Digital Video Conference Platforms for KITE Researchers

Instructions Manual

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The Kite Research Institute ⟲ UHN

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Overview

Pros and Cons of each platform

Below are a few pros and cons of using Microsoft Teams, Skype for Business, GoToMeeting, and Zoom.

Microsoft Teams

Pros	Cons
• UHN Approved • Centralized digital workspace with features like chats, meetings, calls, files, and tools in one location • Can bring together your team, enabling collaboration in real-time all within one hub that reduces switching between apps and tools • Integrates with other applications in the Office 365 stack for use by TeamUHN such as: Outlook, OneNote, SharePoint, Excel, Word, PowerPoint, etc. • Has a mature support model with dedicated UHN technical support teams equipped to ensure users have a great experience	• Not intended for communication with patients • PHI transmitted or shared via MS Teams is not part of the patient record, this information can and may be deleted ***If you have questions on how to integrate MS Teams with your research study, please contact Vera Zivanovic (Vera.Zivanovic@uhn.ca) for more information.*** • Currently there is no charge associated with using MS Teams, in the near future UHN Digital will communicate the associated costs for the service. No date has been provided at the time of issuing this guide. The costs will only be limited to licensing costs that Microsoft have listed and will not include support costs from UHN Digital ***Please note that no charges will be introduced during the pandemic.*** • can only view 4 video participants at a time during video conferencing

Skype for Business

Pros	Cons
• UHN Approved • Collaboration tool where you can chat, videoconference, share your screen and more • Has dedicated UHN technical support teams equipped to ensure users have a great experience	• You will not be able to send files through Skype for Business. This function has been disabled for all UHN users. • In alignment with the broader communication strategy, UHN plans to decommission Skype for Business in the near future and provide support only to MS Team. No date has been provided at the time of issuing this guide. • High CPU usage for more than 6 or 7 participants

GoToMeeting

Pros	Cons
• Two accounts owned by the Kite Research Institute • Collaboration tool where you can chat, videoconference, share your screen	• Institute shared accounts - Have to check the shared calendar to see if the account is being used prior to booking your meeting • Must book a training session to be able to use the institute owned accounts ***Please contact Janitha Shanmugarajan (Janitha.Shanmugarajan@uhn.ca) for more information on the GoToMeeting training sessions.*** • No dedicated UHN technical support team • Not a UHN approved platform

Zoom

Pros	Cons
• Collaboration tool where you can chat, videoconference, share your screen • Has a free version with 40 minutes allowed per meeting	• Not a UHN approved platform • No dedicated UHN technical support team • Recent security issues (Zoom bombing, unauthorized data sharing etc.) • Will need to purchase a Zoom account if you wish to have meetings longer than 40 minutes • High CPU usage

General Tips for using digital audio/video conference tools

1) Test your audio and video feeds prior to the meeting. Especially if you have changed equipment since the last time you have participated in the meeting.

2) Make sure to have a stable internet connection. If you have a slow connection, you will experience visual disruptions and inconsistencies with the audio. If you know that your internet access is unstable or poor, phoning into the meeting would be a better option. Please note that if you do phone in, you will not be able to view any screen sharing.

3) If the audio/video performance is poor or stalling, try turning off your video feed if possible.

4) Headsets with boom microphones generally provide better quality audio than laptop built-in mics, but built-in mics can be adequate. Note that headsets which use a USB audio connection to the PC generally provide cleaner audio. You can also call into the meeting as well for better audio quality.

5) Use the mute feature to reduce general background noise when you are not actively speaking.

6) When sharing your screen, be mindful of what is on your screen. This is to avoid sharing any personal information such as website tabs that are not relevant to the discussion.

Integrating your Research Study with a Digital Platform

If you have questions on how to integrate your research study with a UHN Approved Digital Platform, please contact Vera Zivanovic (Vera.Zivanovic@uhn.ca) for more information.

Microsoft Teams (UHN Approved Platform)

Adapted from UHN Digital's "MS Teams – Fact Sheet" and "UHN Digital Tip Sheet Getting Started MS Teams"

What is Microsoft (MS) Teams?

MS Teams is a centralized digital workspace with features like chats, meetings, calls, files, and tools in one location. You can bring together your full care team, enabling clinicians to collaborate in real-time around their specific patient needs – all within one hub that reduces switching between apps and tools.

Why should I use this application instead of other tools?

MS Teams is a secure platform that can be used for collaboration purposes. This tool is also well integrated with the broader communication and collaboration strategy we have in place and integrates with other applications in the Office 365 stack for use by TeamUHN such as: Outlook, OneNote, SharePoint, Excel, Word, PowerPoint, etc.

MS Teams has a mature support model with dedicated technical support teams equipped to ensure users have a great experience while other tools like Zoom do not have UHN staff supporting it.

==In alignment with the broader communication strategy, UHN plans to decommission Skype for Business in the near future and provide support only to MS Teams. At the time of issuing this guide, there has been no approximate date announced.==

Privacy and Security: What are the privacy and security considerations with MS Teams?

MS Teams can be used for inter-colleague communication but it is **not intended for communication with patients**. While communicating with peers we understand that some PHI may be shared. In this case, please read the important note below for further clarification.

Important note: PHI transmitted or shared via MS Teams is not part of the patient record, this information can and may be deleted. When PHI is involved, please ensure the recording functionality available within MS Team is switched off.

If you have questions on how to integrate MS Teams with your research study, please contact Vera Zivanovic (Vera.Zivanovic@uhn.ca) for more information.

Chargeback Model: Is MS Teams a free service offering?

Currently there is no charge associated with using MS Teams, in the near future, UHN Digital will communicate the associated costs for the service. The costs will only be limited to licensing costs that Microsoft has listed and will not include support costs from UHN Digital. **At the time of issuing this guide, there has been no date announced on when this will be implemented or what the associated costs will be.**

Please note that no charges will be introduced during the pandemic.

How to Access MS Teams

MS Teams is available via 3 different options:

Option 1 and 2: Web browser or downloading the Teams desktop app

Tip: *For the quickest setup and best functionality it is recommended to use the web-based browser – many UHN devices do not meet the minimum requirements for the desktop version of Teams.*
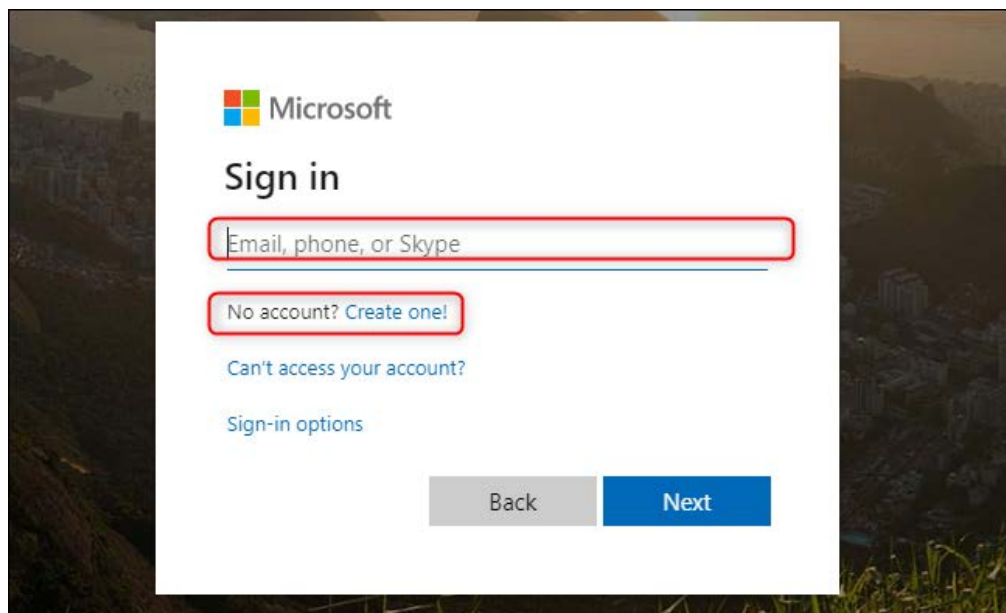
The Microsoft Teams app works in the following desktop browsers:

- Internet Explorer 11
- Microsoft Edge*
- The latest version of Chrome*
- The latest version of Firefox

*For the best experience using MS Teams, use the Chrome or Edge browser.

1) Log onto the web browser: https://teams.microsoft.com/ and sign in to your work email (lastname.firstname@torontorehab.on.ca / Firstname.lastname@uhn.ca).

Note: you may need to try using a different internet browser, if your current browser does not support this platform

You will be redirected to the UHN login page:

2) Once you have signed into your Microsoft account, select **Get The Windows App** to download and install the app on your macOS device or Windows.

Note: You would need admin privileges to install the app locally on an iDAPT device. If you wish to have this app installed locally, on your iDAPT device, please contact the iDAPT Helpdesk.

If you want to access Teams through your browser without downloading the app, click **Use the web app instead**.
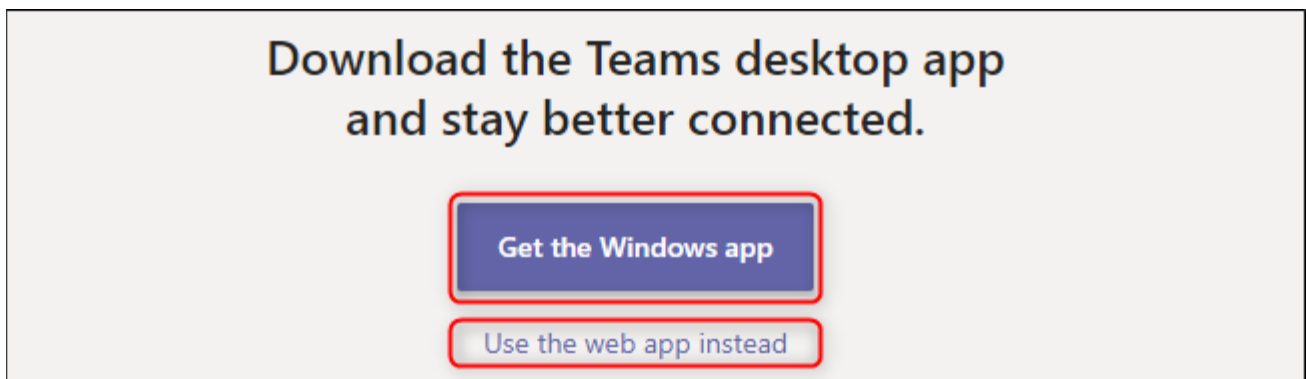
3) When the Teams app is first installed on your device, you may need to sign in again. Click **Sign Up for Teams** to begin setting up your organization.
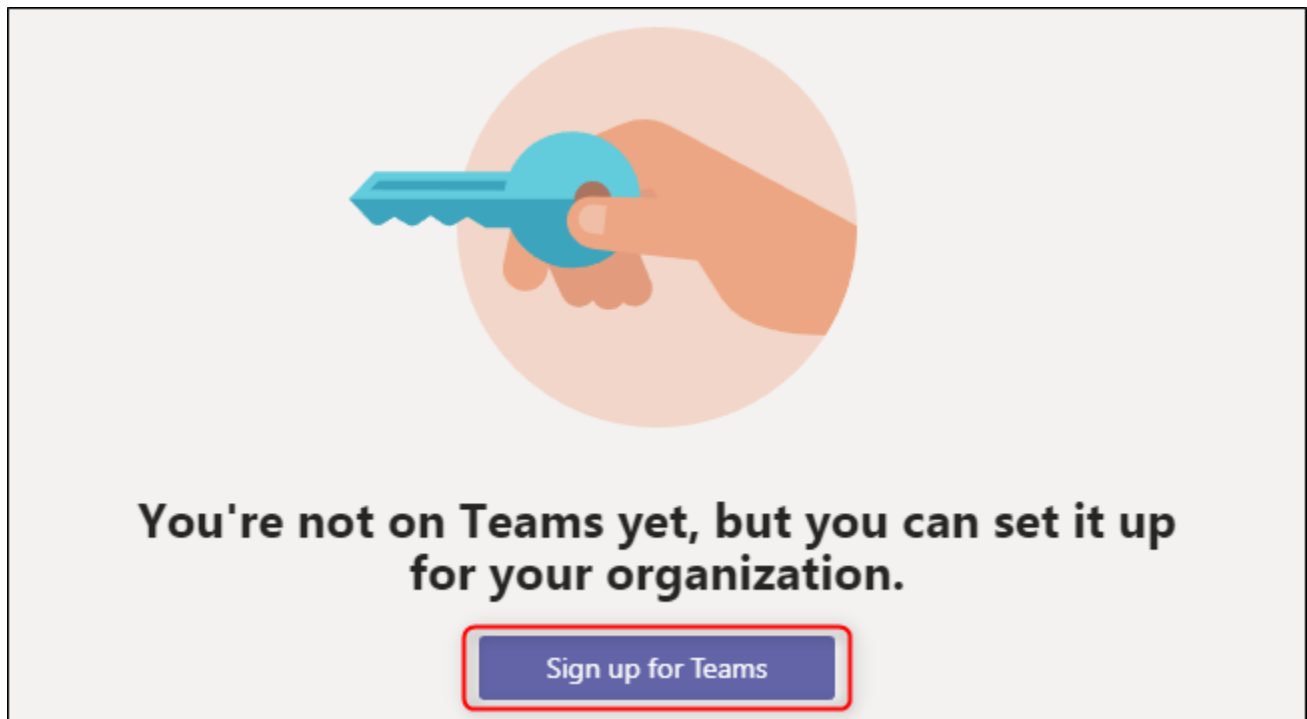

A new web page will open where you can read through a full list of features and compare pricing plans (at the time of issuing this guide, MS Teams is free of cost). Please refer to the **Chargeback Model: Is MS Teams a free service offering?** section for more information.

4) Click on **Sign up for free** and log in using your UHN email and password- (lastname.firstname@torontorehab.on.ca / Firstname.lastname@uhn.ca)
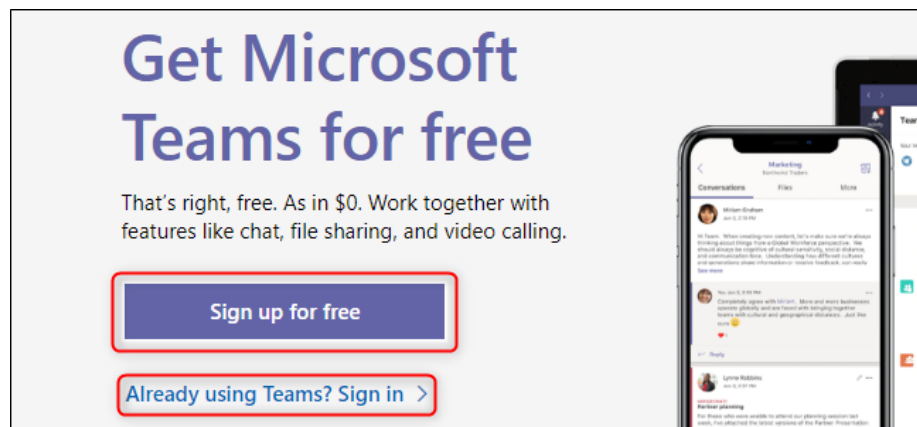
Our organization already exists with Teams so the chat screen should appear after logging in.
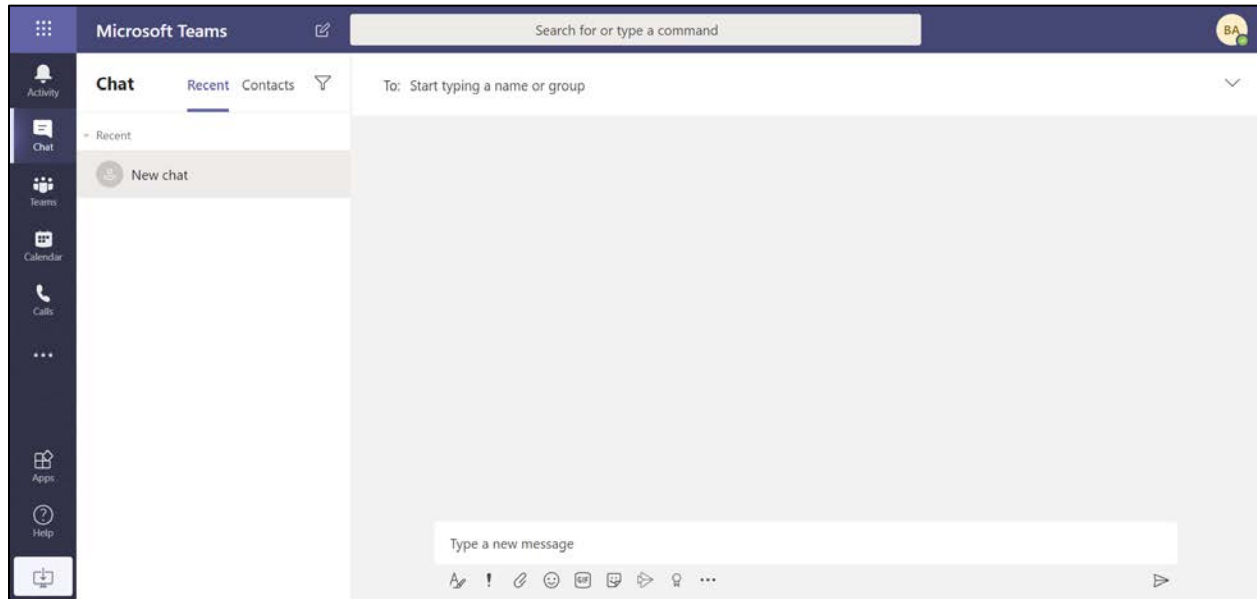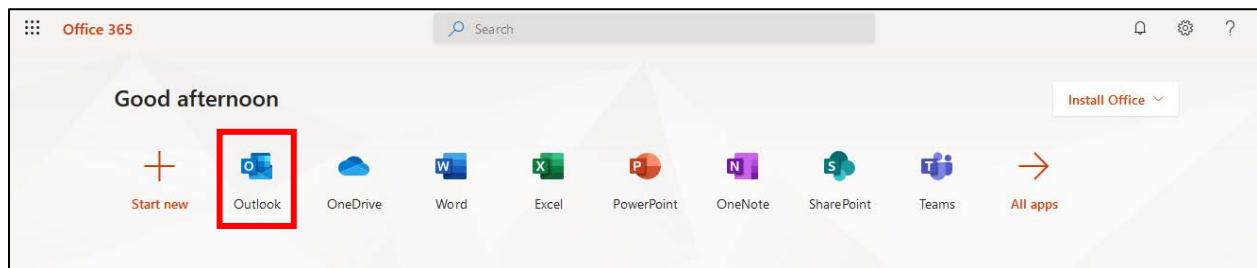

NOTE: If **Option 1 and 2: Web browser or downloading the Teams desktop app** does not work, please refer to **Option 3: Using your Outlook Calendar (via Outlook Web App) to schedule a MS Teams Meeting** which will explain how to schedule a MS Teams meeting through your Outlook Calendar.

Option 3: Using your Outlook Calendar (via Outlook Web App) to schedule a MS Teams Meeting
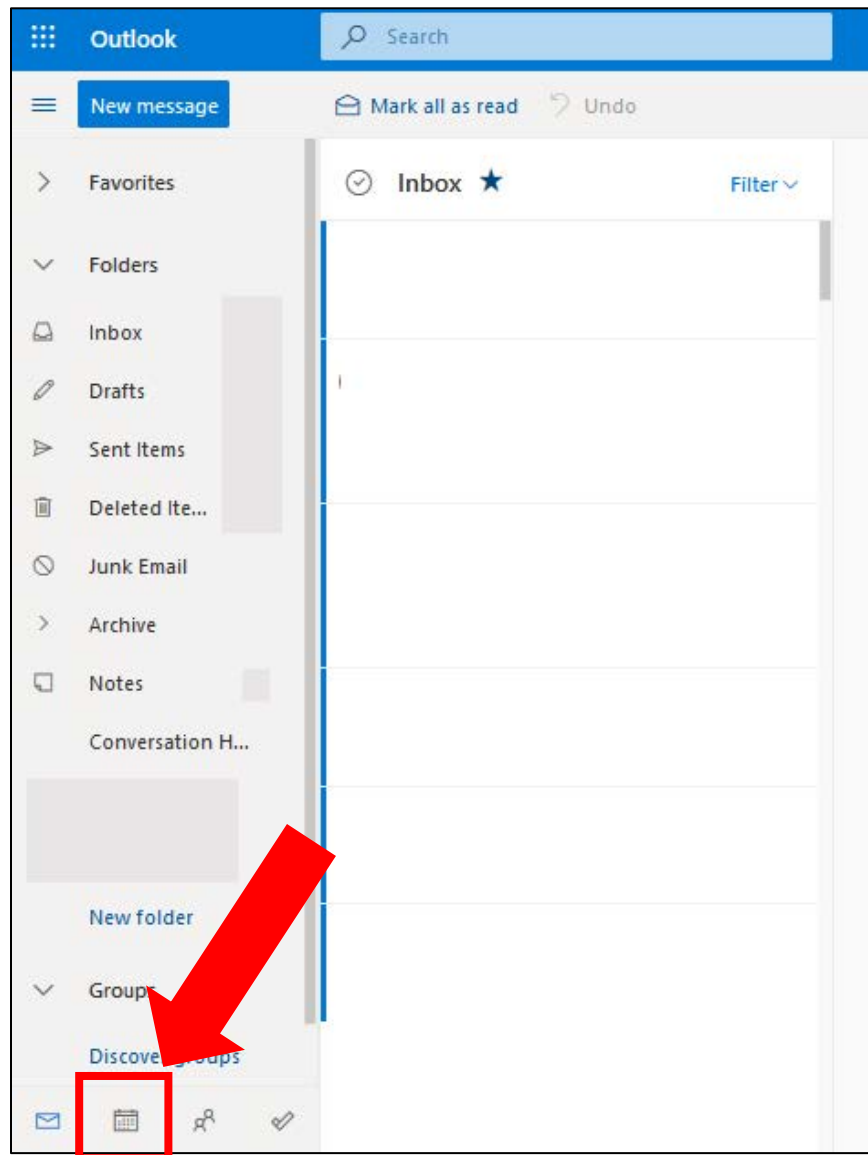
1) Go to your Outlook Web App (https://portal.office.com/) and sign in with your organizational account.
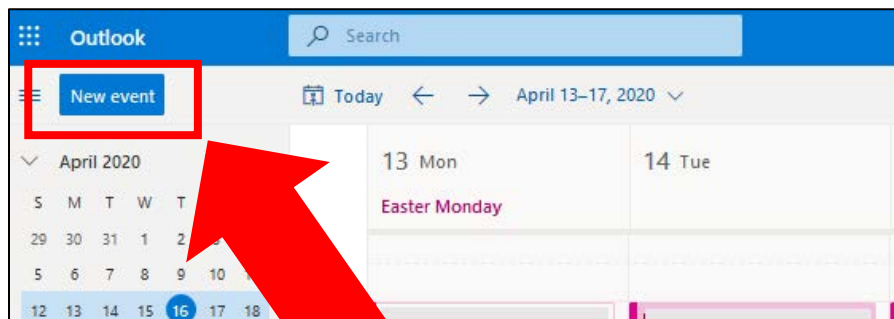

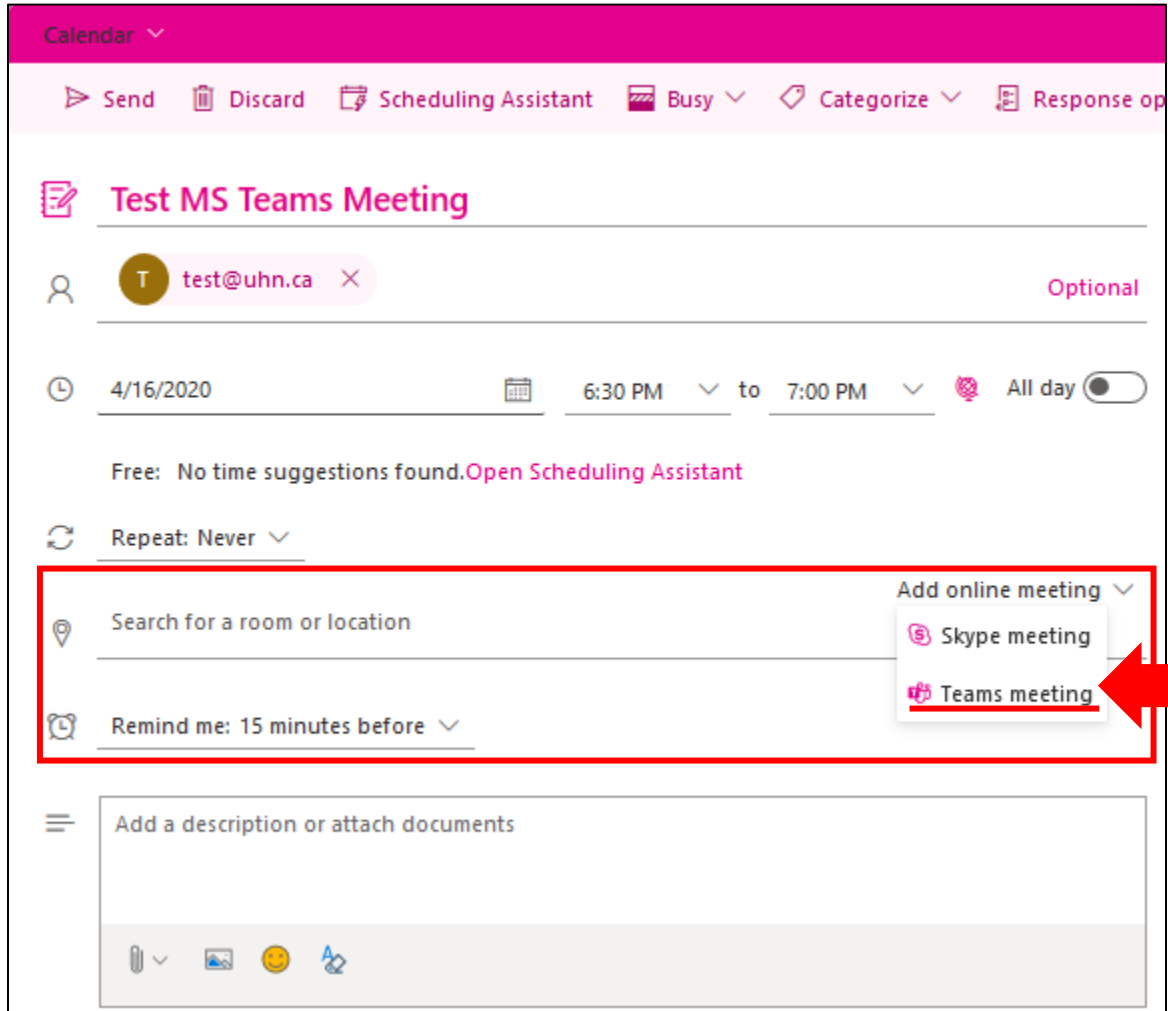2) Click on the icon to open Outlook. This will automatically sign you into your Outlook account.

3) Click on your **Outlook Calendar** (located on the bottom left corner of the screen).

4) Once in your Outlook Calendar, proceed to scheduling a new meeting by clicking **New Event** in the top left corner of your screen.

5) Enter the title, invitees and time for your meeting. When you get to the **Meeting Location** section of your calendar invitation, you will see an **"Add online meeting" dropdown**. Click this dropdown and select **Teams meeting**.

6) At the top of the meeting window, click **Send**.

7) A MS Teams meeting link will appear in your invitation. This allows attendees to join a group Teams conversation by clicking **Join Microsoft Teams Meeting**. If you have audio conferencing capabilities, call-in details will appear in your meeting invitation.
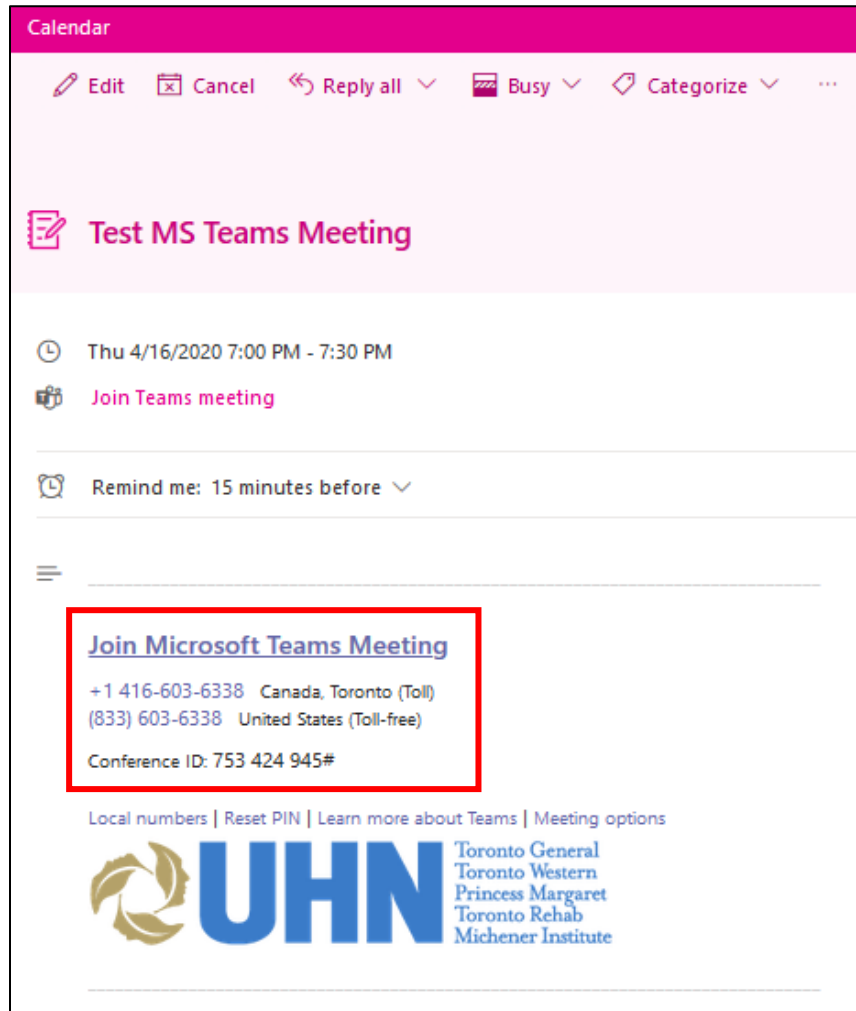
8) To start your MS Teams meeting, click **Join Microsoft Teams Meeting** in the meeting invitation. If a call-in number is listed in the meeting invitation, you can also call into the meeting. You will be prompted to enter your Conference ID number.

Using the MS Teams Platform (Web Application or Desktop)

Chat (with UHN staff and non-UHN staff)

MS Teams Meetings can be attended by non-UHN staff without limitation; however, the only requirement is that the meeting must be organized (created) by a TeamUHN member. When guests join the meeting, a message will pop up in the meeting window, and someone from UHN must "admit" the guest's entry into the meeting.

Peer to Peer

1) To begin a conversation with anyone within UHN, select the ***New chat*** icon at the top of the page.
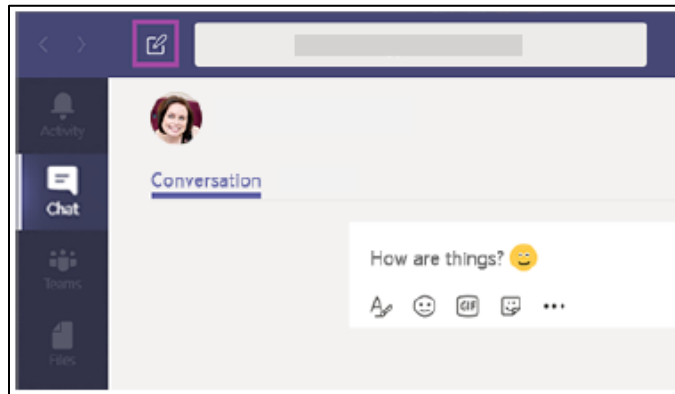
2) Once you've selected **New chat** and entered the person's name, compose your message in the box at the bottom of the chat. To open your formatting options, select **Format** beneath the box where you type your message.


3) When you're ready, select **Send**. This starts the chat.

4) You can also start a one-on-one chat from someone's profile card. Open it by clicking their picture in a channel or from a search.

Add people into an existing conversation

1) To loop more people into the conversation, click **Add people** (or **View and add participants** in group chat) in the top right corner of Teams.

2) Type the names of the people you'd like to chat with, select how much of the chat history to include, and click **Add**.
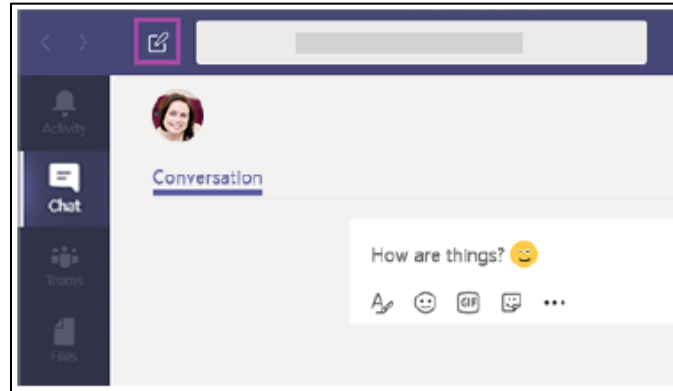
   Note: When adding someone to a group chat (not a one-on-one), you can include the chat history.
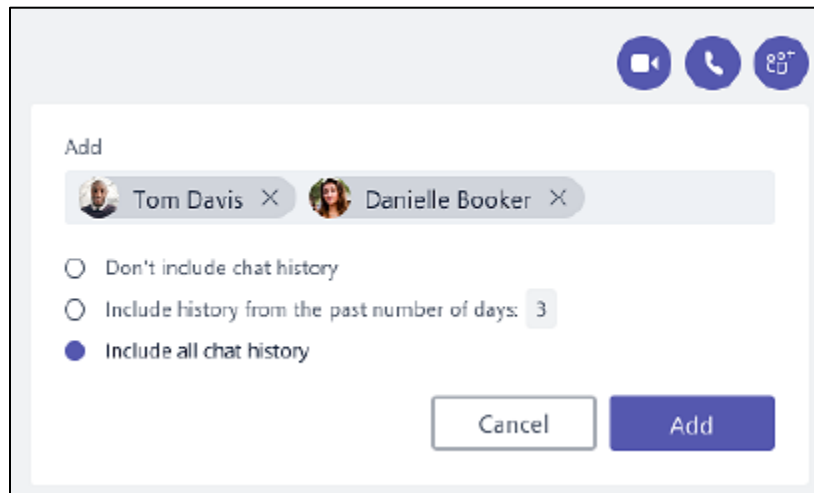

Teams will save the whole chat history, all the way back to the first message. And if someone leaves the group, their chat responses are still there in your chat history.

Group chat

1) Start one the same way you start a one-on-one chat: select **New chat** at the top of your chat list.

2) Select the down arrow to the far right of the **To** field and type a name for the chat in the **Group name** field. Then, type the names of the people you'd like to add in the **To** field.
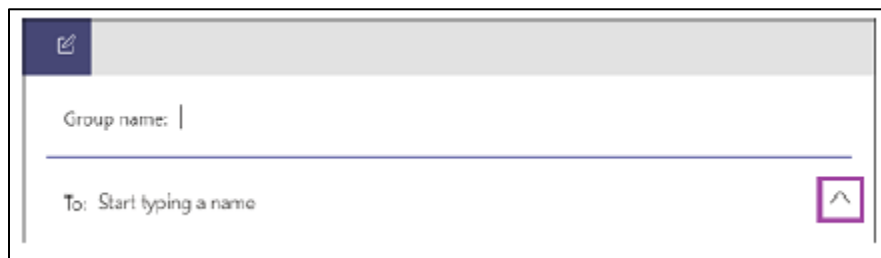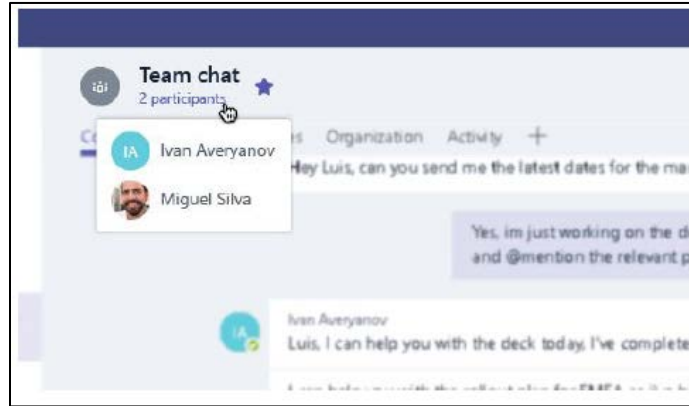

This starts a new conversation. Everyone who has access to the group chat can send messages.

Tip: *You can have up to 100 people in a group chat.*

See who's in a group chat

1) To see who's in a group chat, hover over the number of participants in the chat header to show a list of everyone's names.
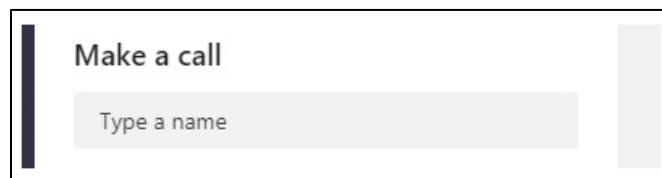

Call someone from a chat

1) Select **Video call** or **Audio call** to call someone directly from a chat.

Audio & Video Calls

1) To begin a call proceed to the ***Calls*** tab on the left-side toolbar. From there type names in the ***Make a Call*** field (you can add multiple individuals here).

2) Then at the bottom select either the ***Audio*** or ***Video*** button to initiate the call.

Tip: You can include multiple people in the Make a Call field to start a group conversation by audio or video
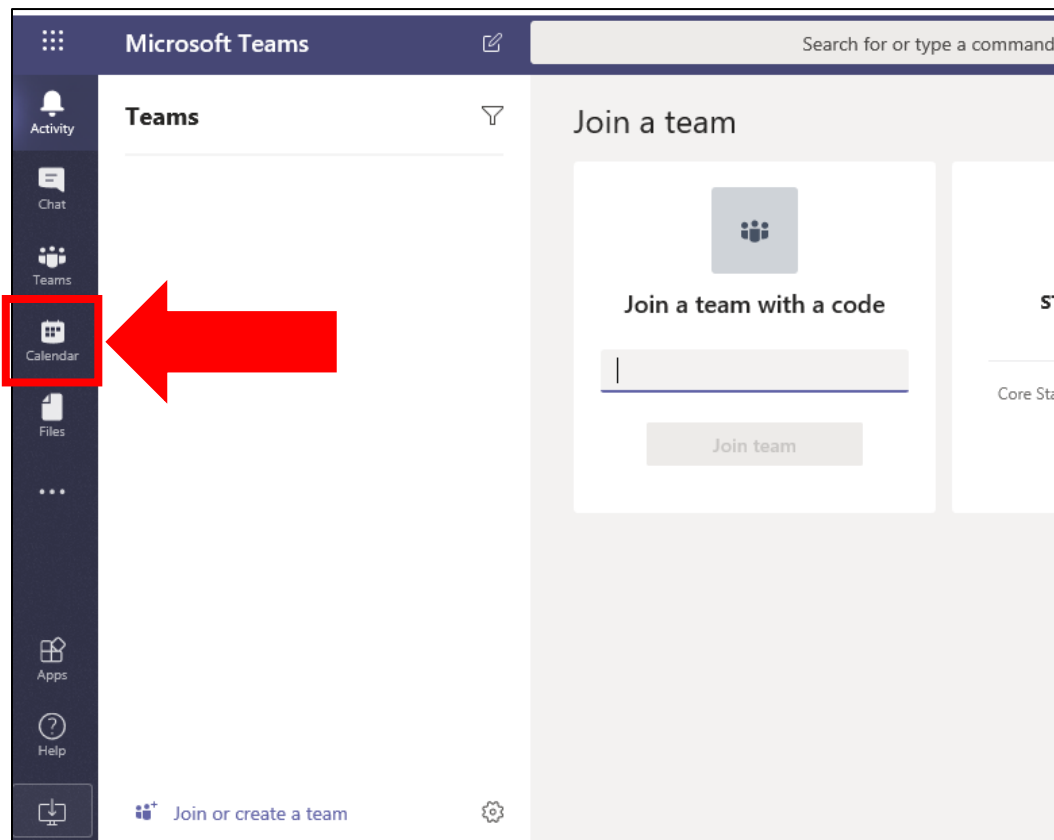
Scheduling and Participating in Meetings (using the MS Teams Platform)

Participating in a Meeting

There are two different methods to join a meeting that you have been invited to:

1) **Calendar:**
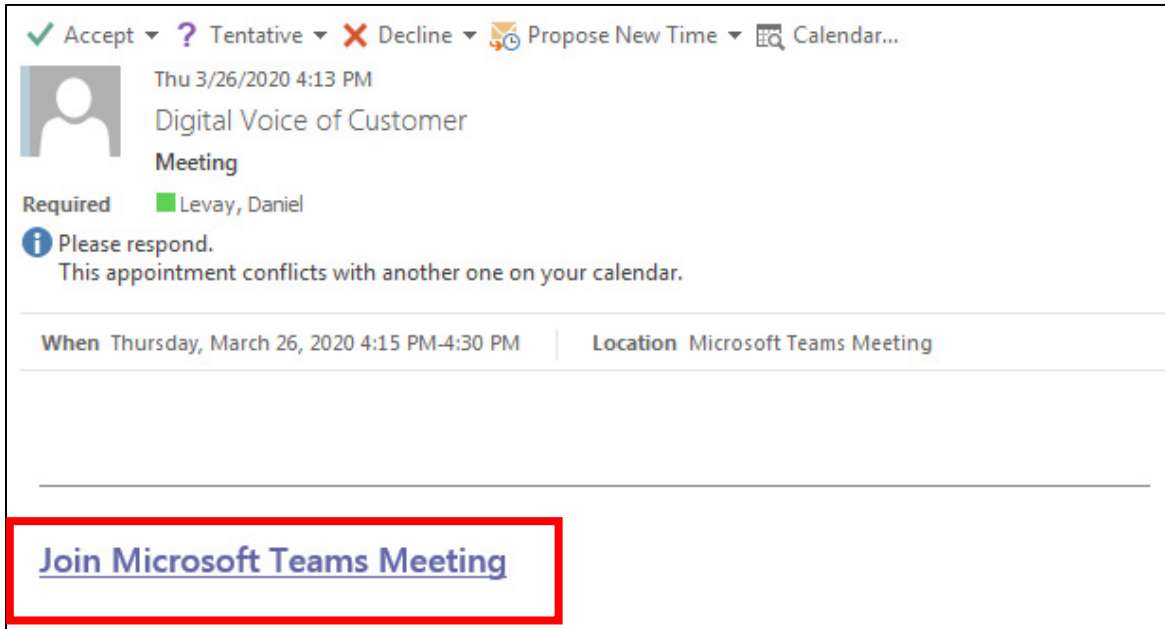   a. You can access the **Calendar** function from the left-side toolbar.

   b. Click on the meeting in your calendar to open the details of the meeting. Select the **Join** button to enter the meeting.

2) **Outlook Invite:**

      a. In Outlook, your email invite will display the Teams link as **Join Microsoft Teams Meeting** – click on this link to launch the meeting automatically.
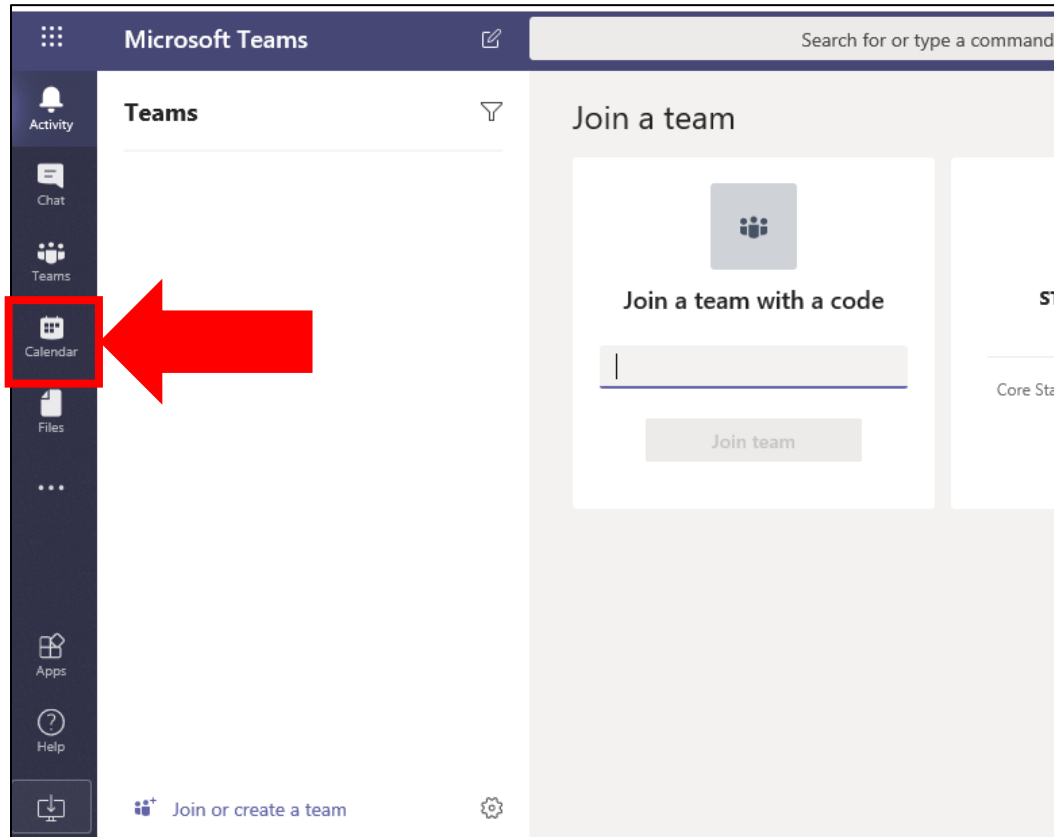

Creating a Meeting

To create a meeting there are three different methods:

1) Select **Schedule a meeting** in a chat

2) Go to **Calendar** and select **New meeting**. Then, select your preferred meeting channel and choose whom you would like to invite. Use the Scheduling Assistant to find the right time.

3) **Start an instant meeting:** From your calendar or channel by clicking the **Meet now** button, this will launch a meeting and you can then invite people from the active meeting screen.

Screen Sharing

In a Teams Chat

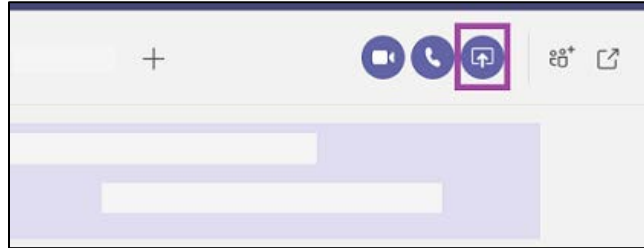1) When you're chatting with one or more people in Teams, you can instantly share your screen. Go to the chat controls in the upper-right corner and select **Share** ⬆️.

2) Choose a window to share that specific program and its content, or select **Desktop** to share everything on your screen.

3) The other participants in the chat will receive a notification asking them to accept your screen share. Once they do, they'll be able to see your screen and continue the chat.

4) When you're done sharing, go to your meeting controls and **select Stop sharing**.

In a Teams Video/Audio Meeting

In Microsoft Teams, you can show your desktop, a specific app, presentation, or any file while in a meeting.

1) Select **Share** ⬆️.

2) Select what you want to share (For more detail visit Microsoft's website page: [Share content in a meeting in Teams](#)):

- **Desktop** lets you show everything on your screen.
- **Window** lets you show a specific app.
- **PowerPoint** lets you show a presentation.
- **Browse** lets you find the file you want to show.
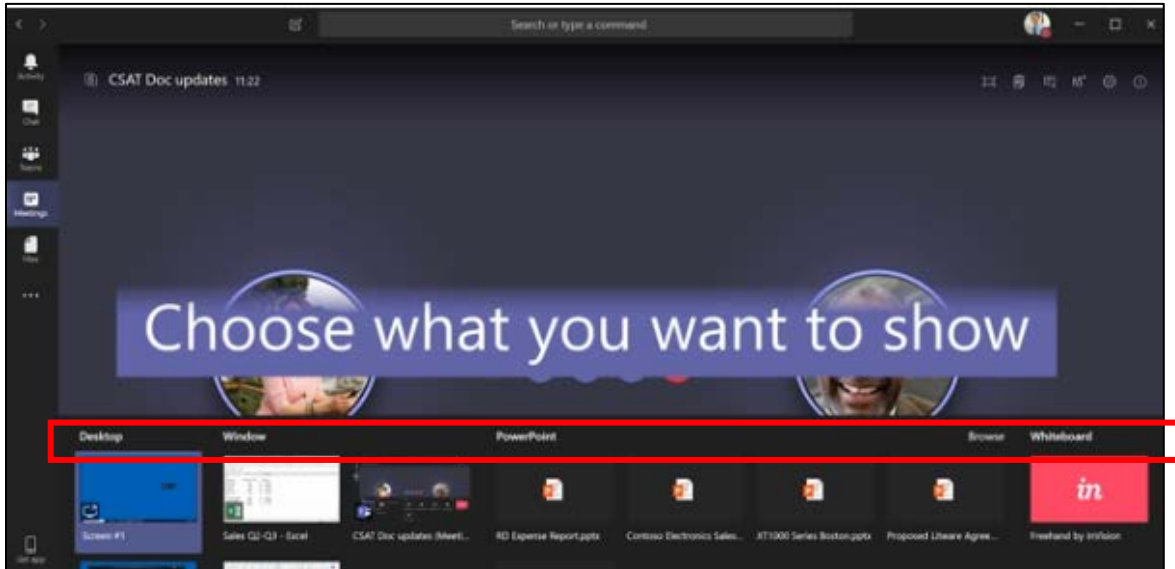
3) After you select what you want to show, a red border surrounds what you're sharing.

4) Select **Stop sharing** to stop showing your screen.

Give and take control of shared content

Give control

If you want another meeting participant to change a file, help you present, or demonstrate something, you can give control to that person. You will both be in control of the sharing, and you can take back control anytime.

Note: When you're sharing an app, only give control to people you trust. People you give control to may send commands that could affect your system or other apps. Microsoft has taken steps to prevent this but has not tested every possible system customization.

1) On the sharing toolbar, select **Give control**.

2) Select the name of the person you want to give control to.

   Teams sends a notification to that person to let them know you're sharing control. While you're sharing control, they can make selections, edits, and other modifications to the shared screen.

3) To take control back, select Take back control.

Take control

1) To take control while another person is sharing, select **Request control**. Then, the person sharing will approve or deny your request.

   While you have control, you can make selections, edits, and other modifications to the shared screen.
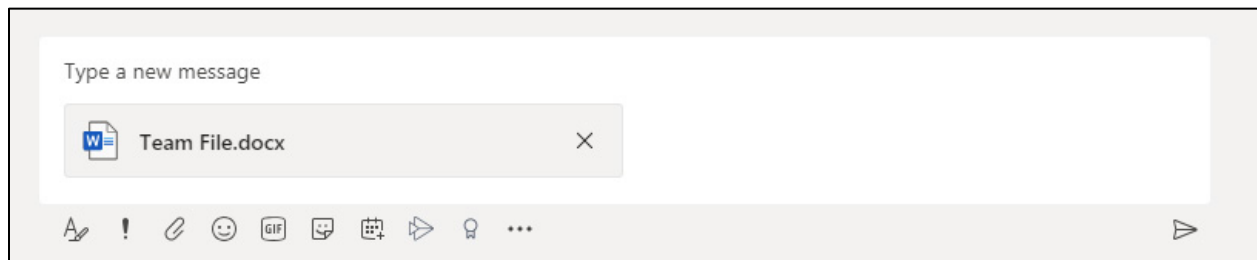
2) When you're done, select **Release control** to stop sharing control.

File Sharing

There are several methods for sharing and collaborating on files (Excel, OneNote, PDF, PowerPoint, Word, etc.) within Teams.

Chat

You can share a file directly in your Chat by dragging and dropping the file into the message box in the chat.
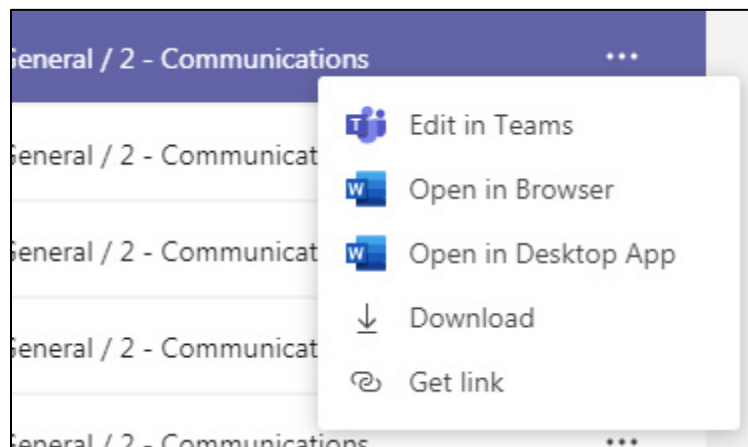
Then, you can access the file via Teams by clicking on the Add a Tab (+) at the top of the chat and selecting the app that your file corresponds to.
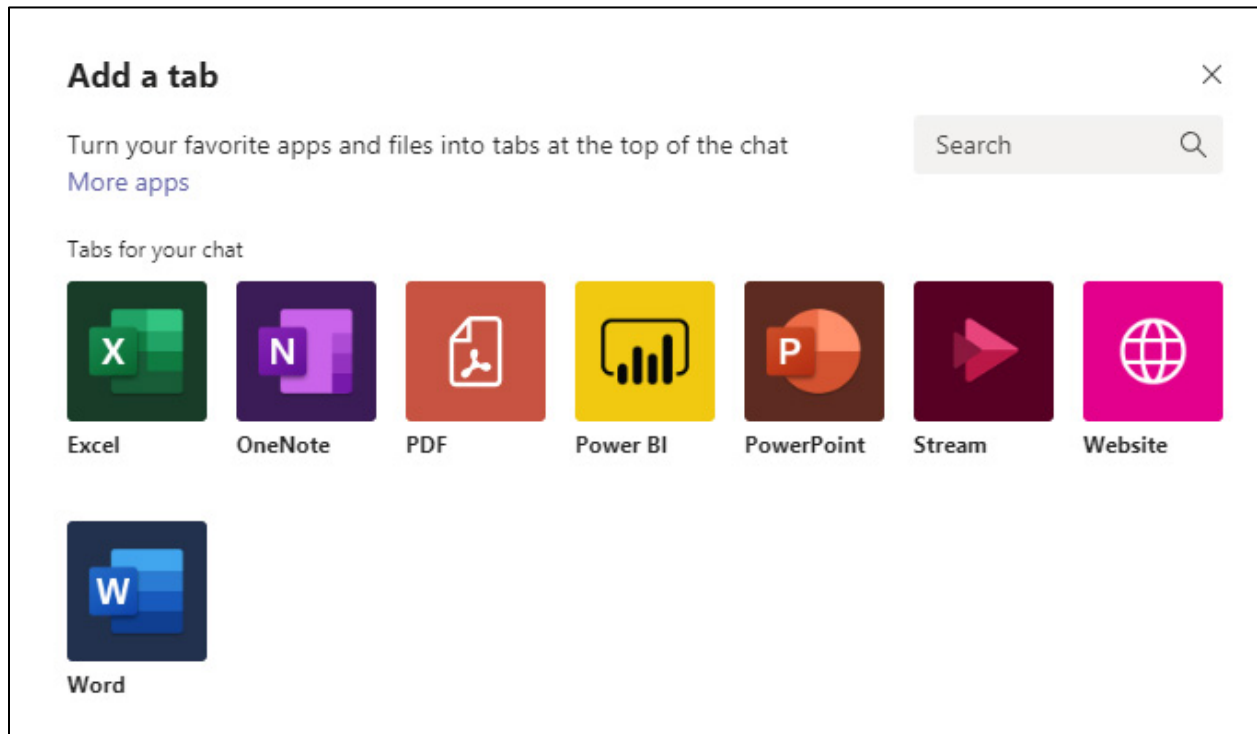

Files

From the files tab on the left-side toolbar you can view all files that have been shared with (or by) you. You can right-click on a file and select an action: edit in Teams, open in Browser, Open in Desktop or download.

Teams

You can share a file directly in your Team (or Channel) by going to the ***Teams*** tab on the left-side toolbar. Once you have selected the Team you will see the ***Files*** option at the top. From there you can select + New to create new folders and files. Alternatively, you can upload existing files to this section through the ***Upload*** button.
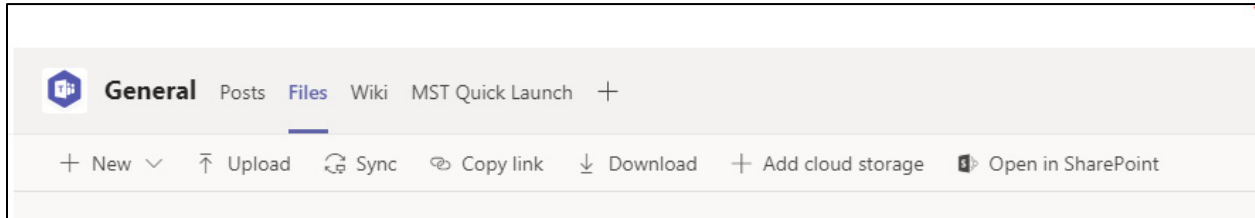
Skype for Business (UHN Approved Platform)

Adapted from UHN Digital's "Skype for Business – Info Sheet"

==In alignment with the broader communication strategy, UHN plans to decommission Skype for Business in the near future and provide support only to MS Teams. At the time of issuing this guide, there has been no approximate date announced.==

==**Please note:** You will not be able to send files through Skype for Business. This function has been disabled for all UHN users.==

How to Access Skype for Business

You can host a Skype meeting through Skype for Business to IM a group of colleagues or share your screen. Please visit UHN's [Calendar Resources](#) page for more information**.**

Please note: You will not be able to send files through Skype for Business. This function has been disabled for all UHN users.

Option 1: Skype for Business Online from your web browser

1) Go to your Outlook Web App (https://portal.office.com/) and sign in with your organizational account.

2) Click on the icon to open a Skype for Business Online window on the right side of your Outlook Web App screen. This will automatically sign you into your Skype account.

Option 2: Full Skype for Business application from your UHN computer

1) Go to your Windows start menu.

2) From the applications listed, find and click on **Skype for Business 2016.**

3) You may be prompted to enter your credentials. Enter your primary email and password, select **Remember my credentials**.
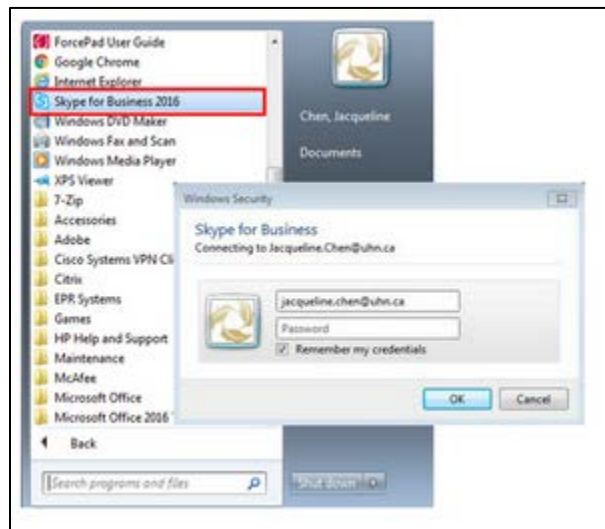
NOTE: If the Skype for Business Application (**Option 1: Skype for Business Online from your web browser** and **Option 2: Full Skype for Business application from your UHN computer**) do not work, please refer to **Option 3: Using your Outlook Calendar (via Outlook Web App) to schedule a Skype for Business Meeting** and **Option 4: Using your Outlook Calendar (using your UHN Computer) to schedule a Skype for Business Meeting** which will explain how to schedule a Skype for Business Meeting through your Outlook Calendar.

Option 3: Using your Outlook Calendar (via Outlook Web App) to schedule a Skype for Business Meeting

1) Go to your Outlook Web App (https://portal.office.com/) and sign in with your organizational account.

2) Click on the icon to open Outlook. This will automatically sign you into your Outlook account.

3) Click on your **Outlook Calendar** (located on the bottom left corner of the screen).
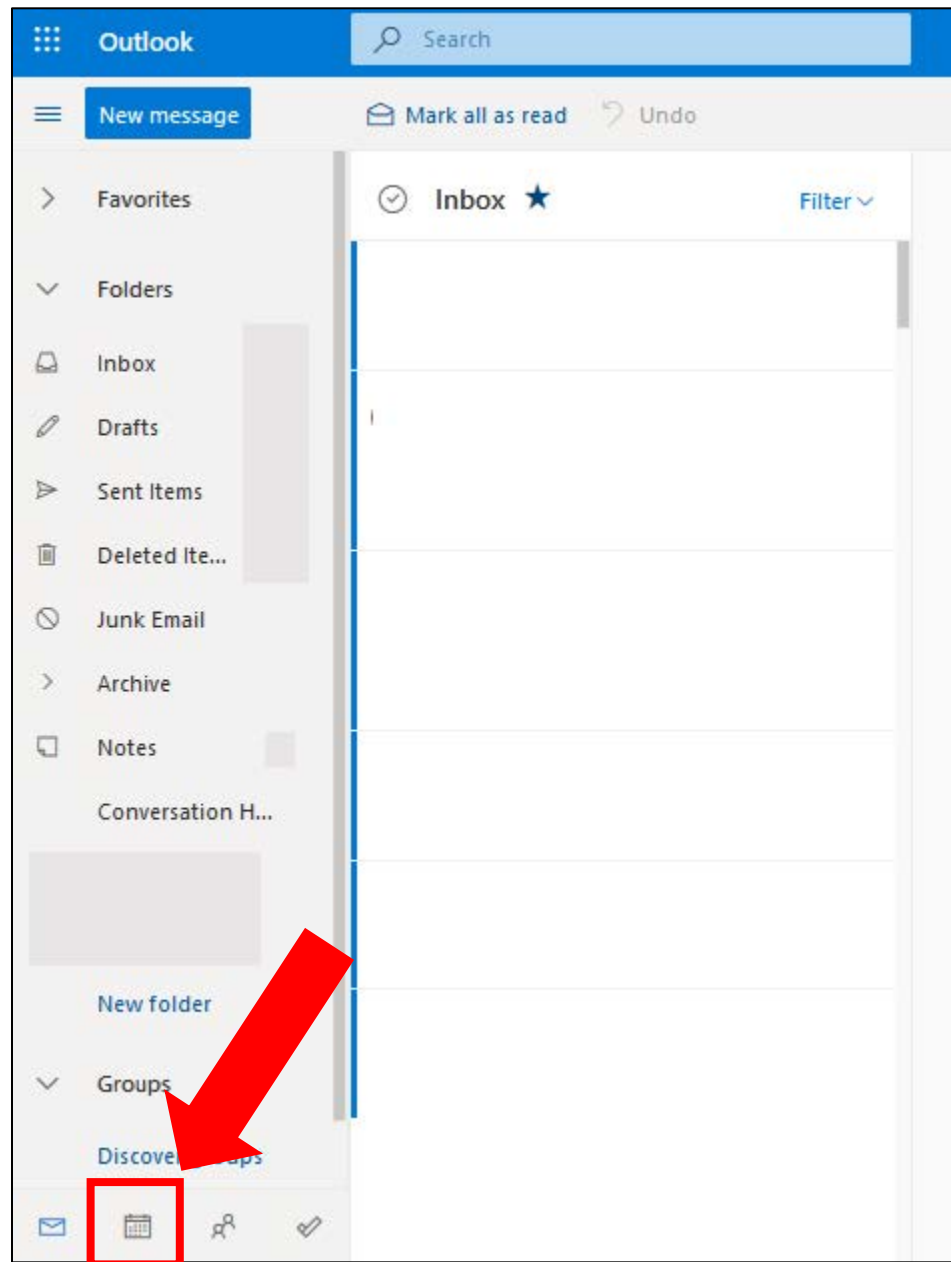
4) Once in your Outlook Calendar, proceed to scheduling a new meeting by clicking **New Event** in the top left corner of your screen.

5) Enter the title, invitees and time for your meeting. When you get to the **Meeting Location** section of your calendar invitation, you will see an **Add online meeting** dropdown. Click this dropdown and click **Skype meeting**.

6) At the top of the meeting window, click **Send**.

7) A Skype meeting link will appear in your invitation. This allows attendees to join a group Skype conversation by clicking **Join online meeting**. If you have audio conferencing capabilities, call-in details will appear in your invite.
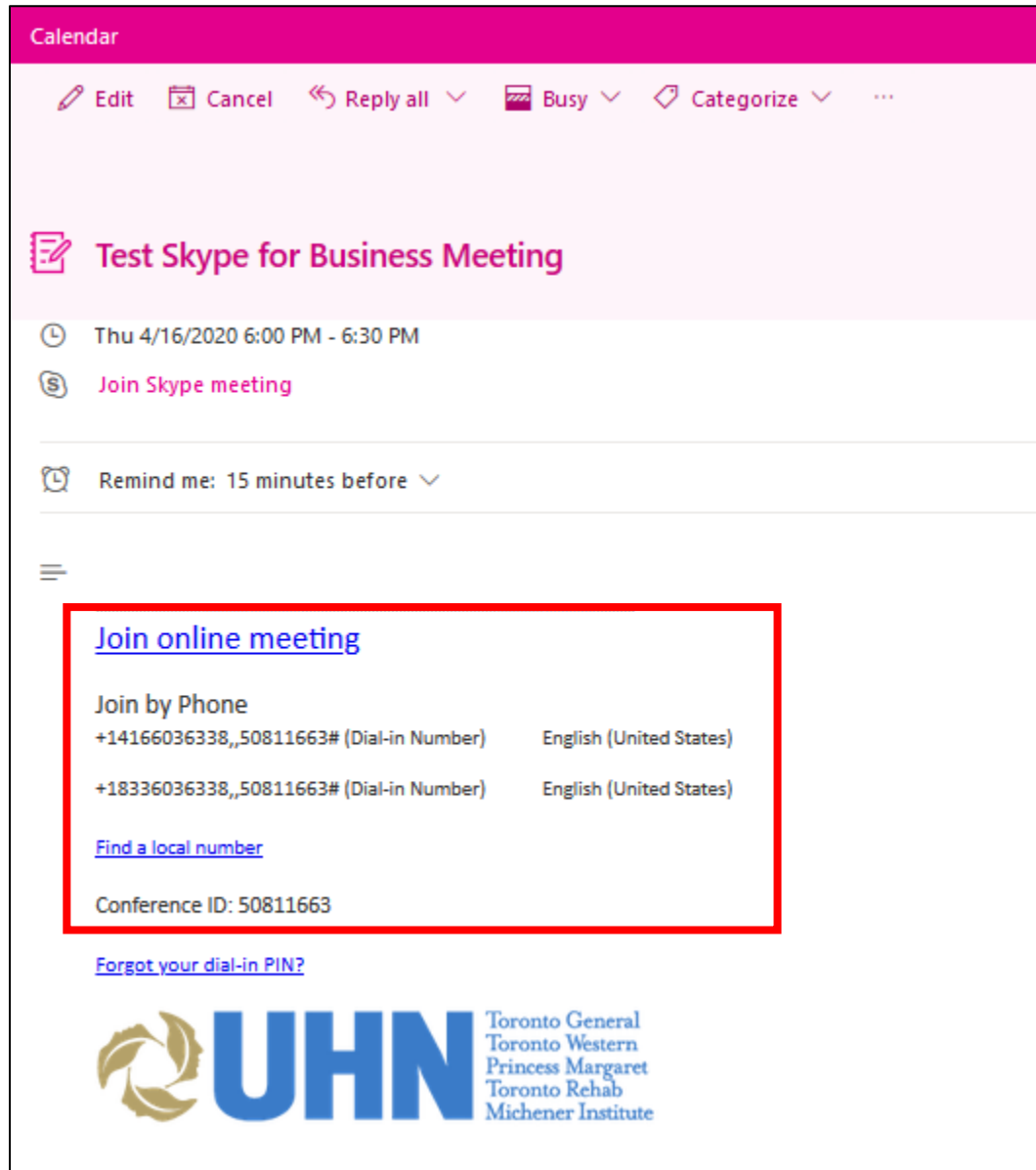
8) To start your Skype meeting, click **Join online meeting** in the meeting invitation.

Option 4: Using your Outlook Calendar (using your UHN Computer) to schedule a Skype for Business Meeting

1) Open Outlook and go to your calendar.

2) From your menu ribbon, click **New Skype Meeting**.

3) A Skype meeting link will appear in your message. This allows attendees to join a group Skype conversation during the meeting. If you have audioconferencing capabilities, call-in details will appear in your invite.
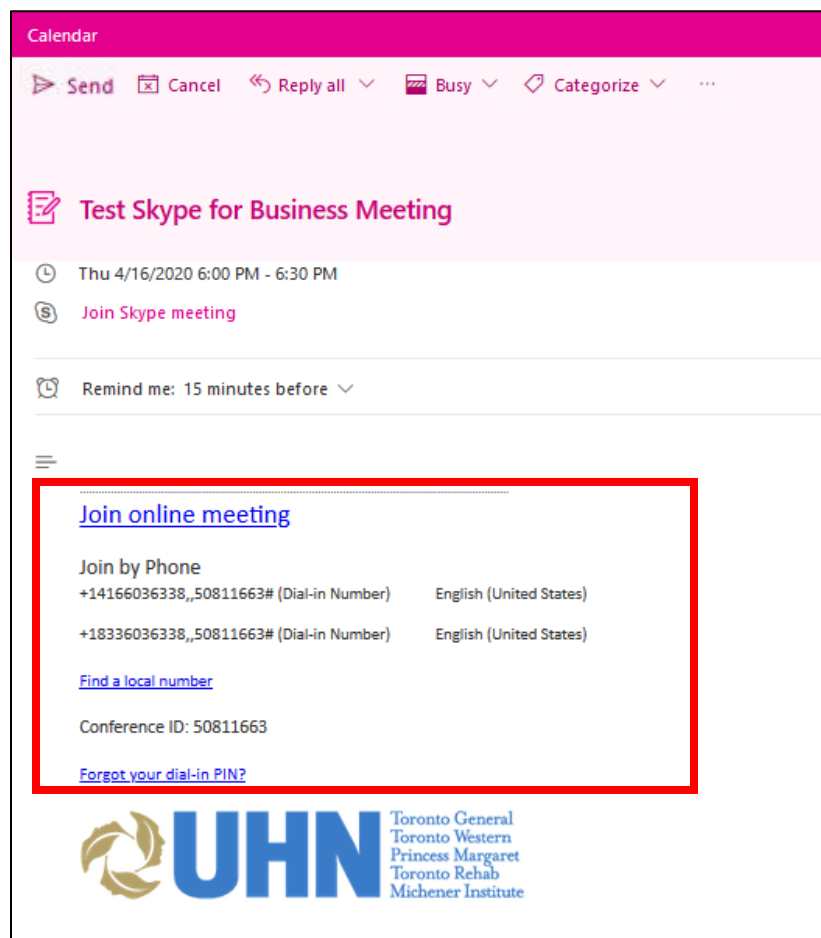
4) At the top of the meeting window, click **Send**.

Screen Sharing via Skype for Business:

Skype for Business allows you to share your screen with colleagues while having an IM conversation.

1) At the bottom of the conversation window, click the Present (monitor) button. To share the content on your desktop, click **Present Desktop**.
   - Please note, when sharing your desktop, everyone in the meeting can see your programs, files, and notifications.

2) To share one or more programs or files, click **Present Programs**, and then select the specific program or file. This is a good option if you have files on your desktop you do not want meeting attendees to see.
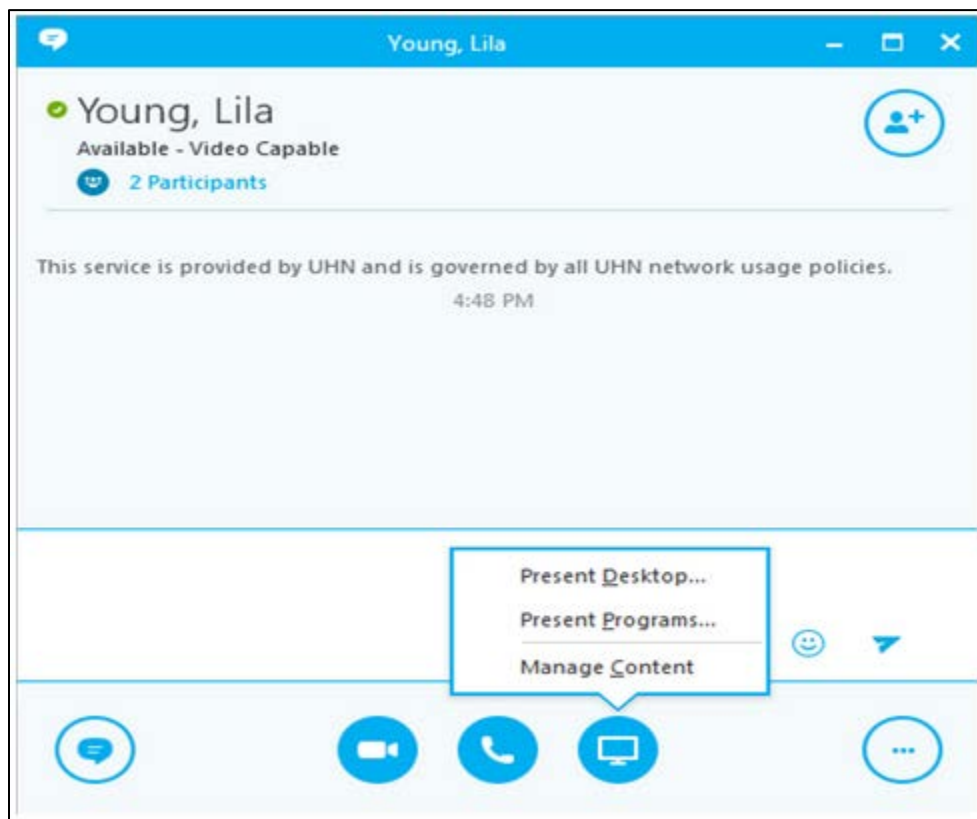
3) Follow the prompts and select **Present** to begin sharing your screen. You will see a sharing toolbar on the screen you choose to share.
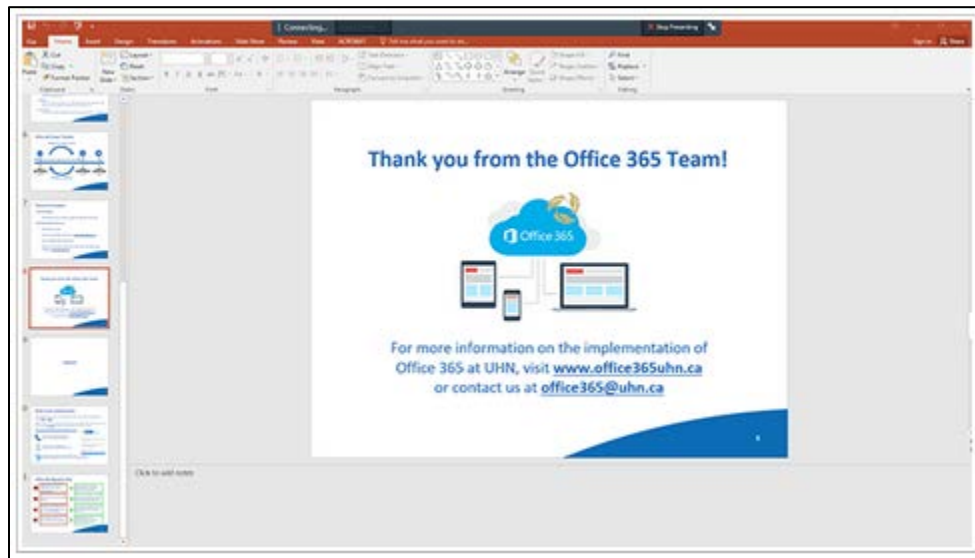
On the sharing toolbar, on top of the screen, use any of these options:
- Click **Stop Presenting** when you are done sharing your screen.

- Click **Give Control** to share control of your desktop or program with the participants.

- Click the pin to hide your toolbar.

Using the Skype for Business App

Updating Your Availability on Skype

You can manually change your presence status to indicate to availability to your colleagues

1) Click the status menu drop-down arrow below your name on the Skype for Business main window.
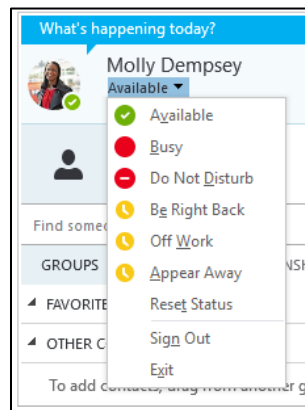
2) Select the status you want to show your colleagues.

3) You can also reset your status to update based on your Outlook availability by clicking on the status menu

Adding a UHN Contact on Skype for Business

1) In the search box along the bottom of your Skype application, type in the name of the colleague you wish to add to your contacts list.
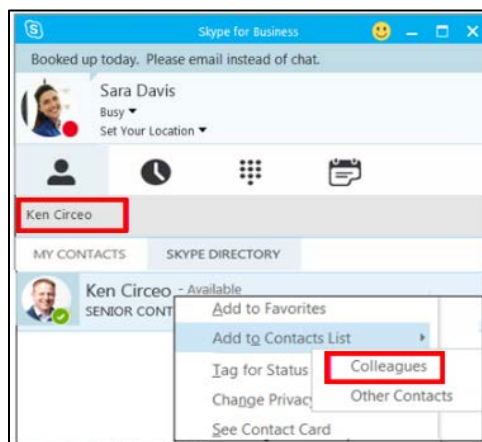
2) Right-click the colleague's display name, select **Add to Contacts List**.
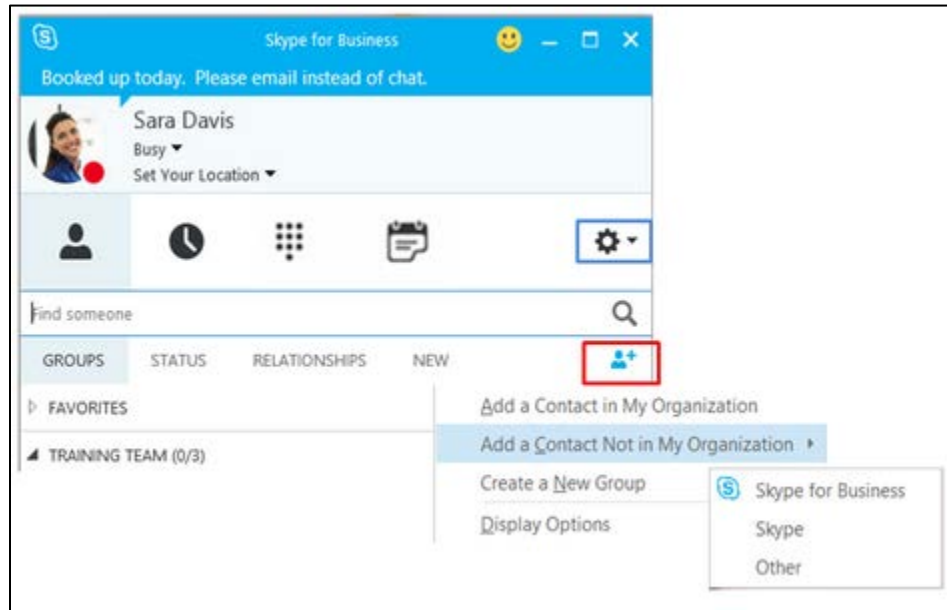
Sending an Instant Message

1) From your Skype for Business window, double click on the colleague's name you want to start a conversation with.
   - You can also access Skype for Business Online from your Outlook Web App account by clicking on the icon along the top navigation bar.

2) A new conversation window will open. Type in the message area.

3) Click **Send** to send your message to your colleague.

You can host a Skype meeting through Skype for Business to IM a group of colleagues or share your screen.

Starting a Videoconference

1) Open Skype for Business and select the contact you wish to begin a videoconference with. You can search for your contact in your Contacts list or type a name in the search box to find the person you're looking for.

2) When you hover over the contact's profile icon, a quick menu will appear. Select the call icon to start the videoconference.
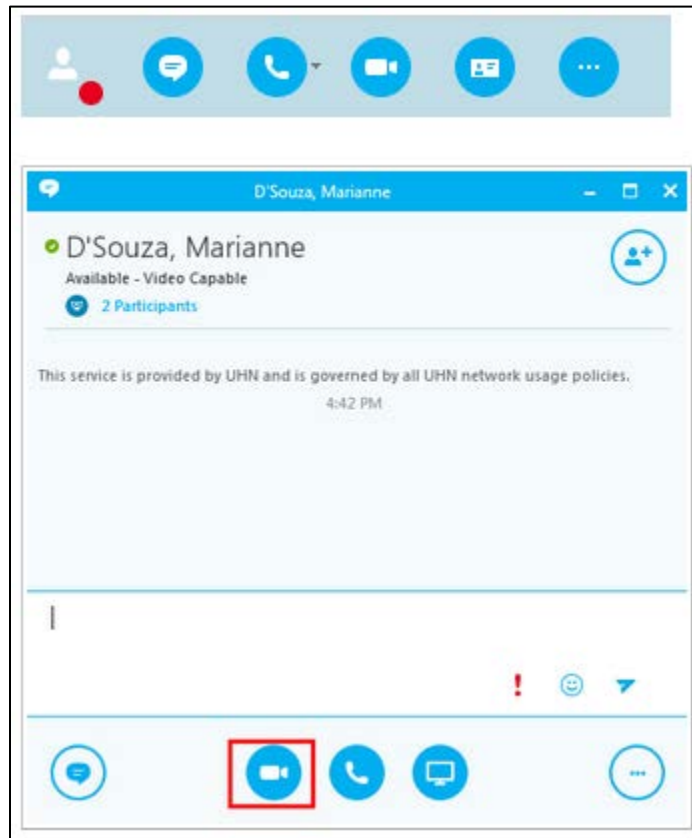
3) You can also start a videoconference to an existing instant messaging (IM) conversation. Simply click the camera icon in the window to start your video.

4) An alert will pop up on your contact's screen, which they can use to accept or ignore your request. If the video call is accepted, the conversation window expands to display the video.

5) To end the videoconference, close the window, or click the hang up button.

GoToMeeting (KITE Research Institute Accounts)

The KITE Research Institute has **two GoToMeeting accounts available for use**. Please contact Janitha Shanmugarajan (Janitha.Shanmugarajan@uhn.ca) to arrange for the necessary training.

GoToMeeting Features

- Video Conferencing
- Screen Sharing
- Conference Calling
    - Option to link your conference call line to meeting conference platform (or you can use your computer audio)

Zoom

Zoom Security Issues

Please be aware that there have been some very high risk security issues recently discovered in the Zoom technology. One of these issues is referred to as 'Zoombombing'. Through insecure settings and misconfigurations in Zoom, an uninvited attendee can disrupt meetings, send inappropriate photos, eavesdrop meetings and hijack the screen of the host. For this reason, UHN is **strongly advising against using Zoom** for conferencing.

If this is not possible and the Zoom platform is required, here are some tips to ensure that you don't fall victim to 'Zoombombing':

1. **Use a unique ID for large meetings with many participants** – Zoom allows for a one-time ID for large meetings. This way it is harder for an outsider who knows your usual meeting ID to jump into the meeting and disrupt it.

2. **Require a meeting password** – Zoom has an option to have a meeting password. It is recommended to use it to avoid uninvited people from joining.

3. **Make sure only the host can share the screen for large meetings** – To avoid the risk of an uninvited guest sharing their screen it is recommended that for larger meetings or presentations only the host should be able to share the screen. The default setting allows all participants to be able to screen share.

4. **Lock meeting once it has started** – Once all participants have joined, a setting should be used to lock the meeting so no others may join.

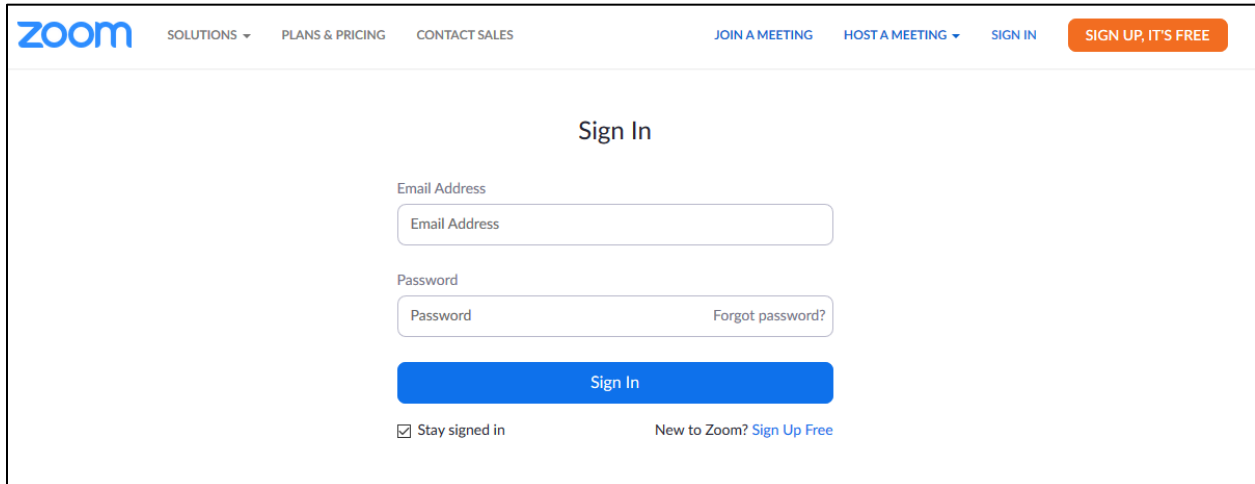## How to Sign Up and Activate your Zoom Account

The KITE Research Institute does not have licensing for Zoom.

To sign up for your own free account or a subscription, visit https://zoom.us/signup and enter your email address. You will receive an email from Zoom (no-reply@zoom.us). In this email, click **Activate Account**.

Please note: Zoom's free account only allows for 40 minute sessions.

Signing into your Zoom account on the web

You can login to your Zoom account on the web at any time, at https://zoom.us/signin.
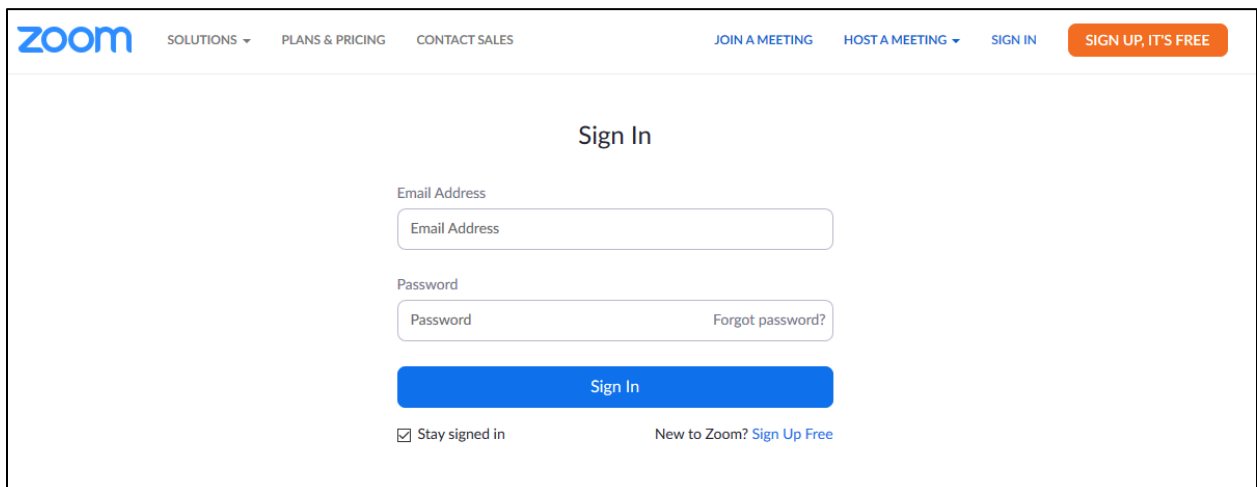

Once you're logged in, use the panel on the left side to navigate the Zoom web portal. You can update your profile, schedule a meeting, edit your settings, and more.
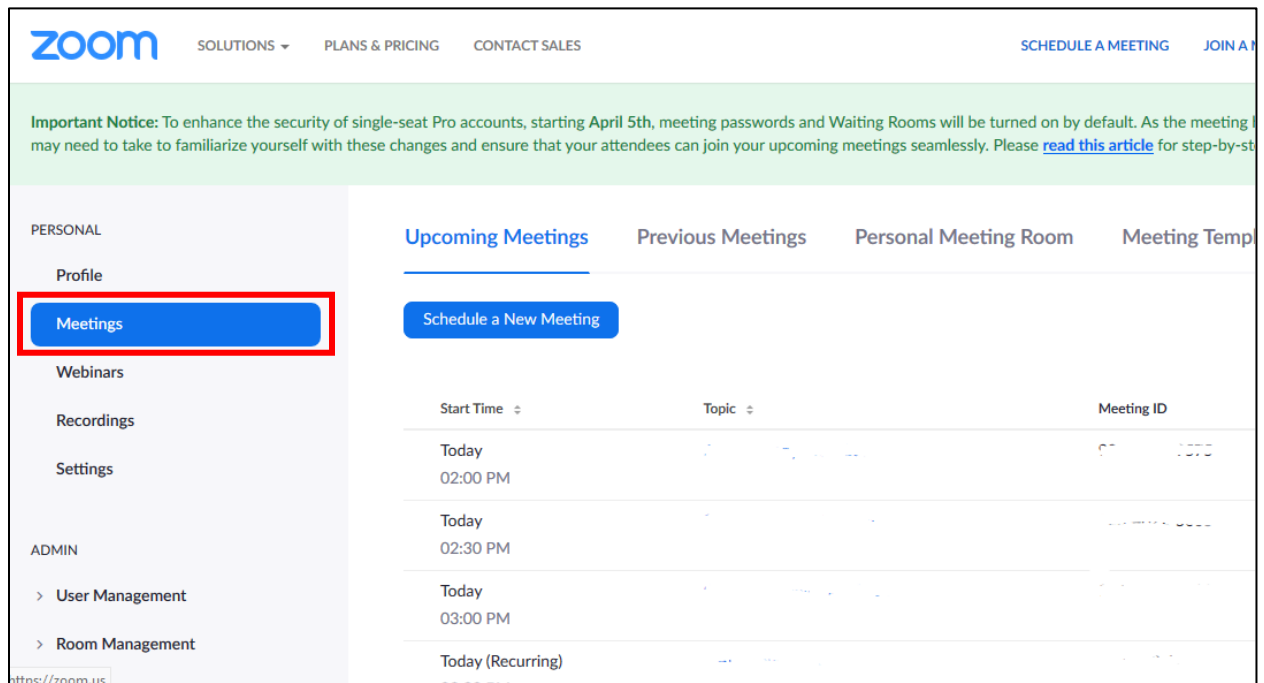
Scheduling your first meeting

1) Sign into your Zoom web portal.

2) Click **Meetings**.

3) Click **Schedule a Meeting**.
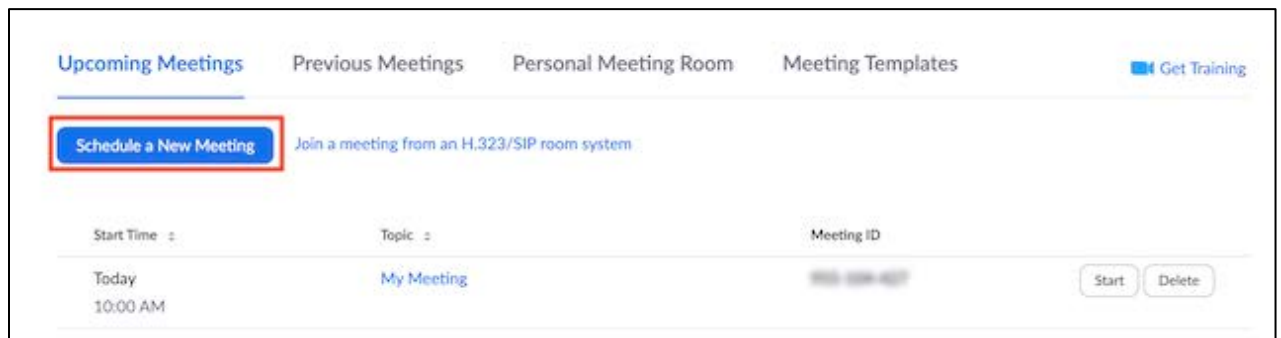
4) Select the meeting options. Note that some of these options might not be available if they were disabled and locked to the off position at the account or group level.
   a. **Topic**: Enter a topic or name for your meeting.
   b. **Description**: Enter in an optional meeting description.
   c. **When**: Select a date and time for your meeting. You can manually enter any time and press enter to select it.
   d. **Duration**: Choose the approximate duration of the meeting.
      i. This is only for scheduling purposes. The meeting will not end after this length of time.
   e. **Time Zone:** By default, Zoom will use the time zone set in your profile. Click the drop-down menu to select a different time zone.

f. **Recurring meeting**: Check if you would like a recurring meeting (the meeting ID will remain the same for each session). This will open additional recurrence options.

    i. **Recurrence**: Select how often you need the meeting to recur: **Daily**, **Weekly**, **Monthly**, or **No Fixed Time**. It can recur up to 50 times. If you need more than 50 recurrences, use the **No Fixed Time** option.

    ii. The other recurrence options will depend on how often the meeting recurs. You can configure the meeting to end after a set number of occurrences or have the recurring meeting end on a specific date.

g. **Registration**: Check this option if your meeting will require registration. Instead of a join link for your participants, you will be provided a registration link. If registration is required and the meeting is reoccurring, choose one of these options:

    i. **Attendees register once and can attend any of the occurrences**: Registrants can attend all of the occurrences. All dates and times of the meeting will be listed and the registrant will be registered for all occurrences.

    ii. **Attendees need to register for each occurrence to attend**: Registrants need to register separately for each occurrence to attend. They can only choose one date and time on the registrant page.

    iii. **Attendees register once and can choose one or more occurrences to attend**: Registrants register once and can choose one or more occurrences to attend. They will need to select which dates and times they would like to attend and they will only be registered for those occurrences. They can choose multiple options.

h. **Host Video**: Choose if you would like the host video on or off when joining the meeting. Even if you choose off, the host will have the option to start their video.

i. **Participant Video**: Choose if you would like the participants' videos on or off when joining the meeting. Even if you choose off, the participants will have the option to start their video.

j. **Audio Options**: Choose whether to allow users to join using **Telephone** only, **Computer Audio** only, **Telephone and Computer Audio** (both), or **3rd Party Audio** (if enabled for your account).

k. **Dial in From**: If **Telephone** or **Telephone and Computer Audio** is enabled for this meeting, click **Edit** to select the dial-in countries that you would like included in the invitation.

l. **Require meeting password [UHN RECOMMENDED]**: You can select and input your meeting password here or one will be automatically generated. Joining participants will be required to input this before joining your scheduled meeting.

m. **Enable join before host**: Allow participants to join the meeting without you or before you join. The meeting will end after 40-minutes for Basic (free) users if 3 or more people join the meeting.

n. **Mute participants on entry**: If join before host is not enabled, this will mute participants as they join the meeting. Participants can unmute themselves after joining the meeting.

o. **Use Personal Meeting ID**: Check this if you want to use your Personal Meeting ID (available through your Zoom account). If not selected, a random unique meeting ID will be generated.

p. **Enable waiting room [UHN RECOMMENDED]**: Allows the host to control when participants join the meeting by placing them in a waiting room.

q. **Only signed-in users can join this meeting**: Restrict access to the meeting so that only signed-in using can join.

r. **Default to HD Video**: If you enable this option, the participant view will always default to HD video automatically (if the feature is available in the Account Settings).

s. **Record the meeting automatically**: Check this if you want the meeting to be automatically recorded. Select if you want it to be recorded locally (to your computer) or to the cloud (zoom.us/recording).

t. **Schedule For**: If you have scheduling privilege for another user, you will be able to choose who you want to schedule for from the drop down.

u. **Alternative Hosts**: Enter the email address of another Zoom user who is Licensed, on your account to allow them to start the meeting in your absence.

5) Click **Save** to finish.
6) Once finished, you can either select a calendar option to add the scheduled meeting to your calendar or select **Copy the Invitation** to send out the invitation to your Zoom meeting.

Time	Apr 9, 2019 12:00 PM Pacific Time (US and Canada)		
	Add to	31 Google Calendar Outlook Calendar (.ics) Yahoo Calendar	
Meeting ID	586-981-6226		
Join URL:	https://aidancrosbie.zoom.us/j/5869816226		C Copy the invitation

Copy the Invitation will open a window where you can copy the full invitation to send out via email:

How to start a scheduled meeting as a host

1) Login to **Meetings** on the Zoom Platform.
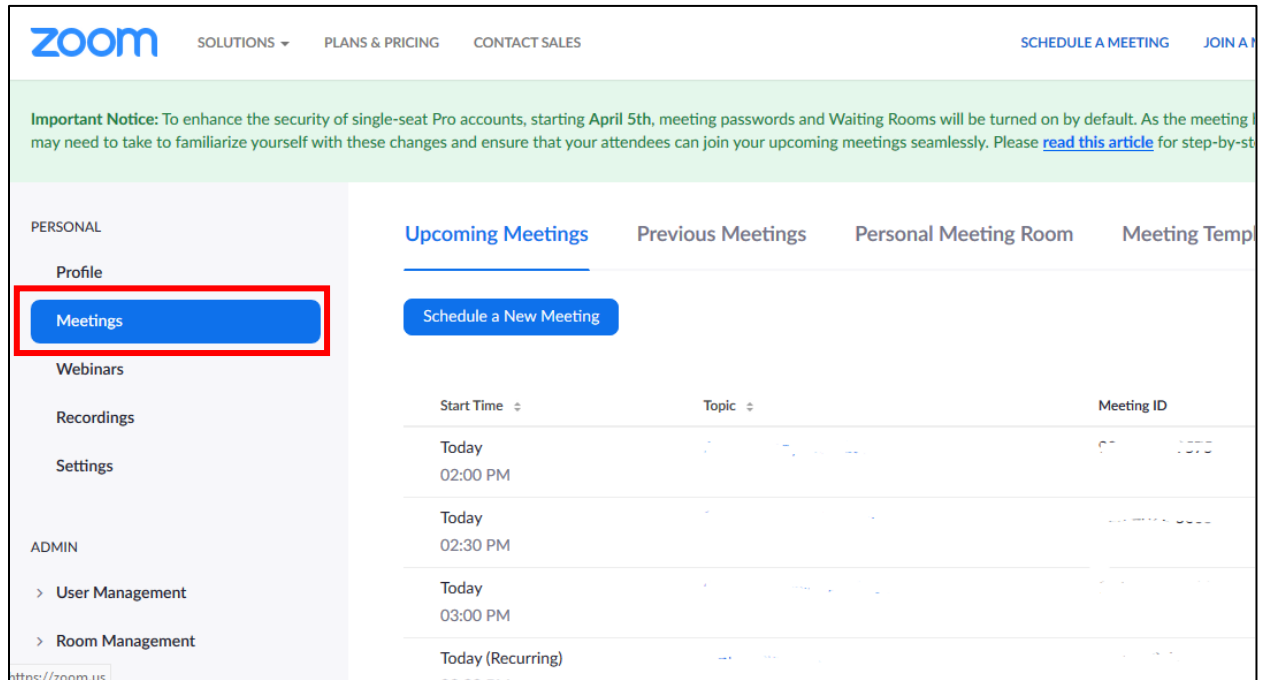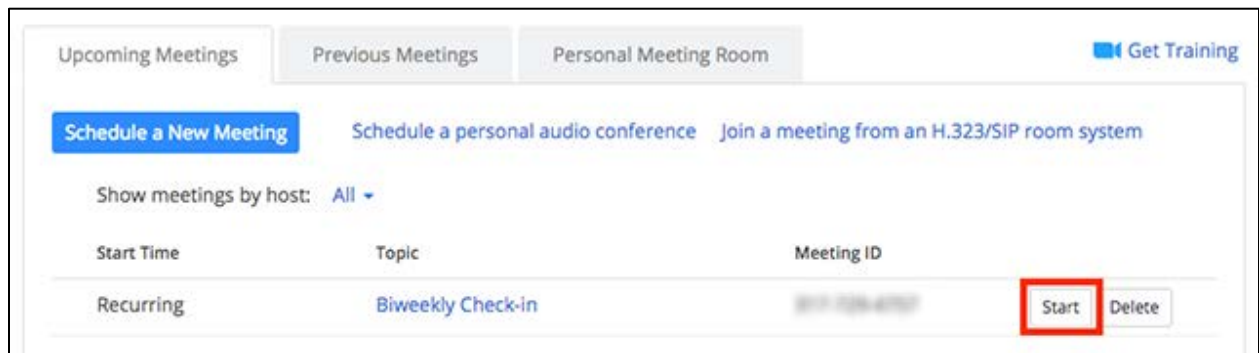

2) Under **Upcoming Meetings**, click **Start** next to the meeting you want to start.

3) The Zoom client should launch automatically to start the meeting.

In-Meeting Controls (once host has started the meeting)

Once you have started a meeting, you can access the meeting controls located at the bottom of the meeting window (move your mouse in the Zoom window to display meeting controls).

The host controls will appear at the bottom of your screen:

- **Join Audio**: Open the options to join the audio portion of the meeting.

- **Invite**: Invite by copying the invitation, the join link, or by phone or room system (if available for your account).

- **Manage:** View the participants list and manage participants

  - ○ Hover over a participant's name and click **More** for additional options.
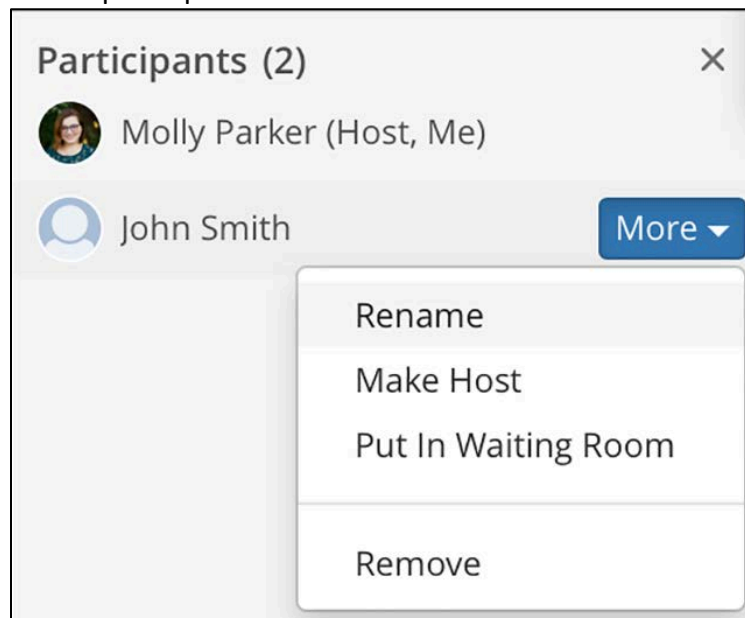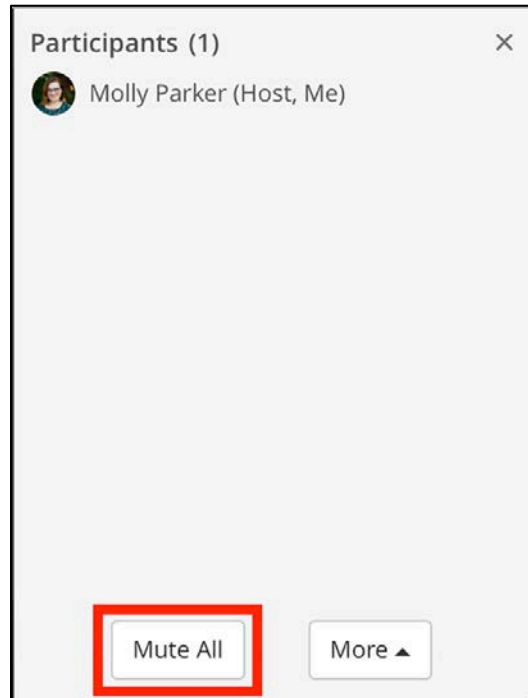

  - ○ **Rename**: Change the participant's name in the meeting.
  - ○ **Make Host**: Transfer host controls to this participant.
  - ○ **Put in Waiting Room**: Remove this participant to the waiting room. You will then have the option to readmit them.
  - ○ **Remove**: Remove this participant from the meeting.
  - ○ **Mute All**

- Click **Manage.**

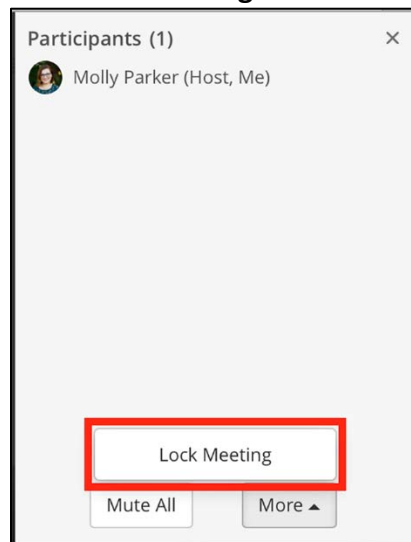- At the bottom of the participants' window, click **Mute All**.

o **Lock Meeting**
  - Locking the meeting prevents any new participants from joining the meeting.
  - Click **Manage.**

  - At the bottom of the participants' window, click **More**.
  - Click **Lock Meeting**.

- **Record:** Start a cloud recording.
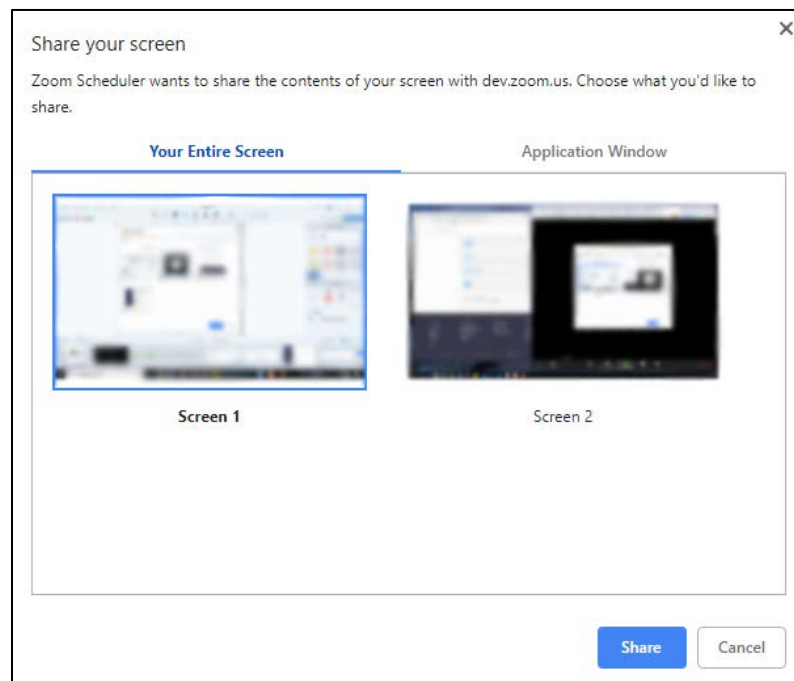 - Click **Record** to start a cloud recording.

- **Leave Meeting:** Leave the meeting. If you leave the meeting without designating another host, the meeting will end.

How to share your screen

1) Click **Share Screen** located in your meeting tool bar.

2) Select the screen you want to share then click **Share**. If you are using multiple monitors, you will see each screen.

To share a specific application window, click the **Application Window** tab, select an application, then click **Share**.

Notes:

- o When sharing an application, live changes made to a document may not appear for others. If you experience this issue, please stop sharing and restart the share or share your entire screen to avoid this issue.
- o For Windows 10 users, if several applications are open, a limited number will be listed as an option to share. If the application you want to share is not listed, close unnecessary applications and try again.
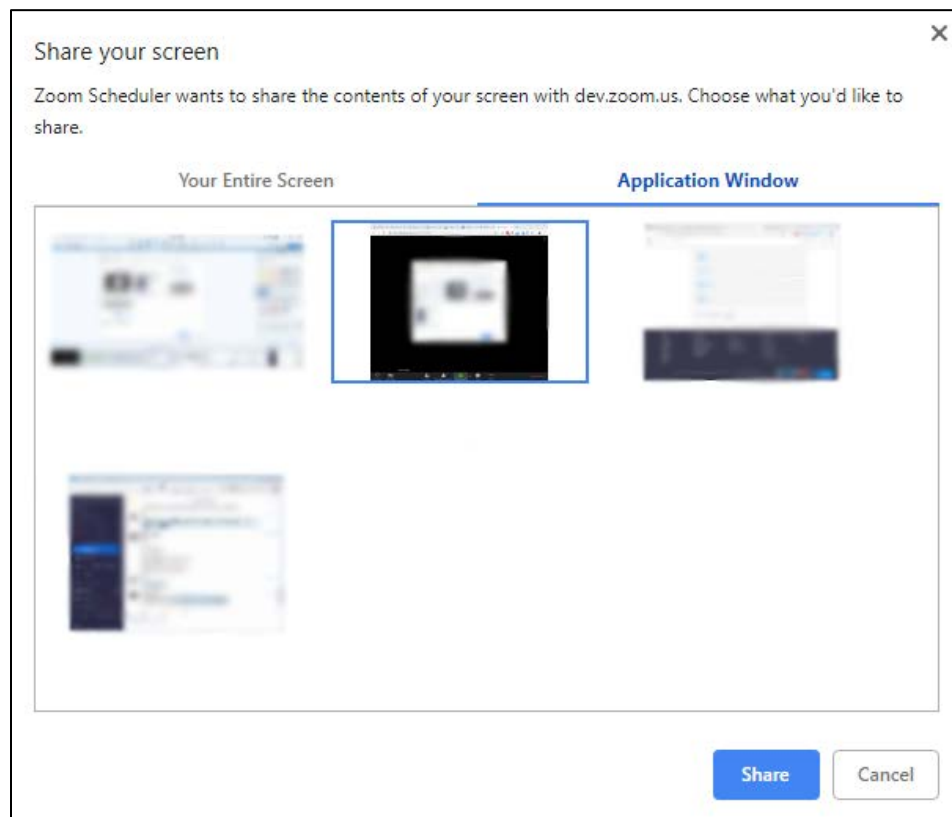

3) While screen sharing, you will have access to the following controls:
   - o A notification at the top of your Zoom meeting window shows a preview of your shared screen. Click **Pause Share** to pause screen sharing.


   Click **Resume Share** to start screen sharing again. You can also click **Stop Share** to stop sharing your screen.

- o A floating notification bar appears on top of your browser. Click **Stop sharing** to stop sharing your screen. Chick **Hide** to remove the floating notification bar.
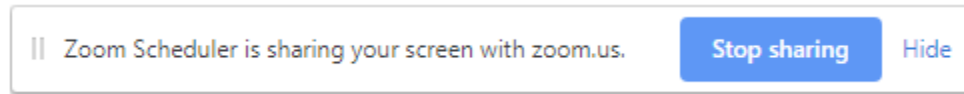
4) Click the upwards arrow beside the **Share screen** button to change who has access to screen sharing.
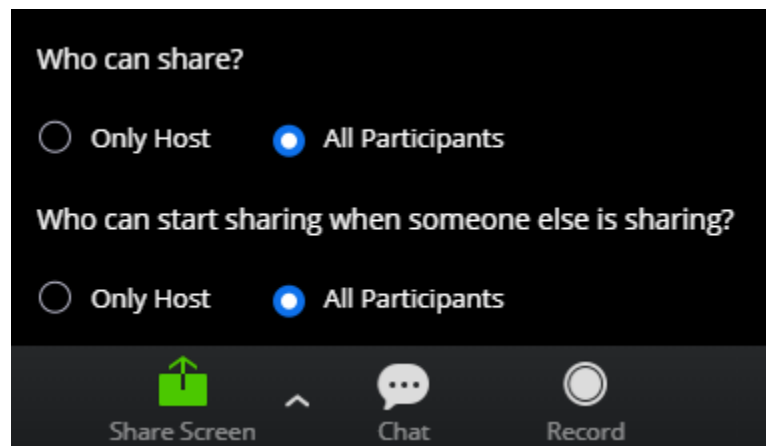
How to edit scheduled meetings

Reschedule a meeting

- If you need to re-schedule a meeting, simply update your schedule on your Outlook calendar.
- It is not necessary to update the meeting on the Zoom scheduler

Adding or deleting invitation attendees

- If you need to add or delete attendees, you can do so from your Outlook calendar
- There is no need to update the meeting on the Zoom scheduler

Edit your scheduled meeting on the Zoom Scheduler

- Click on My Meetings, Upcoming, Edit (the scheduled meeting)
- You can use it to update the scheduled time