Guidelines for Organizing Online Meetings for RIMS Joint Research Activities Using Zoom

Operation Manual

Hosts: organizer, chairs, and speakers



Rules that must be observed by all participants of an online joint research meeting

- Do not share URLs, IDs, and passwords for online joint research meetings with outsiders. It is strictly prohibited to post such URLs, IDs, and passwords at locations that are accessible to many and unspecified third parties (e.g., websites, social media).
- → Outsiders (third parties) may enter without permission and jeopardize the online joint research meetings by engaging in annoying behavior (e.g., activities irrelevant to joint research).
- Use your correct email address.
- → Using an incorrect address may result in information leakage to third parties.
- It is prohibited to record online joint research meetings and save the videos and images for purposes other than for personal references. It is strictly prohibited to distribute such videos and images at locations accessible to many and unspecified third parties.
- *Recording and saving the videos for on-demand sharing is, however, acceptable when the organizer or the speaker deems it necessary to accomplish a joint research meeting.
- Speakers must exercise utmost care in handling of reference materials used as presentation documents. They must implement appropriate measures (e.g., clearly indicating the source).
- → Regarding handling of copyright, appropriate measures must be implemented in accordance with relevant laws and regulations.
- When using this operation manual for purposes other than joint usage projects of RIMS, contact the Cooperative Research Service Section (kyodo(at)kurims.kyoto-u.ac.jp).



RIMS Guidelines for Organizing Online Joint Research Meetings Using Zoom

Operation Manual

Hosts: organizer, chairs, and speakers

Contents

1	Zoom settings	1 2 3	Installing the Zoom app Creating an account Setting a camera, speaker, and microphone • To open the settings window • Setting and testing of a speaker and microphone • Setting of a camera • Prevention and mitigation of howling ar echoes Updating Zoom	
	Before a meeting On the day of a	1	URLs for pre-registration and a meeting	10
	meeting	1	 By the start time of a research meeting Joining a Zoom meeting Hosts/co-hosts Setting co-hosts What you can do during a meeting 	11
		2	Start of a research meeting • Admitting participants • Controlling audio and video (What you can do on [participants] wind • Sharing the screen • Removing participants	14 dow)
		3	 Ending a meeting Other features Chatting Breakout rooms 	18
4	Other	1 2	Measures against disruptions in a meeting Zoom manual for the free version • When serving as a host • When participating as a guest	19 21



1. Installing the Zoom app



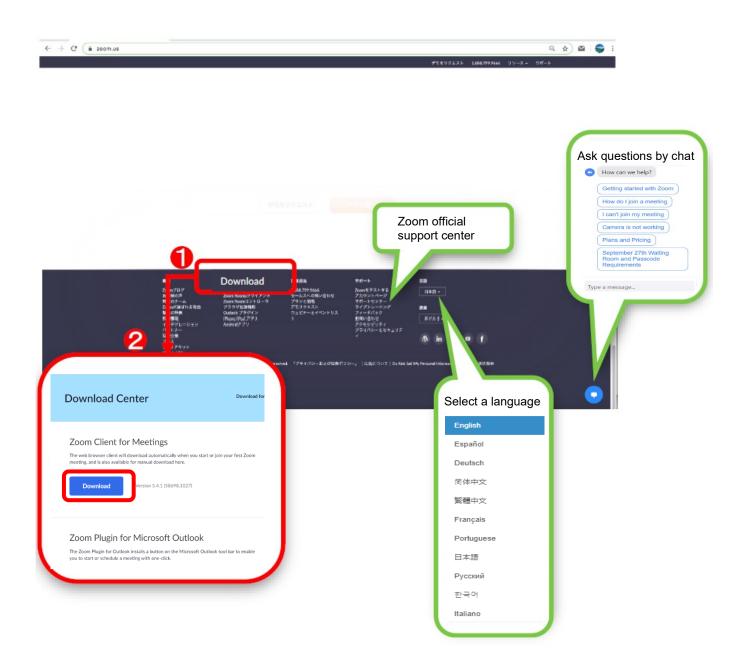




Access the Zoom website https://zoom.us. Click [Download] at the bottom to download and install the Zoom application (app) on the [Download Center] window.

* The display may look different depending on the browser and PC (Windows/Mac).

Before a meeting





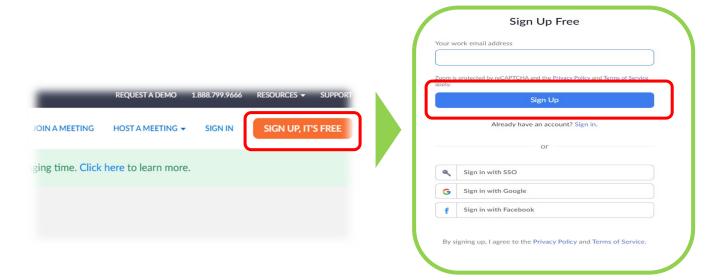
2. Creating an account







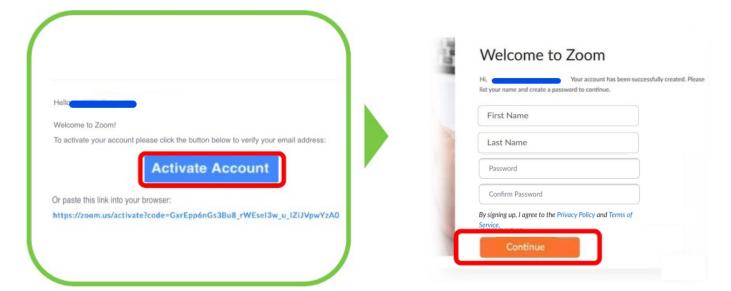
Access the Zoom website https://zoom.us, and click [SIGN UP, IT'S FREE] in the upper right of the screen. On the [Sign Up Free] window, enter your email address in the field for [Your work email address], and click [Sign Up].



A confirmation email is sent to the registered email address. Click in the email the **[Activate Account]** button or the URL for registration.

On [Welcome to Zoom] window, enter necessary information in each field ([First Name], [Last Name], [Password], and [Confirm Password]), and click [Continue].

* This transitions to the [Invite Colleagues] page. It is not required to invite colleagues. To skip the process and create an account, click [Skip this step].





3. Setting a camera, speaker, and microphone





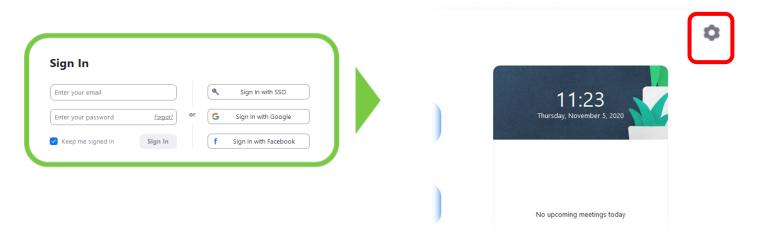


To open the setting window

First, check if your PC is equipped with a camera, a speaker, and a microphone. Test the camera and audio, and make sure that they are ready before starting the meeting.

Open the installed Zoom app, and [Sign In].

Click the gear shape icon on the right side of the [Home] window to go to [Settings].



The camera and audio settings can also be changed on the meeting screen.

Click the upward pointing arrow (caret) on the right side of the microphone icon (audio icon) or video icon in the lower left of the screen, and click **[Audio Settings...]** or **[Video Settings...]** at the bottom.





3. Setting a camera, speaker, and microphone





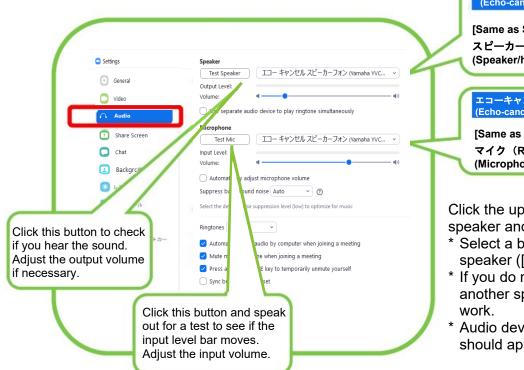


Select an item to set up from the options on the left side of the [Settings] window.

If an appropriate speaker is not selected, you may not be able to hear the sound. Make sure to test the audio settings in advance.

Setting and testing a speaker and a microphone

Click [Audio] on the left side of the [Settings] window.



エコーキャンセルスピーカーフォン(Yamaha.. (Echo-cancelling speakerphone (Yamaha...

[Same as System]

スピーカー/ヘッドホン(Realtek High Defi... (Speaker/headphones (Realtek High Defi...))

エコーキャンセルスピーカーフォン(Yamaha... (Echo-cancelling speakerphone (Yamaha.

[Same as System]

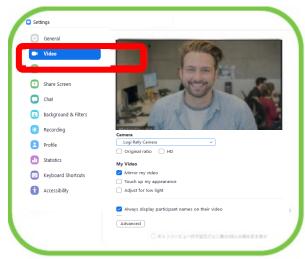
マイク(Realtek High Definition Audio) (Microphone (Realtek High Definition Audio))

Click the up or down caret to select the speaker and microphone to be used.

- * Select a built-in speaker or an external speaker ([same as system]), etc.
- * If you do not hear the sound, check if another speaker and microphone may
- Audio devices connected to your PC should appear in the list to be selected.

Setting of a camera

Click [Video] on the left side of the [Settings] screen.



Camera: Click the up or down caret to select a camera. If you are captured on the monitor screen, the selected camera is working.

- * If the camera is not working, check the followings.
- Click the video icon to undo the red slush / over the image at the bottom of the screen.
- Close other video apps if any on, including Skype.
- Enable the camera function of your PC.



3. Setting a camera, speaker, and microphone







Prevention and mitigation of howling and echoes

Before a meeting

When the microphone picks up the sound from the speaker, unpleasant howling (high-pitched squeals) and echoes may occur. Voices may sound muffled, strange, or choppy. Speakers may not notice this problem, but the audience may experience difficulty hearing the lectures clearly.

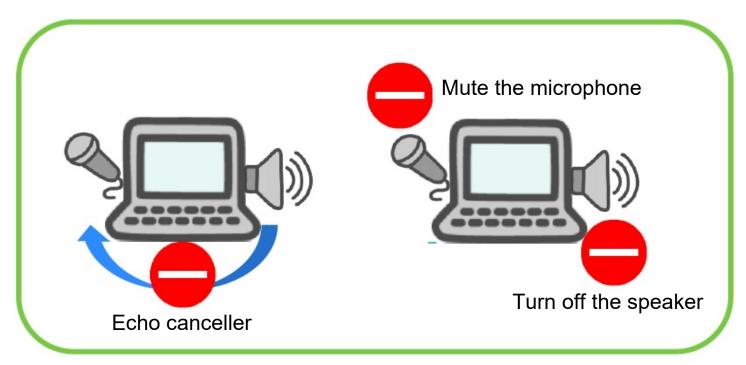


It is recommended to use the echo-cancelling or noise-cancelling function if your speaker/microphone is equipped with such

Also check that the microphone is not too close to the speaker.

If there are two or more PCs used in a room, mute the microphone and turn off the speaker of the PCs that are not used by the speaker giving a lecture at the moment. To mute microphones, click on other PCs the microphone icon to be crossed out with / in red at the bottom of the screen.

* To turn off the speakers, click [Leave Computer Audio] or use a headset.





4. Updating Zoom

Zoom settings

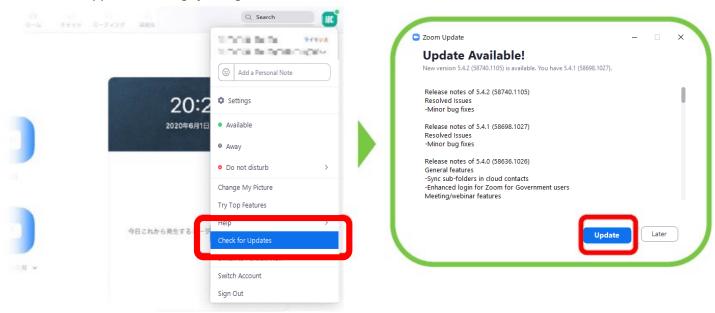






The Zoom app is updated regularly. To avoid problems, check regularly and update to the latest version.

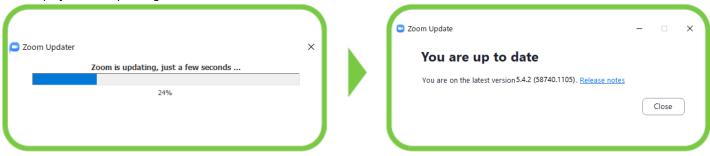
To update the app, start the Zoom app and click your account icon (photo or name) on the upper right side of the home screen. Click [Check for Updates] on the menu. When an update is available, a popup window appears. Click [Update].



In a short while, the download will be completed and the latest version is installed.

To check whether the app is in the latest version, click the account icon on the upper right side of the home screen again and click [Check for Updates]. If "You are up to date" appears, the app is on the latest version.

* The display varies depending on the OS.



The app can also be updated to the latest version by following the same procedure as that of "1. Installing Zoom" on p. 4.



1. URLs for pre-registration and a meeting



On the day of a meeting



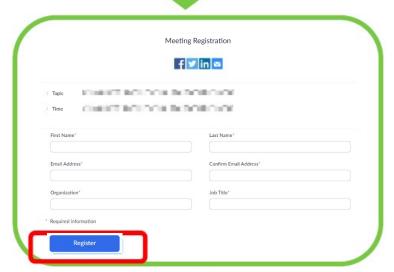


The organizer is to make preliminary arrangements with the person in charge from the Cooperative Research Service Section of RIMS (hereinafter, "RIMS staff"). The RIMS staff will email the URL for pre-registration to the organizer. The organizer will then send the URL for pre-registration, Program for the joint research meeting, and **Zoom Manual** to prospective participants by email (invitation).

[Note] Do not share URLs, IDs, and passwords with outsiders. It is strictly prohibited to post such URLs, IDs, and passwords at locations that are accessible to many and unspecified third parties (e.g., websites, social media).



In the invitation mail, click the URL shown under [Register in advance for this meeting:].



On the [Meeting Registration] window, fill out the fields for [First Name], [Last Name], [Email Address], [Confirm Email Address], [Organization], [JobTitle], and others if any. Click [Register].

* Enter all information correctly, especially your e-mail address.



An email to confirm the pre-registration is sent to the registered email address with the meeting URL.

* To cancel registration, click [Cancel]

You can join the meeting by clicking [Click here to join] on the day of the meeting. Enter the password if necessary.



1. By the start time of the research meeting

Before a meeting

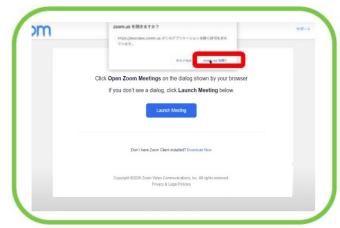




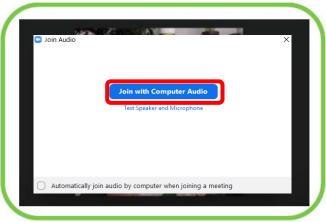


The organizer should enter the meeting beforehand by clicking the meeting URL (or enters the ID and password) in the pre-registration confirmation email. The RIMS staff, who is serving as a temporal "host," will admit the organizer into the meeting and then delegates to the organizer the privileges of the host. The organizer should designate co-hosts and be ready to admit participants before the meeting starts.

Joining a Zoom meeting

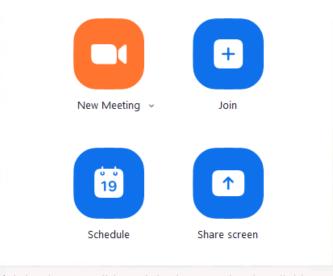


Click the URL for the meeting, and click [Open zoom.us] to join the meeting.



When the meeting screen appears, click [Join With Computer Audio].





* It is also possible to join the meeting by clicking [Join] on the home window. Enter the meeting ID and password to join.



1. By the start time of the research meeting







Hosts/co-hosts

The following Zoom features are available to the host. As it is deemed rather difficult to handle the necessary features properly while fulfilling tasks as a host during a research meeting, it is recommended to designate cohosts to control the administration on behalf of the host so that the host can concentrate on facilitation of the meeting, etc. Co-hosts will have privileges as seen below.

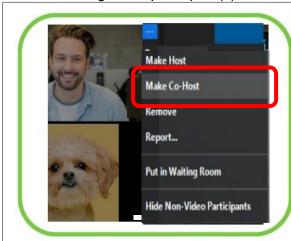
Summary of privileges of host/co-hosts	Host	Co-host
Admit participants	0	O**
Mute or unmute participants	0	0
Delegate the host's privileges to any other person	0	×
Promote any other person as a co-host	0	×
Create breakout rooms	0	×
Remove participants	0	O*
End a meeting	Ö	×

^{*} At RIMS, speakers of the meeting cannot be appointed to act as co-hosts.

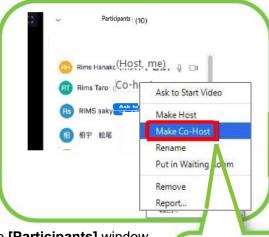


Setting co-hosts

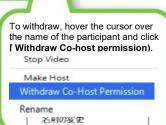
The host can designate a participant(s) to act as a co-host(s) in two ways.



On the video screen, hover the cursor over a participant to be designated as a co-host. Click [...] and select [Make Co-Host].



On the [Participants] window, hover the cursor over the name of a participant to be designated as a co-host, and click [More]. Select [Make Co-host]. The title [Co-host] will be indicated next to the name.





1. By the start time of the research meeting

Before a meeting



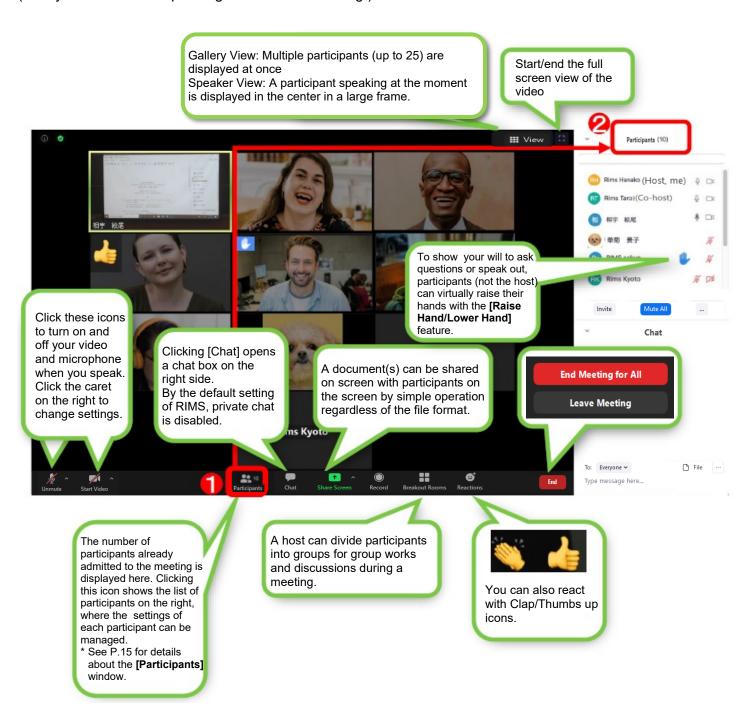




What you can do during a meeting

Various features are available during a Zoom meeting. The basic Zoom screen is as shown below.

(It may look different depending on the default setting.)



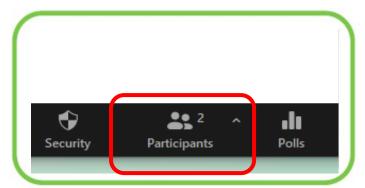


2. Start of a research meeting

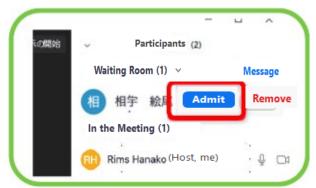


Admitting participants

The Waiting Room feature is designed to avoid any unauthorized participation. When **[Enable Waiting Room]** is set effective in the default setting done by the RIMS staff upon scheduling of the meeting, the host can control admission of participants joining earlier than the starting time. Also, as the host can hold participants temporarily in the waiting room, he/she can check those in the waiting room and admit only the official participants, avoiding any unexpected persons to enter.



The number appears here is the number of participants already admitted to join the meeting (from the waiting room) by the host. When participants are waiting in the Waiting Room, the list appears on the right side of the screen by clicking **[Participants]** icon at the bottom of the screen.



Click **[Admit]** on the **[Participants]** window one by one for admission.

To enable all participants waiting in the Waiting Room to join, click [Admit all].

Be sure to check if there are no unwanted persons in the waiting room.

Do not share URLs, IDs, and passwords of online joint research meetings with outsiders. It is strictly
prohibited to post such URLs, IDs, and passwords at locations that are accessible to public and unspecified
third parties (e.g., websites, social media).



Controlling audio and video (What you can do on [participants] window)

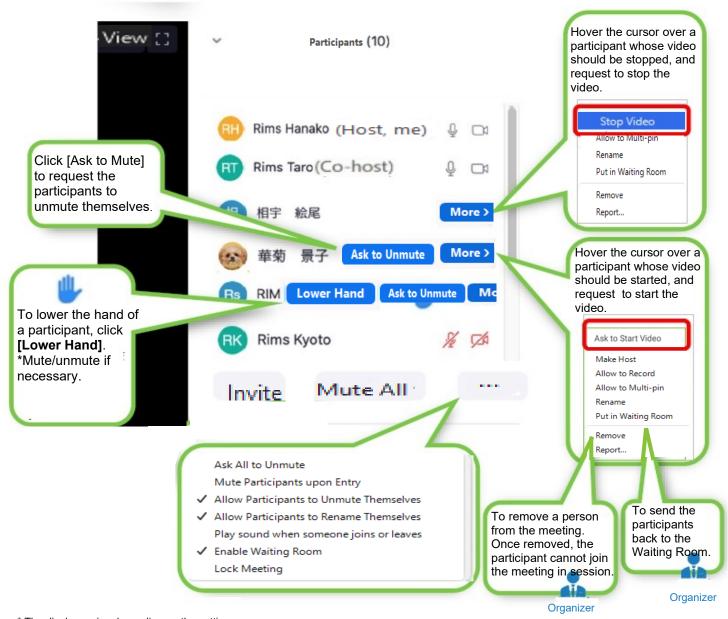


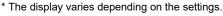


When participants' microphones are kept turned on, sounds which are not so unpleasant in daily activities (e.g., talking to oneself, coughing, dropping a pen) generate much noise. This causes distraction and makes it difficult to hear speakers and chairs.

To control the microphone, click **[Participants]** at the bottom of the screen to show the list of participants.

* RIMS recommend to set the microphones of all participants' devices to **[Mute]** when a speaker or others (e.g., a participant who asks a question) are talking. Unmute when necessary. Participants can unmute themselves. In this case, the host or the co-host(s) must instruct the participants to mute them again after they finish talking. Otherwise, the host or the co-host(s) must control the microphones of the participants.







2. Start of a research meeting



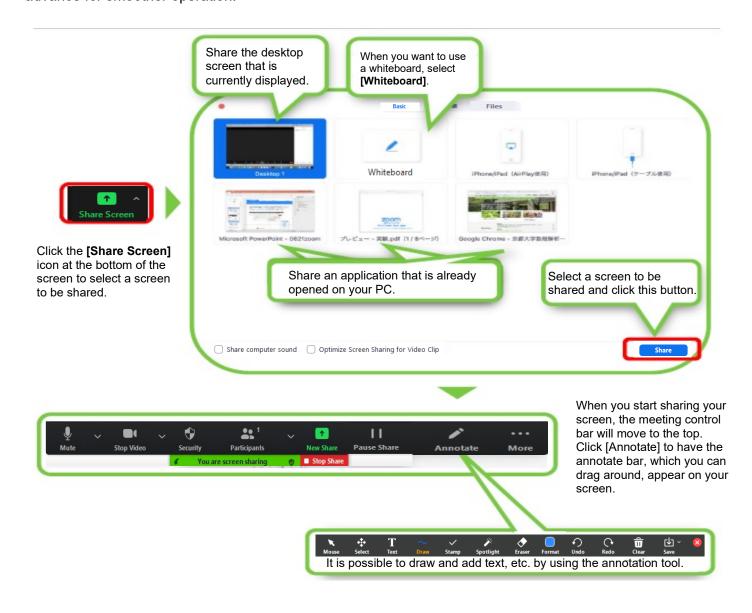
on which the speaker (and participants, if necessary) can annotate on.

Sharing the Screen

Speakers are able to share their screens with participants while giving a talk. Document files on his/her PC such as PDF and PowerPoint slides can be shared with participants as well as on screen virtual [whiteboard]

Others

- * In the default setting of RIMS, only hosts and co-hosts have the privilege for screen sharing.
- * A document file to be shared (e.g., PDF, PowerPoint) should be ready on the speaker's PC screen in advance for smoother operation.





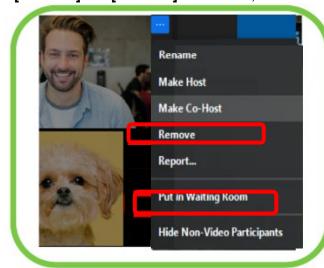
2. Start of a research meeting



Removing participants

This feature enables a host to forcibly remove a participant based upon the host's privilege. It is possible to send back participants to the Waiting Room during a meeting (re-admission allowed) or to completely remove participants engaged in annoying activities (re-admission not allowed).

The host or the co-host(s) can remove unwanted participants either from the video screen or from the **[Participants]** window. Hover the cursor over a participant to be removed, and select **[Put in Waiting Room]** or **[Remove]**. * If **[Remove]** is selected, the removed participant cannot rejoin the meeting in session.





Video screen

[Participants] window

Ending a meeting



Only the host can end the meeting in session. To end meetings, click **[End]** at the bottom of the screen.



Click [End Meeting for All].

* By clicking **[Leave Meeting]** you will be out from the meeting. If the host is leaving the on-going meeting, he/she should delegate the host privileges to a specified participant. If not, one of the remaining participants will be automatically designated to serve as a host.



3. Other features

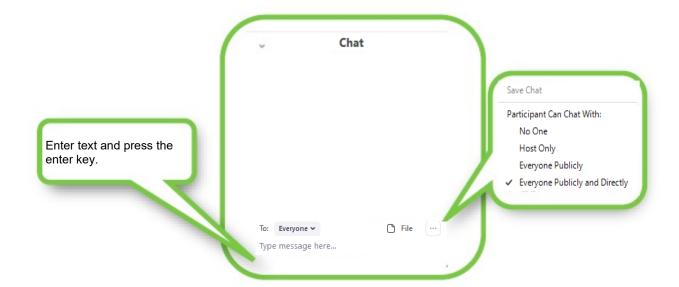






Chatting * By the default setting recommended by RIMS, private chat is disabled.

Clicking the **[Chat]** icon at the bottom of the screen in a meeting enables text chat. A participant who logs in after the start of a meeting cannot check the text sent prior to the entrance. If text messages should be sent to all participants via the chat room, make sure to send it when all expected participants are present.



Breakout rooms

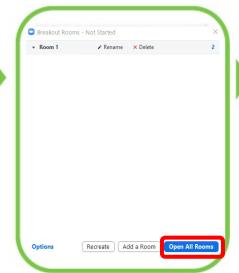
* Breakout rooms are disabled in the default setting of RIMS. To have breakout rooms set beforehand, consult the RIMS staff in charge.

The host can divide the participants into small groups.

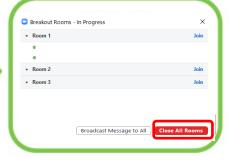
Clicking the [Breakout Rooms] icon at the bottom of the screen to go to the submenu window.



Select the number of rooms to set up and the method of assigning participants to rooms; [Assign automatically], [Assign manually] or [Let participants choose rooms]



Click [Assign] to manually assign participants. Automatically assigned participants can also be manually moved to other rooms.



Once the Breakout rooms start, the host (or a co-host) can;

- · visit the rooms
- · send chat text to the rooms
- end the breakout rooms.



1. Measures against disruptions in a meeting

Before a meeting







The following measures can be implemented to cope with disruptions in a meeting.

Removing participants

If an outsider joins and engages in inappropriate behavior, a host can forcibly remove the person.

- ① Click the [Participants] icon at the bottom of the Zoom screen.
- ② List of participants appears. Hover the cursor over a participant to be removed and click [More].
- 3 Click [Remove].
 - → The removed participant cannot re-enter the meeting.
- Enabling the Waiting Room

It is desirable to set the Waiting Room effective when scheduling a meeting so that outsiders cannot enter the meeting without permission. It is also possible to enable the Waiting Room after the meeting starts.

- ① Click the [Security] icon at the bottom of the Zoom screen.
- 2 Check [Enable Waiting Room].
 - → New participants will automatically be in the Waiting Room until the host admitted them into the meeting.
- Muting All and Prohibiting Participants to Unmute Themselves
 Organizers can select the setting to prohibit participants from unmuting themselves and control who are to speak out for smoother meeting operations.
 - ① Click the [Participants] icon at the bottom of the Zoom screen.
 - ② Click the [Mute All] button at the bottom of the list of participants. → All participants are muted.
 - ③ Click ... and uncheck [Allow Participants to Unmute Themselves].
 - → Participants will not be able to unmute themselves.
- Disabling Screen Sharing

If the screen sharing privilege is set to **[Only Host]** in the default setting, participants cannot share the screen of their PCs with other participants. Only the host can share his/her screens.



1. Measures against disruptions in a meeting







- Disabling [Annotate] (writing on the shared screen) in Screen Sharing
 When a speaker shares a file (e.g., PDF, PowerPoint), there may be a possibility that someone may
 scribble on the screen using the Annotate (pencil icon) tools.
 How to prevent such scribbling
 - ① Click ... [More] at the right end of the menu at the bottom of the screen.
 - ② Click [Disable Attendee Annotation] → Participants cannot write on the shared screen.
- Prohibiting [Chat]
 A host can control [Chat]. For details, refer to the Chat section (On the day of a meeting Other features) (p. 18).
- Prohibiting [Rename] During a Meeting
 A host can prohibit participants from renaming (changing their registered names) themselves during a meeting in order to identify the participants by their names.
 - ① Click the **[Participants]** icon at the bottom of the Zoom screen.
 - ② Click [...] at the lower right of the participants list.
 - ③ Uncheck [Allow Participants to Rename Themselves].
 - → Participants cannot rename themselves in a meeting. However, a host can rename participants.





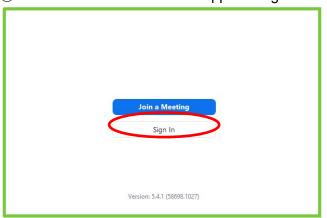


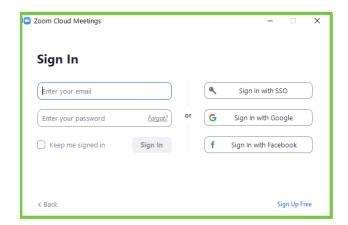


For the RIMS online joint research activities, hosts are requested to use a paid license of Zoom as described in the guidelines. The free version may be used to familiarize with the Zoom features. The process to install Zoom, create an account, update the app, etc. is the same as that of the paid version. Refer to "1. Zoom settings." Make sure the Zoom app is updated to the latest version.

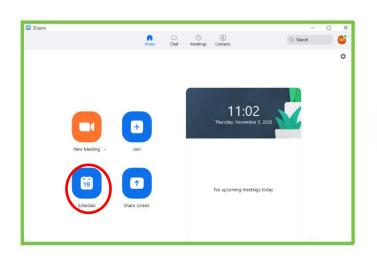
When serving as a host (inviting participants to a meeting)

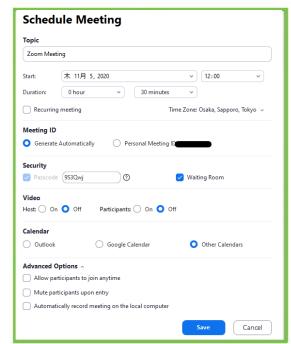
1) Start the downloaded Zoom app and sign in.





② Click [Schedule] on the home window. On [Schedule a Meeting], set the date and time of a meeting, video on/off, detailed options, etc.





The details of the items are continued on the next page.

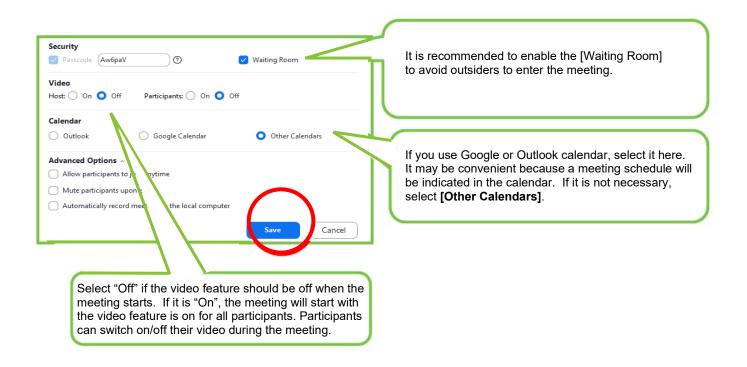


On the day of a meeting

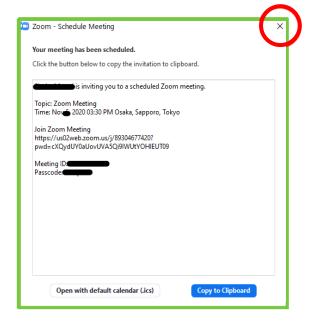


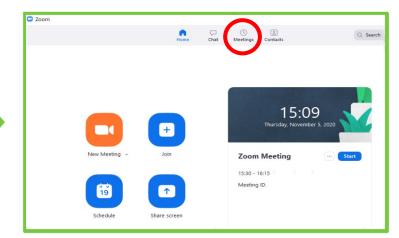


2. Zoom manual for the free version



③ By clicking [Schedule] on the setting screen above, a window appears to notify [Your meeting has been scheduled.]. Click the close button in the upper right to close it, and on the home window click [Meetings].



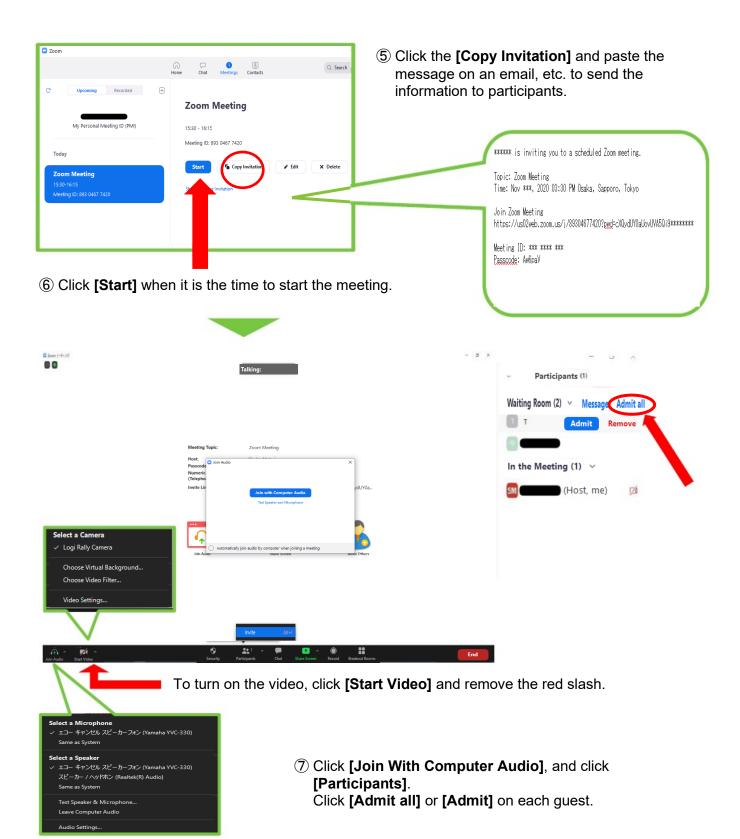














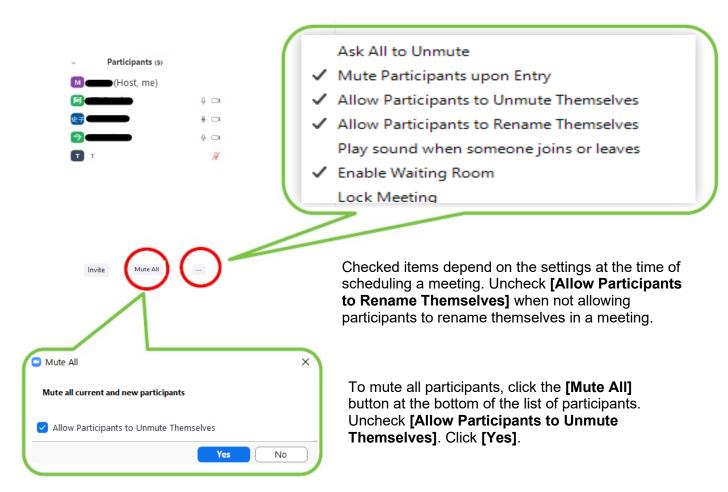
Zoom settings







A host can manage audio, video, etc. of participants on the participants window.



To end a meeting, click [End] in the lower right of the screen.



Click [End Meeting for All]. The meeting ends.

* If you select [Leave Meeting], you leave the meeting that continues, and one of the remaining participants serves as a host after you leave the meeting.





On the day of a meeting





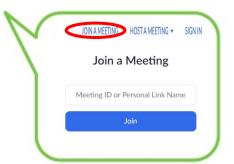
When participating as a guest (invited to a meeting)

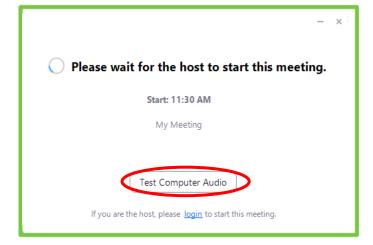
To become a host, it is required to sign in on Zoom app. A guest can join a meeting without signing in (without an account).

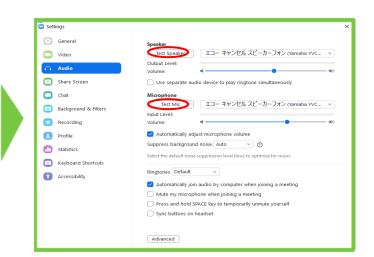
Invitation emails are to be sent out from the host. At the scheduled time, click the URL indicated in the email.



* If the URL does not work, enter the meeting ID and password in the [Join a Meeting] window of the Zoom website.







Click [Test Computer Audio] to test and check your speaker and microphone. For the speaker, make sure you hear sound and set the output level.

When the host starts a meeting and he/she will admit you to join the meeting. When a host chooses not to have a Waiting Room for the meeting, you will directly join the meeting without waiting in a Waiting Room.

When the meeting is set with a waiting room feature, all participants are to be held in the waiting room at first until the host lets them into the meeting.









