

Video Conferencing Basics Training Workshop

Instructor Outline: Video Conferencing

This document is designed to be used by the instructor alongside the PowerPoint presentation and/or projected live demonstration. It includes a course overview, talking points, and instructions for the activities. Please note the slide numbers to help keep you on track.

Workshop Description

This in-person or virtual workshop is for those who have some experience setting up personal accounts online and are interested in video conferencing. It will support attendees to create an account on a popular video conferencing platform (Zoom) and build confidence when using features of the platform in an online meeting. Please see notes below on adjustments for delivering this workshop virtually.

Curriculum Track

Basics

Audience

Adults from newly connected households and/or who are looking to build basic skills and confidence using technology.

Workshop Length

60–90 minutes

Training Method

Volunteer Instructor-led, hands-on

Purpose

In this workshop you will introduce newly connected computer and internet users to video conferencing. Learners will create a personal account and explore basic features for attending and hosting meetings. A primary objective of the workshop is for learners to increase confidence in their ability to engage in online meetings.

Equipment Requirements

In person: Projector and projection screen; computers for instructor and participants with internet connections; laser pointer (recommended). *For classroom-only settings (no participant computers),

instructor will project a live demonstration and engage participants by talking through the activities and performing interactive tasks in a group discussion format.

Virtual: This workshop may be challenging to deliver virtually because it requires learners to connect to a video conferencing platform, like Zoom, to attend the workshop. We suggest you direct learners to access the self-guided online course at www.digitallearn.org if virtual access is desired. Should you wish to deliver the workshop virtually, there is an Additional Workshop Requirements section later in this document.

Software Requirements

Computer capable of running a PowerPoint presentation with a web browser, preferably Google Chrome. Learner computer devices or classroom computer devices will need access to download Zoom if it is not already downloaded to the device.

Material Requirements

- Notepaper, pens, or pencils
- Instructor PowerPoint: Before the workshop, review the slides and update the following information:
 - Verify which web browser you will be using during the workshop and how to launch the browser from desktop.
 - Slide 1: Update instructor name, instructor affiliation (for example, library staff, community volunteer, and so on), location name and your library's logo. Be prepared to give a brief introduction about yourself.
 - Slide 20: Update the slide with the email address that learners will use to email you a Zoom invitation or remove the email address if you are not including this activity.
 - Slide 33: Insert your library's website URL and Insert name and date of next workshop if one is being offered.
- Instructor Outline (this document): Review the Instructor Outline and familiarize yourself with the workshop materials and software requirements.
- Learner Handout
 - For in-person workshop: Print handouts for each attendee and provide them to learners before the workshop begins.
 - For virtual workshop: Provide link to the Learner Handout, either before the workshop as part of their registration confirmation or in the online platform's chat feature.
- Learner Activity Worksheet
 - For in-person workshop: Print handouts for each attendee and provide them to attendees before the workshop begins. You can also keep up the appropriate slides that show the activities as the learners complete them.
 - For virtual workshop: Learners will use the activity sheet you sent before the workshop to complete the activities. You can also keep the appropriate slides up that show the activities as the learners complete them. Note differences in Activity 3 below in Additional Workshop Requirements.

- **Certificate of Completion:** For the in-person workshop, print a certificate to hand out to each attendee once the workshop is completed. For virtual attendees, send them an electronic copy via email.
- **Attendee Name Tags:** If you want to easily identify attendees, make sure to bring name tag stickers or table tents.

Learning Objectives

At the end of the session, learners will be able to:

- Identify how to join a meeting from an invitation.
- Create a personal Zoom account.
- Recognize common participant features.
- Schedule a Zoom meeting.
- Use tips for hosting meetings.

Before Workshop Begins

- **In person:**
 - Make sure all computers are turned on and ready for attendees to use. (See the previous note about classroom settings, in the “Equipment Requirements” section.)
 - Place attendee materials at each computer. Attendee materials include the Learner Activity Sheet and Learner Handout. There may also be paper (for attendees to take notes) and pens or pencils.
 - Be sure to send the Volunteer Guide and the “To Do List End of Year Party” demo document for the volunteer participant.
 - If using name tags, make sure they are easily accessible to attendees and that you provide a marker or pen for attendees to write their name.
 - Keep a registration list so you can identify who attended.
 - Review the computer before the workshop begins and see which web browser is installed and how to launch it from the computer.
 - Review the “Additional Workshop Requirements” section below.
- Identify a “parking lot,” which is a place to track questions to be answered later in the workshop. Some suggested places for a parking lot are a whiteboard, flip chart, or notepad. Encourage learners to note the slide number and section as they “park” questions.
- **Virtual:**
 - Send instructions to participants about how to connect to the workshop. If possible, you may want to create a short video or document with step-by-step instructions (with images) to provide a basic overview of how to use the web conferencing tool to share with your participants.
 - Send a link before the workshop to the learner materials. These materials include the Learner Activity Sheet and the Learner Handout. During the workshop, resend the link through the web conferencing chat tool.
 - Keep a registration list so you can identify who attended.

- Identify a “parking lot,” which is a place for participants to ask questions and a way for you to easily track the questions to be answered later in the workshop. You may want to use the chat feature or the question feature of the web conferencing tool. Encourage learners to note the slide number and section as they “park” questions.
- Review “Additional Workshop Requirements” for virtual workshops below.

Assessment Technique(s)

Successful completion of activities

IMPORTANT: Additional Workshop Requirements

In this workshop, you will need:

- 1) A Zoom account that can be used to demonstrate how to use Zoom including how to host a meeting.
- 2) If you want to demonstrate how to send/receive an email invitation to a meeting, you will need an email account to use for this purpose.
 - a. On slide 21: You will need to insert an email address that learners will use to practice sending a meeting invite.
 - b. You will demo the email account so they can see the invitation.
 - c. Please log in to the email account before the workshop begins to ensure the demo goes seamlessly.
 - d. If you do not want to do a live demo you can discuss the process while on slide 21. Remove the email address from the slide.

Volunteer Video Participant

Coordinate the participation of an additional virtual volunteer who will join a Zoom meeting with you. This will help you demonstrate the features. You might invite a volunteer colleague to help you. Or you might invite a special guest from a nonprofit partner, a local or state representative’s office, or someone from another leadership organization, such as a “friends of libraries” group.

Provide the Volunteer Zoom Participant Guide to your volunteer for them to follow along with you as you demonstrate the Zoom features beginning on Slide 14. Provide the volunteer with the “To Do List End of Year Party” document for them to share on their screen during the demo. Send them an invitation to your meeting so they can join you.

Notes for Virtual Workshop

If you choose to present this workshop virtually, you will need to be creative with the way you adapt the activities, since learners will already be on Zoom or another video conferencing platform to attend the workshop.

Consider:

- Activity 1: Learners can still create their own Zoom account but will need to go away from the video conferencing meeting to do so, and then come back. Consider how you will support learners who are having trouble creating an account.
- Participant Features Demo and Activity 2: Instead of learners hosting their own meeting and exploring the features, have them explore the features and complete the activity within the workshop meeting as you discuss them.
- Volunteer participation: Consider whether you need a volunteer in the meeting, since the learners will be present as meeting attendees. You may still want to include a volunteer, but this is something to think through in advance.
- Activity 3: Learners will again need to go away from the video conferencing meeting to complete this activity. Learners can complete the activity through step 5. At step 6, they would instead edit the scheduled meeting, click on Copy Meeting Invitation, and then email you the invitation.
- Activity 4: Consider whether you want the learners to go away from the meeting to complete the practice lesson, or, whether you want to share the lesson in Zoom and have the learners call out the answers.

Instructor Presentation

Slide 1: Video Conferencing Basics.

Show workshop title slide.

Please update this slide with the appropriate information:

- *Instructor name*
- *Instructor affiliation (for example, library staff, community volunteer, and so on)*
- *Location Name*
- *Add library logo*

INSTRUCTOR NOTE: Before the workshop, please review the Instructor Outline. It provides guidance on what to do to prepare for the workshop, how to conduct the workshop, and what you should do once the workshop ends.

Today's workshop is provided with support from AT&T and the Public Library Association.

INSTRUCTOR NOTE: Include a thank you to community collaborator if applicable.

My name is **<your name here>** and I am **<brief description of yourself>**. Before we get started, here are a few housekeeping items: *[Mention the items that are relevant to your workshop.]*

- Where are the restrooms?
- Where are the emergency exits?

- When/how to ask questions. Point to the page number located on each slide for participants to write down along with the question.
- If you have a cell phone with you, please make sure to either turn it off or set to silent.
- Will there be a break?

Slide 2: Workshop Content Outline—Agenda (3 mins.).

In this workshop you will learn about video conferencing. We'll work on building skills and confidence so you can engage in online meetings. This will include:

- Joining meetings that others invite you to.
- Creating your own personal Zoom account.
- Recognizing common features, you'll use in an online meeting.
- Scheduling an online meeting.

As we go, you'll learn tips and tricks for hosting an online meeting. And you will have opportunities to practice.

Let's get started!

Section: Introduction—What Is Video Conferencing?

Slide 3: Do You Have Any Experiences to Share?

INSTRUCTOR NOTE: Ask attendees the question on the slide. Depending on what they share, you may want to ask follow-up questions, ask if others in the workshop have had similar or different experiences, or share your own experiences with your use of video conferencing.

Slide 4: What Is Video Conferencing?

Video conferencing, which is sometimes referred to as web conferencing, is a live meeting between two or more people online. You can use video conferencing tools to connect with family, friends, co-workers, your children's teachers, and more. There are many tools you can use to meet with an individual or a group online. In this workshop, we'll be using Zoom.

Section: Joining a Meeting

Slide 5: Joining a Meeting.

For many of us, the first time we use a video conferencing tool is when someone else invites us to a meeting. We typically receive an invitation through email. Let's take a look at an example invitation.

Slide 6: Joining a Meeting (continued).

INSTRUCTOR NOTE: Point out each element on the slide as you mention it.

The invitation includes:

- Who is inviting you to the meeting
- The purpose of the meeting (the topic)
- The date and time
- A link to join the meeting
- Telephone numbers to use to call into the meeting (Phone numbers may or may not be part of the invite.)

You can still attend a meeting using your phone, even if you don't have access to a computer, the internet, or a mobile device that has a camera. When calling in from your phone, you may need to use your telephone keypad to enter the meeting ID and passcode.

On the day and time of the meeting, you would click on the Join Zoom Meeting link in the email you received. You can also access the meeting by pasting this link into an internet browser.

Slide 7: Joining a Meeting (continued).

The first time you use Zoom, you'll be asked to download and open a Zoom app. You can follow the prompts on screen to install the application.

[Click Enter to display popup] After it is installed, a popup window displays. Click on Open Zoom.us.app.

Slide 8: Joining a Meeting (continued).

Once you're logged into the meeting, a box appears with a message asking if you would like to join with computer audio. When you click on this link, you will enter the meeting.

During the meeting, Zoom will use your computer's internal microphone and speakers or the headset you have connected to your computer. You need a microphone to make sure everyone in the meeting can hear you.

Slide 9: Joining a Meeting (continued).

What if you don't have access to the internet, or you don't want to use the microphone on your computer? In that case, you may be able to join the meeting by calling a telephone number in the meeting invitation. You will need to enter the meeting ID number and passcode before you can join the meeting.

INSTRUCTOR NOTE: Before moving to Activity 1, review "parking lot" questions. If there are no questions in the parking lot, ask the attendees if they have any questions before you move to Activity 1.

Section: Creating a Zoom Account

Slide 10: Activity 1—Creating a Zoom Account.

INSTRUCTOR NOTE: Point attendees to Activity 1 on Activity Sheet page 1.

Slide 11: Activity 1—Creating a Zoom Account (continued).

You can join Zoom meetings without an account. But I want you to see the Zoom features for yourself. So, we're going to create personal Zoom accounts as our first activity.

INSTRUCTOR NOTE: Lead participants through the first three steps in this activity. Invite participants to follow along in creating their own Zoom account. If this is an in-person presentation, walk around and support participants with the activity (in particular after step 3) as needed. After you've demonstrated the first three steps, go to the next slide.

Slide 12: Activity 1—Creating a Zoom Account (continued).

*INSTRUCTOR NOTE: Continue to walk around and support participants with activity. Before moving on from this activity, please emphasize **the importance of keeping passwords in a safe place**.*

Section: Common Participant Features

Slide 13: Demo—Common Participant Features.

Now that you've created an account, we're going to look at some of the important features you'll use as a meeting participant. From your new account, click on the link to host a meeting. Then choose With Video. This will start a meeting, and you'll be able to see many of the features.

Slide 14: Demo—Common Participant Features (continued).

*INSTRUCTOR NOTE: Slide is to segue into the demo. Instructor will **demo from here** using a Zoom account that you identified to use for this workshop. Volunteer will join at this point using the Volunteer Zoom Participant Guide.*

Encourage interaction with the volunteer video participant as you point out the features.

We have a volunteer who's joining my demo Zoom meeting today to help me show you the features.

[Admit volunteer participant. Zoom should be in Gallery view.]

Zoom includes a **toolbar** where you can access many of the participant features. When using the desktop application, the toolbar appears on the bottom of the screen.

[For each feature you demonstrate, encourage the learners to explore that feature on their own computer.]

Microphone

The first item in the toolbar is the **Mute button**. You can use this button to turn your sound off and then back on again. Try muting and unmuting your microphone.

If the Unmute has a red slash going through it, your microphone is turned off. When the mute button is off, no one in the meeting can hear what you say.

[Volunteer is muted—point out that you can see they're muted.]

Here's a helpful tip: Computer speakers pick up background noises, like children playing or a dog barking. Those sounds may be distracting in a meeting setting. For this reason, it makes sense to **mute yourself when you are not speaking**.

The microphone button is like a toggle switch. To turn it back on, click the mute icon again.

Video

The second item on the toolbar is the **Video icon**. You can use this button to turn your video camera on or off. When the video is off, a red slash displays and your image goes away.

[Instructor and/or volunteer turns their camera off.]

Just like with the mute button, the video button is a toggle switch, *and you click it again to turn your video back on.*

[Instructor and/or volunteer turn their camera back on.]

The computer must have a camera for this video feature to work. If your computer does not have a camera, you can listen to other participants, see the screen, speak during the meeting, and share your screen. However, if your computer does not have a camera, people will not be able to see you.

Chat

You can use the Chat feature to send a message or share a link to all attendees or to a particular person.

[Instructor sends a chat message to the volunteer. Volunteer chats back.]

To close the chat window, click the chat icon again and the chat window goes away.

Share Screen

The Share Screen feature allows you to share what is displayed on your screen. For example, you can show other participants a document, a presentation, or a website.

[Volunteer shares the provided "To Do List End of Year Party" document. After this section is completed, Volunteer stops sharing.]

Reactions

The Reactions feature allows you to use emojis to share how you feel with the group about something happening in the meeting. You can clap, give a thumbs-up, smile, and more just by clicking on a specific emoji.

[Volunteer reacts with an emoji of their choice.]

The “raise hand” feature alerts the person who is conducting the meeting that you have a question or that you would like to speak.

[Volunteer raises hand.]

Participants View

If you click on the Participants icon, you can see who is in the meeting. You can also change your name and personal information that displays to the other participants by clicking More and then Rename.

[Both instructor and volunteer change their name in some way—for example, remove your last name, change to a nickname, add pronouns, and so on.]

You can also invite someone else to the meeting.

[Show invitation button at bottom of Participant panel.]

Views

Typically, when you enter a Zoom meeting room, you see the other participants in what’s called Gallery View. There are different views you can choose from when you’re in a video conference. To see the different options, click on the View link at the top right corner. The Gallery view shows all the people who are in the meeting, with their information lined up in columns and rows. The Speaker view shows the person who is speaking in the middle of the screen. Other participants will have small thumbnail images at the top or left-hand side of the screen. Use this view if someone is doing a presentation or if one person will be speaking for a long time.

Leave a Meeting

When you are ready to leave the meeting, click on the Leave button on the bottom right. When you start and host your own meeting, as we have today, this button will say End. However, if you join a meeting that someone else is hosting, the button will say Leave.

[Prompt the volunteer to leave the meeting.]

You’ll then see an extra step for ending or leaving. Click this button, and Zoom will log you out of the meeting and the Zoom app. If you connected audio through your phone, you would simply end the call to disconnect your audio.

Return to the Instructor Presentation.

Slide 15: Features on a Mobile Device.

What if your computer does not have a camera? You can also connect with your mobile device, if it has a working camera. To do this, you will need to have the Zoom app installed on your phone.

Depending on which device you use for video conferencing, some options may be in a different location on your screen. In this example, the Mute, Video, and Participants tab are all at the bottom of the screen. You can click More to see other features, like Chat and Reactions.

INSTRUCTOR NOTE: Before moving to Activity 2, review “parking lot” questions. If there are no questions in the parking lot, ask the attendees if they have any questions before you move to Activity 2.

Slide 16: Activity 2—Common Participant Features.

INSTRUCTOR NOTE: Point attendees to Activity 2 on Activity Sheet page 2.

Slide 17: Activity 2—Common Participant Features (continued).

INSTRUCTOR NOTE: If this is an in-person presentation, walk around and support participants with the activity as needed. Also, demo features as needed. When participants have finished the activity, talk through each item and answer questions as needed.

Slide 18: Activity 3—Scheduling a Meeting.

INSTRUCTOR NOTE: Point attendees to Activity 3 on Activity Sheet page 3.

Slide 19: Demo—Scheduling a Meeting.

One of the advantages of having your own Zoom account is that you can schedule and host an online meeting. To schedule a meeting, go to your account on the Zoom website. I’ll demonstrate the steps. Please follow along with me and with the activity sheet.

*INSTRUCTOR NOTE: Instructor will **demo from here** using a Zoom Account identified for this workshop. Please encourage learners to follow along on their activity sheet as you demo. Support participants with the activity as needed.*

Demo: Scheduling a Meeting

From your account Zoom account, click on Schedule a Meeting.

The schedule meeting form displays. We’re going to create a meeting called “Work Meeting” or “School Meeting” (or whatever else you would like) for next Friday (whatever the date is) at 11:00 am for 30 minutes.

In the form,

- enter the topic, [create “Work Meeting” or your own topic]
- the date and meeting start time, [enter the date for next Friday, and 11:00 am]

- and the duration of the meeting. *[enter 30 minutes]*

Once you've entered the information, click "Save" . . . and the meeting is scheduled!

We won't go through these steps since we're not on our own computers, but you can add the event to your calendar using these buttons.

[Point out the calendar buttons.]

Once you've added this meeting to a calendar, you can use your calendar application to send invitations.

Now that you've scheduled this meeting, you can find it again later by clicking on Meetings on the left sidebar. Roll over the meeting, and then click Start to start it.

Once you've started the meeting, go to the Participants icon and click on the caret next to it. Click on Invite. Copy the meeting invitation, and then go to your email and paste it in. This is how you can invite others to a meeting. You can also copy the meeting link and send it without the other meeting details.

Slide 20: Demo—Scheduling a Meeting (continued).

INSTRUCTOR NOTE: Return to the instructor presentation so learners are able to see the demo email account address on this slide.

Now that you have the meeting invitation pasted into an email, go ahead and send it to me. Here's my email account.

[Give out demo email account so learners can email you an invitation.]

[Log into the demo email account and point out the invitations in the inbox. Open one invitation. Point out the main parts of the invitation that you discussed in the first section on Joining an Online Meeting—whom it's from, topic, date and time, and the link to the meeting.]

End demo. Return to the Instructor Presentation.

Section: Hosting Tips

Slide 21: Hosting Tips.

When you're the meeting host, you're the one who is in control of the meeting. Here are some tips to make sure you have the best meeting possible.

The Meeting host features are in the menu at the bottom of the screen. Since you've been in a meeting as a host, you've seen these features on the toolbar. But we haven't discussed them before now. If you're not a meeting host, you won't see these features.

Slide 22: Hosting Tips—Security.

Here are some tips related to using the security features.

Tip 1: You can lock a meeting after it starts. This keeps anyone unwanted from entering the meeting.

Slide 23: Hosting—Security (continued).

Tip 2: You can enable the waiting room so you only let people in that you want to attend the meeting.

Slide 24: Hosting Tips—Security (continued).

Tip 3: Consider what features you want participants to be able to do, such as unmute themselves, share their screen, or chat. You can adjust these features before the meeting begins, or you can take care of that during the meeting.

Slide 25: Hosting Tips—Security (continued).

Tip 4: If someone unwanted enters your meeting, you can use the Remove Participant feature to remove them. That person cannot rejoin the meeting until you allow it.

Slide 26: Hosting Tips—Participants Panel.

As the host, you also have more features available in the Participants panel. Here are a few more tips.

Tip 5: If someone will be making a presentation or speaking for a long time, you can mute everyone in a meeting using the Mute All button. This is helpful to keep background noise to a minimum.

Slide 27: Hosting Tips—Participants Panel (continued).

Tip 6: If background sound is coming from a participant and they aren't able to mute themselves, you can mute that person by clicking the Mute button next to their name.

Slide 28: Hosting Tips—Recording.

If you want to keep a recording of the meeting, you can use the Record feature. This will save a recording of the video to your computer or online Zoom account.

Tip 7: Always let people know when you plan to record a meeting.

Slide 29: Hosting Tips—Ending the Meeting.

Tip 8: As the host, it's important for you to end the meeting when it's over. To end the meeting, click End. Then click End Meeting for All. As you might expect, this ends the meeting for all participants.

INSTRUCTOR NOTE: Before moving to Activity 4, review "parking lot" questions. If there are no questions in the parking lot, ask the attendees if they have any questions before you move to Activity 4.

Slide 30: Activity #4.

In this activity, we will practice what we've covered and see what everyone has learned.

Open a web browser and type in <https://www.digitallearn.org> in the address bar. Click on Basics of Video Conferencing, and then click on Lesson 8—Practice.

INSTRUCTOR NOTE: Allow the learners several minutes to work on the practice lesson. Then, go through the practice lesson as a demo and have learners participate in answering the questions.

Slide 31: Questions.

INSTRUCTOR NOTE: Ask if there are any other final questions and answer any outstanding ones that may have been missed in the parking lot sections. (For more information about the parking lot, see the "Before Workshop Begins" section earlier in this document.)

Slide 32: Congratulations!

Today you . . .

- learned about video conferencing.
- built skills to:
 - join online meetings.
 - use common participant features.
 - schedule a meeting and invite others.
- discovered useful tips to host an online meeting.

INSTRUCTOR NOTE: Provide each attendee with a Certificate of Completion.

Slide 33: DigitalLearn Courses.

INSTRUCTOR NOTE: Point the learners to additional courses available at the website.

Slide 34: Thank You.

Thanks again to AT&T and PLA for this workshop. We appreciate all our participants for coming and we encourage you to keep learning!

Slide 34 – Thank you

Thanks again to AT&T and PLA for this workshop. We appreciate all our participants for coming and we encourage you to keep learning!