Recovery Dharma: Setting Up Local Zoom Meetings

Hello RD Community! This document is based on the hosting guide used by Recovery Dharma Online, who have been hosting daily online RD meetings using Zoom since RD was founded.

The goal of this document is to share our tips for running an online RD meeting, in case other local communities want to temporarily use Zoom while the COVID-19 situation is ongoing.

This document explains how to use the Zoom videoconference platform to run an RD meeting. We're trying to keep it short and easy to read because mostly Zoom "just makes sense", and you should be able to find what you need by just looking around. If you want more guides on Zoom in general, check out the Zoom Help Center.

*If you just want to **join** an online meeting, or want to get involved in ongoing, global online meetings, please skip this document! Just head over to recoverydharma.online and find the next meeting that fits in your schedule to get involved!*

Online Meeting Script

Our community has developed a fleshed-out script that accounts for many of the special needs of an online meeting. If you don't have a special script for hosting online meetings, we recommend you start with this one:

http://bit.ly/rdo-default-meeting-script

This format was designed for use with the **Share Portion of Screen** option in Zoom (as described below). Following those instructions, you'll be able to share the meeting "readings" via screenshare in a way that works great on both large computers and smartphones.

As always there's no need to "read everything" if there is something in the script you find unnecessary. If you want to make edits, you can of course just use the **File > Make a Copy** menu item in Google Docs to clone the file and start editing it to your taste.

Getting a Zoom account and logging in as admin

These are some quick instructions for how to sign up for a Zoom account and set up a meeting room. There are many details we won't get into here, but these basics should be helpful.

Essentially you'll need to do the following:

- Sign up for a Zoom account. We recommend using a "generic" name like "Recovery Dharma Berlin" rather than your personal name.
- You'll need to pay for a 15$/month plan in order to have meetings over 40 minutes with many attendees, as well as to use the **Host Key** feature described below.
- Share the account information with a few people so they can log in and host.

Some quick tips on **Personal Meeting Room**:

- Every Zoom account has a "Personal Meeting Room" that they can use any time, rather than creating individual meetings.
- Find the info and settings for this room in the Zoom.us settings:
  - **Personal > Meetings > Personal Meeting Room**
- We recommend using this Personal Meeting Room, which is a single, permanent meeting URL, rather than having different URLs for each meeting.
- This makes it easier to share the URLs with people and for people to remember them. Anyone using your Zoom account just has to find that one link and they'll be able to log in.

We also recommend the following settings for your **Personal Meeting Room**:

- **Enable join before host: ENABLED**
- **Mute participants upon entry: ENABLED**

Once your account is set up, anyone with the login name and password will be able to enter the meeting as an administrator:

- Go to the Zoom.us website and log in as the official account.
- Open the meeting
- You should be the "host" with all abilities.

Using a "Host Key" to delegate admin control

Zoom has a very useful system to avoid anyone having to "log in" on the Zoom website as the actual admin account.

What is the "Host Key"?

The system lets you set up a "Host Key" for your **Personal Meeting Room**, then anyone who has that code can join the meeting without logging in to zoom.us, and just use the **Claim Host** button (described below) to become the host.

Benefits of Host Key:

- You can easily give someone the Host Key so they can admin a meeting, it's just a 6-digit code rather than a strong password
- It means everyone can create a free personal Zoom account (described [below](#)) and be logged in to that, which means they have personal avatars and their name shows properly. No one has to be logged into the generic institutional account.

Setting up a Host Key

- Open up the settings for the paid account on Zoom.us
- Go to **Personal > Profile** settings
- Find the **Host Key** setting and edit it to have a number.

TIP: The host key can be ANY 6-digit number. Make it something easy to remember!

Using the Host Key to "Claim Host"

- **Open the meeting URL for that meeting**
  - This should be your **Personal Meeting Room** URL described above.
  - This is the same URL you distributed to people who will attend the meeting.
- **You are now an attendee but not a host**
  - In theory you can run a whole meeting this way, but will lack the ability to mute others and do other admin tasks until you claim host status
- **Use the "Claim host" button in the Participants list**
  - Open the **Participants** list using the button at the bottom of the window
  - At the bottom of the window, *IF THERE IS NO HOST YET*, there will be a **Claim Host** button.
  - Click the button and enter the **Host Key** for the meeting.
  - If the button is missing it is probably because someone else in the room is already set as host (which is visible in the **Participants** list). Ask this person to make you **Co-host.**

Sharing meeting info

There are many ways to share the information for your Zoom meeting, but the key thing to ensure is that you clearly and prominently share the **Meeting URL**. The URL can be clicked on pretty much any device to be automatically led through a process that will get the person into the call, including installing the app if necessary.

In addition to the **Meeting URL**, Zoom will give you dial-in information that people can use to call in by phone and enter the meeting code to join. You can often just copy and paste this information from Zoom, but the result is that when sharing your meeting, you should focus on the following information being prominent and easy to find:

- **Meeting URL** (e.g. https://zoom.us/j/5443375344 On a website, you can make this a link like "Join the meeting!")
- **Meeting ID** for telephone or entering manually into the Zoom app (e.g. 544 337 5344)

- **Phone number(s) to call** (Zoom gives both some example numbers for specific places, and a URL to click and find the best number for you).

For an example of how to share Zoom meeting info to make it easy on your users, check out [this example RDO Meeting page](#).

Promoting meetings with a Facebook event

If you are having a new online meeting and already have a Facebook group or page for your sangha, you can use a **Facebook event** to promote the meeting to great effect.

A few Facebook Event tips:
- **Meeting URL:** Make sure the Zoom URL is at the top of the event description so that people can quickly find it and join the meeting.
- **Location:** Don't put the Zoom URL in the "Location" box as on some apps this can lead to confusion when a map view opens up and can't find this as a place. Instead just write "Online Zoom Meeting (URL in description)" as the location of your event.

Hosting a meeting

Below are tools and tasks that you will be using on an ongoing basis. The instructions below apply to anyone facilitating a meeting, whereas the instructions above are mostly just for the person doing the initial Zoom setup.

Creating a personal Zoom login

- It's free and quick to create a personal Zoom account for yourself, separate from the one we pay for to host these meetings.
- It's not required for you to use a personal Zoom account, but we recommend it because it gives you a nice avatar image and automatically sets your name each time you log in.
- You can stay logged in to your personal Zoom account full time, and just use the **Host Key** (as described above) to claim host status when you log into a meeting.

Speaker View and Gallery View modes

- There are two view modes in Zoom, **Speaker View**, and **Gallery View**.
- The "View mode" button is in the top right of the window where you see the video streams. It's text always shows the "other" mode, and clicking switches to it.
- **Speaker View** only shows you one user at a time (the one who is currently talking)
- **Gallery View** shows a "Brady Bunch" display where all users are visible at once. You can still see who is "talking now" (making noise) because they are surrounded by a yellow box.
- We recommend facilitators leave this in **Gallery View**, so you can see all participants.

Participants list

- The button to open the **Participants** list is at the bottom of the window.

- Shows all users and whether they are muted
- Use the tools in this list to manage users (rename/mute/stop video/disconnect)
- Also shows if other users are the host or co-host
- Keep the participants list open at all times.

Making another user "co-host"

- Once you are the host (see above) you can assign others to be "co-host" granting them the same powers you have (except the ability to remove you from the call).
- Having a co-host is useful in case there is a problem with your internet connection, or you just need help. Choosing a trusted co-host for each meeting is a good idea.
- Co-host and host can still mute each other if there is a problem.
- If you are the host, you can also use the **Make host** command on someone, which will make them the host and *REMOVE your host status*. Usually you should just **Make co-host**, so that you don't lose your own powers.

Muting and unmuting

- Use the microphone icon to mute yourself or others when silence is needed or their line is creating noise when it shouldn't.
- Users can always unmute themselves when it's time to share.

Renaming users and call-ins for clarity

- Computer users can set their own username when they log in, so usually you should leave them alone.
- People calling in by phone will display as their phone number, which makes it hard to refer to them by name.
- You can give these call-in users a display name by clicking on their user and choosing the **Rename** menu item. Use this tool to update their display name after they introduce themselves.

Chat window

- Display the **Chat** panel using the button at the bottom of the main window.
- Users often use the chat when they are having problems with video or audio, so keep an eye on this and help them if necessary.
- You should see visual notifications in your main window if there are unread chat messages.

"Leave meeting" v. "end meeting"

- When normal users leave the meeting the meeting stays open until the final user closes their window.
- When you are a **Host** you are given a choice between **Leave meeting** and **End meeting**
- If you choose **End meeting** then all users will be kicked out without being asked, if you choose **Leave meeting**, then they can hang around after you go until the final user leaves.

- For RDO meetings, we almost always want to **Leave meeting** rather than ending it, so that participants can continue talking to each other if they'd like to (we call this the "Virtual Parking Lot")
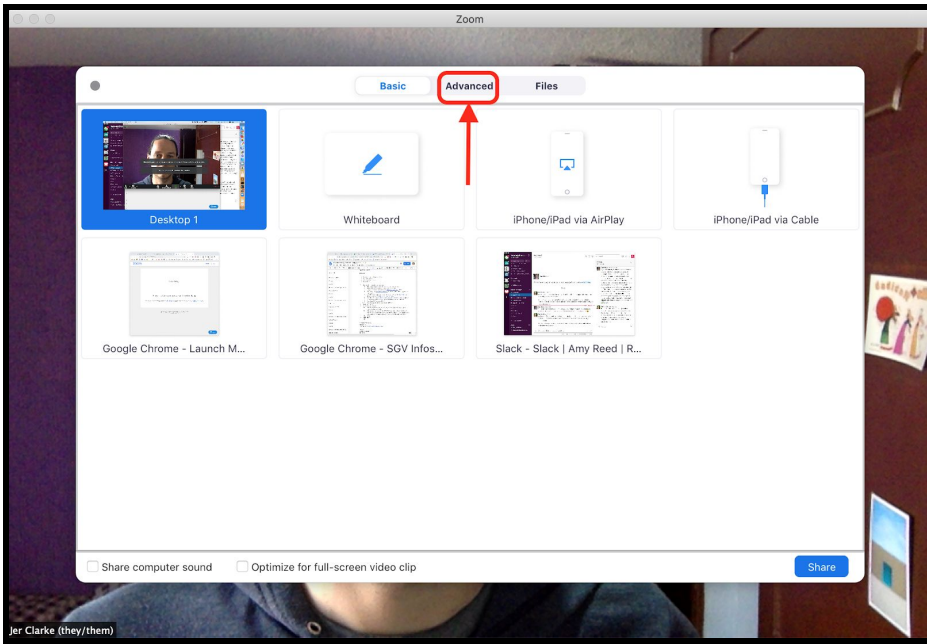
Sharing your screen

- Zoom has a great screen sharing tool built-in that can be used to share readings to all members, to share a video or audio with the call, or just about anything else.
- You can start sharing your screen using the **Share** button at the bottom of the main window.
- This opens a popup window offering you different ways to share your screen, clicking one will begin sharing it.
- Tips:
  - Avoid sharing your full system (labeled "Desktop 1") as this will show users a ton of unnecessary stuff like your other windows and system menus (including stuff you might want to be private)
  - You should share either a specific window, or a **Portion of Screen** as described below.
  - While in sharing mode, you can use the small green/red menu button at the top of the screen to interact with Zoom settings and open up windows like **Chat** and **Participants**, which are otherwise hidden while you are in sharing mode.
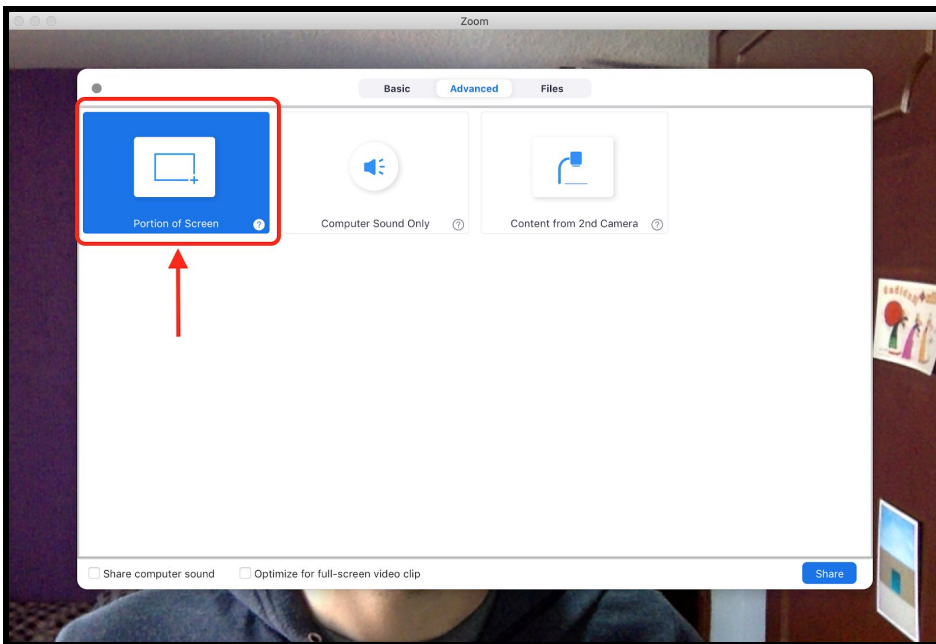
Sharing "Portion of Screen"

- Sharing only a "portion" of your screen is the best way to share only what is most important. This makes it less distracting for your desktop attendees, more private for you, and for those on mobile, it means the shared text will actually be big enough to read without pinching and zooming.
- Sharing "Portion of screen" has another huge benefit: You can keep the other Zoom panels open while you are in this mode, so you can still watch the **Participants** and **Chat** windows while showing attendees what's important in a browser or other window.
- Unfortunately this feature is a bit hidden and confusing at first, so the guide below explains how to use it.
- **Preparing "Portion of Screen" in advance**: Before your meeting starts, get your sharing set up so that the green "portion of screen" box is in the right place to display the first reading and everything is where it needs to be. That way when you get to the first reading everything goes smoothly.
- Please be mindful that when attendees hover their cursors over their own Zoom windows, Zoom puts a button bar over the bottom edge of the window, obscuring whatever you may be sharing. As a result, you might want to keep the bottom 72 to 150 pixels (2.5 cm or 1 inch or so) at the bottom of your green box clear of things you're sharing.
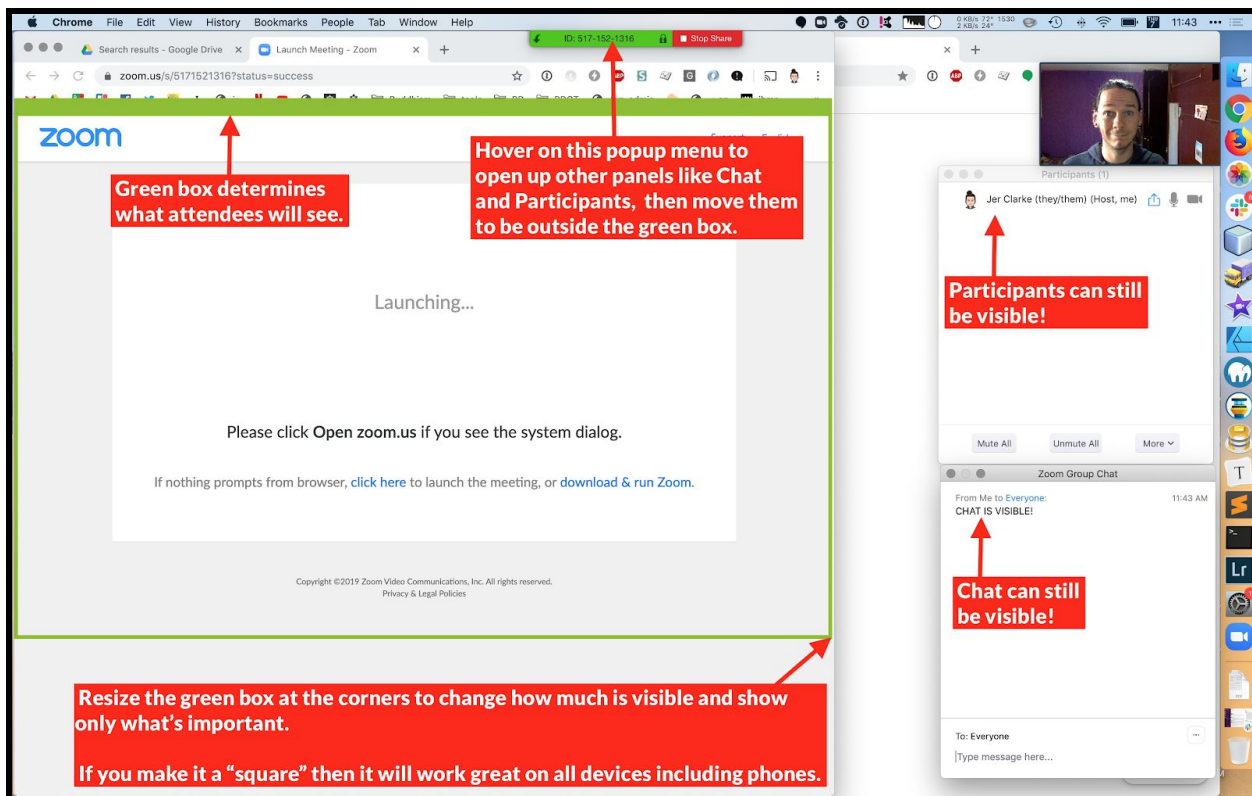
When sharing, ignore the default choices and go to "Advanced" at the top to see more options

Choose "Portion of Screen"

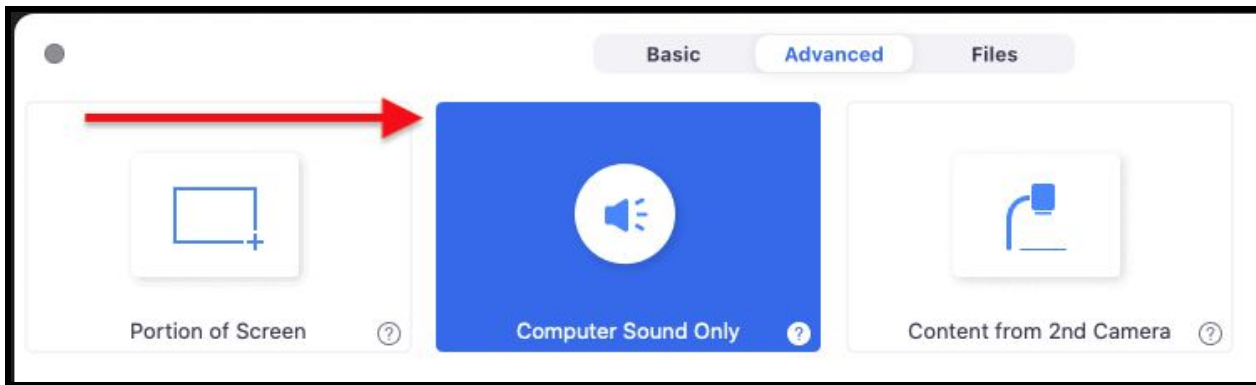**Resize and move the green box to choose what users will see.**

- Drag the green box from its corners to resize the portion that is shared
- If you make it a "**square**" and it will be as big as possible on all devices, especially phones held vertically.
- Use the menu at the top to open up panels like CHAT and PARTICIPANTS
- Drag the panels outside the green box to keep an eye on them while sharing your screen!

Sharing Audio along with your screen

- If you want the sound from your computer to be part of the screencast, click the **Share computer sound** checkbox in the sharing popup window *before* clicking the confirmation button.
- It's also possible to share *just* your computer audio; this is particularly useful when playing back a guided meditation (for example) and provides a superior audio experience over just placing your Zoom microphone near your computer's speakers. To do so:
    - Click Zoom's **Share**
    - Click **Advanced** as above
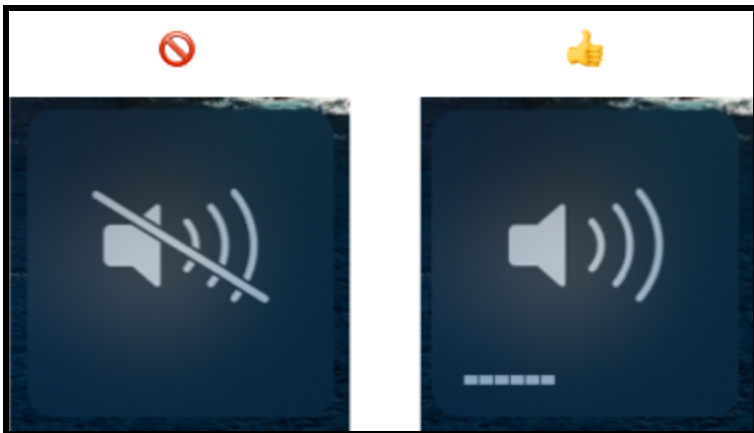   - Click **Computer Sound Only**:

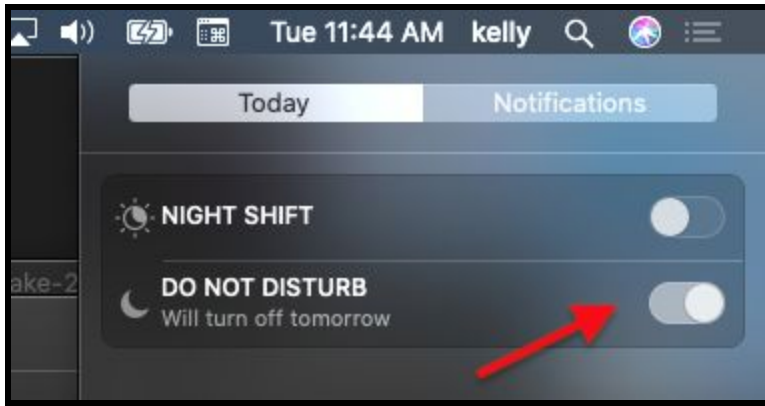**Sharing Computer Sound only in the "Advanced" section of the Share window.**

- You can share any audio that would normally be played by any app on your computer, including:
  - Audio from apps like QuickTime Player, Groove Music, iTunes, Windows Media Player, WinAmp, etc.
  - Audio from media in your web browser like YouTube videos, DharmaSeed audio, etc.
  - Any other app (web browser or otherwise) that produces sound.
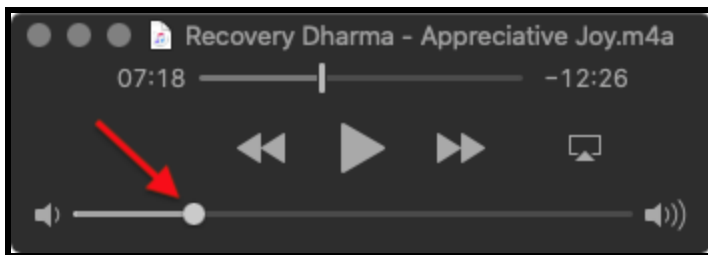
Tips and testing

Make sure your audio isn't muted or no one will hear it! If your computer's audio is muted—regardless of what microphone & speaker you're using with Zoom—Zoom *won't play back any audio to your audience!*

Silence your computer's notifications, beeps, error tones, reminder alerts, and the like will come through Zoom and to your audience.

Test your playback *before* the meeting by sharing audio and starting your playback and then *joining the meeting on another device* (such as your smartphone) and checking the playback level. You may need to turn the volume on your playback app down or up (usually down—and usually *way down*).

Sharing sound and screen from an iOS (Apple) device

You can also share audio from an iOS device (such as an iPhone or iPad). This works on Macs with either AirPlay or a connected Lightning cable; on Windows it works with AirPlay only. To do so, select "iPhone/iPad" on the Basic "Share" window and make sure to check "Share computer sound" in the corner. Note that you have to share your iOS's screen as well; it's not possible to share only its sound.

Download audio in advance

Instead of relying on an app or web site or cloud service to be up-and-running at the time of your playback, consider downloading or pre-recording the audio to a digital file on your computer and playing from it instead. A number of apps are available that will let you record or extract audio to a file.