

# Zoom Guidelines

For Presenters



**Boston  
Children's  
Hospital**

Department  
of Education

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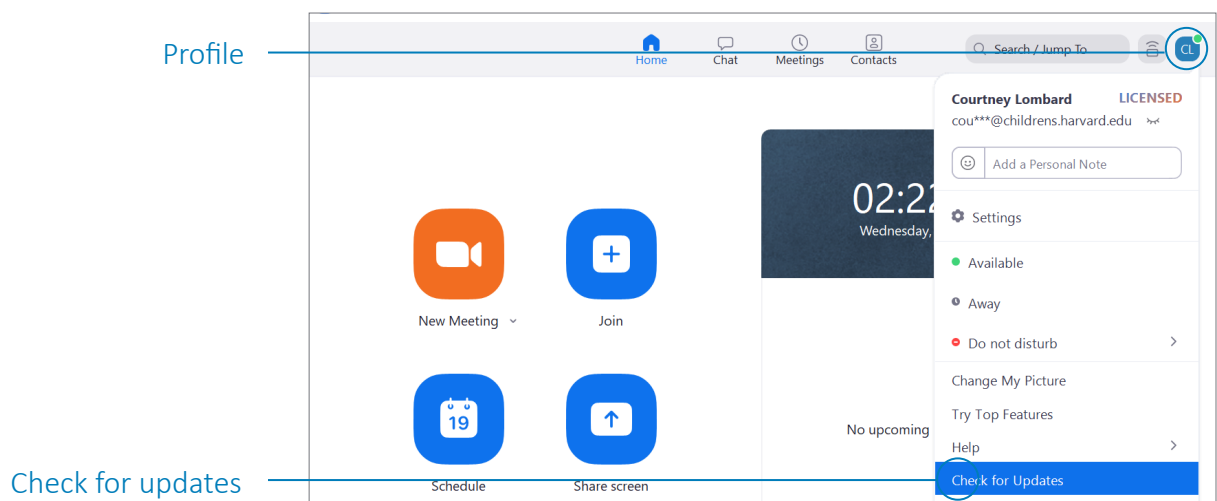
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# Setting Up Zoom

## Computer

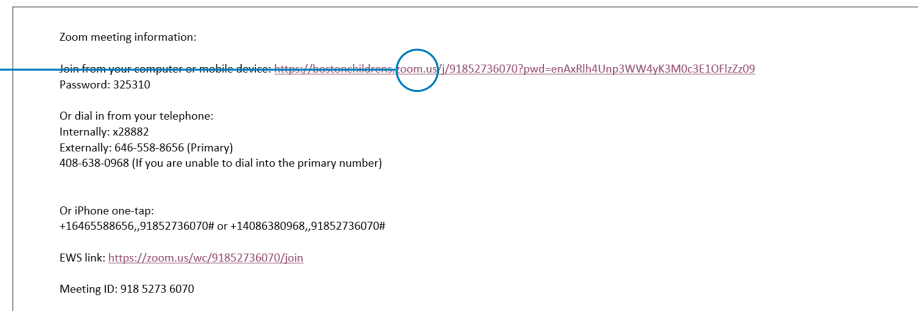
- Make sure Zoom is installed and up to date. If Zoom is not installed, download it here: [Zoom Download](#)
- To check for updates, go to the Zoom desktop application. Click your profile picture or initials in the upper right hand corner. Then click check for updates.



- When presenting, close other non-essential applications on your computer, especially
  - Outlook or other applications with audio notifications
  - Other video conferencing platforms such as Microsoft Teams.

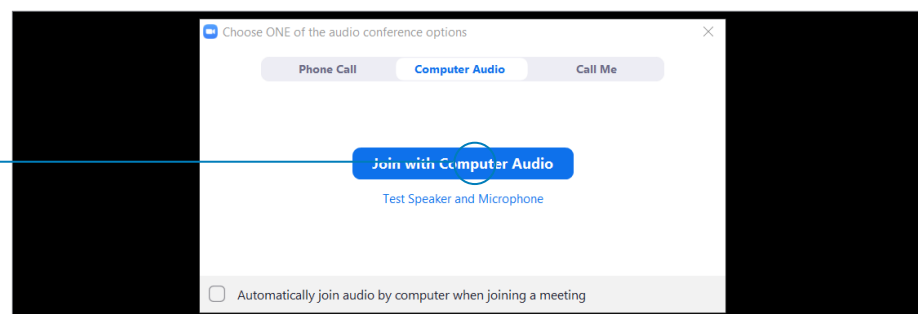
- To join a Zoom call, click the join link in the email invitation.
  - **!Important:** Be sure to read the email invitation for additional instructions about joining your webinar or meeting.

Link



- The Zoom application will open to the meeting or webinar.
- Click Join with Computer Audio. For more information on testing computer audio in Zoom, see the [Microphone section](#).

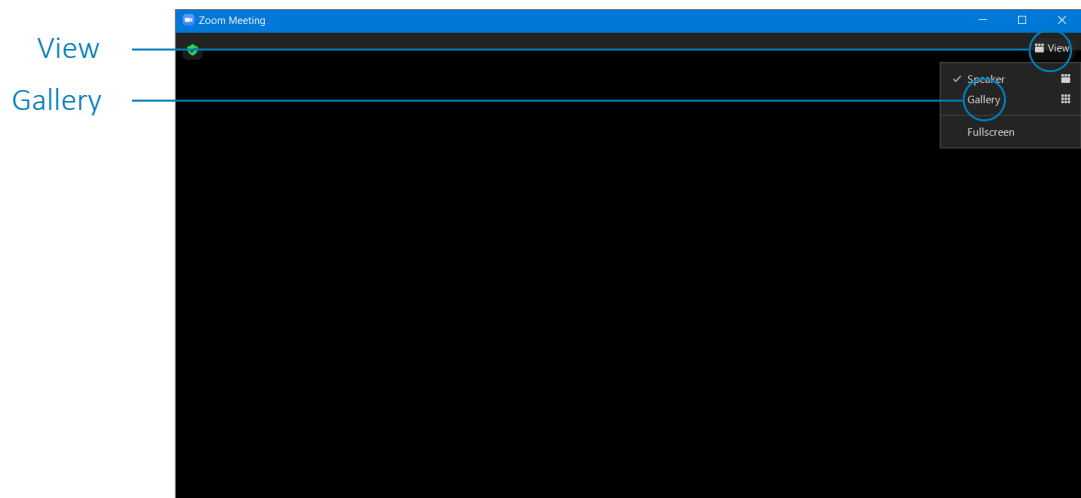
Join with Computer Audio



- Once you are in the meeting, click the microphone to mute/unmute.
- Click the camera to start/stop video.



- For Zoom meetings: click View in the upper right hand corner and select Gallery View.



## Internet

- **! Important:** Log off any VPNs.
- If possible, use a hardwired internet connection to increase the quality and stability of your network connection.
- If no hardwired connection is available, move closer to your wireless router to increase signal strength.
- Reduce network load:
  - Close other apps that use the internet.
  - Turn off networked devices you are not using.
  - Ask others using your network to limit their use if possible—streaming video or gaming can impact a network heavily.

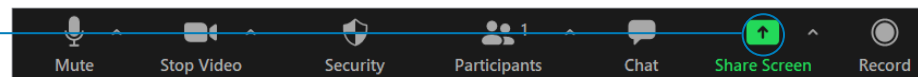
## Camera

- Make sure you're not backlit (illuminated from behind) and your face is adequately lit.
- Position the camera at eye level:
  - Laptops: use a box or stack of books to elevate it to eye level.
  - If using an external webcam, consider an adjustable stand.
- Multiple Cameras (e.g., Chalk Talks)
  - Add a second camera when the dedicated room camera does not adequately capture a whiteboard or other visual.
  - **!Important:** you will need a tripod or other means of supporting and positioning the second camera.
- USB Camera: Method A
  - Plug the USB camera into the computer, and position it toward the desired view.
  - Start the Zoom meeting.
  - Select the caret ^ next to Share/Stop video to select the camera.
  - Select the camera from the list with the desired view.



- USB Camera : Method B
  - Plug the USB camera into the computer, and position it toward the desired view.
  - Start the Zoom meeting.
  - Select Share Screen.

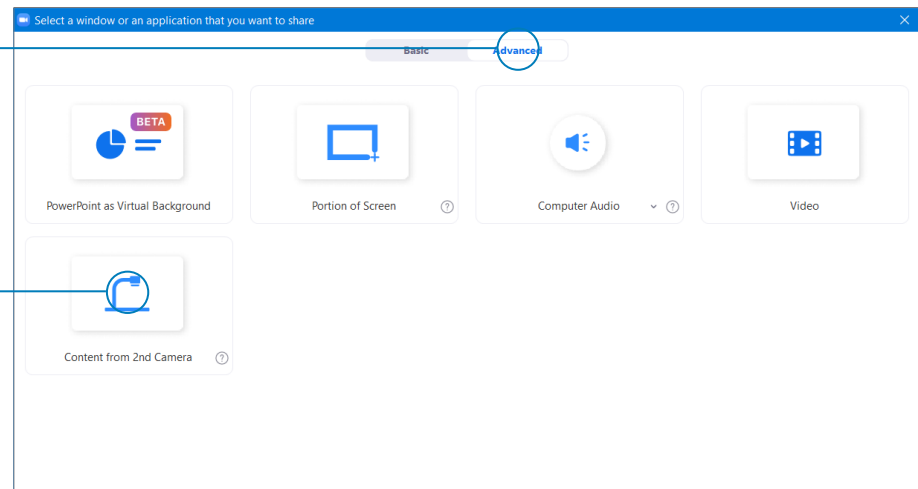
Share Screen



- Select the advanced tab at the top of the screen.
- Select the second camera option.

Advanced

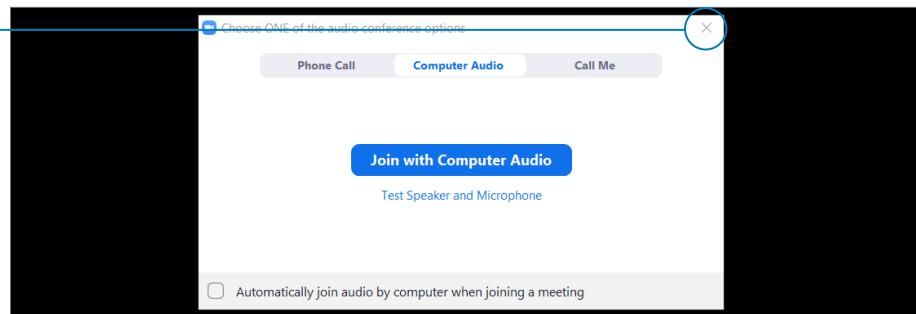
Second Camera



- A “Switch Camera” button should display in the top left corner of the Zoom screen. Use this button to toggle between camera views.
- If using an external webcam, consider an adjustable stand.

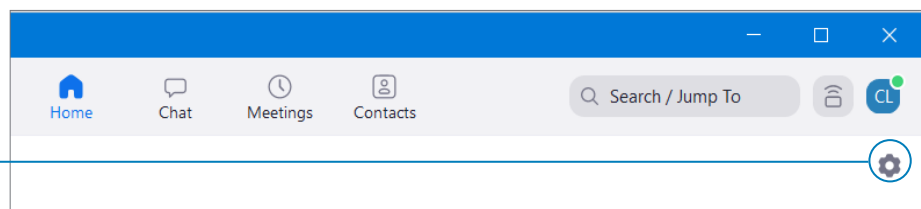
- Phone or Tablet Camera
  - Start the Zoom meeting from the computer with the room camera.
  - Join the Zoom meeting from your phone or tablet—without Audio.

## Join without Computer Audio



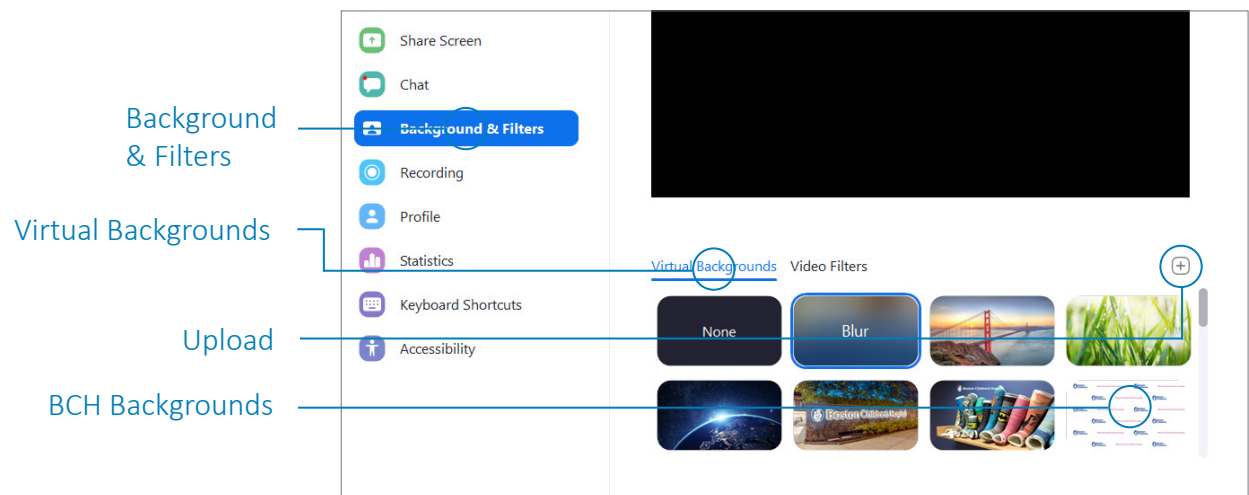
- Pin the phone/tablet to display its view.
- Make sure your background is not distracting. If possible, try to minimize movement in the background.
- Use a BCH branded virtual background, upload a custom background image, or use the background blur effect.
  - To access backgrounds and filters, click on the settings icon in the upper right hand corner of the Zoom desktop application.

## Settings





- Click Background & Filters.
- Under Virtual Backgrounds, select a BCH branded background or the blur background option.
- Click the plus icon to upload a background image.

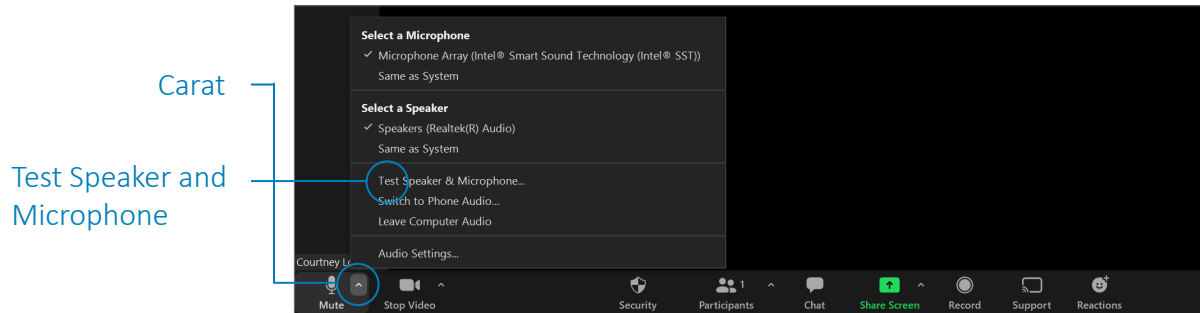


- More information on Zoom backgrounds, available here: [Getting Started with Zoom Virtual Background](#).

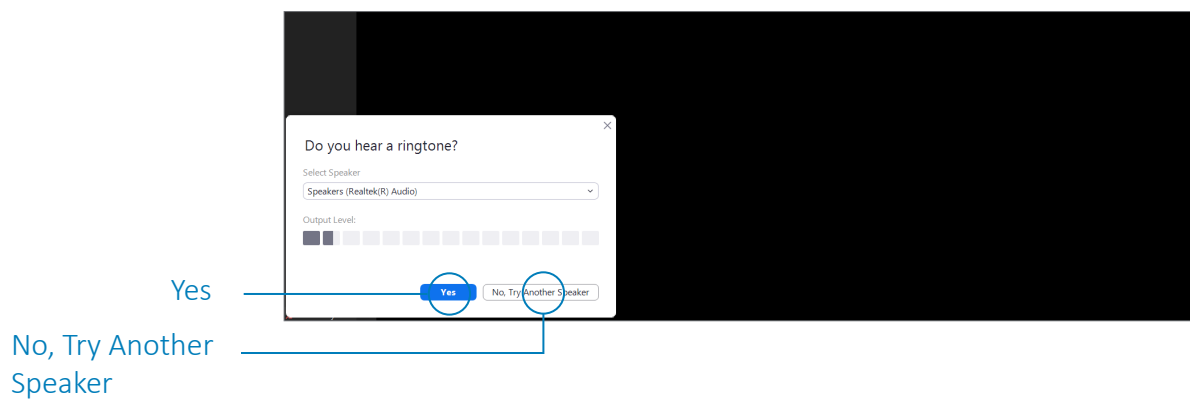
## Microphone

- An external microphone or headset microphone can help reduce background noise.
- Make sure it is fully plugged in and angled towards your mouth.

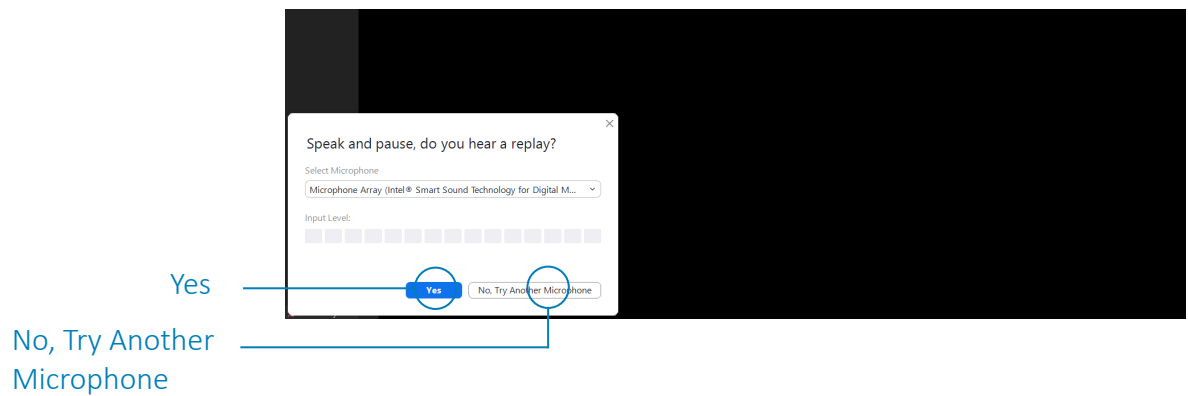
- Click on the carat next to the Mute button on Zoom and make sure your microphone is selected from the list. If you are having trouble hearing or being heard, click on Test Speaker and Microphone.



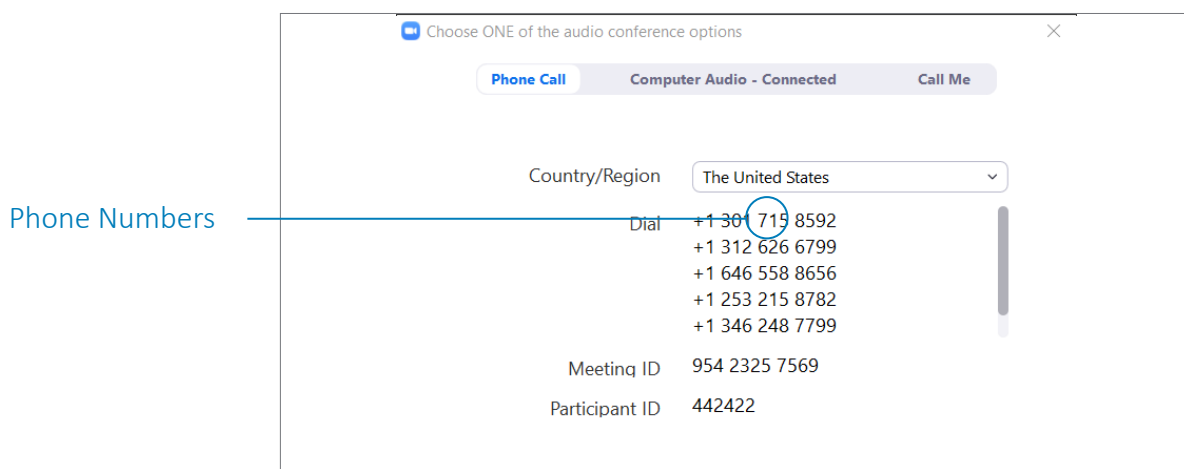
- A dialogue box will appear that plays a tone.
- Click Yes if you can hear the ringtone. Click No, Try Another Speaker if you cannot.



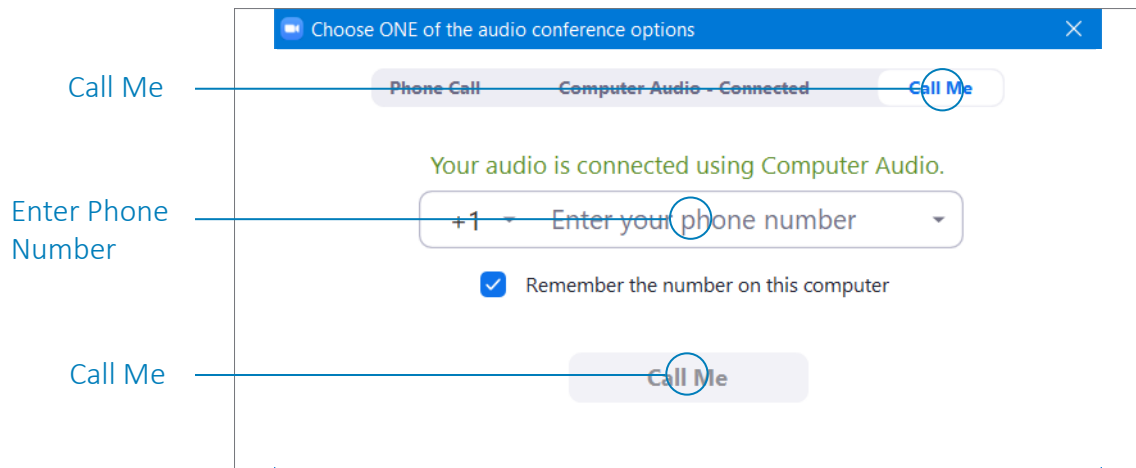
- When the dialogue box prompts you, speak into your microphone.
- Zoom will play back your recording. Click Yes if you can hear it or No, Try Another Microphone if you cannot.



- If you are unable to connect to your microphone or speaker, you will be prompted to join via phone audio.
- Dial one of the numbers in the Choose ONE of the audio conference options dialogue box.



- Or select Call Me and type the number of the phone you wish to join from.

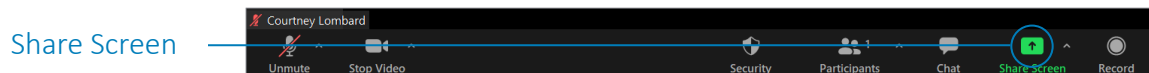


## Screen Sharing

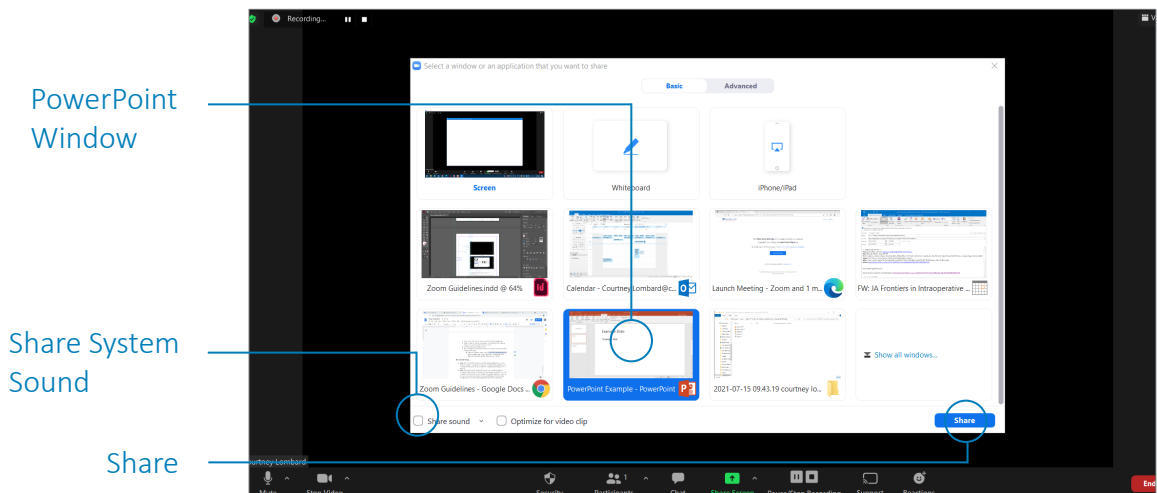
Instructions are specifically for PowerPoint, but other programs (Keynote, Google Slides, etc.) can also be shared.

### Sharing a Presentation

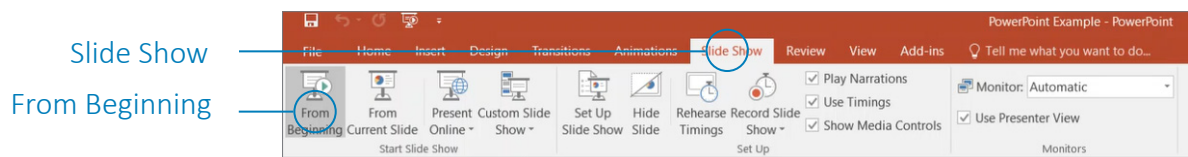
- Open PowerPoint presentation.
- Go back to the Zoom application and click the green Share Screen button.



- Select the PowerPoint window (or other application window as needed).
- If you have an audio or video clip in the presentation, check the Share System Sound box in the lower left corner of the window.
- Click Share.

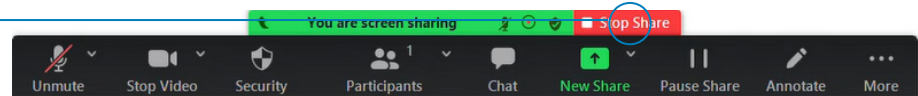


- Click on the PowerPoint window.
  - **! Important:** You must click on the PowerPoint window to make it active again before you can advance your slides or select PowerPoint controls.
- Start slide show—in the toolbar at the top, click Slide Show and then click From Beginning.



- Advance through the show with the arrow keys or mouse as usual.
- When you are done with your presentation, click the red Stop Share button at the top of your screen to exit share screen mode.

Stop Share



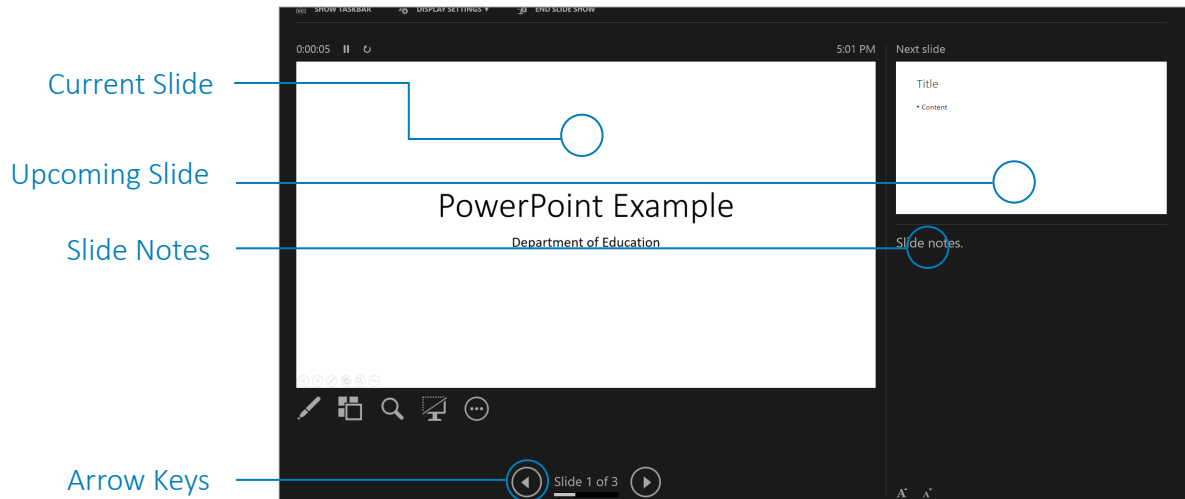
## View Slide Notes during Presentation

- Follow the instructions above to share your slideshow.
- The instructions below are for Microsoft PowerPoint 2016 or later.
- Click on the three dots (...) icon in the bottom left of the slideshow and select "Show Presenter View."

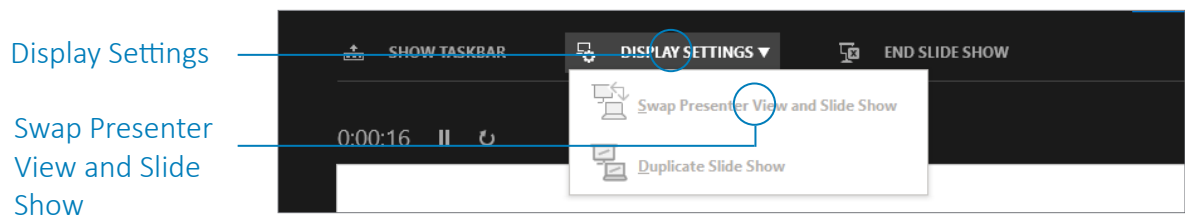
Three dots  
Show Presenter View



- Your view will display the current slide, your notes, and the upcoming slide; attendees will only see the full slide without the notes. You can advance through the show with the arrow keys or mouse as usual.



- If you have two monitors, follow the instructions above to enter presenter view. One screen will show the full slide, and one will show the presenter view.
- You may have to switch screens to show the audience the correct slide view; click Display Settings in the top left corner of the presenter view and select "Swap Presenter View and Slide Show."
  - **! Important:** practice presenting with Zoom, especially when using dual monitors.



# PowerPoint Best Practices

## Protected Content

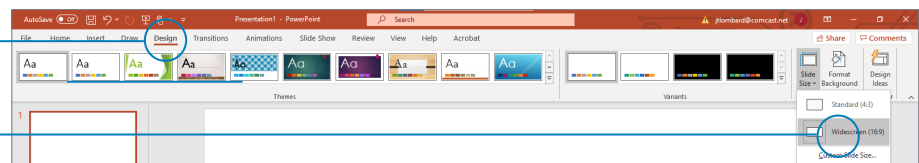
- **! Important:** be sure to omit any patient identifiable information in your presentations. When discussing cases, change names, locations, ages, dates, associations, etc. A signed consent by a parent or guardian is required to use patient images or video without de-identifying them (e.g., black bar over eyes).
- Try not to use copyrighted images or materials without permission in your presentation. If necessary, however, the use of copyrighted material may be permissible under fair use provisions. Fair use is not a concrete objective standard and must be assessed on a case-by-case basis. See [these guidelines](#) for guidance on fair use.

## Recommended Slide Formatting

- BCH PowerPoint template, downloadable here: [Boston Children's Hospital Brand Guidelines](#)
  - Recommended for BCH faculty.
- 16x9 widescreen format.
  - To make your slides 16x9, go to Design in the PowerPoint toolbar, and under Slide Size, select Widescreen (16:9).

Design Tab

Widescreen  
(16:9)





## Text

Unlike an in-person conference, you can't know what size display attendees will be viewing your slides on. They may be viewing on an iPad, a laptop, a large monitor, or even a phone. To better ensure your text is legible, follow these guidelines:

- Leave adequate space between text and images ("white space").
- Use contrasting colors for text and background.
- Minimal recommended font size:
  - Top level bullet: 32 pt
  - Sub bullet: 28 pt
- Minimize the amount of text on a slide — too much text is difficult to read.
  - Boil concepts down to key words or phrases.
- Use speaker notes for reference.
  - Show only essential text on slides.
  - Your audience wants to hear your words, not read them!
  - Minimize repetitive words and phrases. Organize information into conceptual units that can be labeled with a single word or phrase.
  - Separate information onto multiple slides rather than reducing the font size.
- Sans-serif typefaces for slide text — Calibri
  - (The brand typeface for Boston Children's Hospital is Museo Sans, although this typeface must be individually purchased and licensed. The alternate brand typeface is Calibri which is available on most devices.)
- Some examples of sans-serif typefaces are listed below:

### Regular

Calibri

Arial

Roboto

Open Sans

### Bold

Calibri

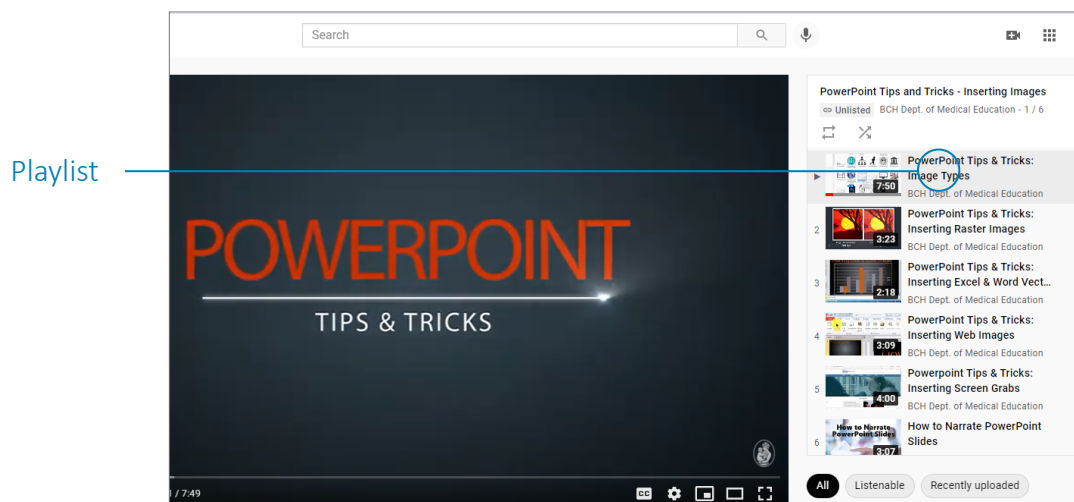
Arial

Roboto

Open Sans

## Images

- Minimize text in images.
- If image text is to be read:
  - Enlarge image, if quality allows.
  - If text in an image degrades with enlargement, try to remove or hide it and replace with larger text that you create.
- Display full diagrams for context.
- Isolate and enlarge details as necessary.
- Size and scale:
  - Avoid blurry images when enlarging small/low resolution images.
  - Consider recreating images that are too small
  - When creating an image with screen capture, enlarge the browser view to enlarge the source image you are capturing.
- Describe the images, charts, and diagrams verbally when presenting for those with small screens or visual impairment.
- See video: [PowerPoint Tips and Tricks: Image Types](#)
  - View other videos about PowerPoint tips and tricks in the playlist located in the right sidebar.



# Recording Best Practices

## Audio

- Find a location with minimal background noise.
- Record and playback a test on your computer, with your speaker set to mid-level.
  - Your recording should be easy to hear at that level.

## Video

- Depending on the recording method you use, you may have the option of recording yourself in a small video window when presenting, much like Zoom.
- If you feel comfortable presenting with it, video can help personalize your presentation.
  - Position yourself fairly close to the camera, such that only your head and shoulders are in the shot. This provides a stronger presence in such a small window.

## Internet Connection

- If you are using a web-based recording tool (e.g., Zoom), maximize the strength of your internet connection.
- The best option is to connect to your modem or router via an Ethernet cable.
  - If you have to use Wi-Fi, maximize your signal by getting closer to your Wi-Fi router.
- Do a test recording (30-60 seconds) to check audio and video quality.

# Options for Recording Presentations

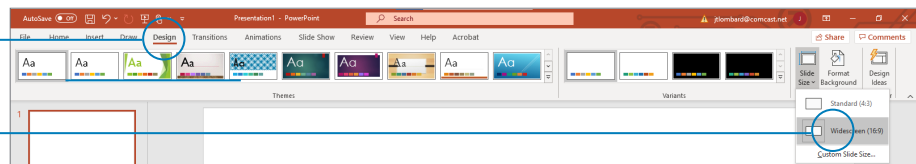
- Do a test recording (30-60 seconds) to check your setup.
- Make sure sound is clear, without static or significant background noise, and audible when your computer sound is mid-range.

## Recording a Presentation in PowerPoint

- If your version of PowerPoint does not have video export, you can still record your presentation and the CME department will handle the conversion to video.
- It's a good idea to record a quick 30 second clip and export it to test settings.
- 16x9 widescreen format.
  - To make your slides 16x9, go to Design in the PowerPoint toolbar, and under Slide Size, select Widescreen (16:9).

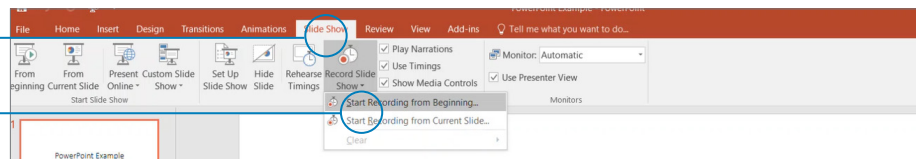
Design Tab

Widescreen  
(16:9)

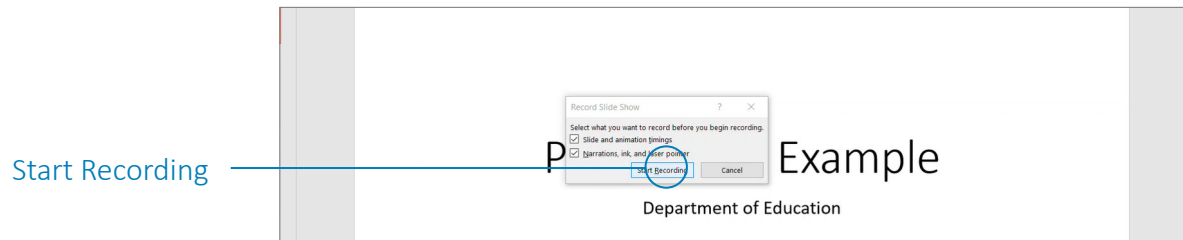


- Go to Slide Show, click Record Slide Show, and then click Start Recording from Beginning.

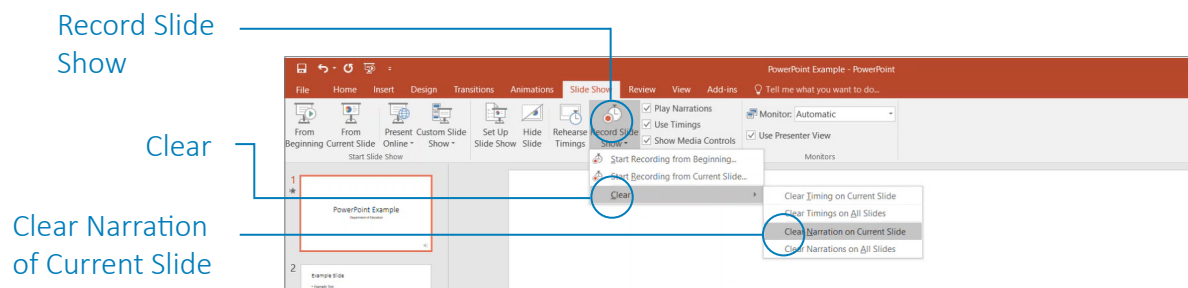
Slide Show  
Start Recording  
from Beginning



- In the Record Slide Show dialogue box, click Start Recording.

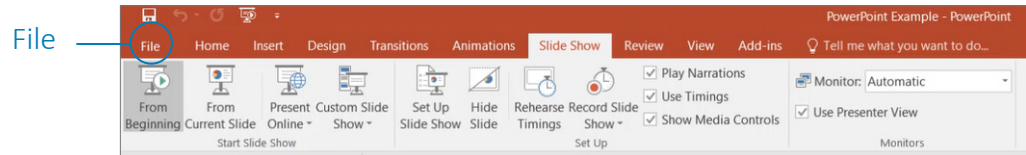


- Office 365 only: you can add your webcam view to your presentation. Click Settings at the top right of the screen and select the camera you wish to use.
- To re-record a slide, go to Slide Show, click Record Slide Show, Clear, Clear Narration of Current Slide.

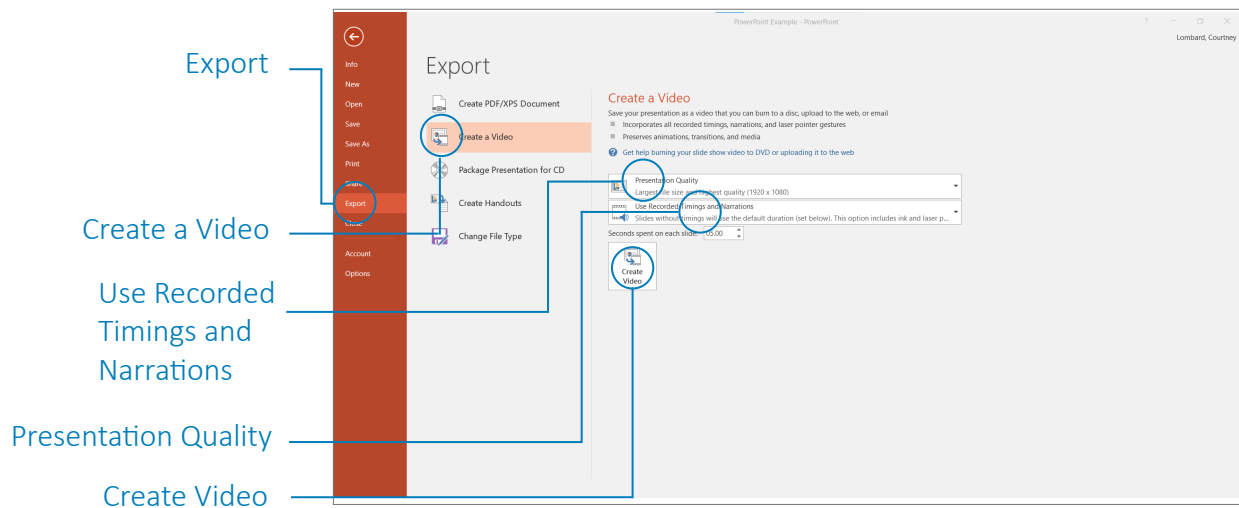


## Export PowerPoint

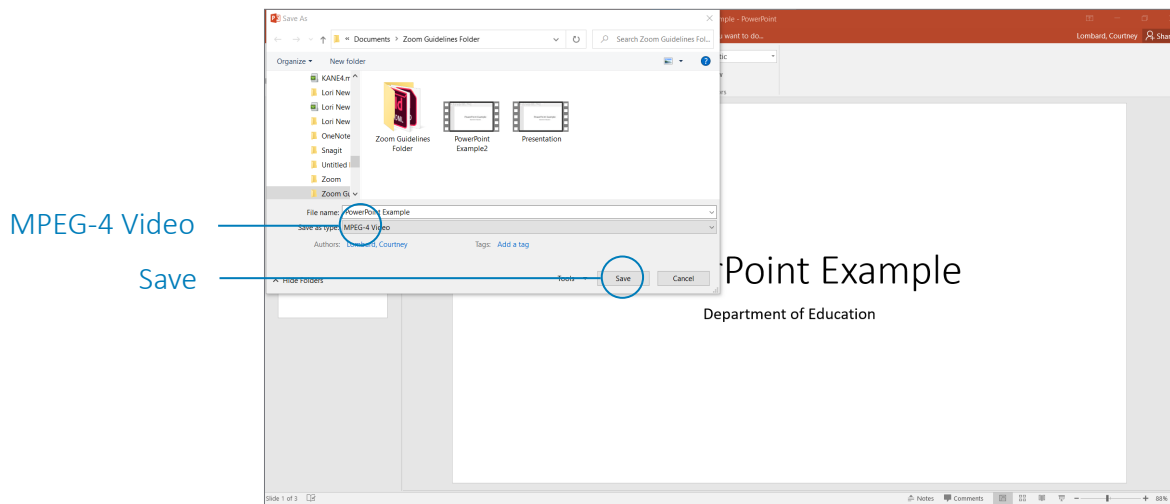
- To export slides as video, go to File and click on Export.



- The default should be Presentation Quality. If not, select Presentation Quality from the drop-down menu.
- If you recorded narrations for your presentation, click Use Recorded Timings and Narrations from the drop-down menu.
- Click Create Video.



- Before you save your video, in the Save as type box, select MPEG-4 Video from the drop-down menu.



## Recording a Presentation in Zoom

Instructions are specifically for recording with a PowerPoint presentation, but other programs (Keynote, Google Slides, etc.) can also be recorded.

- Open Zoom and start a new meeting.
- Click Record in the Zoom toolbar.
- Optionally, turn your camera on to include your video window in the recording.
- Make sure you are unmuted.



- Open PowerPoint presentation.
- Go back to the Zoom application and click the green Share Screen button.

Share Screen

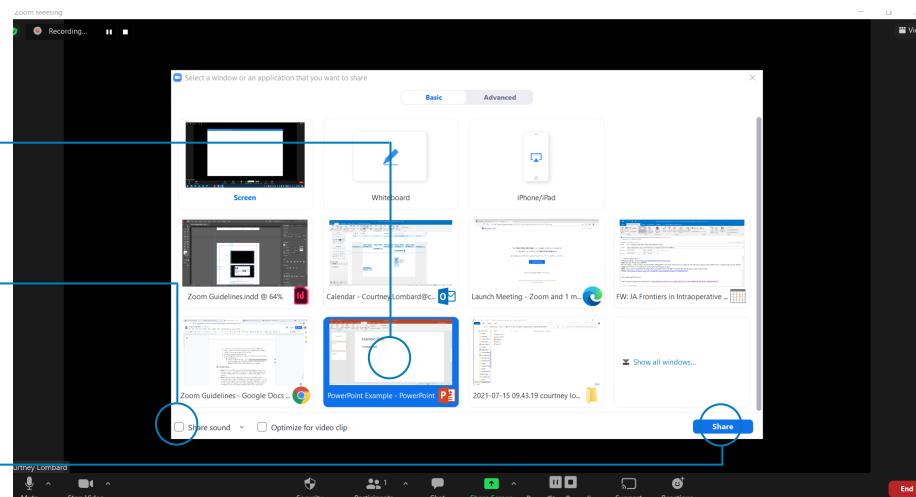


- Select the PowerPoint window.
- If you have an audio or video clip in the presentation, check the Share System Sound box in the lower left corner of the window.
- Click Share.
- Click on the PowerPoint window. It is important to click on the PowerPoint window to make it active again so that you can click through the slides.

PowerPoint Window

Share System Sound

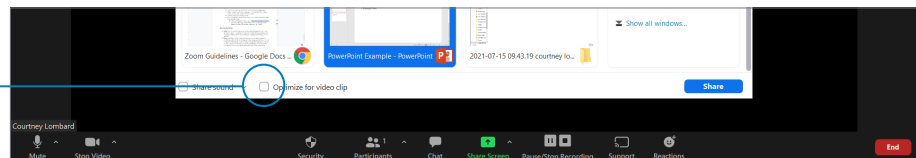
Share



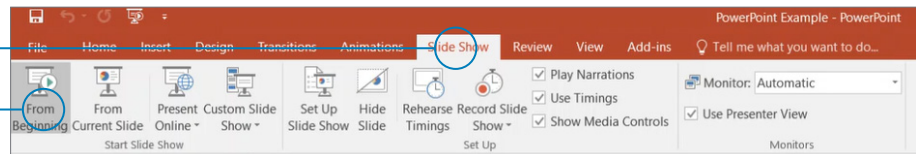


- In the toolbar at the top, click Slide Show. Then click from From Beginning.
- If black bars appear to cover parts of the shared screen in a Zoom recording, make sure to uncheck “Optimize for Video Clip” in the lower left corner of the share window.

Uncheck Optimize for video clip

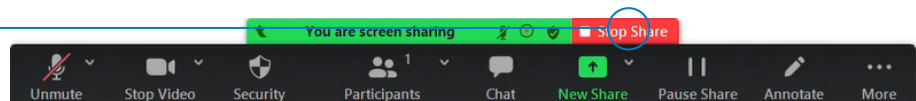


Slide Show  
From Beginning

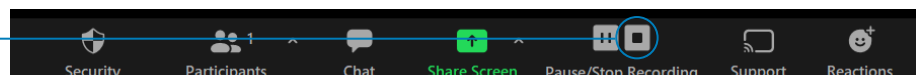


- When you are done with your presentation, click the red Stop Share button at the top of your screen, and you will return to Zoom.
- Click Stop Recording in the Zoom toolbar.

Stop Share

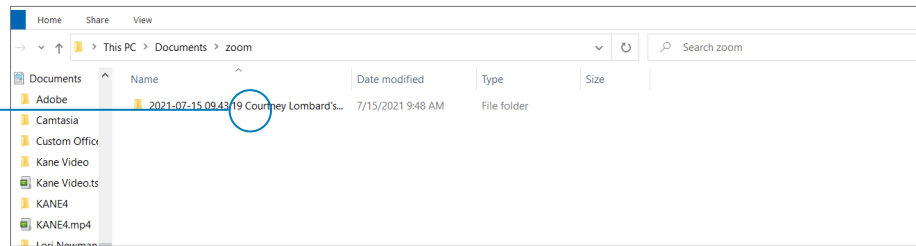


Stop Recording



- Recording storage options:
- Local
  - Your recording will be saved on your computer, most likely in Documents > Zoom > [Meeting Date/Title].

Zoom Recording

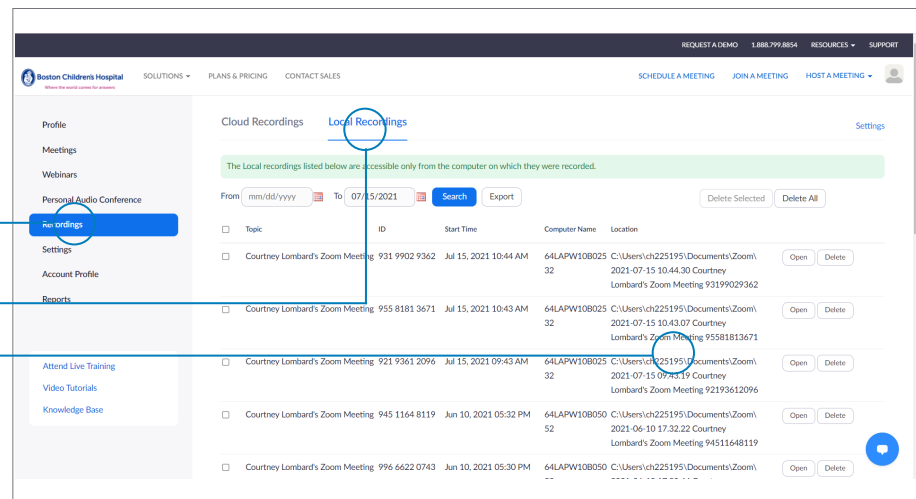


- If you can't find the recording, go to <https://bostonchildrens.zoom.us/> and click on Recordings in the left toolbar.
- Click Local Recordings in the upper tool bar. All of your recordings will be listed with the computer and file location they are stored at.

Recordings

Local Recordings

File Location



- Cloud
  - Requires permission from AV Services.
  - Fill out the [Cloud Access Request Form](#) to access cloud permissions.
  - Note: you must be logged into the BCH network (on-site or through VPN) to access the form.
  - Go to <https://bostonchildrens.zoom.us/> and click on Recordings in the left toolbar.
  - Click Cloud Recordings in the upper toolbar and view your cloud recordings.

Recordings

Cloud Recordings

Title	ID	Start Time	File Size	Share...	More
Courtney Lombard's Zoom Meeting	998 3819 9699	Jul 1, 2021 04:16 PM	2 Files (1 MB)	Share...	More
Courtney Lombard's Zoom Meeting	925 9260 7598	Jul 1, 2021 03:49 PM	3 Files (3 MB)	Share...	More
Courtney Lombard's Zoom Meeting	985 5199 4475	Jul 1, 2021 03:15 PM	2 Files (5 MB)	Share...	More
Courtney Lombard's Zoom Meeting	913 3954 0714	Jul 1, 2021 03:01 PM	2 Files (3 MB)	Share...	More
My Webinar-Test3	961 1591 1103	Jul 1, 2021 01:30 PM	3 Files (15 MB)	Share...	More
My Webinar	930 1426 0759	Jul 1, 2021 12:53 PM	3 Files (5 MB)	Share...	More
My Webinar-Test Zoom	920 4186 6786	Jul 1, 2021 12:36 PM	3 Files (6 MB)	Share...	More

## Contact

- If you have any questions regarding Zoom or your presentation, please contact the [CME Department](#).