

2020 VICTORY

Zoom User Guide

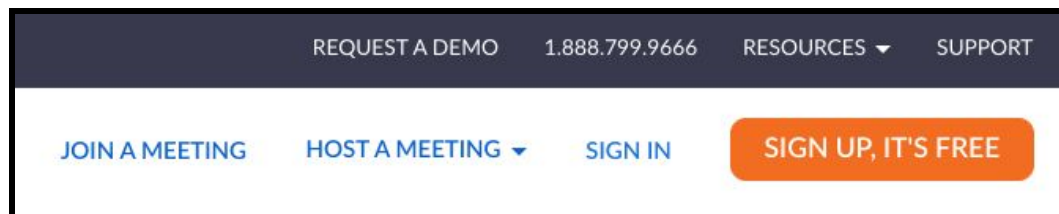
Zoom Basics

Zoom is a video conferencing platform that we recommend to 2020 Victory event hosts for its range of features and free account access. Anyone can create a free account for meetings of up to 100 people for up to 40 minutes.

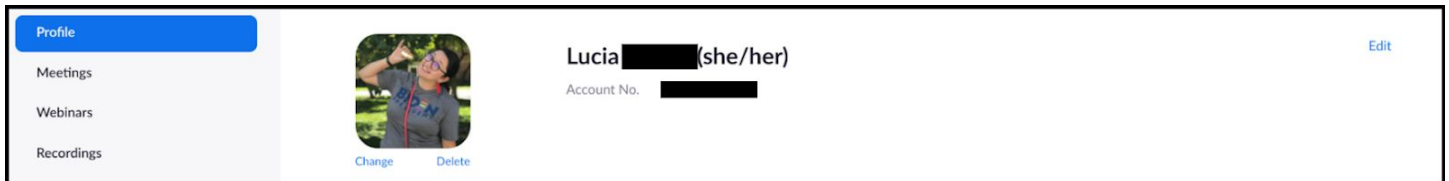
Zoom allows you to share your screen, create “breakout rooms,” and mute or unmute participants. It also features a chat box and a Q&A box. You can turn on or off each feature to tailor the video conference to the needs of your event.

Step One: Create Your Free Zoom account

- 1. Visit zoom.us.** Click the “Sign Up, It’s Free” button at the top right corner. Enter your birthday and email to create an account. Zoom will email you a verification link that you should follow to confirm your account and finish registration.



- 2. Edit your profile.** Update your profile to add your name, photo, and pronouns. Add your pronouns after your last name for them to appear on Zoom.



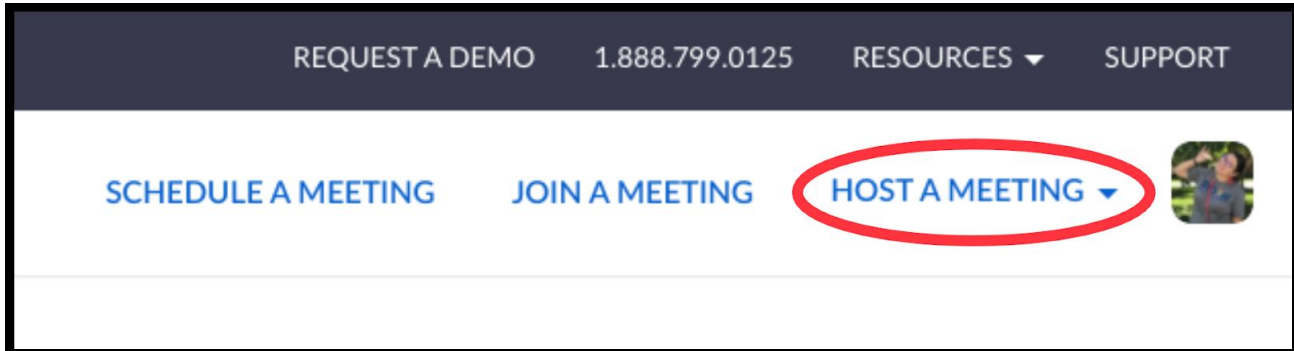
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Step Two: Set Up Your Meeting or Webinar

1. Click **Schedule a Meeting**. You can find this button in the top right corner of your screen.



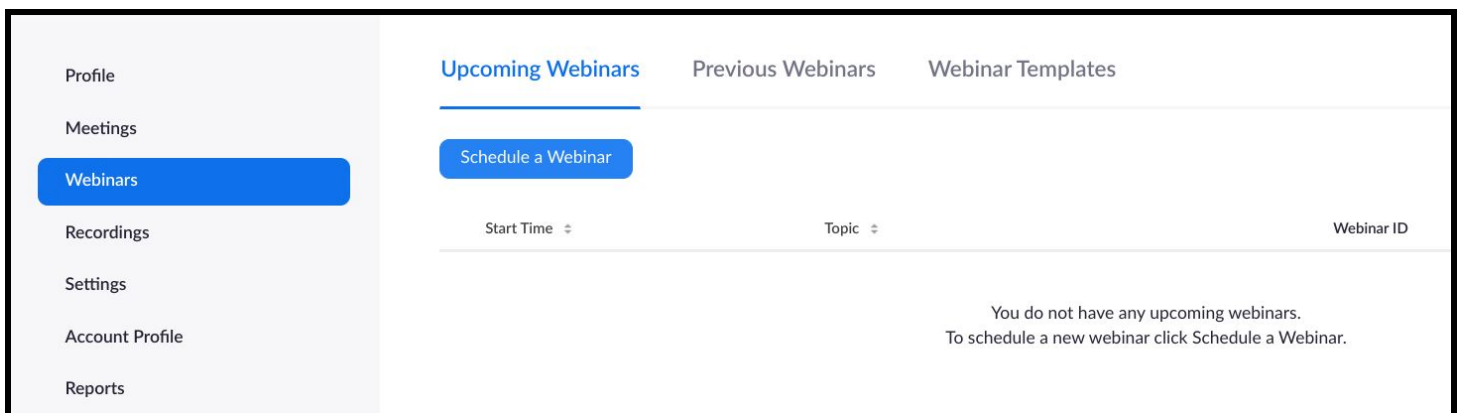
Zoom Meetings versus Zoom Webinars

There are two types of Zoom conferences you can host*:

- **Meetings:** Similar to a Google hangout, Skype, or Facetime, both participants and hosts can be viewed on video. This is a great way to host an interactive meeting or training.
- **Webinars:** Broadcast (one-directional) style-meeting, similar to a standard conference call. Attendees will not be on video in the conference, but can view the host video if that option is selected. This is a great option for large events featuring surrogates. The webinar feature is not available on the free version of Zoom.

*A meeting and a webinar cannot be hosted simultaneously on the same account.

To schedule a webinar, navigate to the Webinars button on the left menu, and select "Schedule a Webinar".

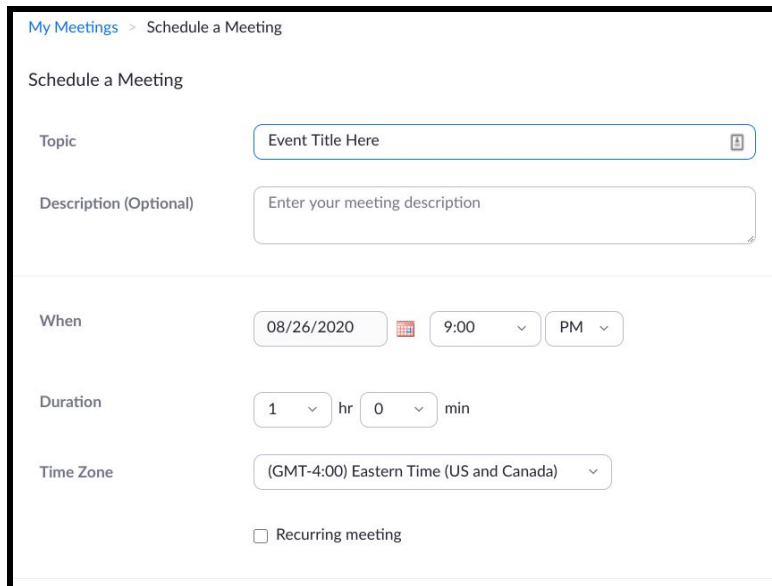


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- 2. Enter basic event details.** We suggest that your event title match the event title on Mobilize so attendees know they are in the right place. Make sure you have the correct date, time, duration, and time zone. Check the “Recurring meeting” button if you’d like the link to be used for repeated meetings, and you’ll see frequency options.



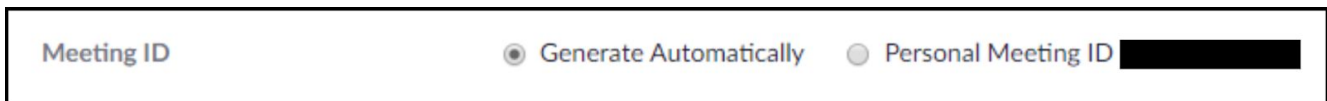
The screenshot shows the 'Schedule a Meeting' interface in Zoom. At the top, it says 'My Meetings > Schedule a Meeting'. Below that, the title is 'Schedule a Meeting'. There are two input fields: 'Topic' with the placeholder text 'Event Title Here' and a small icon to the right, and 'Description (Optional)' with the placeholder text 'Enter your meeting description'. Below these is a section for scheduling: 'When' with a date picker set to '08/26/2020', a calendar icon, a time picker set to '9:00', and a PM/AM selector set to 'PM'. 'Duration' is set to '1 hr 0 min'. 'Time Zone' is set to '(GMT-4:00) Eastern Time (US and Canada)'. At the bottom, there is a checkbox labeled 'Recurring meeting' which is currently unchecked.

- 3. Choose whether you will require registration.** If you require attendees to register, you will be able to pull a list of event attendees after the meeting. However, requiring registration is one extra step for attendees, and some folks may get confused and not join the event even after they sign up on Mobilize.



The screenshot shows a single checkbox labeled 'Registration' with the word 'Required' to its right. The checkbox is currently unchecked.

- 4. Generate a new Meeting ID each time.** Always generate a new meeting ID, if you use the Personal ID for each meeting it is very easy for past attendees to manually enter future meetings even if they were not invited.



The screenshot shows the 'Meeting ID' section of the Zoom interface. It has the label 'Meeting ID' on the left. To its right are two radio button options: 'Generate Automatically' (which is selected) and 'Personal Meeting ID' followed by a blacked-out field.

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5. **Set a Meeting Password and, if desired, enable the Waiting Room.** Set a Meeting Password to prevent uninvited guests from accidentally miss dialing their meeting code and winding up in yours. The waiting room is a great feature for secure meetings. By enabling this feature, anyone that joins with your meeting link & password will be placed in a holding screen until the host specifically allows them into the meeting. As the host, open your participants tab and as people join you will see the options to bring them into the meeting. The waiting room feature is not available in the free version of Zoom.

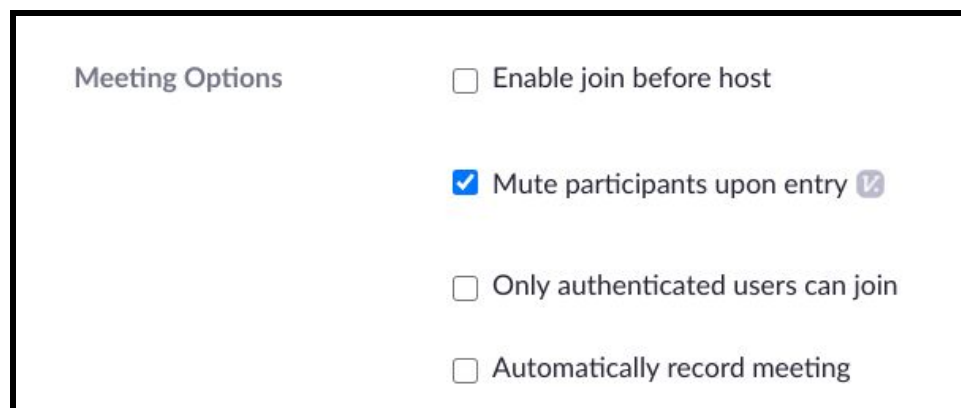


A screenshot of the Zoom Security settings interface. On the left, the word "Security" is displayed. To its right, there are two checked checkboxes: "Passcode" and "Waiting Room". The "Passcode" checkbox is followed by a text input field containing the number "123456".

Remember, if you enable the Waiting Room, you **MUST** manually admit people to join the meeting, otherwise they may get stuck in the waiting room and be unable to join your event. You can wait until your meeting's official start time to admit everyone in the waiting room and then turn off the waiting room feature so that attendees are automatically admitted. If you keep the waiting room feature on, make sure to continue to admit people or give a co-host access to admit people if you will be busy.

A common Zoom hiccup is that people get stuck in the waiting room if hosts are not quickly admitting people.

6. **Select Additional Meeting Options.** We recommend that you Mute Participants Upon Entry to save you some trouble as people join. Keep in mind that unless you are using the Webinar, the default setting is that Participants can unmute themselves. If you require all your participants to join from a computer with no dial-in phone participants, activate authentication. This will require that participants create at least a free zoom account to access your meeting. This is also where you can set up the meeting to be recorded.



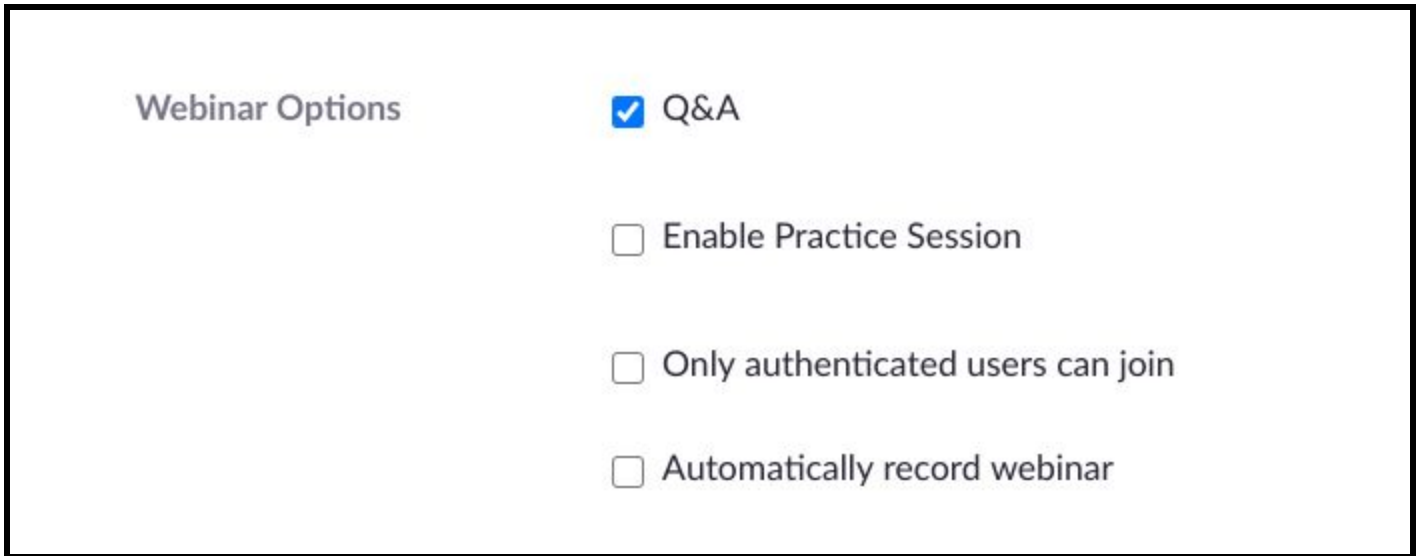
A screenshot of the Zoom Meeting Options settings interface. The title "Meeting Options" is on the left. There are four checkboxes with their corresponding labels: "Enable join before host" (unchecked), "Mute participants upon entry" (checked with a small lock icon), "Only authenticated users can join" (unchecked), and "Automatically record meeting" (unchecked).

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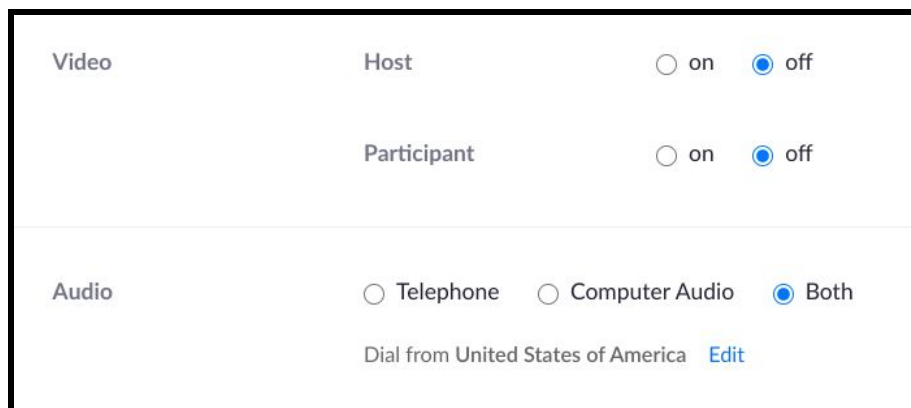
For Zoom webinars, you will see there is no option to have attendees unmute or be on video. However, you may want to enable the practice session. The practice session allows you and other event hosts or speakers to log on to the event and check in before starting to “broadcast” the event to all attendees. It also allows you to enable a Q&A box.



The screenshot shows the 'Webinar Options' section of a Zoom interface. It contains four settings:

- Q&A
- Enable Practice Session
- Only authenticated users can join
- Automatically record webinar

7. **Set audio and video permissions.** Change the video permissions to “on” for Host and Participant to allow folks to be on video. Attendees can choose to join and not show a video of themselves. For more accessibility, allow attendees to join audio via “Both” telephone and computer audio.



The screenshot shows the 'Video' and 'Audio' settings in Zoom:

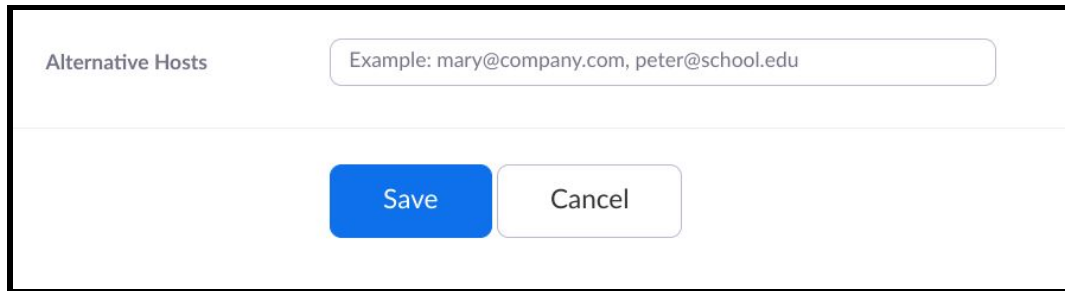
- Video:**
 - Host: on off
 - Participant: on off
- Audio:**
 - Telephone Computer Audio Both
 - Dial from United States of America [Edit](#)

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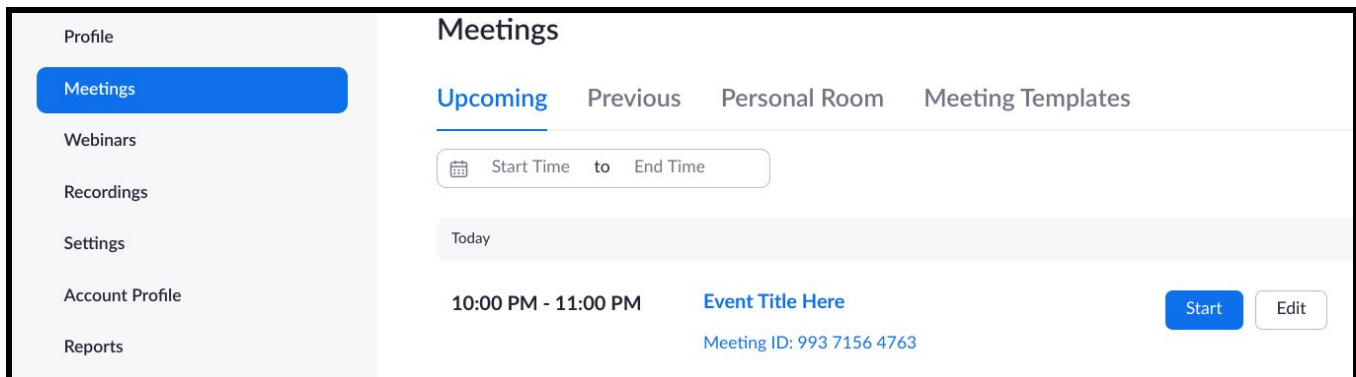
8. Set alternative hosts if desired, and click Save to create the meeting.



Alternative Hosts

Step 3: Run Your Zoom Meeting

1. **Start your meeting.** Hover your mouse over the event title to see the blue Start button, and click Start to start your meeting. It is recommended that you start your meeting at least 5 minutes before the official meeting start time.



Profile

Meetings

Webinars

Recordings

Settings

Account Profile

Reports

Meetings

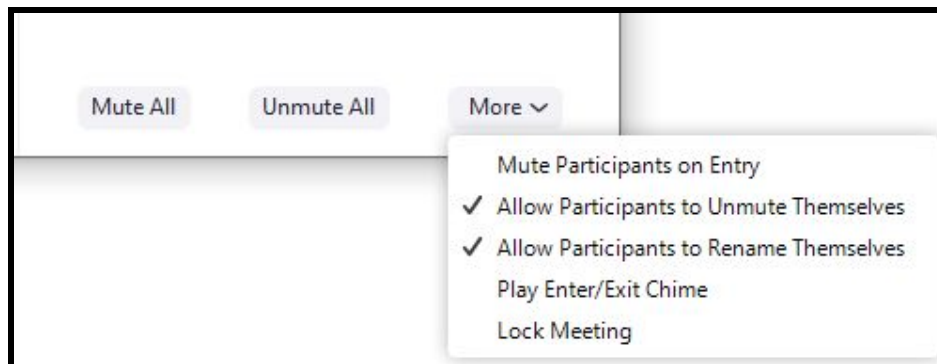
Upcoming Previous Personal Room Meeting Templates

Today

10:00 PM - 11:00 PM [Event Title Here](#)

Meeting ID: 993 7156 4763

2. **Adjust Meeting Permissions.** If you have issues with participants continually unmuting themselves, you can restrict them under the participants tab by selecting More. If you have to remove a participant but they keep rejoining you can Lock the Meeting completely.



Mute All Unmute All More

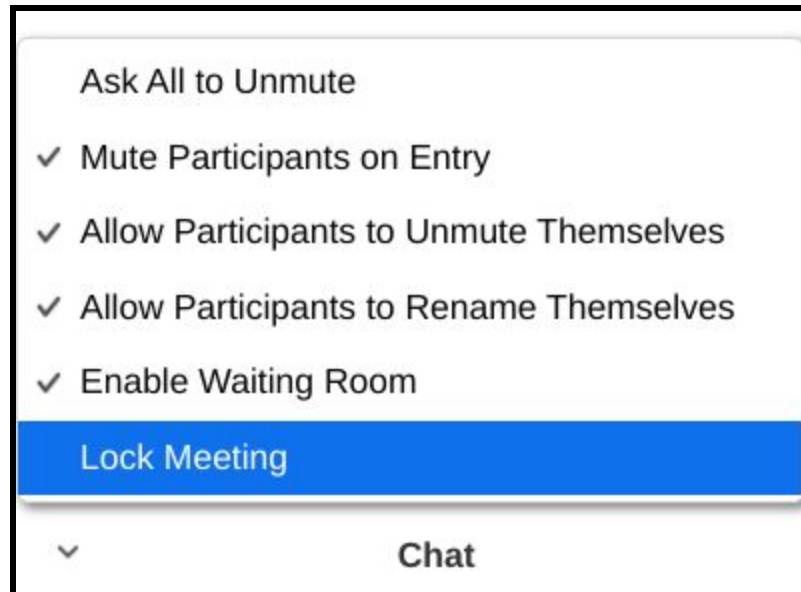
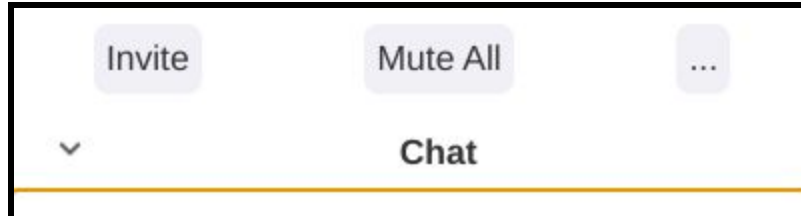
- Mute Participants on Entry
- Allow Participants to Unmute Themselves
- Allow Participants to Rename Themselves
- Play Enter/Exit Chime
- Lock Meeting

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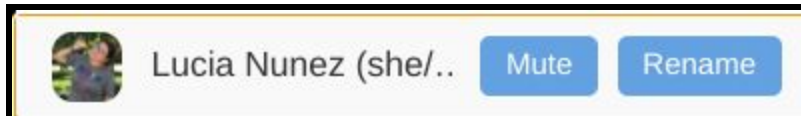
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3. **Mute and Unmute participants during the meeting.** Immediately above the Chat button, you can “Mute All” participants. If you click the “...” button, pictured in the first image, you will see a popup of additional mute options, pictured in the second image. During a meeting you can toggle on and off whether you allow participants to unmute themselves.



You can also mute or unmute individual participants as is needed, or rename participants.

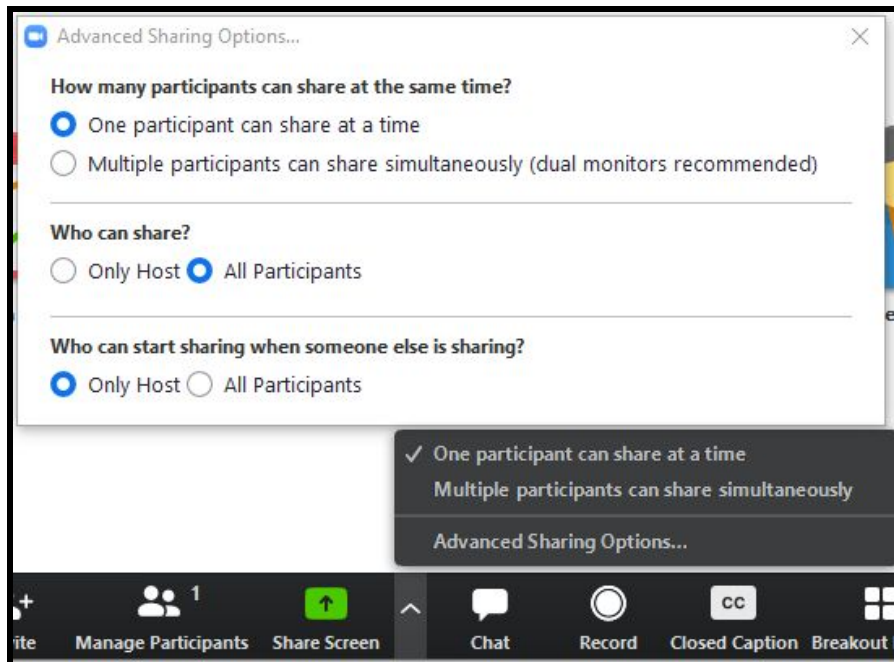


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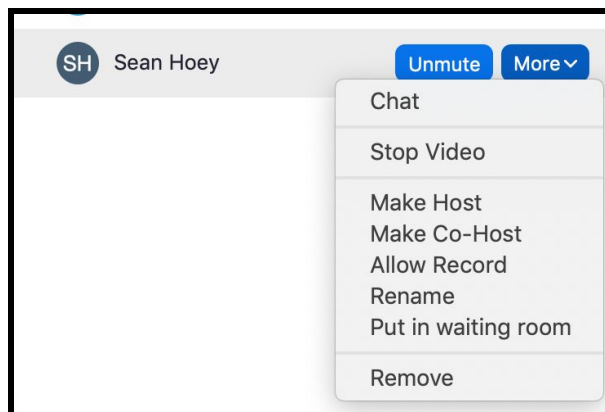
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4. **Lock screen sharing in meeting.** Once your meeting has started, select the arrow next to Screen Share and select “Advanced Sharing Options...” In the new popup window you can change the “Who can Share” permissions to “Only Host” which prevents other participants from hijacking everyone's screen.



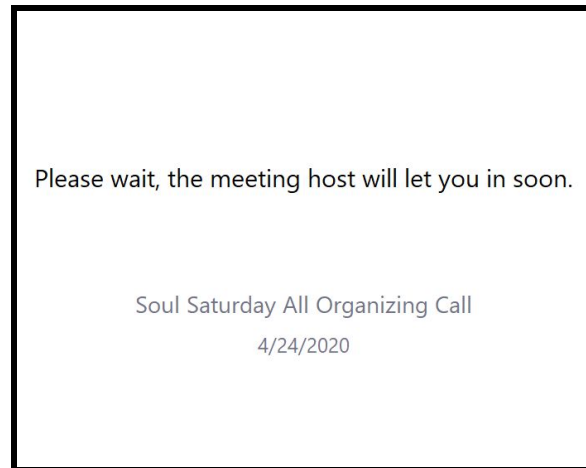
5. **Remove someone from a meeting.** If you need to remove someone who is highly disruptive from your meeting, you can do so by placing them in a waiting room. Click the ‘more’ button next to their name in the participant panel as shown below and then click “Put in waiting room”. They will be placed into a waiting room and will not see your meeting - they will see the second image below on their screen.



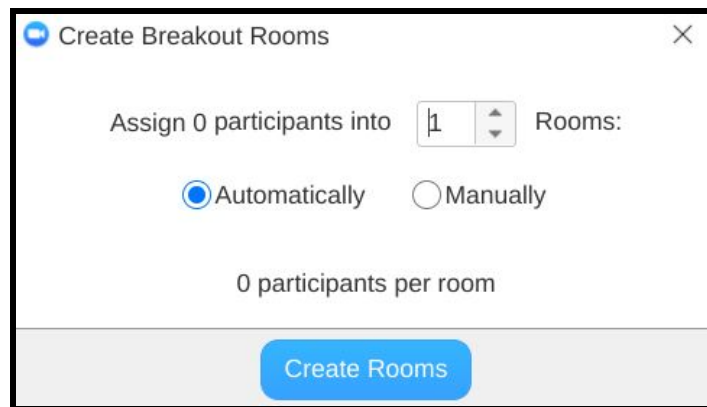
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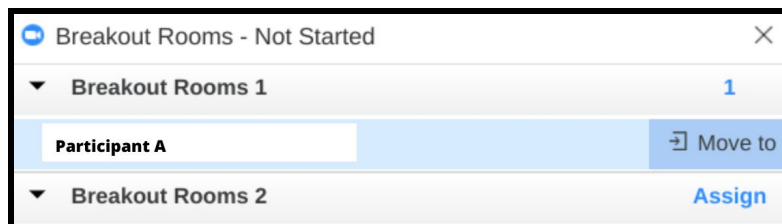
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6. **Create breakout rooms if desired.** Zoom allows you to create breakout rooms for smaller discussion. On the bottom menu, select the "Breakout Rooms" button to see the below pop-up. You can choose how many breakout rooms you'd like to create, and Zoom will automatically assign people at random to each room if you select "Automatically." Alternatively, you can select "Manually" to manually assign participants to specific rooms. Once you've chosen either manual or automatic, select "Create Rooms."



You can move participants between rooms as needed.

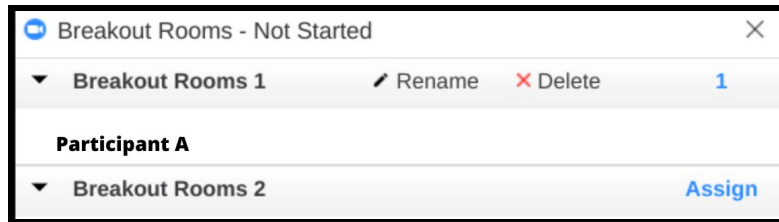


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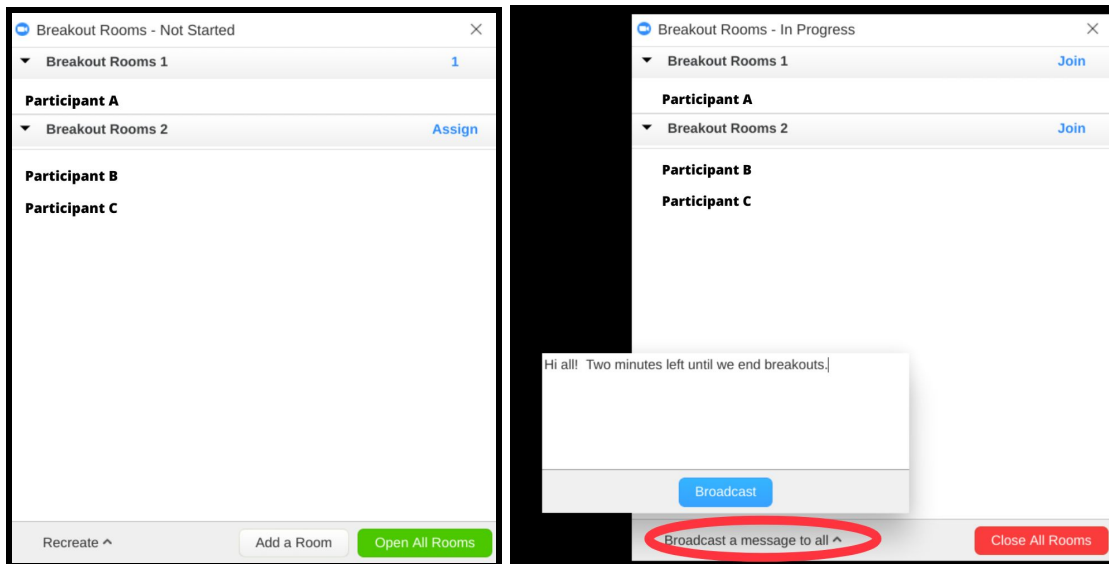
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If you hover over “Breakout Rooms 1” etc., you can change the name of a breakout room.



You will see the names of participants and the rooms they are assigned to, and you should click “Open Rooms” to make the rooms available. Additionally, you can project a message to participants while they are in breakout rooms to send prompts or updates about when the breakout rooms will end.



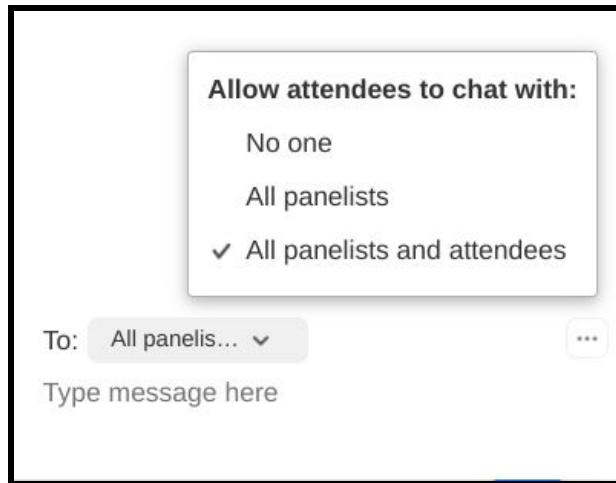
To end your breakout rooms and bring everyone back to the main session, select Close All Rooms and you will send a 60 second time warning. Participants can leave the breakout room before the 60 seconds is up, or at 60 seconds they will be brought back to the main session.

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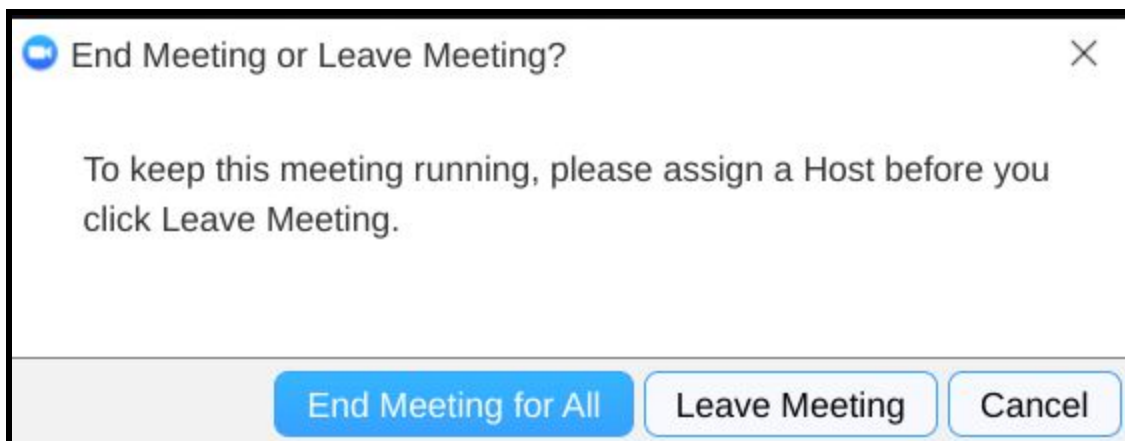
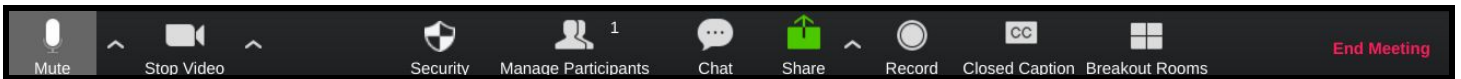
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7. **Adjust chat settings on Webinars.** You can adjust the chat such that participants can chat with everyone, only panelists, or no one.



Step 4: End Your Meeting and Follow Up

1. **End your meeting.** Click the "End Meeting" button in the bottom right corner, and confirm you wish to end the meeting on the popup screen. If desired, you can assign a co-host before leaving the meeting, and the meeting will run until your co-host ends the call from their screen.

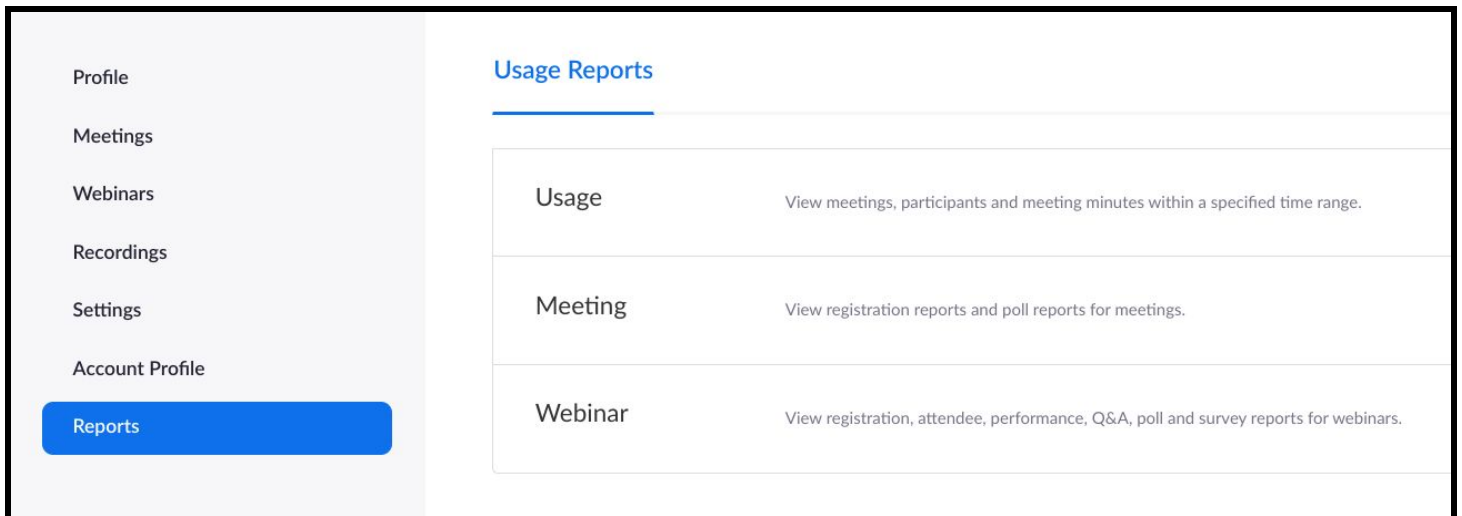


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- 2. View meeting attendance and follow up with attendees.** After your event, you can view reports of who registered for and attended your meeting or webinar. Visit the “Reports” tab on the left menu, and select the type of report you need. Use the attendance list to indicate in your Mobilize event who attended your event.



FAQ & Tutorial Resources

One: One-minute tutorial videos can be [found here](#) to help you learn more about running and scheduling Zoom events on a wide range of topics including recording a meeting and sharing your screen during a meeting.

Two: Find additional articles provided by Zoom on their [support hub here](#). Just use the search bar to search for the topic you’re looking for support on - for example, “how to run a breakout room” - and multiple resources will be available.

Zoom Support Options

One: Use the live chat feature by clicking on the “help” chat bubble on the bottom right corner of your screen when logged into your account. Do expect a wait!

Two: Call Zoom’s support line at 1-888-799-9666; Ext. 2. Please give yourself at least one hour of wait time.

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