Oral History Center
Remote Interviewing for Zoom
July 2020

These protocols were developed to facilitate remote recording of narrators of the highest quality available during the COVID-19 pandemic. We developed these protocols for the Zoom video conference platform using both audio and video. We also provide instructions for backup audio recordings. Interviewers, or the hosts of the interviews, will need to have a professional Zoom license; narrators only need access to a computer or telephone.

For more information about remote recording and interviewing tips, see the [Oral History Center website](#).

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Remote Interviewing Preparations

Pre-interview of narrator about technical side of the recording

Set aside some time to talk the narrator through the technical aspects of the Zoom recording. Perhaps hop onto Zoom to demonstrate how the interview will go. This meeting can also serve as your pre-interview with your narrator, so you can discuss the contours of the recorded interview to come. It will also allow you to see how the narrator is being framed and recorded.

A quiet well-lit space

Determine the adequacy of the room where the narrator plans to record. A smaller room (smaller than 12 x 15 feet) with carpet and/or plush surfaces is ideal. A home office or den might be best. Minimize all types of noise (large computer fans, refrigerators, etc.). Close open windows if possible. Open-concept homes are the most difficult to record in. Acoustically, you'll want a mix of absorptive and reflective (uneven) surfaces. Try to find a corner with plush soft surfaces, such as rugs and stuffed furnishings, and bookcases. Uneven surfaces will break up the reflections of sound that contribute to room echo.

Ask the narrator to ask other members of the household to be as quiet as possible. Note that people often misunderstand what transmits sound and what doesn't. Footfalls, climbing stairs, washing dishes, flushing toilets or phone conversations in the next room or on the floor above can ultimately sound very loud on the recording. Zoom processing is very good at eliminating background noise at the expense of sound quality of the narrator's voice. If the narrator's voice sounds strange, muffled, with warbly digital artifacts around their speech, ask them if there is background noise or an open window and explain that you might not be able to tell because of Zoom processing.

It might be ideal for other people to be outside of the space altogether. However, not everyone has access to ideal conditions. We understand that we need to work with what we have, with young children, family members working from home, as part of the mix. Let's just do what is possible.

Make sure the narrator is well-lit. An incandescent floor or table lamp to one side can be good (and both sides would be better, thus avoiding split lighting on the face). Overhead lighting by itself can look bad, like an interrogation room. If the narrator's camera is facing a window, close the blinds or find another spot if the narrator is too much in silhouette.

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Artificial digital backgrounds should be avoided. The narrator can decide what is in the background, but it should not be too busy or messy. A simple bare wall is fine, but a part of a painting or a bookcase in the shot can look nicer.

Recording equipment and settings

Determine the adequacy of the narrator's computing setup. Laptops with built-in cameras and microphones are ideal. Tablets with the same would also be useful. A desktop computer with a built-in camera, such as an iMac, could also be acceptable. Desktops with plug-in, top-mount cameras may be less compatible [some have fish-eye lenses, which will not work]. In this case, it will be important to work with the narrator to determine how the audio is captured by the desktop (i.e. Where is the microphone? Does it require a mic/headphone setup? Does it even have a soundcard?)

- Headphone w/ mic vs. no headphones: If it is not possible to have a quiet background, you may need to use headphones with a built-in microphone. Bear in mind that the microphone should not rub against clothing. Try to avoid sweaters with large stiff collars, turtlenecks, or large jewelry or scarves. Interviewer and narrator should work together on optimizing this use of headphones.

- Narrators should shut off all other apps on their computers and close as many other tabs in their browsers as possible.

- You may wish to record at a time when more bandwidth is available if the Internet connection speed is slow or dependent on other users. Cable providers have a kind of "party line" system where your Internet speed is influenced by the number of users in your area. Fiber optic connections are dedicated lines that give the user a fixed, reliable bandwidth.

- To have a good quality Zoom call, you will probably need a minimum download/upload speed of 75/8 Mbps (megabytes per second). You may want to disconnect other Wi-Fi devices in the house and minimize video streaming by other users of the connection at the same time. Search "Internet speed test" and run one or more tests to check your speeds. As a last resort, plug your computer directly into your modem for more reliable service. Note that fiber optic connections can have much lower bandwidth needs, around 25 Mbps.

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Zoom Audio/Video Setup

Go to the Berkeley Zoom portal website [berkeley.zoom.us] and sign in to your Berkeley Zoom account. Click on Settings on the left side of screen, then click on "Recording," which is the tab at center top of the screen.

Note: Those who are not members of UC Berkeley will need a Zoom account to do cloud recording. Ask your institution if Zoom is supported and if you can have an account. If you don't have a Zoom account, you can still use Zoom and record the audio and video locally to your computer. You just can't do cloud recording, which is what allows you to change the settings below to get a transcript, higher quality audio/video, etc.

Adjust settings

From the dashboard of your Zoom account:

Make sure that each of the following is selected

- Record active speaker with shared screen
- Record an audio only file
- Optimize the recording for 3rd party video editor
- Audio transcript

Make sure that each of the following is **not** selected

- Add a timestamp to the recording
- Display participants' names in the recording

Make sure to click "save" to apply the changes to these settings. Note: experiments with the latest version of Zoom, 5.0, do not seem to require saving, as the "Save" button has disappeared. However, just to be sure, refresh your browser and check that your settings were saved.

Schedule the Interview

- Go to the left side of your Berkeley Zoom page and click "Meetings."

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- Click "Schedule a New Meeting," set up the schedule, and click "save" at the bottom of the page. It will give you the option to save to your Google Calendar.
- Go to Google Calendar, click Edit [pencil icon in the event window], click Guests, enter email of narrator, save, click "Send a note to guests," and send follow-up email confirming that the zoom link is in this invitation.

Security

There are several layers of security to keep your recording from being interrupted. You will need to decide if you will use your **Personal Meeting ID** (PMI) to interview people. Your PMI is the meeting room permanently associated with your account. Anyone who has this link can hop onto this meeting room at any time. If you meet with people frequently, you can invite people to a meeting with this link. If not, you may wish to consider disabling the creation of new meetings with your PMI, **as it is the default setting**.

- The first, easiest and best way to secure your meeting room is to lock it once you have started with a narrator. To do so, move your cursor over the bottom of your Zoom window, and a number of icons will appear. Clicking on either Security or Participants will lock the meeting, so that even a person who has the link or the password will not be able to join.
- Make sure your downloaded version of Zoom is up to date.
- Go to your Zoom settings, click on Security, and select "Require a password when scheduling new meetings." If you are confident that you will lock every interview in-meeting, then you may not want to add the password requirement. Passwords are recommended.
- If you plan on manually locking every interview while you are in the meeting, then sharing your PMI may likewise not be an issue. If you do not wish to use your PMI every time you schedule a meeting, you need to go to your Zoom settings, click on Security, scroll down and deselect "Use Personal Meeting ID (PMI) when scheduling a meeting."
- Bear in mind that **Zoom automatically save chats in meetings**. Narrators may assume that chats are off the record, so it is best to disable the saving of chats. In the same security settings, deselect "Auto saving chats."

Interview

At the appointed time, join the Zoom meeting that you created and wait for the narrator

to join. Ask the narrator if there are any questions.

- When ready, ask the narrator to press the red Record button on their PCM Recorder app on their phones.
- At the bottom center of your Zoom screen, press Record and choose the second option, "Record to the cloud." (This is very important, as cloud recording applies the settings that you have selected above. Local recording will not generate a transcript, for example.)
- Ask the narrator to clap their hands once loudly. (It's important to get a loud, sharp sound near the beginning of a recording. It allows you (or auto-sync features of video editing software) to synchronize separate audio and video recordings in post-production. If you forget, don't worry about it.
- Slate (introduce) the narrator, with date and respective recording locations.

When the narrator is speaking, try to mute your microphone, using the button at the bottom left side of the Zoom screen. This will prevent noise on your end from switching the video over to you prematurely.

Remember to unmute before asking a question!

When the interview is complete, just close your Zoom and confirm that you wish to "End meeting for all." This will begin the process of converting and generating the mp4 and m4a audio files. Wait a while, then click "Recordings" on your Berkeley Zoom page, then select "Cloud recordings." On the right-hand side, click "More," and click "Download" to a local folder, then upload to the
G Drive for further processing.

Narrators who wish to join by phone

Some narrators will want to connect by dialing in to Zoom only. In their Zoom invitation, they will see a few numbers for them to call, depending on their location. There is even a SIP number for those who wish to use Voice Over Internet Protocols. The instructions regarding muting and unmuting of your microphone apply in this case as well.

See the Zoom instructions on joining a call by phone, reproduced here below:

- Dial an in-country number. If you dial a toll number, your carrier rates will apply. You can find the numbers on your meeting invitation or a full list of international

dial-in numbers at https://zoom.us/zoomconference.

- You will be prompted to enter the meeting ID — the nine (9), ten (10), or eleven (11) digit ID provided to you by the host, followed by #.

- If the meeting has not already started and join before host is not enabled, you will be prompted to enter the host key to start the meeting, or to press # to wait if you are participant.

- You will be prompted to enter your unique participant ID. This only applies if you have joined on the computer or mobile device or are a panelist in a webinar. Press # to skip.

- If you join by computer or mobile device later, you can enter the Participant ID to bind your phone and device session together and show your video when you speak on the phone. To enter your participant ID once you are in the meeting, enter #Participant ID# on your phone.

Phone controls for participants

The following commands can be entered via DTMF tones using your phone's dial pad while in a Zoom meeting:

*6 - Toggle mute/unmute

*9 - Raise hand

Entering the meeting password using your dial pad

If the meeting requires a password, a phone-specific numeric password will be generated. You can find this password in the invitation listed below the dial-in numbers and meeting ID.

Optional Backup Audio Setup

This section is for interviewers and for narrators who feel comfortable doing their own audio recording with their smartphones and then uploading the file to the G drive. Interviewers should copy and paste this section to send to narrators well before the interview. Expect to answer questions from them, especially about G Drive. They will need a free Gmail address and G Drive to do this transfer.

Downloads

Please download the app PCM Recorder Lite to your smartphones (iPhone or Android).

iPhone link

Android link

There have been some complaints about the support of PCM Recorder for Android phones, so here are some other apps below with similar interfaces. The key is to go into the app's preferences and set it to record in .wav audio (not mp3), 16-bit, 44.1 or 48 kHz:

QuickRec (free with Google Play pass subscription)

Smart Recorder (free with Google Play pass subscription)

Voice Recorder (freeware with ads)

Sound quality considerations

Point the bottom of your phone at the computer screen, which will record your voice bouncing off the glass of the screen, and perhaps place the phone on a book beside the laptop to elevate it two inches or so off the table. Ideally, you want to use laptops, as they have inbuilt speakers and a glass screen which can reflect sound efficiently back to the phone mic.

Ask the narrator not to use headphones or headphones with microphones integrated unless there is a lot of background noise and you can keep the integrated microphone from rubbing against clothing: collar, scarf, jewelry, etc.

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Open the PCM Recorder Lite app.

Please press the big red "Record" button when prompted. Press the "Stop" button when the interview is completed.

How to share audio from phone once the interview is over

There are two choices. The second can be more difficult due to the file size, which is usually over 1 gigabyte!

First choice

- With an iPhone: Plug your phone into your computer. Open Finder. Click on your phone, which should appear on the list on the left of the screen. Near the top of the screen, click on the "Files" tab. Double click on "PCM Recorder." Drag the audio file onto your Desktop or another folder where you want to save it. Then upload this file to your G drive to share with us.

- With an Android phone: Support of the Android version of this app, PCM Recorder Lite (via Google Play) seems to be less than for the iPhone.

- According to the app site, the recordings are downloaded directly to the SD card. We have been unable to test this yet.

Second choice

- From your PCM recorder on your phone, press the "Play" button in the top right corner of your screen. The interface will seem to flip over and you will see a list of files if you have multiple recordings already. The topmost recording will be the most recent.

- Press on the three dots at the far right of the most recent recording. Select "Share."

- Swipe right through several choices. Choose "G drive." Select the destination folder if it will let you. Press "UPLOAD" in the top right. If you can't find your destination folder, you can upload now and find it in your G Drive later by clicking on recent. Then, by right-clicking, you can either select "Share" to send it to your interviewer's gmail address or choose "Move" to relocate the file to a folder your interviewer has already shared with you.

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