WhatsApp and Zoom for Convenors

Introduction

The purpose of this guide is to provide Convenors with information on how to use two Internet based systems to keep in touch with their groups, **WhatsApp** to send messages and **Zoom** to hold video meetings.

It should be noted that there are many other similar systems that can be used; this note focuses on WhatsApp and Zoom just to keep things simple and because we have used them ourselves and know they are relatively easy to setup and use.

A note of caution on video calling; this can use a lot of data so make sure you, and your other group members, are using their home internet connection. Also, video calling is quite power intensive so, if you are using a mobile phone or tablet, make sure the battery has a good charge or have the device plugged into a charger.

WhatsApp

WhatsApp runs on smart phones and allows you to send messages, make phone calls and video calls over the internet.

The use of it being described here is to set up a WhatsApp 'group' so members of your U3A groups can exchange messages with all other members of the group.

For instruction on how to install WhatsApp on a smartphone or tablet visit this BBC page and look 'How to video call on WhatsApp'; the first section of the guide covers how to install WhatsApp on Android and Apple smart phones.

The first time you start WhatsApp you will need to:

1) accept the Terms and Condition
2) give your mobile number (this is in international format so omit the leading zero)
3) give your name
4) if you want, you can also provide a photo (which can be of anything you like!)

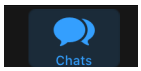
On Apple devices you will also be asked to give permission for WhatsApp to access your contacts (which you should allow) and whether to allow WhatsApp to send you notifications (which you need to decide whether you want to be alerted whenever a new message arrives).

For group members, that is all that needs to be done, but for the convenor there are a couple of extra steps required to set up the WhatsApp Group:

1) You will need to add the members of your group to the contacts on your smartphone (this must include their mobile phone number)
2) You will need to set up the group as follows:
    a. Start WhatsApp
    b. Go to the Chats section by TAPping on the Chats Icon

    c. TAP on 'New Group'; this should open your Contacts
    d. Select all the contacts you want to add to the group by TAPping on the contact (you do not have to do them all at once, you can add others later).
    e. TAP on 'Next'
    f. Enter a Group Subject (e.g. the name of your Wokingham U3A group); the maximum length is 24 characters
    g. TAP on Create
3) Creating the group will send a message "*Your name* added you" to all members, but it would be a good idea to send an additional message along the lines of "Welcome to the *U3A group name* WhatsApp chat group".

For any member of the group to look at message and send messages to all other members of the group:

1) Start the WhatsApp app
2) Go to the Chats section by TAPping on the Chats Icon 

- a list of your groups will be displayed
3) TAP on the group; the latest messages for that group will be displayed.
4) To send a message, type in the message and then TAP the send icon

Zoom

Zoom is a 'video conference calling' system that can be accessed using PCs, Smart Phones and Tablets.

Although Zoom is mainly aimed at business use (for which a paid license is required), they also offer a basic plan which is free but is restricted to a maximum meeting time of 40 minutes and no more than 100 participants (for 1-to-1 meetings there is no time limit).

This guide concentrates on what a convenor needs to do to register for a basic Zoom plan and to run a U3A group as a video conference. It should be noted that only the convenor (or the person who is going to run the meeting) needs to register for Zoom.

Obviously, anyone who wants to participate needs to have access to a PC (which has a camera and microphone) or they can use a tablet or a smartphone.

Here is how to register with Zoom:

1) Go to the Zoom website at: https://www.zoom.us
2) In the top right of the screen there is a button, SIGN UP, IT'S FREE click on this button.
3) A screen will be shown prompting you to enter 'Your *work* email address'; type in your *own* email address (it does not need to be a work email) and click on the 'Sign-up' button.
4) An annoying box is displayed about "We'd like to help you get the most out of Zoom"; you can just ignore this by closing the web browser.
5) All being well, an email will be sent to you with a large 'Activate Account' button; click on this button and you will be taken back to the Zoom website.
6) On the Zoom website page you will need to supply:
    a. First name
    b. Last name
    c. A password for your account
    d. Re-enter the password

    Click on the Orange 'Continue' button to complete the setup of the account.
7) Make a note of your password; your username is the email address you specified at step 3.
8) The next screen is aimed at getting more people to sign-up, you can ignore this by clicking on the 'Skip this Step' button towards the bottom right of the screen.
9) If all is OK you will be taken to a screen 'Start your test meeting'. You do not have to start a meeting, just click on the 'Go to my account' button and this will take you to the main Zoom screen which is the screen you will normally see whenever you log on to Zoom.

How to set-up a meeting:

It is recommended that you go through the process of scheduling a meeting at least a day in advance

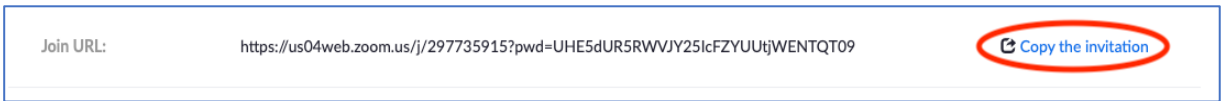
1) Go to the Zoom website at: https://www.zoom.us
2) Click on the "SIGN IN" text which is the right (next to the "Sign up, it's free" button).
3) Enter your username and password and click on the blue 'Sign-in' button; the main Zoom screen will be displayed; this is where you set up a meeting.
4) Click on "SCHEDULE A MEETING"; you will now be presented with a screen where you need to provide the following information:
    a. Topic Name (e.g. "U3A Group Name weekly meeting")
    b. An optional description
    c. The date and time of the meeting (note you are limited to starting meeting on the hour or half hour.

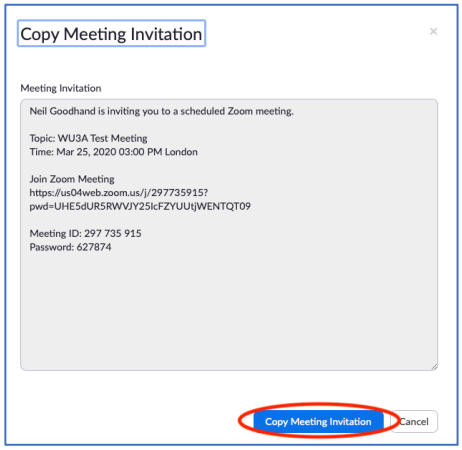
d. You can leave the duration at 1 hour, but because we are using a free plan the meeting may be terminated after 40 minutes.
e. Tick the 'require meeting password' box
f. In the next section (video) set the ON button for both Host and Participants
g. In the Audio section, set the "Computer Audio" button
h. In the meeting section select 'Enable Join before Host"
i. Click on the Save button, if all is OK details of the meeting will be shown.

How to invite others to the meeting

Having scheduled a meeting, the details will include a **Join URL**; this is what you need to send to other group members so they can join the meeting:

1) Locate the Join URL section



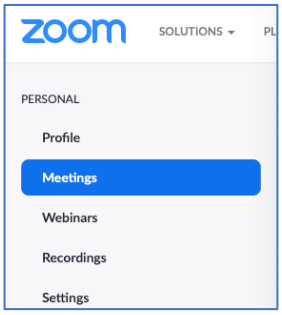


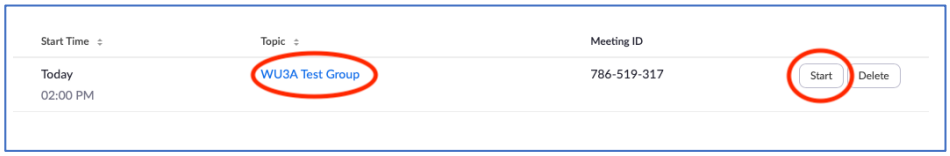
2) Click on the 'Copy the invitation', a pop-up box is shown with details of the meeting:
3) Click on 'Copy Meeting Invitation'; this copies the text into the clipboard
4) Press the 'X' in the top right-hand corner to close the pop-up box.
5) Go into your email system, compose a new email and use the paste option to paste the copied text into the message part of the mail
6) Send the mail, with a suitable 'Subject Line', to everyone you want to invite to the meeting
7) As an alternative the link can be sent via messaging (such as WhatsApp).
8) That's it, everything is done to set up the meeting. To log out of Zoom click on the icon and select SIGN OUT

How to start a meeting

Having scheduled a meeting, you should start the meeting at the agreed time; to start the meeting:

1) Sign-on to zoom (as detailed in steps 1 -3 of "How to set up a meeting").
2) On the left of the screen click on "Meetings", a list of the meeting you have scheduled will be displayed:





3) To Start the meeting, click on the **Start** button (to change details of the meeting click on the meeting topic).

4) Depending on the type of computer being used, the system may ask for permission to download and run an app “zoom.app” or “zoom.us.app”; this is OK.
5) After a few seconds the meeting should start. If a button is displayed “Join with Computer Audio”, the click on that button.
6) If all is well you should see a screen with the video from the camera on your device. Once someone else joins the screen will change to show the other participants.

What a Group Member needs to do.

If a Group member is using a tablet or Smartphone, then they first need to install the Zoom App. The instruction for doing this are the same as those for installing the “WhatsApp” app EXCEPT you need to search for and install the app called “ZOOM Cloud Meetings”.

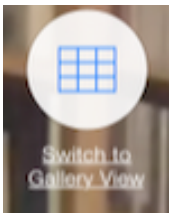
When it is time to join the meeting, simply click on the link in the email or message.

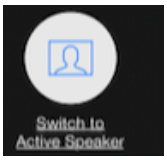
- On a smartphone or tablet, provided the Zoom App is installed, the App should open and once the convenor starts the meeting you can join it by clicking on “Join with Video”.

- On a computer, clicking on the link will take the user to the zoom website. The user may be prompted to download/open an app “zoom.us.app” or “zoom.us” and may have to give the app permission to use the camera and the microphone. Again, once the convenor starts the meeting, you can join it by clicking on “Join with Video”. After a few seconds the meeting should start. If a button is displayed “Join with Computer Audio”, then click on that button.

Video Meeting Hints and Tips

Zoom has 2 modes of working:
1) There is an active speaker mode where 2 pictures shown; a full screen of the person that is speaking and a small ‘in picture’ window showing what your camera is sending. The person shown on the main picture changes to whoever is speaking.
2) Alternatively, there is a gallery view which shows all participants in smaller windows (on an iPad up to 9 participants can be seen).
3) Switching between modes on a tablet is achieved by tapping the screen and then tapping on the appropriate icon.





If a participant is in a noisy environment, then they should TAP on the microphone icon to mute their sound when they are not speaking.

If a participant can’t hear what other people are saying, the first things to check is that the volume on their device is not turned down.

Only one person should talk at a time. If more than 1 person speaks at the same time then this causes issues and it can be difficult to hear what anyone is saying. One way of handling this is to have a chair who invites people to speak and, if someone want to speak, they raise their hands.