission of your video. This measure drastically reduces the required bandwidth. Tell your students why you are deactivating the transmission of your video.
2. Disable incoming videos of other participants.

3. Use a different VPN service. There are some free and commercial VPN services that provide a much higher bandwidth than the RWTH VPN connection. For more information, please click on the following link:

3.7 Encryption

By default, the shared content of your Zoom meeting is encrypted with 256-bit AES-GCM encryption. For dial-in participants joining by phone, the audio is encrypted until it leaves Zoom's data centers and is transferred to the participant's phone network.

For additional protection, you can enable end-to-end encryption (E2EE) (https://zoom.us/profile ▶ Settings ▶ Security). End-to-end encryption requires meeting participants to join from the Zoom desktop client, mobile app, or Zoom Rooms (e.g. not the Browser) and limits some meeting features.

During the meeting, you will see an icon in the top left corner of the Zoom window indicating encryption:

- Meeting is encrypted
- Meeting is partially encrypted
- Meeting is end-to-end-encrypted

More information: https://support.zoom.us/hc/en-us/articles/201362723
3.8 Display name

Under https://rwth.zoom.us/profile, you can change your display name, so that you cannot be found with your full name in Zoom contacts.

Your immatriculation number and phone number are only visible if you enter them in your profile. This is not recommended because they are visible to all RWTH members.
4 Schedule and start meetings

4.1 Home screen

4.2 Set up meetings

4.2.1 Start an instant meeting

4.2.2 Schedule a meeting

4.2.3 Security measures for your meeting

4.3 Invite participants
4.1 Home screen before signing in

After installation, you can immediately join a meeting without signing in.

For more information on participating in Zoom meetings, refer to our separate guide.

However, we recommend that you sign in first.

1. To do so, click the Sign In button.

2. Choose Sign in with SSO.

3. Insert the domain `rwth`

4. You will be redirected to the Single-Sign On of RWTH.
4.1 Home screen after signing in

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User account
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Not explained here
4.2 Set up meetings

You have three different options to set up a meeting:

1. Set up an instant meeting and directly invite participants.

2. Use the Client to schedule a meeting or recurring meetings for a date of your choice and invite participants in advance.

3. Use the Outlook plugin to schedule a meeting or recurring meetings and to automatically add them to your Outlook calendar.

**Note:** Recurring meetings are regular meetings that take place at a specific time and during a defined period of time. E.g., every day of the week or every Wednesday or every Monday and Friday.
4.2.1 Start an instant meeting

Click *New Meeting* to start an instant meeting.

The meeting window opens with a randomly generated Meeting ID, if you haven’t changed the settings.

**The meeting has started and you are the first participant!**

Click *Participants* to invite other participants at any time.

**Note:** Zoom meetings offer a variety of options. E.g., participants can share their screens, send chat messages to other participants, are muted when joining a meeting or can use symbols for communication. You can change these options during a meeting, in the Client or in the browser.
4.2.1 Start an instant meeting

Click the arrow next to New Meeting to open a window where you can choose between two options:

1. **Start with or without video.** This affects both you and your participants. During the meeting, all participants can (de)activate their video at any time.

2. **Personal Meeting ID (PMI)**
   The meeting starts with your PMI and not with a randomly generated ID.

3. **Other settings** such as audio source, enable Waiting Room, mute participants on entry, etc. (PMI Settings)
4.2.2 Schedule a meeting

In the Client: Schedule

In the browser: Schedule a meeting

Note: The default settings of the meeting are those you defined under https://zoom.us ➤ Settings.

Advice: For regular lectures, we recommend that you schedule your meetings in advance and create a recurring meeting for all lectures that will be held during the semester. This will help both you and your students to make a reliable long-term planning. Furthermore, the access link to the meeting will remain the same, which ensures reliable execution of the lecture.
4.2.2 Schedule a meeting

You can schedule a single meeting or a daily, weekly or monthly recurring meeting. You can also determine that a meeting can be used at any time:

Note: If a specific setting of a recurring meeting is not available in the Client, please use the browser version.

Meeting IDs for recurring meetings expire 365 days after the last start of the meeting.
4.2.2 Schedule a meeting

Under *advanced options* you can define if participants can join your meeting before you are there.

1. **Allow participants to join**
   - Set the time before start time (e.g., 5 minutes)
2. **Mute participants upon entry**

In addition, you can here name *Alternative hosts* that can start and end your meeting for you.

Click here for more information
4.2.3 Security measures for your meeting

Passcode protection
A passcode ensures that only participants who have received both the Meeting ID and the passcode (or the invitation link) can join the meeting.

Note: The assignment of a passcode for scheduled and instant meetings is mandatory. You can disable the passcode assignment for your Personal Meeting ID (PMI) only.

Note: In the default setting, the passcode is integrated in the link so that participants do not have to enter it separately. You can change this in https://zoom.us/profile ▶ Setting ▶ Security ▶ Embed passcode in invite link for one-click join.
3.2.4 Security measures for your meeting

The **Waiting Room** feature allows you to control when a participant joins the meeting.

You can manually admit participants one by one or all at once.

To enable Waiting Room:

1. When scheduling your meeting under **Security**

2. During the meeting, in the **Security** menu

3. [https://zoom.us/profile](https://zoom.us/profile) ➤ **Settings**
   ➤ **Security** (general setting for all meetings)
4.2.4 Security measures for your meeting

During the meeting, you can edit several Security features in the menu bar (usually, the menu bar is located at the lower edge of the screen; when sharing your screen, it may move to the top of the screen).

There you can find settings like

- Enabling the waiting room,
- Allowing participants to share their screen or chat,
- Suspend participant activities
4.3 Invite participants

Participants can use the **meeting URL** or the combination of **Meeting ID** and **passcode** to join your meetings.

They can be found

- in the text box of the outlook appointment (if applicable),
- in your scheduled meetings,
- During the meeting in _Participants _
  ➤ _Invite_

**Note:** We created a separate guide for participating in zoom meetings. You can find it under [https://video.cls.rwth-aachen.de/gebrauchsanweisungen/](https://video.cls.rwth-aachen.de/gebrauchsanweisungen/)
5 The meeting room

5.1 Overview

5.2 View modes

5.3 Manage participants
5.1 The meeting room - overview

1. Audio  Click here
2. Video  Click here
3. Security features  Click here
4. Manage Participants  Click here
5. Polls  Click here
6. Chat  Click here
7. Share Screen  Click here
8. View modes  Click here
9. Record  Click here
10. Breakout session  Click here
11. Interact with Reactions  Click here
5.2 View modes

During the meeting, all participants can switch between different view modes on their own. Participants joining with the Browser cannot choose between the modes.

Speaker View:

When a person speaks for a long time (e.g. in a speech), the speaker view is best. The speaker video covers the entire screen. The videos of the other participants appear as thumbnails on the side and can be hidden. You can also \textit{pin} the video of the main speaker(s) in \textit{Participants} (up to nine persons).
5.2 View modes

Gallery View:

When speakers change frequently (like in discussions), the gallery view is favorable. All video thumbnails have the same size and are displayed all over your screen, depending on the number of participants (max. 25 or 49 per page – you can choose the maximum number in your Client settings). The person currently speaking will have a colored box around their image.

Every participant can change the order of the videos via click-and-drag for himself.
5.3 Manage Participants

You can manage your participants by moving the mouse over the video image of a person and click the blue button with three white dots.

There, you can for instance pin the video image of a participant (if this participant has a long speaking contribution), you can name a participant host or co-host and remove him/her from the meeting.
6 Interaction during a meeting

6.1 Interact through chat

6.2 Non-verbal reactions

6.3 Share files between participants

6.4 Interact within small groups

   6.4.1 Small groups with co-hosts
   
   6.4.2 Ask for help
   
   6.4.2 Communication
   
6.4.3 Whiteboards
6.1 Interact through chat

During the meeting, participants can chat with all participants or a specific participant.

If the chat is closed, you will be notified when a participant sends a new message.

Note: Make sure that the chat feature is activated. To do so, go to https://zoom.us/profile ▶ Settings ▶ In Meeting (Basics) ▶ Chat.
Please also check whether the saving feature is switched on or off and who the participants can send chat messages to.
6.2 Non-verbal interactions

All meeting participants can choose non-verbal reactions via Reactions in the menu bar.

These are displays in the video image of this person, in the participants list and – for the host – cumulatively below the participants list.

The symbols of the upper row (emojis) disappear after a few seconds – the lower symbols (Raise Hand, Yes, No, Faster, Slower) have to be deactivated actively by the participant or host.

Note: In the beginning of the meeting, clearly explain to the participants when to use symbols for communication purposes.
6.3 Share files between participants

Before the meeting, decide whether sharing files between participants is wanted or desired:

https://zoom.us/profile ► Settings ► In Meeting (Basics) ► File transfer

If Share Files is activated, the participants see this option in the chat window.

LEGAL NOTE: Sharing files via Zoom harbors the risk of copyright and trademark violations by the participants. As soon as RWTH employees become aware of such violation, the CLS and the Legal Department must be contacted. This is necessary, first of all, for legal protection. Under no circumstances may the use of Zoom lead to the creation of a new exchange platform for illegal content within the campus.
6.4 Interact within small groups

Before you start a meeting, you can create so-called **Breakout Rooms** that enable your participants to work in small groups for group discussions, projects, etc.:

https://zoom.us/profile ► Settings ► In Meeting (Advanced) ► Breakout room

Breakout room

- Allow host to split meeting participants into separate, smaller rooms
- Allow host to assign participants to breakout rooms when scheduling

Video tutorials on interacting within small groups:
https://success.zoom.us/rec/play/6MYrIruqpmk3EoDAtASDVqV-W9Tseqqs0iMfqPAIxUq2AXZVO1TybrcXYLf44Datzqoi3ZP8glMHSiFi?continueMode=true
https://www.youtube.com/watch?v=jbPpdyn16sY&feature=youtu.be
6.4 Interact within small groups

1. In the meeting, you will see the Breakout Rooms icon in the Zoom panel. Please click that icon. If the icon is not visible, click on More to start the Breakout Room.

2. In the window that opens, you can determine the number of rooms and participants per room. You can also decide whether participants should be assigned to rooms automatically or manually or if participants can assign themselves.

Note: Participants can only assign themselves to breakout rooms, if host and participant use the client with version 5.3.0 or higher.
6.4 Interact within small groups

If you choose the automatic assignment, Zoom distributes the participants equally into all rooms. If choosing to manually assign the participants, you decide which participant enters which room. You can also prepare the assignment and upload as a CSV file.

By clicking Add a Room you can add a room. When hovering with the mouse over the name of a specific room, you can rename or delete it. Via Assign you can assign the participants to a room.

Under Options you can e.g. change the countdown after closing the breakout sessions (standard: 60s) or allow participants to return to the main meeting room at any time.
6.4 Interaction within small groups

In *Options* you can for instance define that breakout rooms shall be closed automatically after a specific time or that participants can return to the main session on their own.

- Allow participants to choose room
- Allow participants to return to the main session at any time
- Automatically move all assigned participants into breakout rooms
- Breakout rooms close automatically after: 30 minutes
- Notify me when the time is up
- Countdown after closing breakout room
  - Set countdown timer: 60 seconds

Options | Recreate | Add a Room
3. Then, click on *Start all Rooms*. All participants are prompted to join the room. Participants are successfully linked to the room when the green dot appears in front of a participants’ name.

4. You can enter any room at any time.

5. To finish all breakout rooms, click on *Close all Rooms*.

6. All participants will have 60 seconds to end their discussions within the rooms (time can be adapted) before automatically connecting back to the main meeting.

The rooms can be reused later as required.
6.4.1 Interaction within small groups with Co-Hosts

If you want to manage and supervise large groups of participants in breakout rooms, we advise to share the work with Co-Hosts.

Since Zoom version 5.4.6 (7.12.2020) Co-Hosts have the same rights regarding management and supervision of breakout rooms.
6.4.1 Interact within small groups: Ask for help

While in the Breakout Room, participants can contact you (as the host) by clicking *Ask for Help*.

You will be informed immediately. Then, you can join the corresponding group room and participate in group discussions.

If you are currently busy, the participants will receive a message after selecting *Ask for Help*.

You can invite the host to this Breakout Room for assistance.
You can send a message to participants of all groups. To do so, select *Broadcast a message to all*.

This feature is suitable, for instance, to communicate a schedule or the further procedure to the participants. As this message can be overlooked easily, please inform the participants in advance that you might send the messages.
Furthermore, you as a host or co-host can share your screen into all breakout sessions.

If the screen is shared inside the breakout sessions at that moment, this screen sharing is interrupted. If a Whiteboard is being shared, the „sharer“ will be prompted to save the changes before the host/ co-host screen is shown.

Host and participants have to use Zoom version 5.7.0 (21.06.2021) or newer to use this feature or see the shared screen.
Participants can open whiteboards and work on them collaboratively within the breakout rooms (if this feature was activated by the host). When these whiteboards are saved, you can show and discuss them later with the whole group.

Only if all participants have a Zoom account and use it for the meeting, breakout sessions can be prepared before the meeting.

However, probably not all students have a Zoom account. Thus, you should provide the documents in the main session or plan extra time to enter each breakout session and share the document there. The best way to do this depends on the number of participants and rooms. Like in conventional lecture settings, there should be enough time to change between the main session and the breakout sessions.
7 Tips for video and audio use

7.1 Tips for video use
7.1.1 Virtual background
7.1.2 Disable video

7.2 Tips for audio use
7.2.1 Built-in laptop microphone
7.2.2 External microphone
7.2.3 Push to Talk
7.2.4 Mute participants
7.2.5 Suppress background noise
7.1 Tips for video use

- Place your laptop or smartphone so that the camera is at or just below eye level. This creates a natural conversation atmosphere.

- Turn on all lights in the room and do not sit directly in front of a light source.
7.1.1 Virtual background

If you prefer an anonymous environment, you can create a virtual background.

To do so, click on the arrow next to the camera and select Choose Virtual Background.

For example, you can use the virtual background at the beginning of a session to display information on data privacy and conversation rules. Create an image file (JPG or PNG) in 16:9 format. An example:

Note: The effect works best when you place yourself against a neutral background, e.g. a white wall, and when the lighting in the room is good. Your outlines may appear pixelated. Ideally, use a green background and activate the green screen mode.
7.1.1 Virtual background

You can also blur your background to obscure details since version 5.5.0 (February 2021).
7.1.2 Disable video

To increase interaction in your meeting, ask the participants to enable video transmission. Start by activating your own video transmission.

You can deactivate the transmission of your video at any time by clicking on the video symbol in the menu bar.

You can also disable incoming videos of other participants, for example, if the Internet bandwidth is too low. However, this function is only available in the browser, not in the Client.

![Image of video control icons]
7.1.2 Disable video

If required, you can deactivate your own video. You can use this for example, if you record a presentation with Zoom and do not want to record your own video or do not want to be distracted by your own video. To do this, go to your video tile and click the blue dots in the right upper corner and click *Hide Self View*.

To reverse the action, click *Show Self View* in the top bar.
7.2 Tips for audio use – Built-in microphone

- You can use the built-in microphone of your laptop. However, we recommend that you use a headset.

- Make sure that the area around you is quiet, otherwise you will hear background noises in the meeting.

- When using a laptop, do not use the built-in keyboard or touchpad, since they are too close to the microphone and the participants will hear the noise.

- Instead, we recommend that you connect a USB keyboard and mouse.
7.2 Tips for audio use – External microphone

If you have a headset, you should use it as it can improve the sound quality considerably. We recommend, e.g.:

- Sennheiser PC 8 USB Headset
- Sharkoon Skiller SGH2 Stereo Gaming Headset

Common headphones with an integrated headset also deliver better sound quality than the built-in microphone of the laptop.

- Before you start a meeting, we recommend that you check the sound quality of the headset with Zoom: Settings ▶ Audio ▶ Check Microphone & Speaker Settings or Audio Menu ▶ Test Microphone & Speaker
7.2.3 Push to Talk

The Push to Talk feature mutes you by default, removing all background noises and echo problems. Activate the feature as follows:

1. In the lower left corner, click on the microphone until it is crossed out (muted).
2. Click on the triangle next to the microphone.
3. Select Audio Options from the pop-up menu.
4. In the dialog box that opens, check the option: Press and hold SPACE key to temporarily unmute yourself.
7.2.3 Push to Talk

You can also activate the Push to Talk feature in the settings.

When you want to talk during the meeting, press and hold the SPACE KEY.

You remain unmuted as long as you hold the space key.

Note: If you switch to another application during the meeting, you must bring the Zoom Client back to the front before pressing the space bar.
7.2.4 Mute participants

You can mute specific participants or all participants and unmute them at any time during the meeting.

*Manage Participants ➤ Mute All / Unmute:*  
*Manage Participants ➤ select participant ➤ Mute / Unmute:*

When muting all participants during the meeting, you can choose whether these are able to unmute themselves.

- Mute All
- Allow Participants to Unmute Themselves

Current and new participants will be muted

Yes  No
7.2.5 Suppress background noise

Since version 5.5.0 (February 2021), Zoom offers integrated background noise suppression. In the settings in the Client you can define the optimal level for noise suppression for your situation.

Suppress background noise  Learn more

- Auto
- Low  (faint background noises)
- Medium  (computer fan, pen taps)
- High  (typing, dog barks)
8 Share content

8.1 Share screen

8.2 Whiteboard

8.3 Screen view while sharing content
8.1 Share screen content

During a meeting, it can be useful to show content to all participants. To do so, select the *Share Screen* feature in the bottom menu bar.

You can share various contents, such as the meeting agenda, presentation slides, process visualizations or text templates.

Video tutorial: https://www.youtube.com/watch?v=QGQkAsKtriU&feature=youtu.be
8.1 Share screen content

You can choose several windows to share simultaneously. For this, you choose the first window and press Shift while choosing the second window. You can arrange the windows freely.

Go to Share Screen Menu ➤ Advanced Sharing Options to allow participants to share content and decide whether participants can share simultaneously or one at a time.

Note: The default settings for the participants are strongly limited. You can change some settings during the meeting or for all meetings in the settings in the browser.
8.1 Share screen content

Under *Advanced*, you can find more options to share your screen, e.g.

- Share only a part of your screen (e.g. if you have notes next to the content to be shared but do not want to share them)
- Play Computer Audio only
- Play a video from your computer (MP4, MOV)
- Share the feed from a second camera
**Attention:** When you share your screen, the menu bar moves to the top of the screen. However, you can move it, if required.

Stop sharing screen

Participants video view (can be moved – e.g. to a second screen - or minimized)
8.2 **Whiteboard**

You can also share a whiteboard, which allows you to develop new contents together with all participants and write them down.

*Share Screen ► Basic ► Whiteboard*
If you want to allow participants to share a whiteboard, change the settings accordingly, as this feature is disabled by default.

https://zoom.us/profile ► Settings ► In Meeting (Basics)

You can use the pencils to draw or write something on the whiteboard or on the shared screen.

*Press Ctrl+Z to undo.*

The content can be saved as a png file if needed.
8.2 Whiteboard

All participants can work together on the whiteboard, provided you allow this in the settings.

To work on the whiteboard, participants go to

View Options ➤ Annotate.

A whiteboard can be used as a collaborative tool.

**Attention:** For data security reasons, we strongly advise you not to note your student’s names on the whiteboards.
8.2 Whiteboard

The host can disable the Annotate feature in the settings:
https://zoom.us/profile ► Settings ► In Meeting (Basic) ► Annotation

Annotation
Allow participants to use annotation tools to add information to shared screens

but also in an individual meeting under Security or More:

[Diagram of Zoom settings menu]
8.2 Whiteboard

Participants can also create and save whiteboards in Breakout Rooms to share them with the entire group via Share Screen. The host has to activate Share Screen for all participants. This setting can be changed during the meeting in the Security menu.

The Annotate feature allows you, for example, to prepare a slide that all participants work on during the meeting.

**Note:** Participants may not be able to *annotate* using the Browser to participate in your meeting.

**Attention:** Please note that all participants can save the screen as a screenshot. We kindly ask you to handle this sensitively.
When sharing content in Zoom, the arrangement of the different elements changes:

- The shared content occupies a large part of the screen.

- The video images of your participants move to the right edge of the screen and are arranged vertically (max. four at the same time). You can move the videos and increase the field size to see more than four participants.

- The menu bar moves to the top of the screen. Eventually, some control elements can be found unter More.

- The chat window and the participants view are closed. You can re-open them in the menu bar and arrange them freely on the screen.
9 Recording

To record your video conference, please always select the option “Record on this Computer”.

Recording in the cloud is not recommended, as this does not mean permanent storage of your content. In addition, the recording would be saved by Zoom – TN would have to be informed about this (data protection).

Note: Activate Hosts can give participants the permission to record locally to make sure that participants cannot record the meeting with Zoom.

https://zoom.us/profile ▶ Settings ▶ Recording ▶ Local Recording
9 Recording

When you as the host record a Zoom meeting, the ongoing recording is indicated in three ways:

1. When the recording starts, the person who is recording sees this recording indicator in the upper left corner and receives an auditive information.

2. The other participants see a recording indicator in the upper left corner and are informed auditivey.

3. In the participants menu, a recording indicator appears next to the user who is actively recording the meeting.

**Note:** Only if the recording indicator is **visible** in the meeting, the conference is being recorded.

**Note:** For a better audio quality of your recording, you can let Zoom automatically suppress the noise.
9 Recording

After the meeting, the recording will be saved. You have three options to access the storage location:

- On your computer: *Documents ➤ Zoom*
- In the Client application: *Meetings ➤ recorded*
- Under *https://zoom.us/recording*

**Legal note:** Without prior approval of all persons concerned, it is generally prohibited to make video and audio recordings. Such behavior can constitute a criminal offense and/or a violation of the German Art Copyright Act (KunstUrhG). It is also inadmissible to make available to a third party a video recording without prior consent. A consent to image capture is not sufficient.

Therefore, we recommend that you reduce video recordings to an absolute minimum. If possible, please deactivate the recording function for all participants. If it is necessary to record the video and/or audio of a meeting, prior approval of the students is required, as is the corresponding proof of the approval.
9 Recording

You can also save the recording with HD quality.

**Note:** If your file is very large, the recording is compressed regardless of the activated HD quality. To conserve the quality, you can record your lecture using OBS or Camtasia (extra effort).
In general, the same discussion rules apply to online meetings as to face-to-face meetings. However, the host should prepare for new challenges caused by technical malfunctions, e.g. acoustic problems or delays due to unstable Internet connections.

10.1 Before the meeting

10.2 During a meeting

10.3 Alternative moderation and Co-hosts
10.1 Before the meeting

- Inform the participant that headset / microphone are required and send them the Zoom Guide for Participants, which can be found at:
  
  ![https://video.cls.rwth-aachen.de/gebrauchsanweisungen/](https://video.cls.rwth-aachen.de/gebrauchsanweisungen/)

- If necessary, send the agenda in advance by email.

- Plan a sufficient time buffer to solve technical problems.

- Go to Screen ► Sharing ► Options and check whether you can access the required documents and easily share your screen or whiteboard.
10.2 During a meeting

- When you ask the participants whether they can hear the speaker, it is helpful to also write this question in the chat. The *Thumbs up* feature is also helpful.

- Every participant can choose between Speaker View and Gallery View.

- You can mute individual participants or all participants.

- Individual introduction rounds in a meeting with more than 15 participants make only limited sense.
10.2 During a meeting

In the beginning, inform the participants of the Raise Hand feature, which can be used, e.g.,

- to create a speaker list,

- to draw attention to interposed questions without interrupting the speaker.

Use the *Thumbs up* icon to express approval.

For a (written) discussion after a meeting, we recommend that you change the arrangement of the individual windows and bring the chat to the front.

**Note:** We recommend that you set up precise rules for the use of the icons and features in advance and that you communicate these rules.
You can assign the host role to another participant (e.g., to a tutor):

Manage Participants ► select participant ► Make Host

You can also reclaim this role from the participant without their prior approval:

Manage Participants ► Reclaim Host

Furthermore, there are other options to let others persons assist you in your meetings. These are explained on the next pages.

Note: When changing the host, you as the lecturer give up all rights of the host (mute participants, security settings, polls, etc.).
10.3 Alternative Moderation and Co-Hosts

Zoom offers different options for others to assist you before and in your meetings: Alternative Moderators, assign schedule privileges and name Co-Hosts.

In general, you as an account owner can give another account owner the right to **plan meetings** for you. This can be your assistant, for example. The other account owner has to have an equivalent account to yours. You can find this setting in the browser only, not the Client:

https://zoom.us/profile ►
Settings ► Other

More information:
https://support.zoom.us/hc/en-us/articles/201362803
10.3 Alternative Moderation and Co-Hosts

When planning a specific meeting, you can set alternative moderators who are allowed to start meetings (by clicking the meeting link or inserting the meeting ID) and thus become host automatically. When the original host enters the meeting, the alternative moderator becomes Co-Host. This is useful to make sure that a meeting starts on time. Here, it is also necessary that the alternative moderator has an RWTH account at least equivalent to yours.

When planning a meeting (in Client or Browser) you can set this under Advanced Options:

More information:
https://support.zoom.us/hc/en-us/articles/208220166-Alternative-Host
10.3 Alternative Moderation and Co-Hosts

Contrary to Alternative Moderators, Co-Hosts can be named during the meeting for administrative tasks only. For instance, they can mute entering participants, manage breakout-sessions or release participants from the waiting room. Co-Hosts cannot start or close the meeting.

To name a Co-Host, you have to permit co-hosting in your settings:

https://zoom.us/profile ▶ Settings ▶ In Meeting (Basic)

Co-host
Allow the host to add co-hosts. Co-hosts have the same in-meeting controls as the host.

To name a Co-Host, move your mouse to the video image of the participant you want to name Co-Host, click the blue dots and choose Make Co-Host.
11 Settings

Settings before the meeting
Click here for scheduling a meeting

Settings during the meeting
Click here for the meeting window

11.1 Settings in the Client
Page 91

11.2 Settings in the browser
Page 92

11.3 Recommended settings
Page 93
11.1 Settings in the Client

To change the settings, click on the icon in the upper right corner of the start screen.
11.2 Advanced settings in the browser

To change the advanced settings, sign in to the browser or click on *More Settings* in the settings window of the Client.

*Note:* Familiarize yourself with the advanced settings, especially with the security features such as Waiting Room, Personal Meeting ID, etc.
# 11.3 Recommended Settings: Security

## Security

### Require that all meetings are secured with one security option
Require that all meetings are secured with one of the following security options: a passcode, Waiting Room, or "Only authenticated users can join meetings". If no security option is enabled, Zoom will secure all meetings with Waiting Room. Learn more

### Waiting Room
When participants join a meeting, place them in a waiting room and require the host to admit them individually. Enabling the waiting room automatically disables the setting for allowing participants to join before host.

### Waiting Room Options
The options you select here apply to meetings hosted by users who turned ‘Waiting Room’ on.

- Everyone will go in the waiting room

Edit Options  Customize Waiting Room

### Require a passcode when scheduling new meetings
A passcode will be generated when scheduling a meeting and participants require the passcode to join the meeting. The Personal Meeting ID (PMI) meetings are not included.

### Require a passcode for instant meetings
A random passcode will be generated when starting an instant meeting.

### Require a passcode for Personal Meeting ID (PMI)
- Only meetings with Join Before Host enabled
- All meetings using PMI

Passcode  634016

### Webinar Passcode
A passcode will be generated when scheduling a Webinar and participants require the passcode to join the Webinar.

### Require passcode for participants joining by phone
A numeric passcode will be required for participants joining by phone if your meeting has a passcode. For meeting with an alphanumeric passcode, a numeric version will be generated.
11.3 Recommended Settings: Security

Embed passcode in invite link for one-click join
Meeting passcode will be encrypted and included in the invite link to allow participants to join with just one click without having to enter the passcode.

Only authenticated users can join meetings
The participants need to authenticate prior to joining the meetings, hosts can choose one of the authentication methods when scheduling a meeting. Learn more

Meeting Authentication Options:
Bei Zoom anmelden (Default)  Edit  Hide in the Selection

Allow authentication exception

If Waiting Room is enabled, phone-only users will be placed in the Waiting Room.
If Waiting Room is not enabled, phone dial-in only users will:

- Be allowed to join the meeting
- Be blocked from joining the meeting

Only authenticated users can join meetings from Web client
The participants need to authenticate prior to joining meetings from web client

Approve or block entry for users from specific countries/regions
Determine whether users from specific regions or countries can join meetings/webinars on your account by adding them to your Approved List or Blocked List. Blocking regions may limit CRC, Dial-in, Call Me, and Invite by Phone options for participants joining from those regions.

Allow use of end-to-end encryption
Choose between enhanced encryption and end-to-end encryption when scheduling or starting a meeting. When using end-to-end encryption, several features (e.g. cloud recording, phone/SIP/H.323 dial-in) will be automatically disabled. Learn more
11.3 Recommended Settings: Schedule Meeting

<table>
<thead>
<tr>
<th>Setting</th>
<th>Description</th>
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</thead>
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<tr>
<td>Host video</td>
<td>Start meetings with host video on</td>
</tr>
<tr>
<td>Participants video</td>
<td>Start meetings with participant video on. Participants can change this during the meeting.</td>
</tr>
<tr>
<td>Audio Type</td>
<td>Determine how participants can join the audio portion of the meeting. When joining audio, you can let them choose to use their computer microphone/speaker or use a telephone. You can also limit them to just one of those audio types. If you have 3rd party audio enabled, you can require that all participants follow the instructions you provide for using non-Zoom audio.</td>
</tr>
<tr>
<td>Telephone and Computer Audio</td>
<td></td>
</tr>
<tr>
<td>Telephone</td>
<td></td>
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<tr>
<td>Computer Audio</td>
<td></td>
</tr>
<tr>
<td>Allow participants to join before host</td>
<td>Allow participants to join the meeting before the host arrives</td>
</tr>
<tr>
<td>Enable Personal Meeting ID</td>
<td>A Personal Meeting ID (PMI) is a 9 to 11 digit number that is assigned to your account. You can visit Personal Meeting Room to change your personal meeting settings. Learn more [i]</td>
</tr>
<tr>
<td>Use Personal Meeting ID (PMI) when scheduling a meeting</td>
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</tr>
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<td>Use Personal Meeting ID (PMI) when starting an instant meeting</td>
<td></td>
</tr>
<tr>
<td>Mute all participants when they join a meeting</td>
<td>Automatically mute all participants when they join the meeting. The host controls whether participants can unmute themselves.</td>
</tr>
<tr>
<td>Upcoming meeting reminder</td>
<td>Receive desktop notification for upcoming meetings. Reminder time can be configured in the Zoom Desktop Client.</td>
</tr>
</tbody>
</table>
11.3 Recommended Settings: In Meeting (Basic)

In Meeting (Basic)

Require encryption for 3rd party endpoints (SIP/H.323)
By default, Zoom requires encryption for all data transferred between the Zoom cloud, Zoom client, and Zoom Room. Turn on this setting to require encryption for 3rd party endpoints (SIP/H.323) as well.

Chat
Allow meeting participants to send a message visible to all participants
- Prevent participants from saving chat

Private chat
Allow meeting participants to send a private 1:1 message to another participant.

Auto saving chats
Automatically save all in-meeting chats so that hosts do not need to manually save the text of the chat after the meeting starts.

Sound notification when someone joins or leaves
Play sound for:
- Everyone
- Host and co-hosts only
When someone joins by phone:
- Ask to record their voice to use as the notification

File transfer
Hosts and participants can send files through the in-meeting chat.
- Only allow specified file types
- Maximum file size

Feedback to Zoom
Add a Feedback tab to the Windows Settings or Mac Preferences dialog, and also enable users to provide feedback to Zoom at the end of the meeting

Display end-of-meeting experience feedback survey
Display a thumbs up/down survey at the end of each meeting. If participants respond with thumbs down, they can provide additional information about what went wrong.
11.3 Recommended Settings: In Meeting (Basic)

Display end-of-meeting experience feedback survey
Display a thumbs up/down survey at the end of each meeting. If participants respond with thumbs down, they can provide additional information about what went wrong.

- Display for every meeting
- Display for meetings randomly

Co-host
Allow the host to add co-hosts. Co-hosts have the same in-meeting controls as the host.

Meeting Polls
Allow host to use ‘Polls’ in meetings. Hosts can add polls before or during a meeting.

Webinar Polls
Allow host to use ‘Polls’ in webinars. Hosts can add polls before or during a webinar.

Webinar Survey
Allow host to present surveys to attendees once a webinar has ended

Always show meeting control toolbar
Always show meeting controls during a meeting

Show Zoom windows during screen share

Screen sharing
Allow host and participants to share their screen or content during meetings

Who can share?
- Host Only
- All Participants

Who can start sharing when someone else is sharing?
- Host Only
- All Participants

Disable desktop screen sharing for meetings you host
When this option is on, users can only share selected applications and files.
11.3 Recommended Settings: In Meeting (Basic)

Annotation
Allow host and participants to use annotation tools to add information to shared screens.
- Allow saving of shared screens with annotations
- Only the user who is sharing can annotate

Whiteboard
Allow host and participants to share whiteboard during a meeting.
- Allow saving of whiteboard content
- Auto save whiteboard content when sharing is stopped

Remote control
During screen sharing, the person who is sharing can allow others to control the shared content.
- Allow remote controlling user to share clipboard

Non-verbal feedback
Allow meeting participants to communicate without interrupting by clicking on icons (yes, no, slow down, speed up). These icons are found in the Reactions menu in the toolbar, and when selected, they display on the participant's video and in the participants list until dismissed.

Meeting reactions
Allow meeting participants to communicate without interrupting by reaction with emojis (e.g., clap, heart, laugh). These emojis are found in the Reactions menu in the toolbar, and when selected, they display on the participant’s video and in the participants list for 10 seconds. Participants can change their emoji skin tone in Settings.

Allow removed participants to rejoin
Allow previously removed meeting participants and webinar panelists to rejoin.

Allow participants to rename themselves
Allow meeting participants and webinar panelists to rename themselves.

Hide participant profile pictures in a meeting
All participant profile pictures will be hidden and only the names of participants will be displayed on the video screen. Participants will not be able to update their profile pictures in the meeting.
11.3 Recommended Settings: In Meeting (advanced)

In Meeting (Advanced)

Report to Zoom
Allow users to report meeting participants for inappropriate behavior to Zoom’s Trust and Safety team for review. This setting can be found on the meeting information panel.

Q&A in webinar
Allow attendees to ask questions for the host and panelists to answer

Breakout room
Allow host to split meeting participants into separate, smaller rooms

- Allow host to assign participants to breakout rooms when scheduling

Remote support
Allow meeting host to provide 1:1 remote support to another participant

Closed captioning
Allow host to type closed captions or assign a participant/third party device to add closed captions

Save Captions
Allow participants to save fully closed captions or transcripts

Language Interpretation
Allow host to assign participants as interpreters who can interpret one language into another in real-time. Host can assign interpreters when scheduling or during the meeting.

For end camera control
Allow another user to take control of your camera during a meeting. Both users (the one requesting control and the one giving control) must have this option turned on.

Group HD video
Activate higher quality video for host and participants. (This will use more bandwidth.)

- Standard HD (720P)
- Full HD (1080P)
11.3 Recommended Settings: In Meeting (advanced)

Virtual background
Customize your background to keep your environment private from others in a meeting. This can be used with or without a green screen.

- Allow use of videos for virtual backgrounds

Manage virtual background

Video filters
Turn this option on to allow users to apply filters to their videos

Identify guest participants in the meeting/webinar
Participants who belong to your account can see that a guest (someone who does not belong to your account) is participating in the meeting/webinar. The Participants list indicates which attendees are guests. The guests themselves do not see that they are listed as guests.

Auto-answer group in chat
Allow user to add others to an 'Auto Answer Group'. Calls from members of a user's 'Auto Answer Group' will be automatically answered for that user.

Only show default email when sending email invites
Allow users to invite participants by email only by using the default email program selected on their computer.

Use HTML format email for Outlook plugin
Use HTML formatting instead of plain text for meeting invitations scheduled with the Outlook plugin.

Allow users to select stereo audio in their client settings
Allow users to select stereo audio during a meeting.

Show a "Join from your browser" link
Allow participants to bypass the Zoom application download process, and join a meeting directly from their browser. This is a workaround for participants who are unable to download, install, or run applications. Note that the meeting experience from the browser is limited.
11.3 Recommended Settings: In Meeting (advanced)

Show "Always Join from Browser" option when joining from join.zoom.us
Allow account members to enable "Always Join from Browser" when they join meetings from join.zoom.us.

Allow livestreaming of meetings
- Facebook
- Workplace by Facebook
- YouTube
- Custom Live Streaming Service

Allow livestreaming of webinars
- Facebook
- Workplace by Facebook
- YouTube
- Custom Live Streaming Service

When the webinar has reached capacity
- Remind users to watch the live stream (doesn't apply to custom RTMP)

Show a custom disclaimer when starting or joining a meeting
Create your own disclaimer that will be shown at the start of all meetings hosted by your account

Request permission to unmute
Select this option in the scheduler to request permission to unmute meeting participants and webinar panelists. Permissions, once given, will apply in all meetings scheduled by the same person.
RWTH takes the legal mandate to protect data seriously. Fulfilling this mandate, however, will not be possible without the help of our employees and students. This document is not part of the corresponding information requirements referring to article 13 et seq. of the General Data Protection Regulation. It only illustrates the use of the tool.

As part of the consent, every user must give a separate information and declaration for the processing of data before the actual use of the tool. The declarations for lecturers and students can be found at:

[https://video.cls.rwth-aachen.de](https://video.cls.rwth-aachen.de) ➤ How to

**Legal note:** While using Zoom, data will be transferred to the USA. We **cannot assume any responsibility** for the confidential handling of your personal data that is used for external services, as we have no influence on whether the companies comply with the data protection regulations or not. For further information about the handling of your personal data by these companies, please visit these websites. In general, personal data is protected by the US - EU Privacy Shield of July 12, 2016, which is intended to guarantee a level of data protection that corresponds to the level of data protection within the EU.
12 Legal notes

Data privacy policies for lecturers and students and further information regarding legal aspects:

🔗 https://video.cls.rwth-aachen.de/gebrauchsanweisungen/#rechtliche-hinweise

Zoom statement regarding the GDPR:

🔗 https://zoom.us/privacy

Legal note: Please note that sharing objectionable or possibly illegal content is simply unacceptable, even if they are shared by your regular meeting participants.

Please report such misuses to the CLS and, if necessary, to the Legal Department, so that legal steps can be checked. Especially at the beginning of a new teaching format, it is necessary that the legality is preserved so as not to discredit the entire project.
The RWTH has a clear position on student rights in the context of the invitation to web conferences and webinars:

1. Participation in a Zoom lecture is voluntary. If a student refuses to use Zoom, they may not be able to attend the lecture and an evaluation of their achievements in the lecture subjects may be impossible. In this case, the student has to attend the lecture at a later time.

2. In general, students cannot be obliged to indicate their real names in all lectures.

3. In general, students cannot be obliged to indicate their real email address in all lectures.

4. In general, students cannot be obliged to create a Zoom account in all lectures.

5. In all lectures that require class attendance, lecturers can oblige students to activate their video transmission or to use their own avatar picture either during the attendance check at the beginning of the lecture, randomly or constantly during the lecture.

In examination settings, other rules apply. Please check the examination guides on our website for more information.
Legal notes

Legal note I: You have to clearly communicate that attendance is voluntary, as pointed out in (1), and which consequences may result from not attending the lecture. We propose the following standard wording, which you are welcome to use for emails or Moodle communications, etc.:

“Participation in this Zoom lecture is purely voluntary. If you refuse to use Zoom, you will not be able to attend the lecture and an evaluation of your achievements in the lecture subjects may be impossible.”

Legal note II: Despite the anonymization pointed out in (2) to (4), there is no legally free space online. If students abuse anonymity for criminal offenses, it is possible to ask for information about the user data.

In the further course, criminal and civil law consequences can arise in the case of insults, such as compensation payments. The university is also entitled to impose sanctions, such as exclusion.

For example, in a proceeding, the Green politician Renate Künast asked for information about the user data of those users of Facebook who had previously insulted her on this platform.
13 Further information and help

If you want further information and watch video tutorials from Zoom, please click on the following links:

- https://support.zoom.us/hc/en-us
- https://zoom.us/resources
- https://support.zoom.us/hc/en-us/articles/206618765-Zoom-Video-Tutorials
- https://www.youtube.com/playlist?list=PLKpRxBfeD1kEM_I1lId3N_XI77fKDzSXe

or read the written instructions:

- https://support.zoom.us/hc/en-us/categories/201137166
13 Further information and help

For information, instructions and news around our services, please visit our homepage:

https://video.cls.rwth-aachen.de/

If you have any problems, please contact our helpdesk:

video@cls.rwth-aachen.de

Please note our separate guides to

- Conducting webinars using Zoom,
- Conducting and participating in exams via Zoom, and
- Participating in web conferences and meetings with Zoom.

You can find these guides under https://video.cls.rwth-aachen.de/gebrauchsanweisungen.
Part II: Detailed information on using Zoom
## Table of contents – Part II – detailed information

1. Random or Personal Meeting ID
   - Seite 110 [Klicken Sie hier](#)
2. Create a meeting template
   - Seite 112 [Klicken Sie hier](#)
3. Organize meetings through Outlook
   - Seite 114 [Klicken Sie hier](#)
4. Invite students using Moodle
   - Seite 115 [Klicken Sie hier](#)
5. Create and conduct polls
   - Seite 117 [Klicken Sie hier](#)
6. Interact within small groups: pre-assign groups
   - Seite 123 [Klicken Sie hier](#)
7. Control screen
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8. Share second camera
   - Seite 130 [Klicken Sie hier](#)
Every Zoom meeting has a unique Meeting ID. This is the access number that allows other persons to find your meeting.

There are two types of Meeting IDs:

1. **Automatically generated random Meeting ID** - this is the standard setting for meetings.

2. **Personal Meeting ID (PMI)**

The PMI is a permanent virtual conference room with a randomly assigned Meeting ID that you can change manually.
Attention: The automatically generated Meeting IDs are more secure regarding data privacy. If you want to use a PMI nevertheless, please do not use it for consecutive meetings or for large groups. Persons who know your PMI can join your personal meeting at any time (entering other meetings with the same ID). Unless you

- lock the meeting or
- use the Waiting Room feature to admit participants one by one.
II.2 Create a meeting template

If some of your meetings have similar framework conditions, such as short workshops or consultations, but you do not want to schedule recurring meetings, meeting templates might be useful. Examples are short workshops or oral consultation hours.

After scheduling a meeting, you can save the settings in your browser as a meeting template (up to 40 templates):

Schedule a Meeting ► (enter data) ► Save ► (on the bottom) Save as a Meeting Template

Note: This function only works via the Browser and not in the Client.
II.2  Create a meeting template

For example, you can use Polls repeatedly at the start and end of a web conference, like a start end ritual.

In the browser under Meetings on the left-hand side you find your meeting templates.
1. Download the Zoom Plugin for Microsoft Outlook

   [https://zoom.us/download](https://zoom.us/download)

2. Open your Outlook calendar and your Zoom account.

3. In Outlook, click *Schedule Meeting* or *Start Instant Meeting* and change the settings as required. The Zoom details are added automatically to the email text.

4. Then, add participants and send out the invitation.

In addition to the Outlook calendar, you can also use other calendars to schedule a meeting. After planning the meeting, the meeting appears in your calendar.
II.4 Participating through phone

When a participant does not have a stable internet connection, he/she can participate using his/her phone. You can allow this when planning a meeting:

*Computer Audio* means that participants participate via internet as described in this guide. *Telephone* allows participation through phone.

Participants dial in with a phone number. You have to specify from which countries participants can dial in.

**Note:** You can specify these countries permanently under [https://zoom.us](https://zoom.us) ▶ Settings ▶ Telephone. The setting is permanent only if the country is the standard setting of your computer.
II.4 Invite students using Moodle

1. Schedule a meeting in Zoom. Please note that it is possible to create recurring meetings.

2. Open the learning platform Moodle.

3. On the platform, write an email to your students from the corresponding mailing list. Copy the URL (Manage Participants ➤ Invite) of the recurring meeting and include it in the email.

4. Please also attach or upload the Zoom Guide for Students that can be found at https://www.video.cls.rwth-aachen.de so that your students can familiarize with the tool in advance.
II.5 Create and conduct polls

If you want to create a poll, you have to schedule or edit the meeting in the browser, as this is not possible in the Client.

You find the button for creating a poll at the bottom of the meeting scheduling page. You can create several polls that will be conducted during the meeting, e.g., in the beginning and at the end of a meeting.

**Note:** Check the *Anonymous?* box to make the poll anonymous.
II.5 Create and conduct polls

Polling reports can be exported as an Excel file. Polling results of non-anonymous polls contain the participants’ names. During the meeting, the results are not linked to names. The host can view the names afterwards only.

1. Click *Polls* to conduct the poll in your meeting. Depending on the window size and the number of open tools (such as chat window), you may find this button under *More*. 
II.5 Create and conduct polls

Then select the poll that you want to start.
II.5 Create and conduct polls

The participants will see the poll and can participate. The participants have to save their answers. After saving their answers, they can no longer access the poll window.

The host can end the poll and share the results.

If required, the host can reopen the poll and conduct it again.

Instructions for polls and reports:

[https://support.zoom.us/.../213756303-Umfragen-für-Meetings](https://support.zoom.us/.../213756303-Umfragen-für-Meetings)
II.5 Create and conduct polls

From the participants’ perspective:

1. How are you today?
   - best day ever!
   - awesome
   - fine
   - could be better
   - worst day ever!

---

1. How are you today?
   - best day ever! 100%
   - awesome 0%
   - fine 0%
   - could be better 0%
   - worst day ever! 0%
II.5 Create and conduct polls

When you save a meeting as a meeting template, the polls are saved as well and there is no need to create new polls. However, you can modify the polls as required, even during an ongoing meeting. Please note that the settings can only be edited in the browser.

Guide to polls and reports: https://support.zoom.us/hc/en-us/articles/213756303-Umfragen-f%C3%BCr-Meetings

Video-Tutorial: https://success.zoom.us/rec/play/tZR_I-Cqp2k3TNyc4gSDCqN5W43pJ6qs0Scc_PAFmkzkVCRRY1KiZLQbYuJrsD34HsdqEnphg4ul-N-s?autoplay=true&startTime=1583970215000
II.6 Interact within small groups: Pre-assign groups

You can prepare the assignment of your participants into breakout rooms in advance. **To do this, every participant has to have a zoom account and use it for the meeting.**

To pre-assign breakout rooms, you have to plan or edit the meeting using the browser.

[https://zoom.us/meeting](https://zoom.us/meeting)

► Schedule a new Meeting

Insert your dates and scroll down to Meeting Options ► Breakout room pre-assign
II.6 Interact within small groups: Pre-assign groups

There, you can assign the rooms manually.

Assign participants to breakout rooms by adding their email. You can create up to 50 breakout rooms and assign up to a total of 200 participants.

<table>
<thead>
<tr>
<th>Rooms</th>
<th>+</th>
</tr>
</thead>
<tbody>
<tr>
<td>Red Room</td>
<td>1</td>
</tr>
</tbody>
</table>

Red Room

Add participants

xxx@gmail.com

Import from CSV

Cancel  Save
II.6 Interact within small groups: Pre-assign groups

Alternatively, the pre-assignment can be uploaded with a csv file. Click *Import from CSV* and download the template.

Import Rooms and Participants from CSV file

1. **Drag & Drop your CSV file**
   - CSV format requirements: Breakout room name, email. Click to [download](#) the template.

   Tips: You can create up to 50 breakout rooms and assign up to a total of 200 participants.
II.6 Interact within small groups: Pre-assign groups

Open the file in Excel and insert room names and participants exactly as in the template:

- Leave the first line as it is
- Do not insert spaces

Save the file as „Comma Separated Values (.csv)“ or „csv (Comma delimited)“. The file shall not be saved as §CSV UTF-8 (comma-delimited) (.csv)“. 

Then you can upload the file for preparation of breakout rooms.

More information under https://support.zoom.us/hc/en-us/articles/360032752671-Pre-assigning-participants-to-breakout-rooms
II.6 Interact within small groups: Pre-assign groups

After starting the meeting you find the prepared breakout rooms under *Breakout Session*.

If you activated *Enable Join before Host*, participants that enter the meeting before you as the host, are assigned automatically to the pre-assigned breakout room. Participants entering the meeting after you, may not be assigned straight-away. In this case, go to *Recreate ➤ Recover to pre-assigned room*. 
When sharing screen content, you can enable other participants to control your mouse and keyboard. You find this option after sharing your screen in the menu bar under *Remote Control*.

In the menu bar, you see the *Remote Control*. There, you can end it.

You will still be able to use mouse and keyboard, so you should communicate who uses mouse and keyboard at a time.
II.7 Control screen

Under *options*, participants can *request the remote control*, as well.

Your view:

**ABC is requesting remote control of your screen**

You can regain control at any time by clicking on your screen.

Participant view:

You are about to request remote control of ABC's shared content.
Select **Request** and wait for ABC's approval.
Select **Cancel** if you don't want to send a request.
If you have two cameras, you can share camera input from a camera that is not your webcam.

You can use this feature, for example, to stream a math exercise if you prefer to work with paper and pen or if you don’t have a tablet. To do so, connect the second camera to your PC via USB.

*Share Screen ➤ Advanced ➤ Content from 2nd Camera*
Alternatively, you can start sharing a second camera during an ongoing share. To do so, go to Video Settings ▶ Video Camera and select another device from the drop-down menu.
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