



New England (HHS Region 1)

ATTC

Addiction Technology Transfer Center Network  
Funded by Substance Abuse and Mental Health Services Administration

# Transitioning to Effective Online Training (TEOT): Advanced Zoom Functions and Best Practices

Raymond Sanchez Torres

Mika Salas

# Disclosures



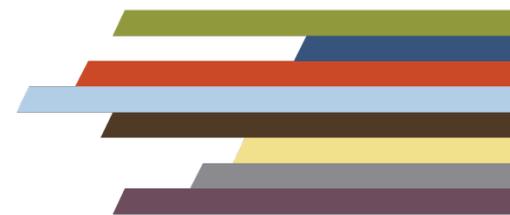
- The development of these training materials were supported by grant H79 TI080209 (PI: S. Becker) from the Center for Substance Abuse Treatment, Substance Abuse and Mental Health Services Administration, United States Department of Health and Human Services. The views and opinions contained within this document do not necessarily reflect those of the US Department of Health and Human Services, and should not be construed as such.



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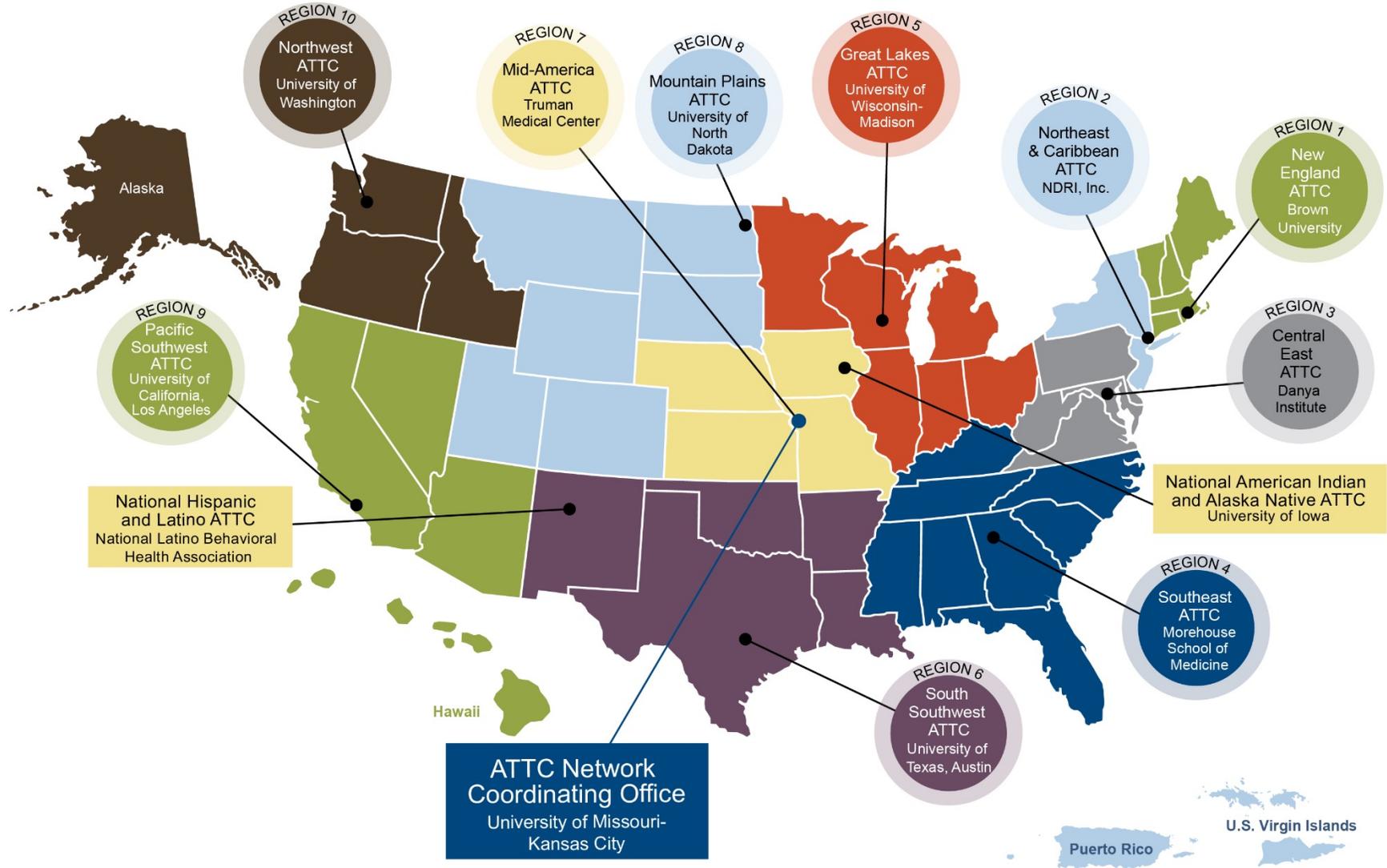
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**U.S.-based ATTC Network**



# Description

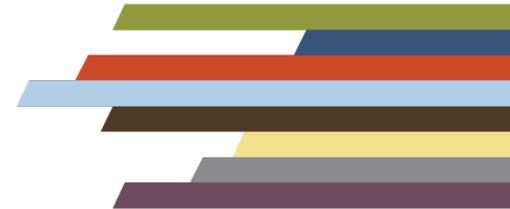
This training will introduce participants to **intermediate and advanced Zoom functions** in order to build the specialized skills necessary to host and facilitate an engaging and secure virtual meeting, training, and/or conference. Participants will learn how training objectives can be used to inform key decisions about **modes of engagement**, use of a training partner and/or technical support, and tailoring of curriculum to match participant needs. Moreover, the training will describe strategies, techniques, and resources to manage and engage participants in their ‘virtual classroom’. The trainers will facilitate **open discussion and answer questions** to promote skill acquisition.



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# Online Etiquette & Housekeeping

We encourage you to:



Leave your video on



Stay muted until you have questions



Ask questions or post comments via the chat

We will be:

- Sharing a link to handouts at the end of today's training
- Sharing the link to TEOT: Getting to Know Zoom at the end of today's training

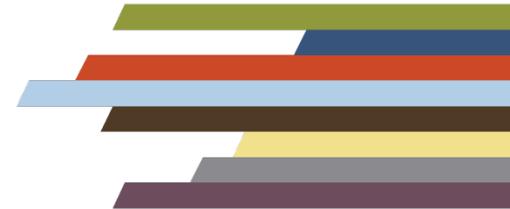
## Poll Time!



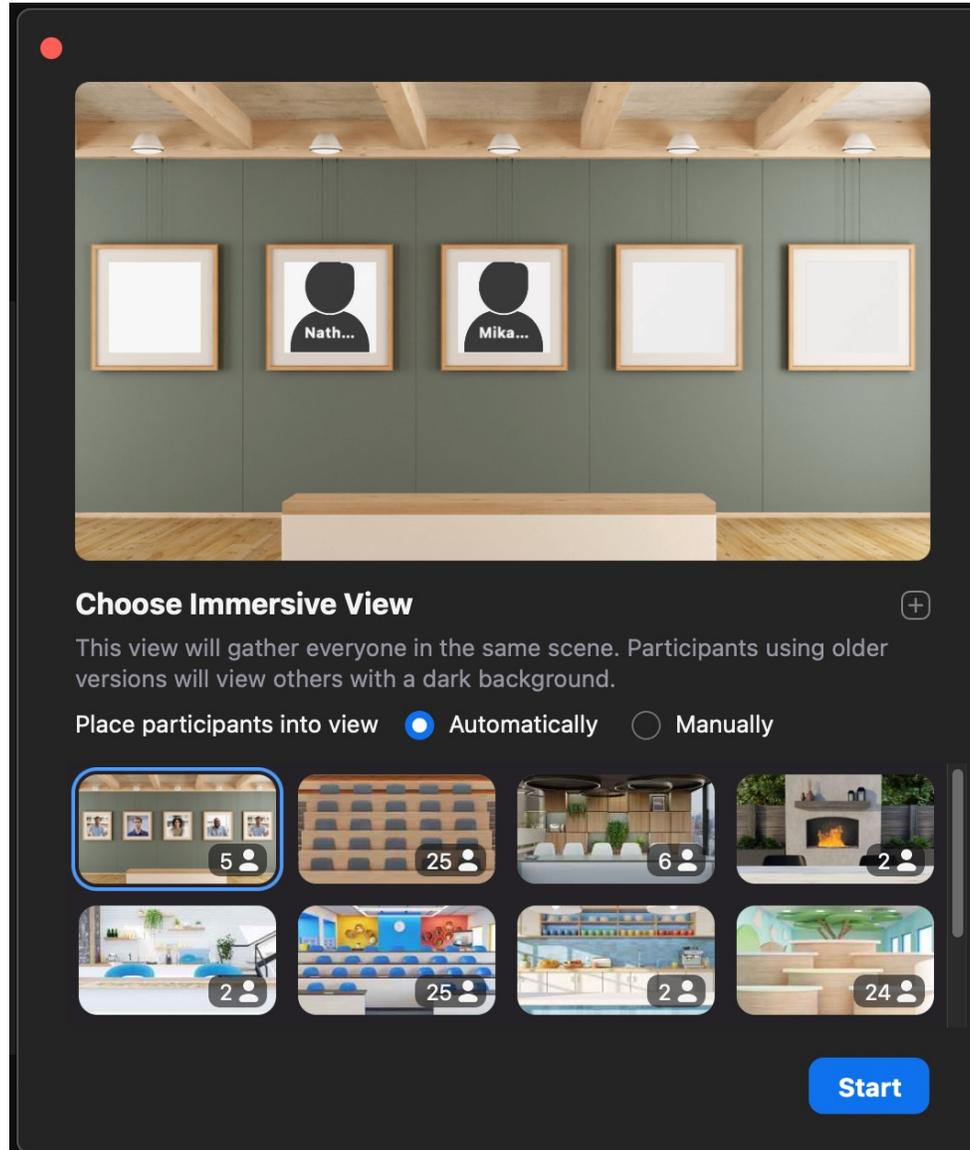
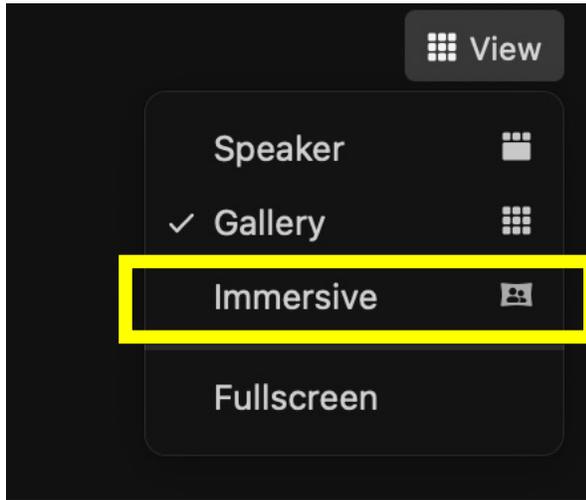
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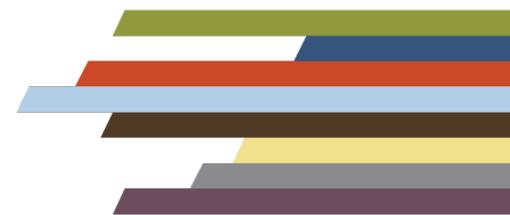


# Zoom Updates

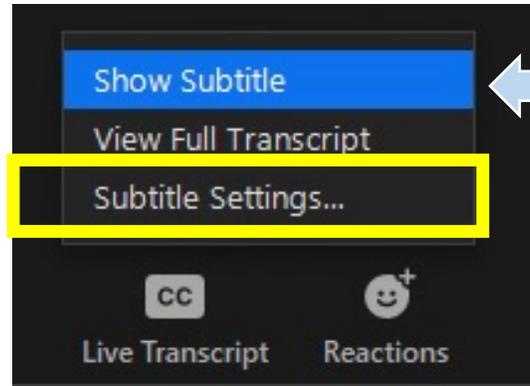
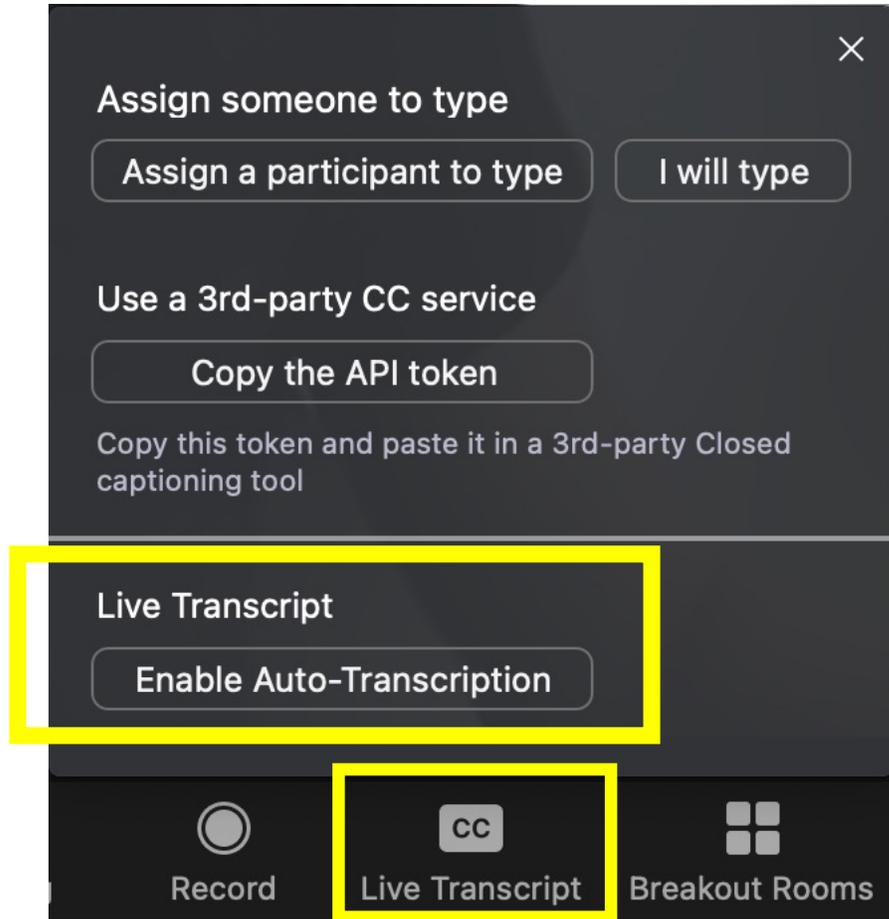


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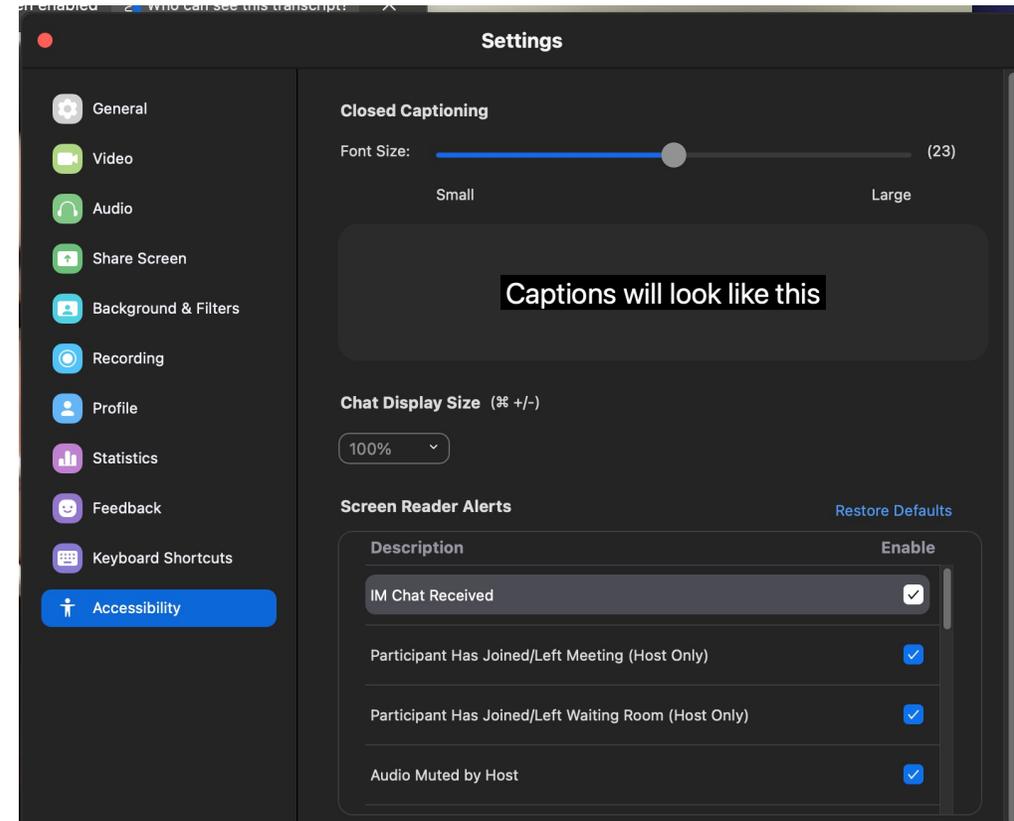
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# Zoom Updates



Participants might need to individually enable

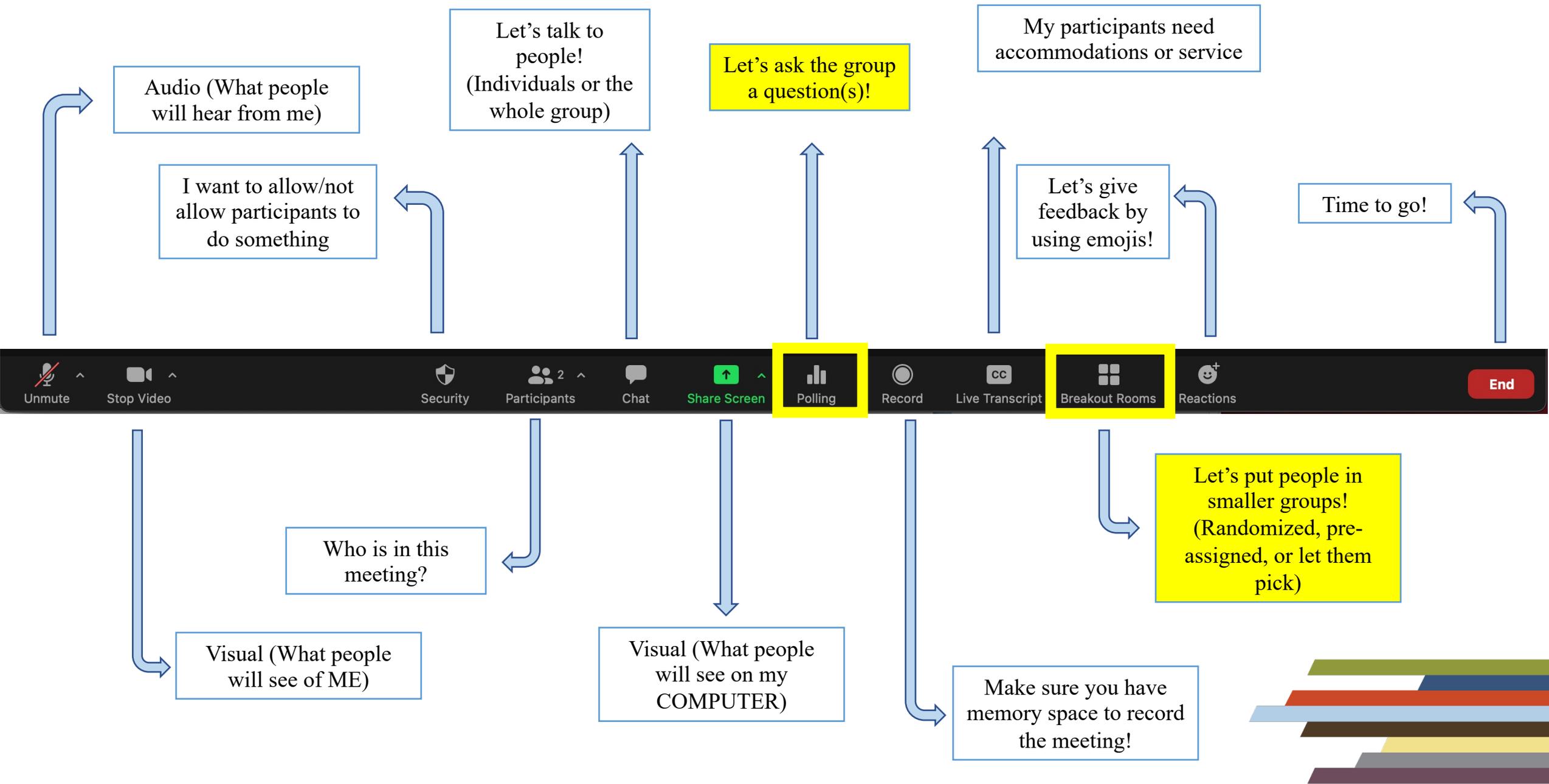


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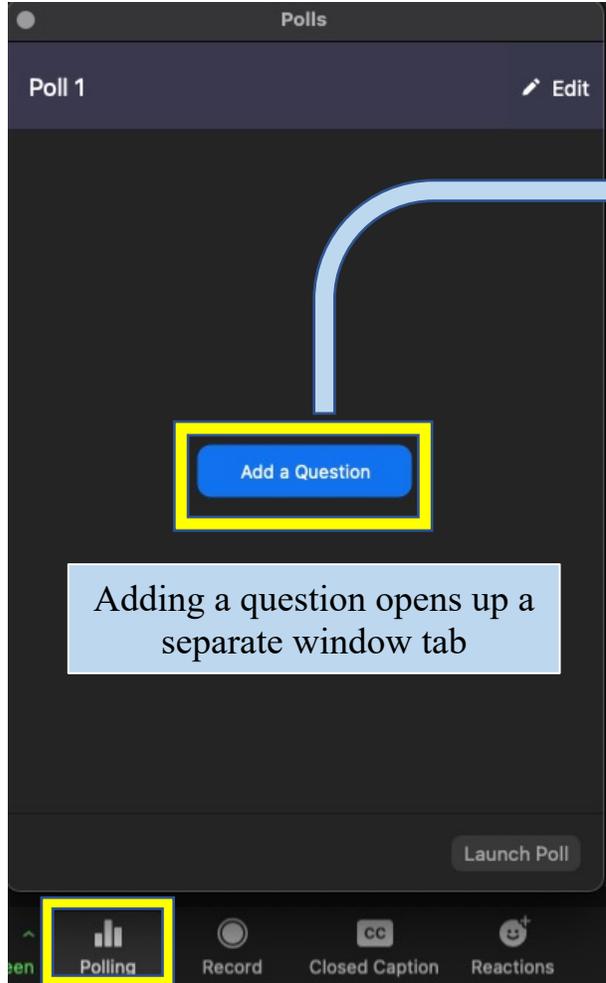
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# Zoom Controls

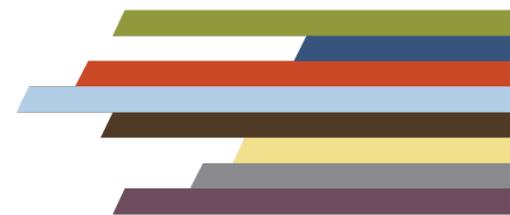
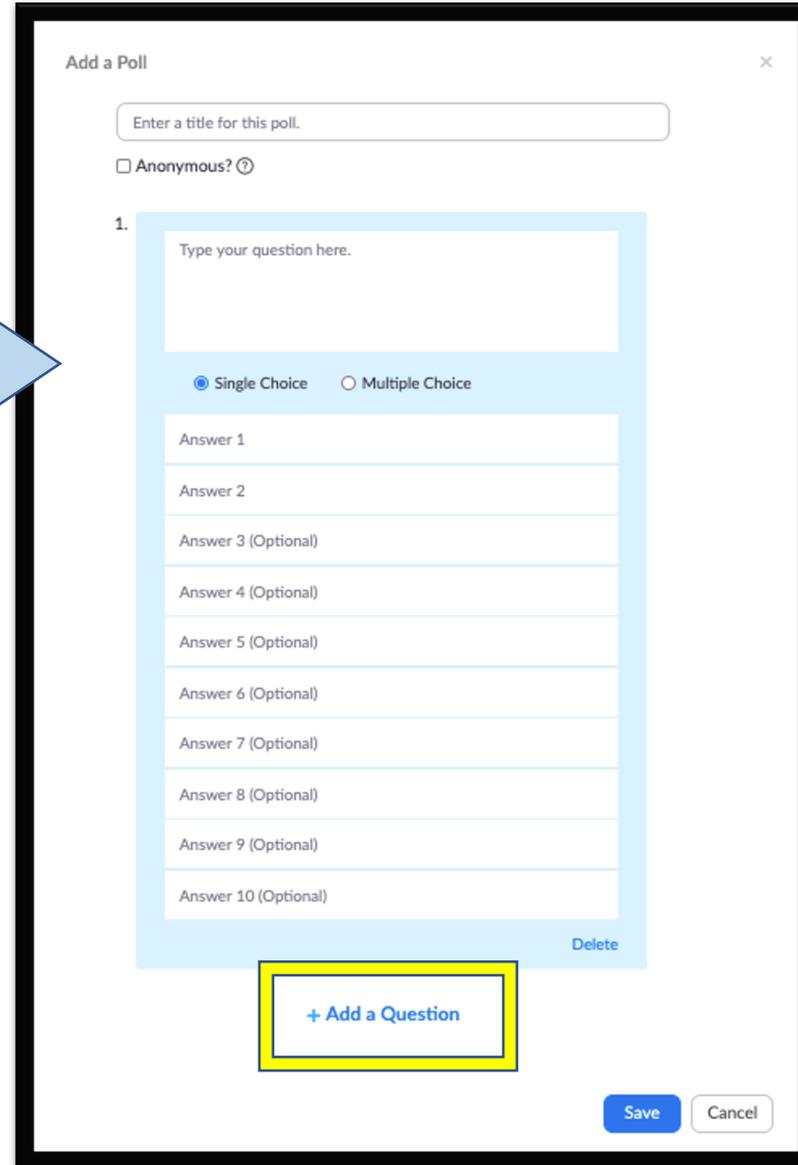


# Zoom Controls (Polling)

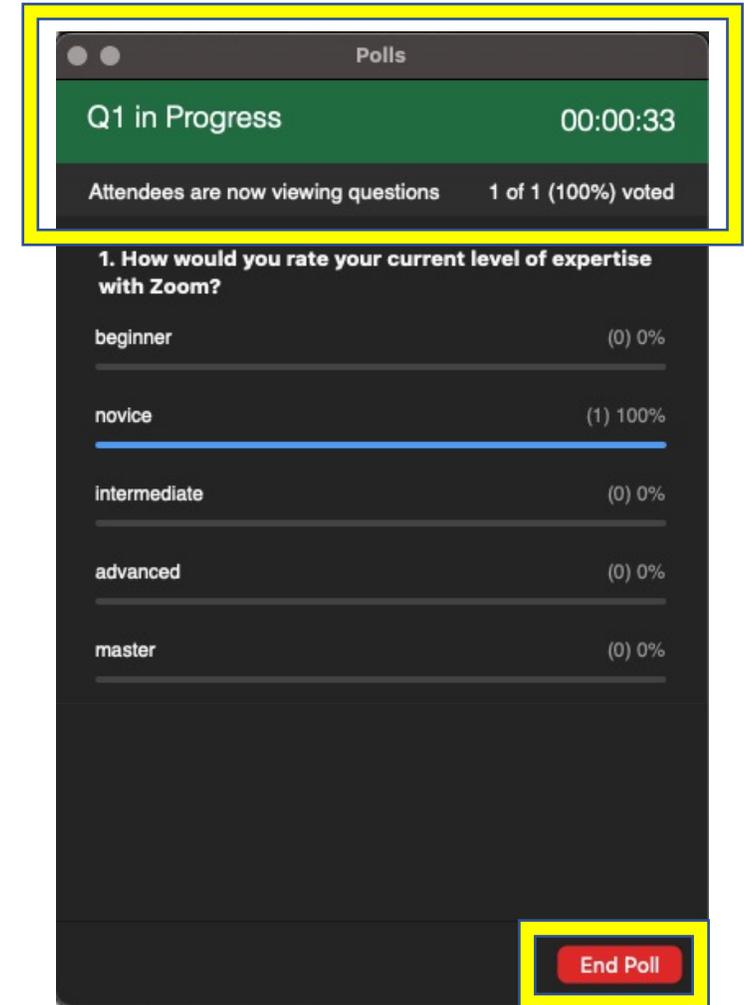
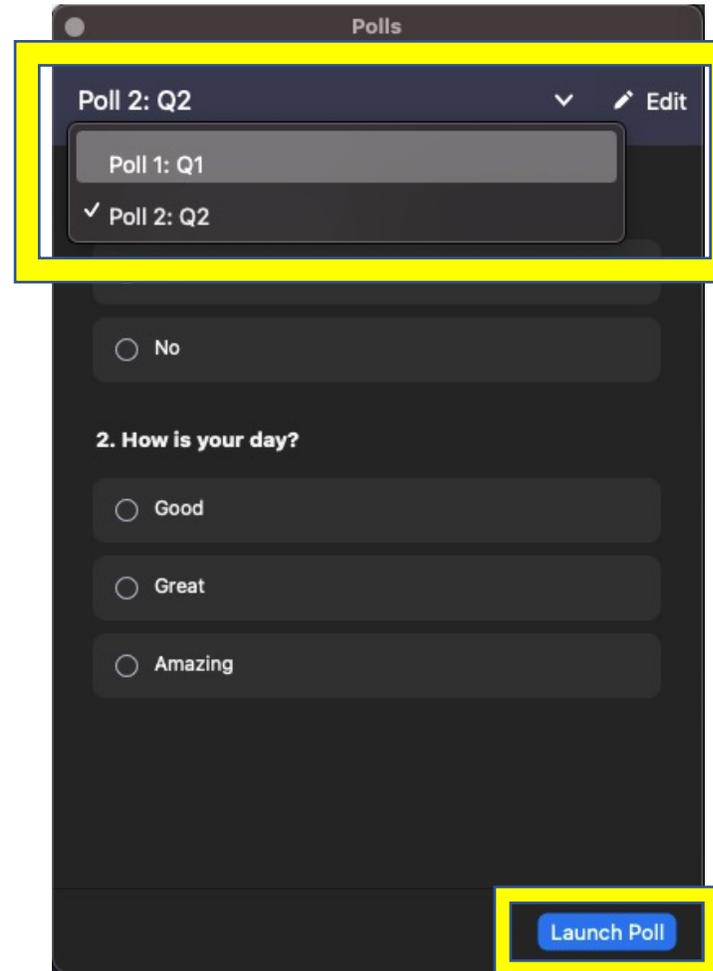
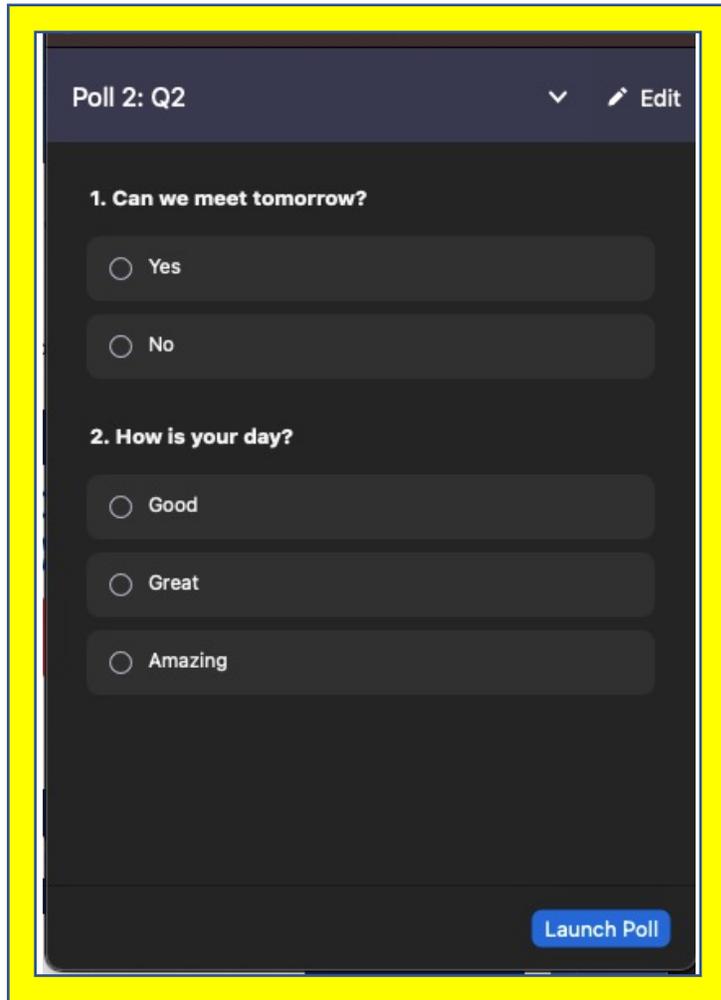
Didn't set up polls ahead of time? No big deal! Create it on the fly!



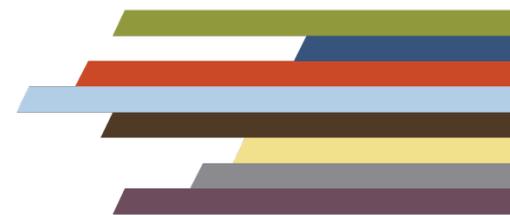
Adding a question opens up a separate window tab



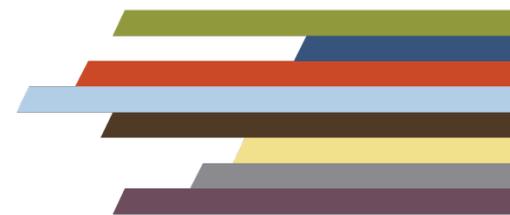
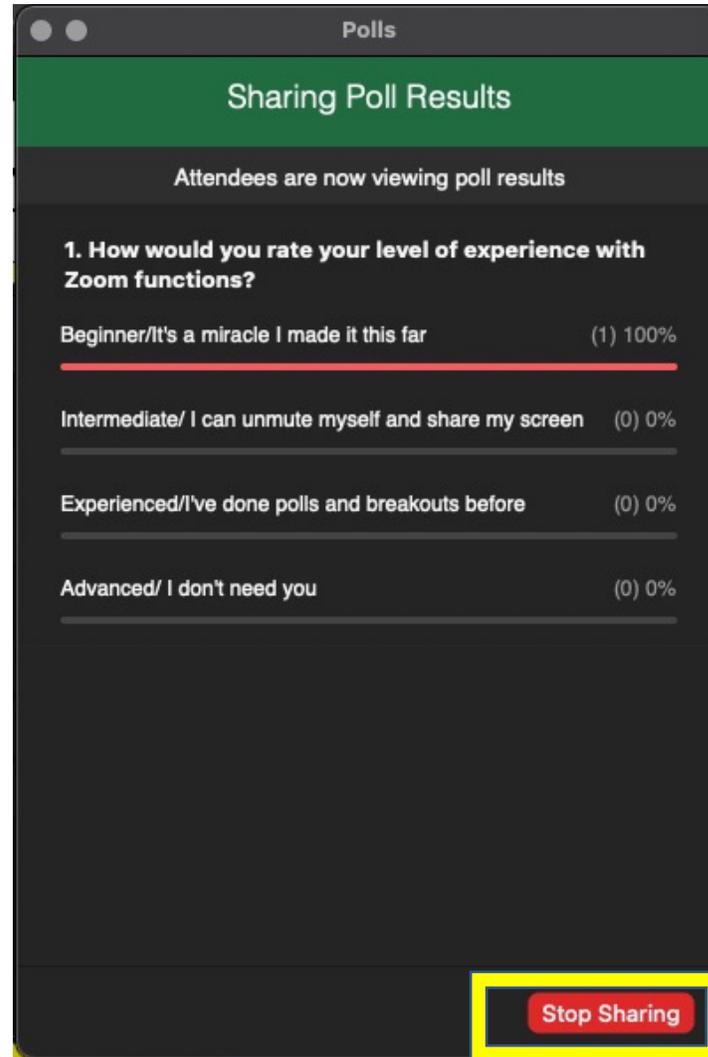
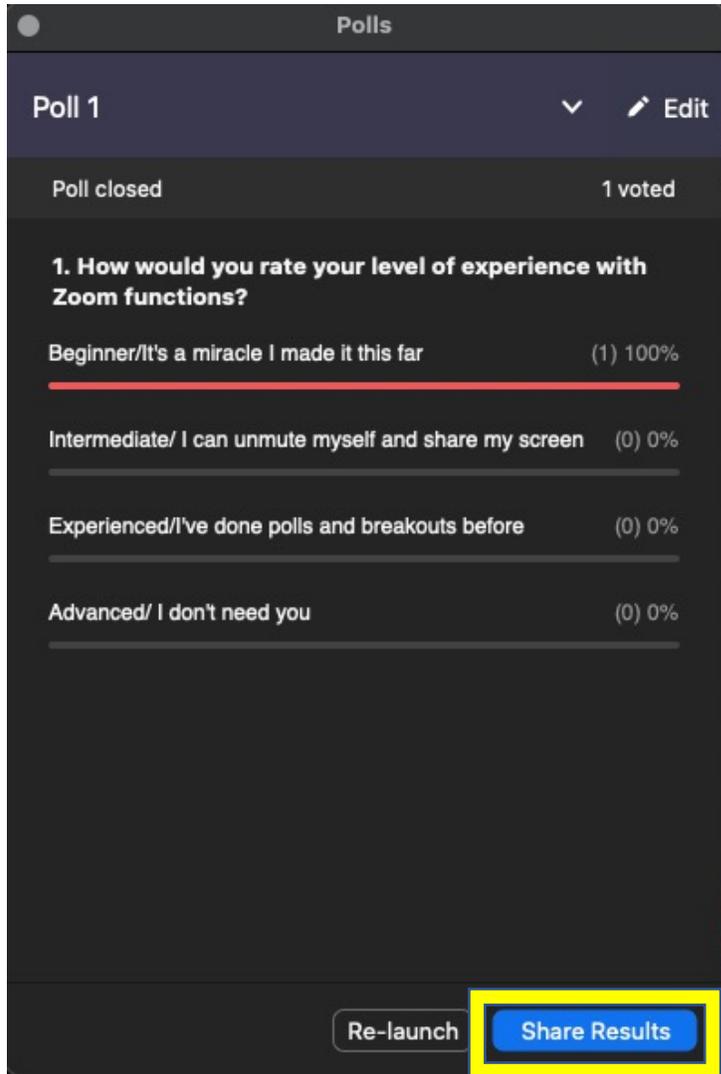
# Zoom Controls (Polling Cont.)



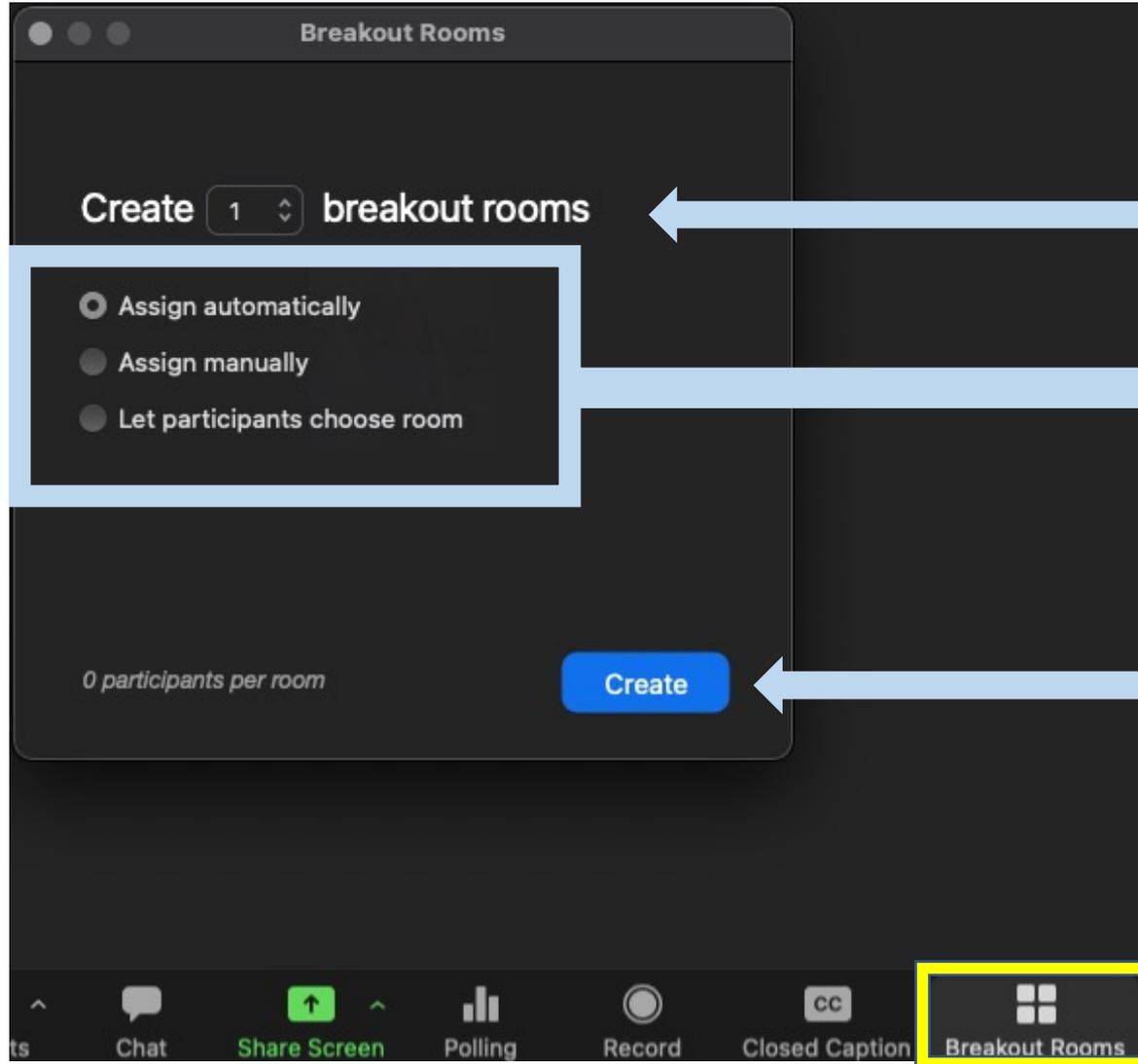
Adding a question creates a multi question poll



# Zoom Controls (Polling Cont.)



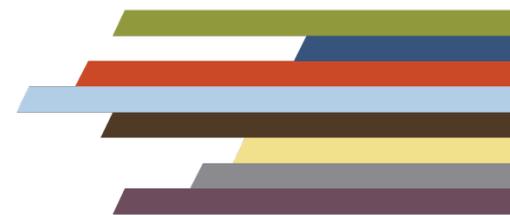
# Zoom Controls (Breakout Rooms)



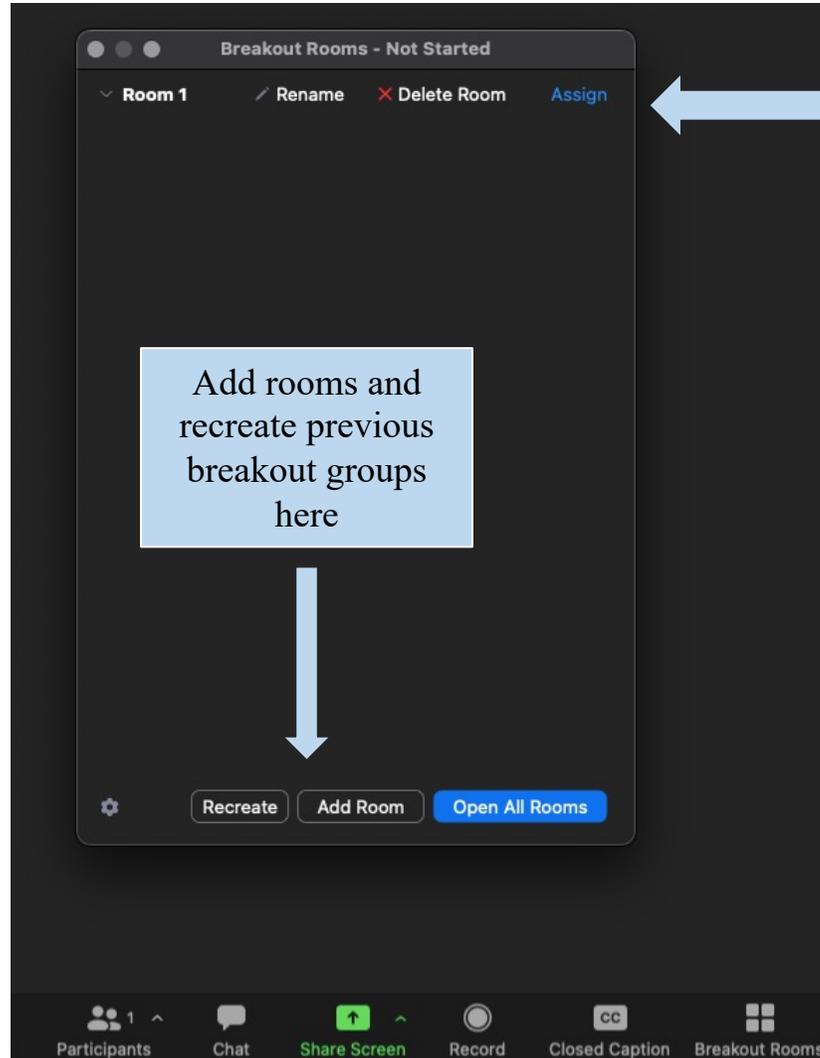
How many rooms do you want to create?

Do you want random groups?  
Pre-assigned groups?  
Do you want participants to choose their own rooms?

Once you have decided, create the rooms!



# Zoom Controls (Breakout Rooms Cont.)

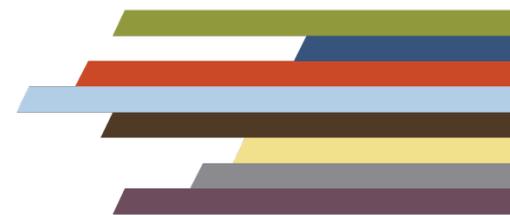


You can rename rooms, delete rooms, and assign specific people here

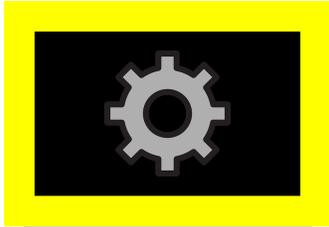
Add rooms and recreate previous breakout groups here

Recreate Add Room Open All Rooms

Participants Chat Share Screen Record Closed Caption Breakout Rooms



# Zoom Controls (Breakout Rooms Cont.)



Breakout Rooms - Not Started

Room 1 Rename Delete Room Assign

Raymond Sanchez Torres

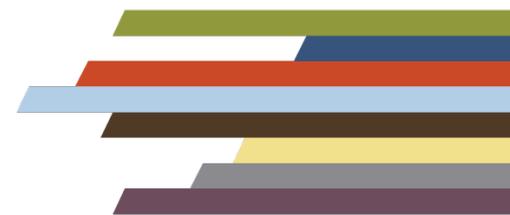
- Allow participants to choose room
- Allow participants to return to the main session at any time
- Automatically move all assigned participants into breakout rooms
- Auto close breakout rooms after 10 minutes
  - Notify me when the time is up
  - Countdown after closing breakout room

Set countdown timer: 60 seconds

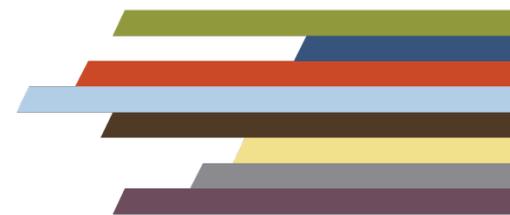
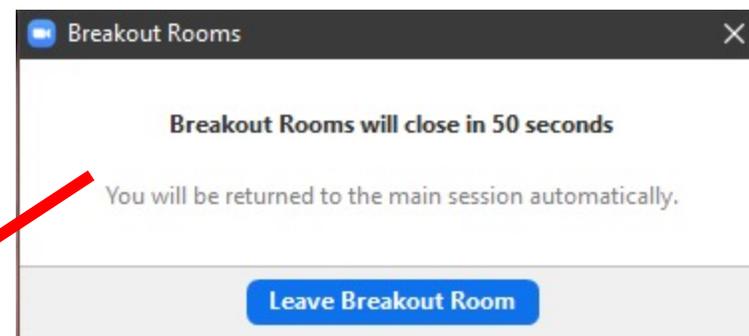
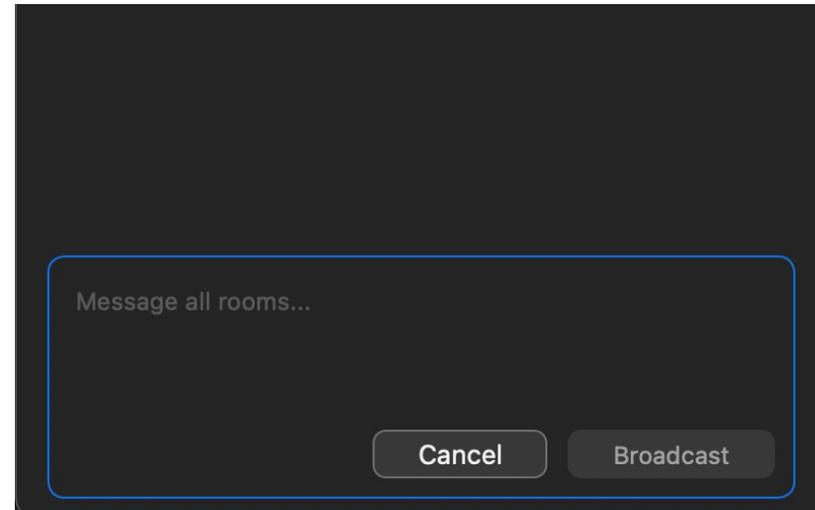
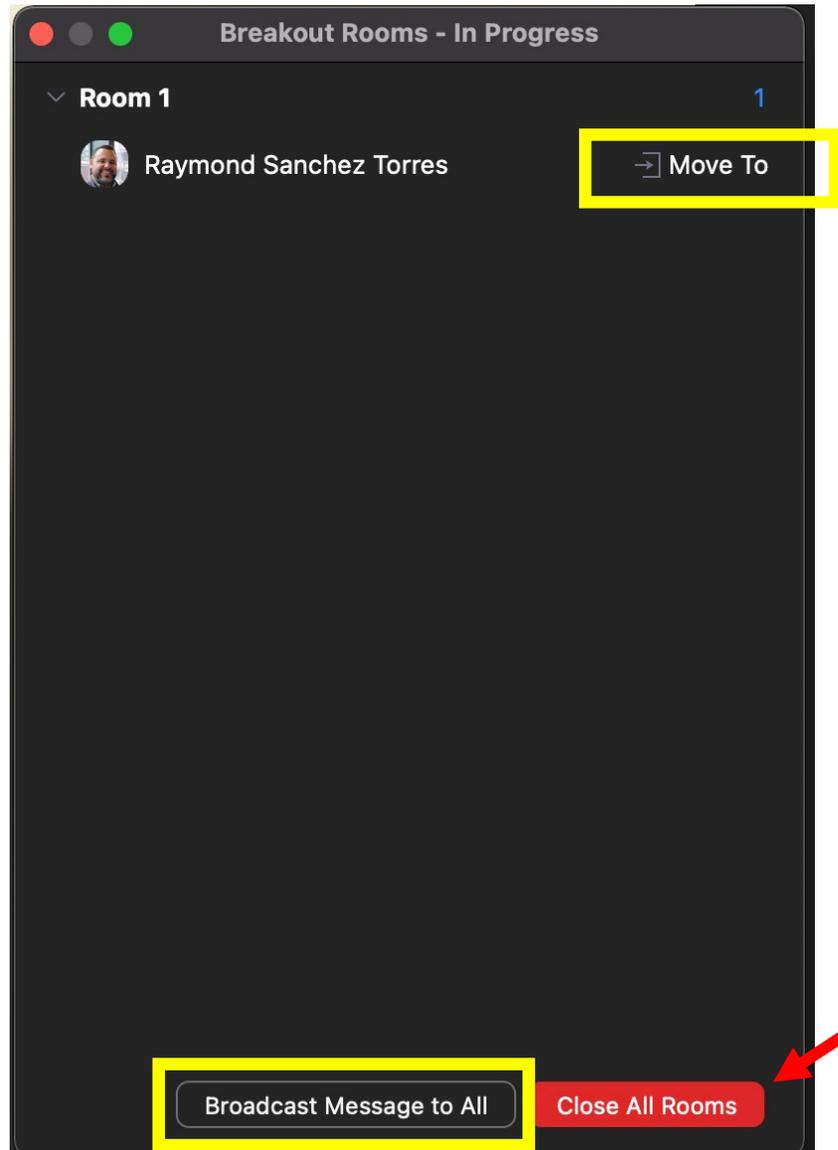
Recreate Add Room Open All Rooms

Participants Chat Share Screen Record Closed Caption Breakout Rooms

Once you are done, send people to the rooms!



# Zoom Controls (Breakout Rooms Cont.)



# Backend Setup (Recording)

Meeting **Recording** Telephone

Recording

**Local recording**  
Allow hosts and participants to record the meeting to a local file

Hosts can give meeting participants permission to record locally

**Cloud recording**  
Allow hosts to record and save the meeting / webinar in the cloud

Record active speaker with shared screen  
 Record gallery view with shared screen ⓘ  
 Record active speaker, gallery view and shared screen separately  
 Record an audio only file  
 Save chat messages from the meeting / webinar

**Advanced cloud recording settings**

Add a timestamp to the recording ⓘ  
 Display participants' names in the recording  
 Record thumbnails when sharing ⓘ  
 Optimize the recording for 3rd party video editor ⓘ  
 Audio transcript ⓘ  
 Save panelist chat to the recording ⓘ

**Allow cloud recording sharing**  
A sharing link for the recording will be generated after a meeting. Users who have been granted the viewing permission can access the cloud recording through this link.

**Automatic recording**  
Record meetings automatically as they start

**IP Address Access Control**  
Allow cloud recording access only from specific IP address ranges

**Require users to authenticate before viewing cloud recordings**  
Right before sharing cloud recordings, meetings hosts can choose from one of the options configured below to require users to authenticate before viewing recordings.

**Authentication Options:**  
Signed-in users in my account (Default) [View](#)

Record active speaker with shared screen  
 Record gallery view with shared screen ⓘ  
 Record active speaker, gallery view and shared screen separately  
 Record an audio only file  
 Save chat messages from the meeting / webinar

**Advanced cloud recording settings**

Add a timestamp to the recording ⓘ  
 Display participants' names in the recording  
 Record thumbnails when sharing ⓘ  
 Optimize the recording for 3rd party video editor ⓘ  
 Audio transcript ⓘ  
 Save panelist chat to the recording ⓘ

# Backend Setup (Security)

## Meeting

Recording Telephone

### Security

- Schedule Meeting
- In Meeting (Basic)
- In Meeting (Advanced)
- Email Notification
- Other

### Security

**Require that all meetings are secured with one security option**

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

**Waiting Room**

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

#### Waiting Room Options

The options you select here apply to meetings hosted by users who turned 'Waiting Room' on

Everyone will go in the waiting room

[Edit Options](#) [Customize Waiting Room](#)

**Require a passcode when scheduling new meetings**

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

**Require a passcode for instant meetings**

A random passcode will be generated when starting an instant meeting

**Require a passcode for Personal Meeting ID (PMI)**

**Require a passcode for Personal Audio Conference**

**Require passcode for participants joining by phone**

A numeric passcode will be required for participants joining by phone if your meeting has a passcode. For meeting with an alphanumeric passcode, a numeric version will be generated.

**Embed passcode in invite link for one-click join**

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

**Only authenticated users can join meetings**

The participants need to authenticate prior to joining the meetings, hosts can choose one of the authentication methods when scheduling a meeting. [Learn more](#)

#### Meeting Authentication Options:

Brown Users only (Default) [Edit](#) Hide in the Selection

If Waiting Room is enabled, phone-only users will be placed in the Waiting Room.

If Waiting Room is not enabled, phone dial-in only users will:

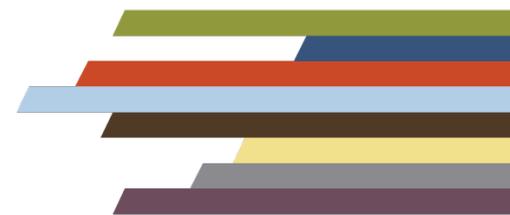
- Be allowed to join the meeting
- Be blocked from joining the meeting



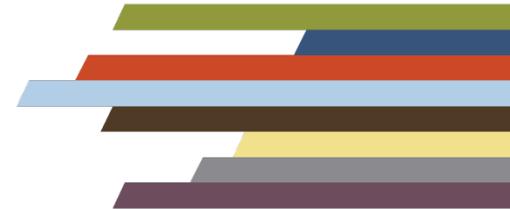
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Questions?



# Backend Setup (Meeting Settings Basic)

	In Meeting (Basic)	
Security	<b>Require encryption for 3rd party endpoints (SIP/H.323)</b> By default, Zoom requires encryption for all data transferred between the Zoom cloud, Zoom client, and Zoom Room. Turn on this setting to require encryption for 3rd party endpoints (SIP/H.323) as well.	<input checked="" type="checkbox"/>
Schedule Meeting		
In Meeting (Basic)		
In Meeting (Advanced)	<input checked="" type="checkbox"/> <b>Chat</b> Allow meeting participants to send a message visible to all participants	<input checked="" type="checkbox"/>
Email Notification	<input type="checkbox"/> Prevent participants from saving chat <a href="#">?</a>	
Other		
	<input checked="" type="checkbox"/> <b>Private chat</b> Allow meeting participants to send a private 1:1 message to another participant.	<input checked="" type="checkbox"/>
	<input checked="" type="checkbox"/> <b>Auto saving chats</b> Automatically save all in-meeting chats so that hosts do not need to manually save the text of the chat after the meeting starts.	<input checked="" type="checkbox"/>
	<b>Sound notification when someone joins or leaves</b>	<input type="checkbox"/>
	<input checked="" type="checkbox"/> <b>File transfer</b> Hosts and participants can send files through the in-meeting chat. <a href="#">?</a>	<input type="checkbox"/>
	<b>Feedback to Zoom</b> Add a Feedback tab to the Windows Settings or Mac Preferences dialog, and also enable users to provide feedback to Zoom at the end of the meeting	<input checked="" type="checkbox"/>
	<b>Display end-of-meeting experience feedback survey</b> Display a thumbs up/down survey at the end of each meeting. If participants respond with thumbs down, they can provide additional information about what went wrong. <a href="#">?</a>	<input type="checkbox"/>
	<input checked="" type="checkbox"/> <b>Co-host</b> Allow the host to add co-hosts. Co-hosts have the same in-meeting controls as the host.	<input checked="" type="checkbox"/>
	<input checked="" type="checkbox"/> <b>Meeting Polls</b> Allow host to use 'Polls' in meetings. Hosts can add polls before or during a meeting. <a href="#">?</a>	<input checked="" type="checkbox"/>
	<input checked="" type="checkbox"/> <b>Always show meeting control toolbar</b> Always show meeting controls during a meeting <a href="#">?</a>	<input checked="" type="checkbox"/>
	<input checked="" type="checkbox"/> <b>Show Zoom windows during screen share</b> <a href="#">?</a>	<input checked="" type="checkbox"/>
	<input checked="" type="checkbox"/> <b>Screen sharing</b> Allow host and participants to share their screen or content during meetings	<input checked="" type="checkbox"/>

# Backend Setup (Meeting Settings Advanced)

Security

Schedule Meeting

In Meeting (Basic)

**In Meeting (Advanced)**

Email Notification

Other

**In Meeting (Advanced)**

**Report to Zoom**  

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

**Breakout room**  

Allow host to split meeting participants into separate, smaller rooms

Allow host to assign participants to breakout rooms when scheduling 

**Remote support** 

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

**Closed captioning**  

Allow host to type closed captions or assign a participant/3rd-party service to add closed captions

Allow use of caption API Token to integrate with 3rd-party Closed Captioning services

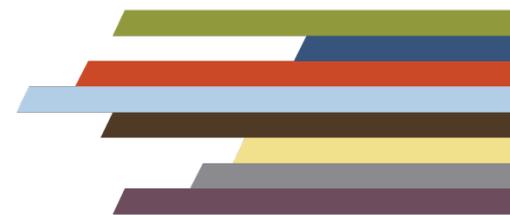
Enable live transcription service to show transcript on the side panel in-meeting

**Save Captions** 

Allow participants to save fully closed captions or transcripts

**Language Interpretation** 

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



# Backend Setup (Meeting Settings cont.)

Security

Schedule Meeting

In Meeting (Basic)

In Meeting (Advanced)

Email Notification

Other



## Virtual background

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

Allow use of videos for virtual backgrounds [?](#)

Manage virtual background [?](#)



## Video filters

Turn this option on to allow users to apply filters to their videos [?](#)



## Identify guest participants in the meeting/webinar

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



## Auto-answer group in chat

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



## Only show default email when sending email invites

Allow users to invite participants by email only by using the default email program selected on their computer



## Use HTML format email for Outlook plugin

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



## Allow users to select stereo audio in their client settings

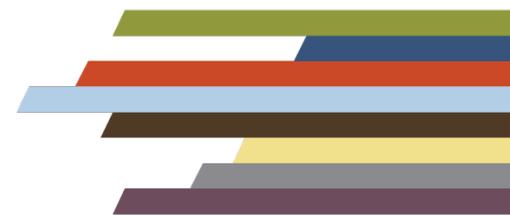
Allow users to select stereo audio during a meeting



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# Backend Setup (Meeting Settings cont.)

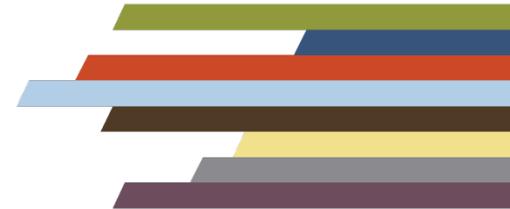
Security	<b>Allow users to select stereo audio in their client settings</b> Allow users to select stereo audio during a meeting	<input checked="" type="checkbox"/>
Schedule Meeting		
In Meeting (Basic)		
<b>In Meeting (Advanced)</b>	<b>Allow users to select original sound in their client settings</b> Allow users to select original sound during a meeting	<input type="checkbox"/>
Email Notification		
Other	<input checked="" type="checkbox"/> <b>Show a "Join from your browser" link</b> Allow participants to bypass the Zoom application download process, and join a meeting directly from their browser. This is a workaround for participants who are unable to download, install, or run applications. Note that the meeting experience from the browser is limited	<input checked="" type="checkbox"/>
	<b>Allow livestreaming of meetings</b>	<input type="checkbox"/>
	<b>Show a custom disclaimer when starting or joining a meeting</b> Create your own disclaimer that will be shown at the start of all meetings hosted by your account	<input type="checkbox"/>
	<b>Request permission to unmute</b> Select this option in the scheduler to request permission to unmute meeting participants and webinar panelists. Permissions, once given, will apply in all meetings scheduled by the same person. <input checked="" type="checkbox"/>	<input type="checkbox"/>



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# Reports

Profile

Meetings

Webinars

Personal Audio Conference

Recordings

Settings

Account Profile

**Reports**

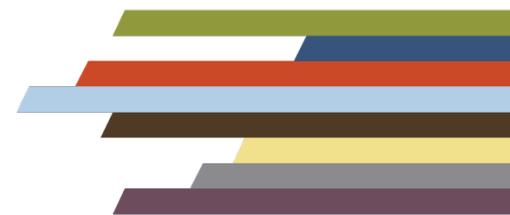
**Usage Reports**    User Activity Reports    [Document](#)

Usage	View meetings, participants and meeting minutes within a specified time range.
<b>Meeting</b>	View registration reports and poll reports for meetings.



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# Reports

Reports > Usage Reports > Meeting

Document

## Meeting Report

## Report Queue

Report Type

Registration Report  Poll Report

Search by time range ▾

From: 03/01/2021

To: 03/31/2021

Search

Maximum report duration: 1 Month

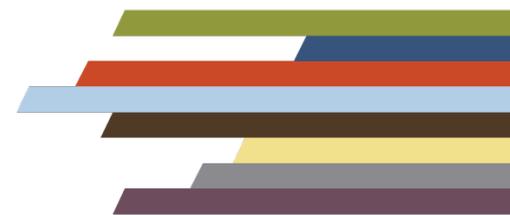
<input type="checkbox"/>	Scheduled Time	Topic	Meeting ID	
<input type="checkbox"/>	03/31/2021 04:00:00 PM			Generate
<input type="checkbox"/>	03/29/2021 04:00:00 PM			Generate
<input type="checkbox"/>	03/29/2021 10:00:00 AM			Generate
<input type="checkbox"/>	03/25/2021 03:00:00 PM			Generate
<input type="checkbox"/>	03/23/2021 01:00:00 PM	TEOT 201 Meeting		Generate
<input type="checkbox"/>	03/23/2021 09:00:00 AM	TEOT 201 Meeting		Generate
<input type="checkbox"/>	03/19/2021 09:30:00 AM	TEOT 201 Meeting		Generate



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Meetings

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**Reports**

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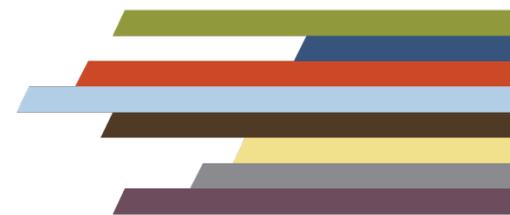
<b>Usage</b>	View meetings, participants and meeting minutes within a specified time range.
Meeting	View registration reports and poll reports for meetings.



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# Reports

Reports > Usage Reports > Usage

[Document](#)

From: 03/01/2021 To: 03/31/2021

[Search](#)

Maximum report duration: 1 Month

The report displays information for meetings that ended at least 15 minutes ago.

[Export as CSV File](#)

[Toggle columns](#)

[Add tracking field to columns](#)

Total: 33 < >

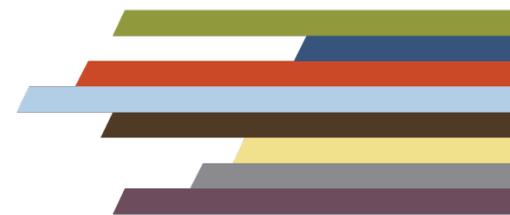
Topic	Meeting ID	User Name	User Email	Department	Group	Has Zoom Rooms?	Creation Time	Start Time	End Time	Duration (Minutes)	Participants	Source
	984 3950 1820	Mika Salas	mika_salas@bro-wn.edu	Center for Alcohol & Addiction Studies		No	02/17/2021 04:50:59 PM	02/18/2021 09:59:39 AM	02/18/2021 01:32:19 PM	213	3	G Suite
	927 3572 0960	Mika Salas	mika_salas@bro-wn.edu	Center for Alcohol & Addiction Studies		No	02/19/2021 06:47:30 PM	02/19/2021 06:47:31 PM	02/19/2021 08:19:37 PM	93	3	Zoom
Tips to Launch a Successful ...	941 4525 3711	Mika Salas	mika_salas@bro-wn.edu	Center for Alcohol & Addiction Studies		No	01/11/2021 02:17:34 PM	02/22/2021 11:09:46 AM	02/22/2021 01:32:13 PM	143	130	Zoom
	967 2176 0873	Mika Salas	mika_salas@bro-wn.edu	Center for Alcohol & Addiction Studies		No	02/22/2021 11:01:06 AM	02/22/2021 01:58:30 PM	02/22/2021 02:28:03 PM	30	2	G Suite



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# Reports

Meeting Participants

Export with meeting data  
 Show unique users

Report to Zoom [Export](#)

Name (Original Name)	User Email	Join Time	Leave Time	Duration (Minutes)	Guest
Mika Salas	mika_salas@brown.edu	02/22/2021 11:09:46 AM	02/22/2021 01:32:12 PM	143	No
		02/22/2021 11:29:34 AM	02/22/2021 11:29:38 AM	1	Yes
		02/22/2021 11:29:38 AM	02/22/2021 01:29:23 PM	120	Yes
		02/22/2021 11:33:19 AM	02/22/2021 11:33:27 AM	1	Yes
		02/22/2021 11:33:27 AM	02/22/2021 01:29:22 PM	116	Yes
Sara Becker	sara_becker@brown.edu	02/22/2021 11:33:45 AM	02/22/2021 11:33:50 AM	1	Yes
Sara Becker	sara_becker@brown.edu	02/22/2021 11:33:51 AM	02/22/2021 01:32:04 PM	119	Yes
		02/22/2021 11:34:21 AM	02/22/2021 11:34:54 AM	1	Yes

Meeting Participants

Export with meeting data  
 Show unique users

Report to Zoom [Export](#)

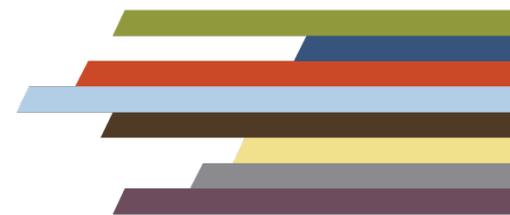
Name (Original Name)	User Email	Total Duration (Minutes)	Guest
Mika Salas	mika_salas@brown.edu	143	No
		216	Yes
		117	Yes
Sara Becker	sara_becker@brown.edu	120	Yes
		116	Yes
		115	Yes
		112	Yes
		102	Yes
		101	Yes
		97	Yes
		96	Yes
		95	No



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# Differentiating Training Levels

## Level 1

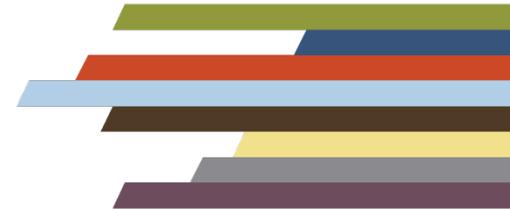
- Low level of interaction
- Typically 1 – 2 hour training
- Large participant numbers (50+)
- No Breaks
- No Breakout Rooms
- Minimal to no time for Q&A
- PowerPoint heavy

## Level 2

- Mid level interaction
- Typically 1.5 – 4 hour training
- Smaller participant numbers (<100)
- 1 – 2 Scheduled breaks
- Use of breakout rooms and/or group discussions
- Use of PowerPoint, but not the entirety of the training

## Level 3

- High level interaction
- Typically 4+ and/or multiday training
- Small participant numbers (<40)
- Scheduled breaks/lunch
- Frequent interaction
- Use of breakout rooms, group discussions, polling, etc.
- Minimal PowerPoint time (frequently stopping share to facilitate discussion)



# Internal Engagement Tools

## Integrated in Zoom:

- Polling
- Breakout Rooms
- Reactions
- Chat

## Getting Creative:

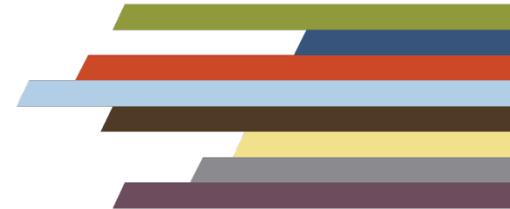
- Stop share, have everyone turn off their video, turn video on if you XYZ
- “Telephone?”: participant responds to prompt/question, then picks the next person who will respond



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# Basic Best Practices

Check to see if your Zoom account needs to be updated at least once a week!

Update your computer and browsers at least a day before the training!

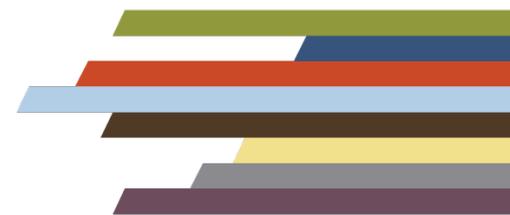
Log in early to check your connection, screen share, etc. (Preferably with another individual to confirm your connection sounds good!)

Share "Housekeeping" information at the beginning of your training via chat and verbally (e.g., slides will be shared at the end of today's training)

Remember that people's video will likely be in the upper right corner blocking content. Adjust your slides accordingly.

Share your slides ahead of time (if possible). Include the instructions for any breakout rooms too!

Remember that mistakes will happen! It's okay!



# Basic Best Practices

Utilize Google Docs/Sheets/Forms to facilitate any group work

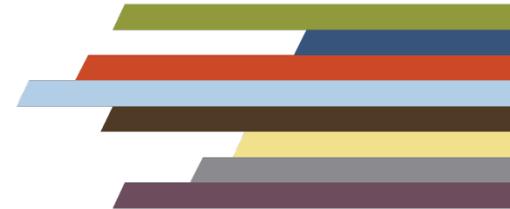
Utilize polls to ask the group questions and get **instant feedback**

Don't be afraid to get creative with Zoom features to encourage engagement

Make use of 'Reactions' within Zoom to get instant feedback from participants

When transitioning in-person curriculum, start by creating an agenda and use that to identify spaces you can incorporate XYZ

Have fun! If you are having fun, your participants will be more engaged





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Q&A

