

HOW TO ZOOM



New York State Association of REALTORS®, Inc.

Please use this manual to help set up Zoom for online classes. We hope this is a helpful resource for you.

Part 1- Summary of Zoom Account

Use this link and create an account with an email and password. You will want to review the various licenses and pick what is best for you. At NYSAR we use the Pro-version, which allows all the features we will review in this manual.

Main Zoom site to create an account: <https://zoom.us/>

Once your account is created sign-in. You will see this screen: *You can add a picture of yourself for your account here by clicking on the edit button.

The screenshot shows the Zoom user profile page for Kristin Cohen. The page is divided into a left-hand navigation menu and a main content area. The navigation menu includes links for Profile, Meetings, Webinars, Recordings, Settings, Account Profile, and Reports. The main content area displays the user's profile information, including a profile picture, name, department, job title, location, and account number. Below this, there is a section for the Personal Meeting ID, Sign-In Email, User Type, and Capacity. A red box highlights the profile picture and the 'Edit' button next to it. A red arrow points from the text above to the 'Edit' button. A blue box highlights the left-hand navigation menu.

Below is a quick overview of each of the tabs found on the left side of the screen (see the blue box)

1. The Profile Tab:

Here is where you will add a picture that will be used in meetings and webinars (displays when your video is off).

The rest of the info in the Profile Tab is just the licensure data.

2. The Meetings Tab:

Here you can view upcoming meetings you have created.

You can create new meetings.

This is where data about meetings is stored.

Part 1- Summary of Zoom Account (continued)

3. The Webinar Tab:

Here is where you will create webinars and run webinars that you have created.

Here is an article on the difference between a Zoom Meeting and a Zoom Webinar:

[Meeting and Webinar Comparison Article](#)

4. The Recordings Tab:

Here you can review and pull recordings.

To be able to do this you must record meetings and webinars.

There are different features including need-to-know for recordings done on **the Cloud** or on a **Local Computer**.

Please read the following articles to ensure you capture and download your recordings appropriately.

[The Cloud Recordings Need-to-Knows](#)

[The Local Computer Recordings Need-to-Knows](#)

5. Settings Tab:

This is where you set all the different features you will want in your Meetings or Webinar.

This article does a good job defining the settings from basic to advanced:

[Zoom Settings](#)

This article specifically reviews the use of breakout rooms

[Managing Breakout Rooms](#)

**Here is a tip we discovered for breakout rooms:

When you are hosting an instructor, it is best to do the following to allow the instructor to oversee the breakout rooms. The proctor needs to switch the instructor to host and then the instructor should make the proctor a co-host. Doing this allows the instructor to manage their own breakout rooms (i.e. join the rooms for discussion, bring them back in, extend the time, etc.) Once breakout rooms are done for the session, the instructor may want to return the hosting to the proctor.

This article will review how to use Whiteboards

[Using Whiteboards in Zoom](#)

6. Account Profile Tab:

This is your account information section.

Part 1- Summary of Zoom Account (continued)

7. Reports Tab:

Reports are available after your sessions are done. Here is an article on reports.

[Getting Started with Reports](#)

Part 2: Zoom Wording Invite

NYSAR Zoom CE Class Wording Invite:

Here is what NYSAR sends out for CE classes as part of the Zoom Invite. Some of you have asked us to share it with you.

Hi,

Welcome to NYSAR's webinar classes. We know times are challenging right now and we hope that offering classes via broadcasting helps you keep growing in your career. To help you be successful in your learning, please take a moment to read the following guidelines. **#strongerRtogetherR**

- Be sure to join the webinar for the first session of your course at least 15 minutes early.
- You **must** print or download the manual and have it available while taking the class.
- To stay compliant with the Department of State (DOS), all our **CE classes** will be monitored by a NYSAR staff member, to assure your course completion.
- It is **required** that you fully participate in each session of the full course.
- We will have a break during each session. Strict adherence to the breaks is expected (break on time means returning on time).
- To participate, you **must** have a camera and audio access on your computer or use a phone for the audio.
- You **must** stay visible and engaged in class for the full hours of each session.
- We will be using a variety of meeting tools to engage you during the course and monitor your participation and because of this **requirement** we recommend the following best practices:
 - Please change your name if using someone else's device (i.e. family iPad).
 - Please use a device that will allow you to engage in the various meeting tools (this is required to give CE credit).
 - Sit in a location that allows for good lighting (we need to be able to see you).
 - Create a space that will allow for good learning to use tools such as polling questions, hand raising for Q&A, chat box for participation, and the manual.
- Please dress accordingly - remember you will be seen!
- Please see the information below on how to join the Zoom Class.

We look forward to seeing you in class! NYSAR Education Department

Part 2: Zoom Wording Invite (continued)

Please read and review the Zoom Class Instructions (see below).

Zoom Class Instructions

The NYS Department of State is temporarily allowing for remote delivery of live instruction via Zoom. As your providing school, we will manage the delivery of national designation classes, with a live instructor, to individuals around the state.

If you have never participated in a class or meeting using an online platform such as Zoom, please take some time to familiarize yourself with it by viewing [this](#) or other Zoom.us tutorials. You must be familiar with where your video and microphone controls are and where the Chat box is to type in your questions.

In order to participate, you will need to use a device with a camera so that your participation may be verified by our staff throughout each session. Knowing that the instructor, moderator and your fellow participants will be able to see you, please dress appropriately.

Before class, please print the manual using the link that was provided in your confirmation email or have it available on a separate screen to access during the class. Please sign into your first session at least 15 minutes early.

We will be monitoring your participation throughout the program. Please be advised that, in order to earn credit, you'll need to attend all sessions of the class for the full time. Most sessions will be 2.5 hours with a 15-minute break.

Please keep your microphone muted during the program. Use the chat function to ask questions. With the help of the moderator, the instructor will periodically respond to your questions.

As always, NYSAR's Education Department is here to support you. For questions please reach out to us at educate@nysar.com

Part 3: Best Practice Tips for Proctors

These are the best practice tips NYSAR is using for Proctors in Zoom classes:

- Proctors include the instructor on the invite sent to the participants along with any classroom materials.
- We (Ed Dept) ask all instructors to use Poll Questions. Proctors work with the instructors to get the questions and add them into the sessions prior to class. We use the same questions for each class module.
- In advance, proctors ask the instructors if they wish to have a practice session. This is especially good to do if it is a newer instructor/proctor and they are not familiar with Zoom.
- Proctors ask instructors if they are using breakout rooms, who is running them and when in the class they happen.
- On day 1 of class, we do a welcome, go over the rules (bullet points in the email template above) and introduce the instructor. Proctors ask the instructors how they want this to be done prior to class.
- For all sessions of class:
 - Proctors welcome the class, ask if there are any questions and then pass the class to the instructor.
 - Proctors ask a question after break and at the end of the class in the chat box for all participants (we use as one form of tracking participation). Some example questions Proctors use are:
 - What is your favorite ice cream?
 - Who is your favorite author?
 - What is your favorite movie?
 - Do you prefer coffee or tea?
 - What is your favorite animal?
 - Who is your favorite singer or band?
 - Any others you come up with.
- On the final day, proctors do the following:
 - At the end of class, they let the participants know they will be sent an evaluation from Qualtrics and to please fill it out.
 - They will also receive their CE certificates within a week or so, via email which includes a link to their certificate.
- Proctors record each session and put in the appropriate designated file.
- Proctors download the poll reports and chat and put in the appropriate file.
- Proctors use an excel template to track attendance. In Zoom Meetings you can only get registration reports if you require registration (only report from Zoom Meetings you can get for attendance). We do not have them register through Zoom since they already register and pay using NYSAR's in-house system (RAMCO).