

## Zoom Guidance for volunteers

Below is a table of contents. You can navigate to each section using keyboard short cuts or holding ctrl and clicking to get to the section you need.

### Contents

Zoom Guidance for volunteers.....	1
Quick Overview.....	2
Joining a Zoom meeting .....	2
Quick shortcuts in a zoom meeting .....	3
Accessibility .....	3
Security.....	3
Getting Started.....	4
Installing Zoom.....	4
Before your first meeting.....	4
Setting Up.....	5
Setting up/hosting meetings using a free account.....	6
Navigating around the Desktop App.....	7
Navigating around the Mobile App .....	8
Join a Meeting from your email .....	9
Join a Meeting via The Desktop App .....	10
Join a meeting using Zoom Cloud Mobile App .....	10
Joining a Webinar.....	11
Create an instant meeting.....	11
When in a meeting, Invite others to the meeting.....	11
Breakout Rooms on PC Zoom App .....	12
Joining a breakout room.....	12
Asking for help in a breakout room .....	12
At the end of the Breakout Session .....	12
Breakout Rooms By telephone (dial-in).....	13
Joining a breakout room.....	13

Participating in the breakout room .....	13
Gallery/Speaker view .....	13
Polls.....	13
Further Support .....	14
Online guide videos.....	14
Keyboard Shortcuts .....	14
End of document.....	15

Zoom is an easy to access and popular way to keep in touch and hold virtual meetings.

We know many of you already use this in your own lives, but this guide gives some pointers for using Zoom as a Guide Dogs volunteer, whether you are starting from scratch or looking for more information. There is a quick overview to get started or you can browse later pages for more specific detail.

## Quick Overview

For the latest information on how to install and use Zoom visit <https://zoom.us/>. This includes bite-sized training videos and FAQ's.

## Joining a Zoom meeting

Volunteers may join a meeting run by staff or by other volunteers. You can usually join by clicking on a link you receive in an email.

Alternatively, you can:

1. Go to <https://zoom.us/>
2. Select 'Join a meeting' towards the top of the screen in the menu bar
3. Enter the meeting ID or personal link name
4. Select join

For both methods, if it is the first-time using zoom on a device, you will be asked to download the Zoom App.

Before your first meeting it is useful to install zoom first, so you don't miss any of the meeting setting this up. You only need to do this once on a device.

There are slight differences between joining a meeting and a webinar:

- Meetings are designed to be a collaborative event with all participants being able to screen share, turn on their video and audio, and see who else is in attendance.
- Webinars are designed so that the host and any designated panelists can share their video, audio and screen. Webinars allow view-only attendees.

## **Quick shortcuts in a zoom meeting**

Alt + A to turn mute on or off

Alt + V to turn your webcam on or off

Alt + U to open participants panel list

Alt + Q to leave meeting

## **Accessibility**

Zoom works well with screen readers but like any other software it takes practice to remember. Useful Keyboard shortcuts and JAWS points are given later in this guide. There is a separate guide for ensuring that meetings are welcoming to all, including tips suggested by service users.

Attendees will hear a new chime when a participant has entered the Waiting Room or when a participant joins or leaves the meeting if the meeting host has the setting 'Play sound when participants join or leave' enabled. This can be distracting, and hosts should ensure clear introductions, or (in larger meetings) that participants introduce themselves each time they speak.

## **Security**

- You should only ever use software you are comfortable with using.
- There is more detail on the zoom website.
- You do not need to join with video.
- Always remember to click on 'Leave' meeting rather than just closing zoom once the meeting has finished.
- AES 256-bit GCM encryption, Zoom version 5.0.0 or higher, offers increased protection of your meeting data in transit and resistance against tampering. This provides confidentiality and integrity assurances on your Zoom Meeting, Zoom Video Webinar, and Zoom Phone data.

# Getting Started

## Installing Zoom

If you are using your own computer, tablet or phone you can set up a personal account via <https://zoom.us/>.

If you are hosting a meeting (and don't already have an account):

1. Click '**Sign up, it's free**' at the top right of the page.
2. You will be asked for a date of birth. This data will not be stored.
3. Enter your preferred email address and click sign-up.
4. Zoom will send you an email that you must respond to activate your account
5. Zoom will also ask if you want to receive other resources (product news, how-to videos, and helpful demos). You can either confirm or set preferences, which includes the option to unsubscribe from any other zoom emails.
6. When you receive the zoom activation email, follow the instructions.
7. You will be asked to set a password for your account

If you are using a Guide Dogs laptop, Zoom will have been installed on your computer by IS. You can initially locate by searching for it via your Windows Search facility. (This is found at the bottom left hand of your screen, just click the image of a magnifying glass and type 'Zoom'.) If you cannot find Zoom, please contact IS Service Desk in the first instance.

## Before your first meeting

The web browser client or Zoom App will download automatically when you start or join your first Zoom meeting and is also available to download in advance from <https://zoom.us/download>.

If you are using a computer or laptop you should download 'Zoom Client for Meetings', if you are using a tablet or phone you should download 'Zoom Mobile App' and select either the apple or android button depending on the brand of device you own.

## Setting Up

Zoom can be accessed in a multiple of ways

- Web App
- Desktop App
- Mobile App

We will concentrate on the Web App - as this is the easiest way to navigate through the settings menu on any device.

We would recommend that before you join or schedule any meetings, you follow the steps below to ensure the following settings have been set up.

1. Open your browser (e.g. Chrome, Safari, Microsoft Edge) and navigate to the Zoom website <https://zoom.us/signin>

2. Sign in using your username and password.

Please Note:

If you have a Guide Dogs laptop, ensure you Sign in with SSO (Single Sign on). If you have not done this before, refer to the [Zoom - Guide.docx](#) on Pawtal and refer to the 'Sign in to the Zoom Desktop App' section that starts on page 1

If you are using your own device, this link will not open or be relevant to you, so you can ignore this point.

3. Navigate to the Settings section. The quickest way is via the direct link: <https://zoom.us/profile/setting>.

Alternatively, if you're using a laptop or desktop and your screen is maximised (full screen), select 'settings' in the navigation area on the left-hand side. If you're using a mobile or tablet, select 'settings' from the drop-down menu that shows at the top of the page with the 'Profile' option and a blue chevron/arrow to the right of the page on a mobile.

JAWS users can search for it with INS+F5. JAWS users note that the Settings button is called "Personal menu list - Settings menu".

4. Ensure the following settings are set. **Please be aware that there are a lot of options that are not mentioned in the list below - you can just leave those as they are.**

Note for JAWS users: You will be landing on toggle buttons. When JAWS says “Toggle button pressed” it means it is enabled. When JAWS says “not pressed” it is disabled. When you change a setting, there will be a pause and JAWS will then say “Alert. Your settings have been updated”. Then you can proceed.

- Disable Use Personal Meeting ID when starting a meeting
- Enable Require a password when scheduling new meetings
- Enable Embed password in meeting link for one-click join
- Enable mute participants upon entry
- Enable Upcoming meeting reminder
- Enable Play sound when participants join or leave
- Disable Allow removed participants to re-join
- Enable Remote Support
- Enable Closed captioning
- Enable Save Captions
- Enable Language Interpretation
- Disable Group HD Video
- Enable Identify guest participants in the meeting
- Enable Use HTML format email for Outlook plugin

## **Setting up/hosting meetings using a free account**

Zoom abilities are limited when you are using a free account.

This means that:

- You can only set up meetings of maximum 40 minutes in length
- You won't be available to add as an alternative host prior to a meeting starting.

What you can do is:

- Set meetings up for 1:1 sessions - they have no length cap for free users with 2 individuals in a call
- Host meetings up to 40 mins in length with more than 2 attendees.
- Become a co-host during a meeting - once a meeting is set up, by a different host, and has started the host can assign you as a co-host, which will enable you to support with the majority of host functions within a meeting. EG. - sharing a screen, setting up a poll or breakout rooms.

Functions that you cannot administer as a co-host are:

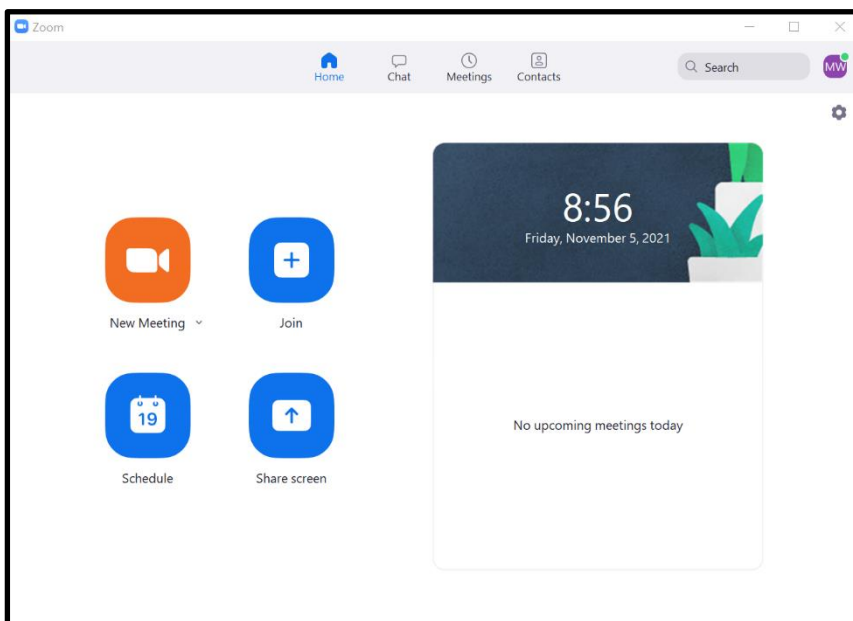
- Start closed captioning and assign someone or a third-party to provide closed captioning

- Start live streaming
- End meeting for all participants
- Make another participant a co-host
- Start waiting room (co-hosts can place participants in waiting room or admit/remove participants from the waiting room)

## Navigating around the Desktop App

The Desktop App is split into four tabs (at the top of the page)

- Home
- Chat
- Meetings
- Contacts



A user can press Ctrl + Tab to cycle through each tab easily.

**Note for JAWS users:** JAWS will announce "...tab selected, to switch pages press Ctrl + Page Down". This does not actually do anything at all.

To navigate through each page, keyboard users should use the Tab key

### Home

The Home tab allows quick access to start a meeting, join a meeting, schedule a meeting, and share screen.

### Chat

The Chat tab displays any chats available like Instant Messenger.

### Meetings

The Meetings tab allows the user to view what meetings are upcoming, start an instant meeting and schedule a meeting.

If you have a Guide Dogs laptop, it is recommended to schedule a meeting through the Outlook calendar to ensure the meeting shows in your diary.

### **Menu Button**

You can change your status and get to settings quickly by moving to the top right of the app (keyboard users can tab to the menu which will read out your name, availability and menu). This button displays as a small thumbnail containing either your initials, or your profile picture if you've added one. Activating the menu, a user can then arrow through options and select by pressing Enter. The Sign Out option is the last item in the menu.

### **Closing the app**

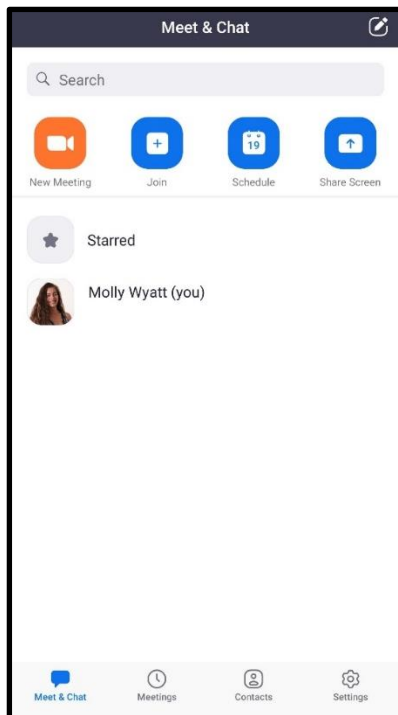
When closing the Zoom Desktop App, it will remain active within the Task bar. If closed completely, the app will remember which Tab you were on the next time you sign in.

## **Navigating around the Mobile App**

The Mobile App is split into four tabs (at the bottom of the page)

- Meet & Chat
- Meetings
- Contacts
- Settings





## Meet & Chat

The Meet & Chat tab allows quick access to start a meeting, join a meeting, schedule a meeting, and share screen.

## Meetings

The Meetings tab allows the user to view what meetings are upcoming, start an instant meeting and schedule a meeting

## Contacts

The Contacts tab will allow you to contact anyone you have in your network via chat or meeting.

## Settings

The Settings tab opens all account settings, with various menu options. You will need to open the profile option (where your name is displayed) and navigate to the bottom of the menu to Sign Out.

## Join a Meeting from your email

- Open your email with the invitation
- Navigate to the link under the “Join Zoom Meeting” wording.
- Open the link.
- The Zoom app will open, and you will be connected to the meeting.
- You may also see options to dial using a phone. Normal volunteer expenses procedure applies.

## Join a Meeting via The Desktop App

- Tab to the “Join” button
- You will hear “Please enter your Meeting ID or Personal Link Name”. Enter the meeting ID in this edit box - this is the number at the end of the Meeting link, if not given separately.
- Tab twice to the next edit box and enter your name. (This may already be populated with your username or own name from previous meetings).
- Leave the first check box unchecked “Do not connect to audio” to ensure your microphone is automatically on when you join the meeting.
- It is up to you if you wish to check the box “Turn off my video”
- Tab to “Join”, Screen reader users will hear “Join Meeting”.
- Press Enter.
- You may be required to enter the meeting password.
- Enter the password in the edit box. The password will be secured. Tab to the “Join Meeting” button and press Enter.
- Note: the meeting host may have set up a waiting room, so you may need to wait until you have been accepted into the meeting.
- When you are connected to the meeting, you will hear a doorbell chime. From here you can mute/unmute yourself or to turn the camera on/off. Refer to the [Keyboard Shortcuts](#) to find out how to do this using keystrokes.

## Join a meeting using Zoom Cloud Mobile App

Download the ZOOM Cloud Meeting App from your device’s app store before accepting meeting requests via email or an error prompt could appear saying the link is not valid.

- Navigate to your email client and double tap the Zoom Meeting link within the email.
- The Zoom app will launch automatically and “waiting in progress” will be announced.
- If a password is required, you will be asked to enter it. (The password will be in the Zoom invitation email)
- A dialogue box will announce Enter appearance name, amend or leave default name (phones name by default), swipe right and select Continue.
- Terms and conditions popup will appear, swipe right to select I agree button to continue.
- Microphone alert, swipe right to select the OK button to proceed.

- Notifications popup, swipe right to Allow or Don't Allow notifications and double tap to select.
- When you join a meeting, a popup appears which reads "To hear others please join audio". Swipe right to select call using instant audio and activate.
- You will now be connected to the meeting.

## Joining a Webinar

If you are used to using zoom for meetings, a webinar maybe slightly different to what you expect.

You need to register beforehand. The registration process is straight forward. You will access a link which will look something like:  
**[guidedogs.zoom.uk/webinar/registration/...](https://guidedogs.zoom.us/join/registration/)**

When you join, your microphone is muted, and your video is turned off. This is because webinars are specifically to interact with large audiences. The host may offer an opportunity to you to speak, but the host will be able to activate and deactivate your microphone. Do not worry though, you can decline if you do not wish to speak.

See the 'Accessing a webinar' guide on [VIP](#).

## Create an instant meeting

1. From the Home tab, navigate to the New Meeting button and activate.

**Note:** That Video is on by default!

If video is not required, please use the below steps.

1. From the Home tab, press Tab until you land on New Meeting Option and activate. A dropdown menu will open
2. Select Start with video and uncheck the checkbox. Press Esc to close the submenu
3. Navigate to Starting a new meeting button and activate.
4. A dialogue will open, Press Tab until you land on Join with computer audio and activate.
5. Your meeting will now start

## When in a meeting, Invite others to the meeting

1. Activate the participants list or Alt + U
2. Tab to the Invite button or Alt + I, A window will appear with a list of contacts.
3. Tab to Copy Invite link button or Copy invitation button

4. You can now paste this copied information into an email or message invitees.

## **Breakout Rooms on PC Zoom App**

Breakout rooms allow the host to split their Zoom meeting in up to 50 separate sessions. The meeting host can choose to split the participants of the meeting into these separate sessions automatically or manually and can switch between sessions at any time.

Rooms are accessible to join via desktop and mobile apps.

### **Joining a breakout room**

The host will invite you to join a breakout room.

Breakout rooms should have been set up previously and the host should notify who is in what room.

1. A dialogue window will appear asking you to Join or later
2. Select Join
3. The screen will change to display text joining breakout room and the breakout room number
4. You will now be added to the breakout room with other attendees displaying all normal meeting controls.

### **Asking for help in a breakout room**

Ask for Help during a breakout room meeting will notify the meeting host that you need assistance and they will be asked to join the breakout room.

1. Select the Ask for help button on the right-hand side of the meeting controls
2. A dialogue will appear, select Invite Host.
3. The host will receive the invite and join the Breakout room.

### **At the end of the Breakout Session**

Breakout Rooms should be set up correctly to transfer all participants in and out of rooms automatically.

When the host ends the breakout rooms, you will be notified and given two options, return to the main room immediately, or wait and be automatically returned in 60 seconds (default).

## **Breakout Rooms By telephone (dial-in)**

### **Joining a breakout room**

When joining a breakout room by telephone, you do not need to do anything to join. Once the host starts the breakout rooms, you will be notified that you have been added to a breakout room.

### **Participating in the breakout room**

You will be able to mute and unmute as in a normal meeting. Use \*6 to mute or unmute.

### **At the end of a telephone breakout room**

You will be notified when the host has ended the breakout rooms and that you will be returning to the main room in 60 seconds (default time). Press the # (hash) key to join the main room immediately.

## **Gallery/Speaker view**

Within a Meeting, you can alter your view of the meeting in the following ways.

- Speaker view - this will display the video/photo of who is speaking at the time
- Gallery View - This view will show every participant as in a tile view. Users need to swipe from left to right to view all participants if there are a lot of people within the call.

## **Polls**

Hosts use polls to ask questions and help gauge responses from the audience.

When a poll is initiated a pop up will appear on the screen presenting the questions and answers.

### **Notes for screen Reader users on desktop**

- If using a screen reader, focus will automatically land take focus on the poll title.
- Tab once to hear the question.
- Tab a second time to navigate to the answer choices.
- Use arrow keys to navigate through the choices.
- Navigate to “submit” button.

It is recommended that Polls only have one question per poll. If on the off chance, a poll has more than one question you may find your screen reader focus does not shift properly to the next question. This can be resolved by navigating back up the form once you have selected next.

Polls results can be shared after participants have taken the poll and this is also accessible, though we did note some screen readers did not read the percentages. This will be addressed by your host, and they will read these visual elements.

Polls are also accessible if using the Zoom mobile app.

## Further Support

There are training videos and FAQs on the Zoom website. We've picked out some pointers in this document. If you do have any issues that are affecting your role, please speak to your Volunteer Manager who will be able to help or signpost you appropriately.

### Online guide videos

- Zoom provide a variety of videos on their blog covering the most common actions, these are not audio described but are clear in direction as to where the settings/options are located.  
[Online guide videos](#)
- There is a mailing list aimed at people with sight loss and Zoom. To join, send a blank email to [zoom-users+subscribe@groups.io](mailto:zoom-users+subscribe@groups.io)

## Keyboard Shortcuts

Shortcuts are not specific to assistive technology and can be used by everyone.

- Alt + A to toggle mute on/off
- Alt + V to toggle share webcam video
- Alt + S to toggle sharing screen
- Alt + H to display/hide In-Meeting Chat panel
- Alt + U to display/hide Participants panel
- Alt + I to open Invite window
- Alt + Y to raise/lower hand
- Alt + Q to leave meeting
- F6 to navigate among Zoom popup windows.
- Alt + F1 to switch to active speaker view in video meeting
- Alt + F2 to switch to gallery video view in video meeting

- Ctrl + Alt + Shift to move focus to Zoom's meeting controls
- Alt + F4 to close the current window
- Alt + Shift + S to add an additional screen share
- Alt to turn on/off the option “Always show meeting control toolbar” in Accessibility Settings
- Alt + M to mute/unmute audio for everyone except host Note: For the meeting host only
- Alt + R to start/stop local recording
- Alt + C to start/stop cloud recording
- Alt + P to pause or resume recording
- Alt + N to switch camera
- Alt + F to enter or exit full screen
- Alt + T to pause or resume screen share Note to Will only work when meeting control toolbar has focus
- Alt + Shift + R to gain Remote Control
- Alt + Shift + G to stop Remote Control
- Ctrl + 2 to read active speaker name
- Ctrl + Alt + Shift + H to show/hide floating meeting controls
- Alt + Shift + T to Screenshot
- Alt + L to switch to portrait/landscape View
- PageUp to view previous 25 video stream in gallery view
- PageDown to view next 25 video stream in gallery view
- Ctrl + W to close current chat session
- Ctrl + Up to go to previous chat
- Ctrl + Down to go to next chat
- Ctrl + T to jump to chat with someone
- Ctrl + Tab to move to the next tab

**End of document**