



**NC STATE UNIVERSITY**

# COVID-19 Toolkit for Virtual Events

University Special Events  
University Advancement

As of June 23, 2020  
Please check back regularly as this  
toolkit will continue to evolve.

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## Virtual Event Checklist

### Decide on general event logistics

- Event Name
- Event Date & Time
- Event Style (board meeting panel discussion, awards ceremony, etc)
- Preferred Platform (Zoom Meeting, Zoom Webinar, etc)
- Public or invitation-only?
- Will this event be recorded?

### Content

- Identify the run of show
- Create detailed script with virtual transitions
  - Presentation slide changes
- Will your event include a PowerPoint presentation?
  - It is recommended to include a visual presentation (title and headshot slides, transition slides, etc)

### Brand

- As always, please abide by the NC State brand guidelines as outlined [here](#).

### Identify the following:

- Moderator/Technical Support: individuals who will be managing the back-end (presentation slides, Q&A, etc)
- Host: who will be the “face” of the meeting/event (will address and welcome attendees, introduce speakers and special guests, can moderate questions)
- Speakers/panelists/special guests will vary on the style of the event
  - Speakers with a certain expertise
  - Board Chairs/Leadership
  - University Leadership
  - Award Winners

### Communication Plans

- Attendee Communication Plan
  - Invitation
    - Including RSVP or registration form
  - Event link with instructions and reminder

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- Special event verbiage – i.e. if the meeting/event is recorded, if all attendees will be muted, how to submit questions
  - Consider a virtual concierge phone number in case of technical difficulties
- Follow Up Communication
  - Option to send recorded meeting/event with survey to attendees
  - Option to send recorded meeting/event to those who were unable to attend
- Speaker/Special Guest Communication Plan
  - Special invitations for speakers to be a part of the meeting/event
  - Request title, headshot and short bio for use
  - Share general program/run of show and provide specific topics and timing for speaking portions
  - Invite to dress rehearsal, if applicable
  - Send event link with special instructions

## Rehearsals

- Set up dress rehearsal on the platform that you will be using
- Practice transitions, slide changes, on & off camera changes and run through script to ensure flow works for the platform
- Invite hosts/cohosts, moderator, speakers (if applicable) and additional colleagues to view from the attendee side
- Work out any potential lighting/background issues
- Technology plans – test in areas with the best internet access

## Meeting/Event Add-Ons

- At minimum, it is suggested to have a still screen image for the beginning and closing of your meeting/event
- What audio other than speaker content do you want included? (i.e. music for the beginning of the meeting/event, applause, etc)
- Logos for registration or meeting/event platform
- What event features would you like to have enabled?
  - Chat
  - Q&As
  - Polls
  - Breakout rooms
- Special backgrounds for speakers available

## Post Meeting/Event

- Schedule a post-meeting/event debrief with colleagues

- Gather final attendee list
- Record any attendee/participant details (i.e. polls, questions, etc)
- Record attendee list where applicable
- Send survey and recorded meeting/event

## Virtual Event Best Practices

### Virtual Event Programming

- Virtual events should be shorter, more tightly-scripted than in-person events
- Abide by the NC State brand guidelines as outlined [here](#)
- Work hard to make your event interactive
  - Breakout sessions
  - Icebreakers
  - Games
  - Polls
  - Screen sharing
- Bigger emphasis on variety of presentation: speaker view, panel, supporting slides, photos, music
- Keep in mind varying degrees of familiarity and comfort with your digital platform by guests
- Provide attendee instructions at the start of the meeting; how to ask questions, ways to participate, etc.
- Chat function during an awards ceremony can build excitement and a sense of “being there” to honor the awardees
- Ensure presenter backgrounds and surrounding areas are free of distracting clutter, signs, photos or other unprofessional backdrops
- Always have a back-up host in case of connectivity issues
- Prep speakers for how to handle technical difficulties during a live event
- Keep speaking segments to no more than 5-7 minutes at a time



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- Utilize a text group or another form of communication outside of the platform you are using to communicate with internal hosts and those who have roles in the virtual event
- Turn off your computer notifications if you are a host or panelist
- If you are switching between speakers in active speaker mode, the camera view will not switch until the panelist/host begins speaking
- Polls are a good way to engage attendees at the beginning of the event/meeting as they are waiting for it to begin

## Virtual Event Security

- Turn on Your Waiting Room
- Do not Use Personal Meeting ID for Public Meetings
- Require a Password to Join
- Only Allow Registered or Domain Verified Users
- Lock Your Meeting
- Control Screen Sharing
- Disable Private Chat
- Turn Off Annotation
- Mute Participants
- Make Someone a Co-Host
- Disable Local Recording
- Disable Cloud Recording for Zoom Rooms

## Platforms

### Zoom Meeting

Zoom Meetings are designed to be a collaborative event with all participants being able to screen share, turn on/off their video and audio, and see who else is in attendance.

#### Suggested use:

Ideal for hosting more interactive sessions where you'll want to have audience participation or break your session into smaller groups. Great for internal use and limited external use with familiar attendees.

Maximum of 300 attendees

#### Features

<https://support.zoom.us/hc/en-us/articles/115005474943-Meeting-and-Webinar-Comparison>

- All participants can video share
- All participants can mute/unmute their own audio
- Host can set all participants to mute upon entry to the meeting
- Participant list is visible to all attendees
- Attendees have the ability to change their visible name
- File transfer features
- Polling
- Livestream to Facebook and YouTube
- Breakout rooms <https://support.zoom.us/hc/en-us/articles/206476093-Getting-Started-with-Breakout-Rooms>
- Waiting room
- Meeting features do not include: email reminders, Q&A, practice sessions

#### Best Practices

- Enable waiting room feature
- Mute all attendees upon entry
- Require password to join
- Enable multiple hosts to ensure continued connectivity
- Enable host-only record option <https://support.zoom.us/hc/en-us/articles/204101699-Recording-without-the-Host>

If you are recording content it is important to let your attendees know at the beginning of your webinar. Confirm recording and reuse intention with your panelists prior to the webinar.

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Check your space: lighting, sound, background, etc.

## Zoom Webinar

Zoom Webinars are designed so that the host and any designated panelists can share their video, audio and screen. Webinars allow view-only attendees. They have the ability to interact via Q&A, chat, and answering polling questions. The host can also unmute the attendees. NC State has one license for Zoom Webinars that is available for use. Contact [learntech@ncsu.edu](mailto:learntech@ncsu.edu) to set-up your webinar.

Maximum of 500 attendees

### Features

<https://support.zoom.us/hc/en-us/articles/115005474943-Meeting-and-Webinar-Comparison>

- Attendees join in listen-only mode. Only the Host and panelists can mute/unmute their own audio
- Participant list is only visible to Host and panelists
- Q&A
- Polling
- Livestream to Facebook and YouTube
- Practice sessions available
- Webinar features do not include: meeting reactions, file transfer, waiting room, breakout rooms

### Best Practices

- Require password to join
- Enable multiple hosts to ensure continued connectivity
- Enable Host only record option <https://support.zoom.us/hc/en-us/articles/204101699-Recording-without-the-Host>

If you are recording content it is important to let your attendees know at the beginning of your webinar. Confirm recording and reuse intention with your panelists prior to the webinar. Check your space: lighting, sound, background, etc.



## Preparing For Your Virtual Event

### Technology

- Ensure you have a reliable internet connection.
- If your connection is unreliable, call into the meeting using a phone, rather than using your computer's built-in audio.
- For best connectivity, hardwire your internet connection.
- Familiarize yourself with the software and practice using it before your event. Use good quality microphone and headphones.
- Provide an email or phone number of a person attendees can contact if they have issues joining the event.
- If you utilize breakout sessions, ensure one host remains in the main room to troubleshoot any issues.
- Confirm and edit how your name appears to others.

#### Changing your name in Zoom:

Open the Zoom application

Select "Settings" in the top right corner

Profile > Edit My Profile

Login using your Unity ID username and password

Select "Edit" next to your name.

#### Changing your screen name in a specific Zoom meeting:

While in a Zoom meeting select "Participants" at the bottom of the window

When the Participants window appears, click "Rename"

Enter your new name in the "New Screen Name" field, then select "OK"

### Background

- Backgrounds should be clear of distractions.
- Abide by the NC State brand guidelines as outlined [here](#).
- If using a virtual background, ensure it is appropriate and will not distract others.

### Lighting

- Lighting should come from in front of you to ensure others can see you.
- Avoid bright lights, as you will appear washed out.

### Ambient Noise and Distractions

- Ensure you are in a quiet area where you are unlikely to be interrupted.
- Avoid outside environments where wind, cars, etc. may produce background noise.

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- Avoid participating in loud activities such as typing and eating during meetings.
- Mute your microphone when you are not speaking.
- Avoid side conversations with others.

## Event Introductions

When opening a virtual event, ensure attendees understand the layout and expectations. Your opening comments should include information about microphone muting and Q&A directives. If you are recording the event, ensure attendees are aware. The example below can be used as an outline:

**“Welcome everyone! We are glad you are able to attend our meeting today. We ask that you mute your microphone during our meeting to minimize background noise. This meeting will be recorded, and we plan to send a copy to everyone after our session. Lastly, there will be a Q&A section as the end of our presentation. Please direct questions to “First Name, Last Name” using the chat feature.”**

## Additional Tips

- Look at the camera, rather than your screen.
- Use gestures and mannerisms you would typically use in person, such as nodding your head to illustrate you are listening.
- Wear business attire during your event; solid colored clothing is best.

## Additional Resources

<https://delta.ncsu.edu/learning-technology/learning-management-systems/zoom-at-nc-state/>

[https://livetraining.zoom.us/rec/play/ucYoluntq243G9fAswSDUPArW9W-eKis1Cga8\\_EPmk7mAnFQMAevZ7lQZefBr9eLpOtBNxuUZZ4WFxrQ?continueMode=true&x\\_zm\\_rtaid=yyoUsZ4aQ-2VF4Ctrxg9hQ.1586307928164.ae198283bdefdd7f179e937ff264f1df&x\\_zm\\_rhtaid=839](https://livetraining.zoom.us/rec/play/ucYoluntq243G9fAswSDUPArW9W-eKis1Cga8_EPmk7mAnFQMAevZ7lQZefBr9eLpOtBNxuUZZ4WFxrQ?continueMode=true&x_zm_rtaid=yyoUsZ4aQ-2VF4Ctrxg9hQ.1586307928164.ae198283bdefdd7f179e937ff264f1df&x_zm_rhtaid=839)

## Virtual Event Guiding Principles

### Determining the platform

Key considerations:

- Very important to be able to maintain the brand (guests will expect this to be an NC State event)
- Remember personal touches that could make guests feel like they are there in person
- Multiple host capabilities will ensure the event will continue if there are internet connectivity issues
- Recording capabilities
- Consider what functions you might need:
- Break out session rooms
- File sharing capabilities
- Registration platform
- Chat controls

### Speaker & leadership preparation

- Follow your department's typical briefing protocol. It may include:
  - Briefing and/or bios
  - Prepare list of attendees
  - Submit research request from Advancement Services, if needed
  - Pull bios for notable attendees for senior leadership in advance

### Content

- Always consider the audience when preparing content
- Content should be relevant, engaging and timely
- Put careful consideration into what you want the guests to take away
- Abide by the NC State brand guidelines as outlined [here](#).

## Sample Run of Show Guides

### Sample Run of Show: Board Meeting

Timeline	Role	Message
0 min	Moderator/Technical Support (1 min)	Welcome, instructions on how to mute/unmute and participate in Q&A (this person should hold the master powerpoint/screen share)
1 min	Host/Emcee/Board Chair (2 mins)	Welcome, opening remarks
3 min	Speaker 1 (5-7 mins)	Use title slides when the speaker is introduced, transition to supportin slides with split screen or speaker view (1 person on screen - no slides)
10 min	Q&A with Speaker 1 (3-5 mins)	Host/Emcee to review questions from audience and ask the speaker using the Q&A or chat functions
15 min	Panel Presentation (10 mins of presentation and 5 mins audience Q&A)	Host/Emcee to moderate, panel view in the platform, questions through Q&A. Run time depends on panel size and content.
30 min	Speaker 2 (7-10 mins) - could be keynote or main speaker	Host/Emcee to review questions and ask the speaker using the Q&A or chat functions
40 min	Q&A with Speaker 1 (5-7 mins)	Host/Emcee to review questions form audience and ask the speaker using the Q&A or chat functions
47 min	Options: breakouts in Zoom Meeting or open discussion, Speaker 3, Clsoing remarks by host/emcee/chair **suggested wrap up within the 1-hour timeframe	

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## Sample Run of Show: Awards Ceremony

<u>Timeline</u>	<u>Role</u>	<u>Message</u>
0 min	Moderator/Technical Support (1 min)	Welcome, make attendees aware that they are muted and that their videos will not be shown and instruct how to participate in congratulating winners in chat function (this person should hold the master powerpoint/screen share)
1 min	Host/Emcee (2 mins)	Welcome, opening remarks, show general ceremony branding in slide and have a split screen, introduce special guest 1 (campus leadership/donor/etc.)
3 min	Ceremony Special Guest 1 (2-3 mins)	Use title slides when the speaker is introduced, transition to supporting slides with split screen or speaker view (1 person on screen - no slides)
6 min	Host/Emcee (2-3 mins)	Host/Emcee thanks Special Guest 1 and begins awards presentations. Introduces Award Winner 1 and reveals slide with AW1 photos and info
9 min	Award Winner 1 (1-2 mins)	Split screen with AW1's slide as AW1 says short remarks
11 min	Host/Emcee (1-2 mins)	Host/Emcee thanks AW1 and continues award presentations. Introduces Award Winner 2 and reveals slide with AW2 photos and info
13 min	Award Winner 2 (1-2 mins)	Split screen with AW2's slide as AW2 says short remarks
15 min	Host/Emcee (1-2 mins)	Host/Emcee thanks AW2 and continues award presentations. Introduces Award Winner 3 and reveals slide with AW3 photos and info
17 min	Award Winner 3 (1-2 mins)	Split screen with AW3's slide as AW3 says short remarks

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19 min	Host/Emcee (1-2 mins)	Host/Emcee thanks AW3 and introduces Special Guest 2 (campus leadership, donor, etc)
21 min	Ceremony Special Guest 2 (2-3 mins)	Use title slides when the speaker is introduced, transition to supporting slides with split screen or speaker view (1 person on screen - no slides)
24 min	Host/Emcee (3-5 mins)	Host/Emcee thanks Special Guest 2. Reintroduces the award winners as a group with slide of all photos and asks for final congratulations.
29 min	Host/Emcee (1-2 mins) **suggested wrap up within the 1-hour timeframe	Closes program and reminds guests that recorded ceremony will be available (if applicable)

## Sample Run of Show: Panel Discussion

<u>Timeline</u>	<u>Role</u>	<u>Message</u>
0 min	Moderator/Technical Support (1 min)	Welcome, instructions on how to mute/unmute and participate in Q&A (this person should hold the master powerpoint/screen share)
1 min	Moderator/Technical Support (1 min)	Introduce host
2 min	Host (3-5 mins)	Welcome, opening remarks, introduce panelists, set up conversation
7 min	Panel Discussion (30 mins)	Panel view in platform
37 min	Q&A with Panelists (10 mins)	Moderator to review questions form audience and ask the speaker using the Q&A or chat functions
47 min	Host (3-5 mins) **suggested wrap up within the 1-hour timeframe	Closing Remarks

## Digital Invitations/Registrations

### iModules

- Work with Advancement Services to create a [registration page](#)
- Link can be used in your branded invitation
- Abide by the NC State brand guidelines as outlined [here](#).

### Paperless Post

- Option for low/no cost
- Templates available or can upload design
- Abide by the NC State brand guidelines as outlined [here](#).
- Master invitee list can be bulk uploaded or individually added
- Track invite opens, engagement, etc.
- Looks like a printed invitation

### Others

- [Eventbrite](#)
- Social Media
- Post Virtual event link inviting followers to share & “attend” event
- Direct email invites
- Some of the online webinar/video conference platforms may have an event invite/registration option

### UA Events Calendar & Attendee Tracking

UA Calendar event creation & “virtual” location

- Submit event with “Virtual” at the end of the event name
- Make sure to list the location as “Virtual”
- See below for detailed instructions

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## [Adding a Virtual Event to the UA Events Calendar](#)

It is important that we continue to identify events that are being held virtually. The mechanism we will use to identify UA Calendar events as virtual is to submit the event location as “Virtual”. All events that are being held in the virtual space should use this identifier. “Virtual” should also be included at the end of the event name, for additional clarity.

When creating a new event, enter “Virtual” at the end of the Event Name and in the Event Location field.

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#### University Advancement Calendar

Event Name \*

NC State Foundation Board Meeting - Virtual

Please provide a 1-2 sentence description of your event. \*

Unit/Department/College Hosting Event \*

Select

If other, please specify.

Event Date \*

Event Start Time \*

Event Location \*

Virtual

Address for Event \*

Event Invitation Type \*

- ☐ Board Meeting
- ☐ Open Event (All welcome to attend)
- ☐ Closed Event (Invite only)
- ☐ Online Registration

## Updating the Location of an existing event to Virtual

If the event already exists on the UA Event Calendar, please reach out to [specialevents@ncsu.edu](mailto:specialevents@ncsu.edu) to make the edit for you.

## Tracking responses and attendees

Same process as in-person events – submit RSVP list and final attendee lists to the Google folder



## Communication

### Confirmation Email to those who RSVP

- Once you receive your RSVPs through whatever invitation portal you choose to use, send your attendees a confirmation email.
- In this email, include the name of the meeting, date, time and link to the virtual meeting.
- If your virtual meeting is password protected, make sure guests have the password in advance of call. Zoom automatically generates a meeting password.
- Only provide the link or access via email to your attendees.
- Do not share your meeting link directly on social media or websites.
- If you post the link more widely, “Zoombombers” are more likely to crash your meeting. “Zoombombers” are hackers who intrude into people’s virtual meetings.

#### Example: Confirmation Email

Subject: Event Registration Confirmation

Email Body:

Hi attendee,

Thank you for registering for <Event Name>

Date: June 15, 2020

Time: 1:00pm – 3:00pm EST

A reminder detailing the event logistics will be emailed to you the day prior to <Event Name>. If you have any questions, please email [specialevents@ncsu.edu](mailto:specialevents@ncsu.edu).

You can cancel at any time by replying to this email.

### Reminder Email to those who RSVPed

Send a reminder email out the day before the meeting. Include date, time and if need be an updated link.

#### Example: Reminder Email

Subject: Reminder: Event Registration

Email Body:

Hi all,

This is a reminder that “Event Name” will be taking place tomorrow, June 15, 2020 at 1:00pm.

Zoom Link:

Call-in Number:

Should you need assistance at any time during this event, please contact our concierge service at <email> or <phone>.

We look forward to seeing you tomorrow.

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## Follow Up Email to all invitees

If your meeting was recorded, send out a follow up email to attendees. Thank attendees for attending your meeting and speakers for their time, include the link to the recording and any materials.

### Example: Follow Up Email

Hi all,

Thank you to all who attended the “Event Name” meeting this afternoon. It was wonderful to see all of you and to be able to catch up and discuss xxxxxx.

For those of you who weren’t able to join today, below is the link to the video recording of the meeting and a copy of the Zoom chat.

Link to meeting: \*This should be your unique link\*

Link to Chat: \*This should be your unique link\*



## Virtual Meeting Technical Support and FAQs


### Zoom Meeting Best Security Practices

#### Turn on Your Waiting Room

One of the best ways to secure your meeting is to turn on Zoom's Waiting Room feature. Some Zoom users, like those in education, will have this feature turned on by default. This feature provides a virtual waiting room for your attendees and allows you to admit individual meeting participants into your meeting at your discretion.


Sign in to the Zoom web portal as an administrator with the privilege to edit account settings. In the navigation menu, click Account Management then [Account Settings](#). Navigate to the Waiting Room option on the Meeting tab and verify that the setting is enabled. Note: If the setting is disabled, click the Status toggle to enable it. If a verification dialog displays, choose Turn On to verify the change.

**Waiting room**  

Attendees cannot join a meeting until a host admits them individually from the waiting room. If Waiting room is enabled, the option for attendees to join the meeting before the host arrives is automatically disabled. 


**Choose which participants to place in the waiting room:**

☐ All participants

☒ Guest participants only 

☐ Allow internal participants to admit guests from the waiting room if the host is not present

**Save** **Cancel**

[Customize the title, logo, and description](#) 

Select who you want to admit to the waiting room.

**All participants:** All participants joining your meeting will be admitted to the waiting room.

**Guest participants only:** Only participants who are not on your Zoom account or are not logged in will be admitted to the waiting room. If not logged in, they will have an option to log in.

**Note:** If Guest participants only is enabled, you can also enable the option to allow internal participants (users on the account), to admit guests from the waiting room if the host is not in the meeting.

(Optional) If you want to make this setting mandatory for all users in your account, click the lock icon, and then click Lock to confirm the setting.

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## Don't Use Personal Meeting ID for Public Meetings

Your Personal Meeting ID (PMI) is the default meeting that launches when you start an ad hoc meeting. Your PMI doesn't change unless you change it yourself, which makes it very useful if people need a way to reach you. But for public meetings, you should always schedule new meetings with randomly generated meeting IDs. That way, only invited attendees will know how to join your meeting. You can also turn off your PMI when starting an instant meeting in your profile settings.

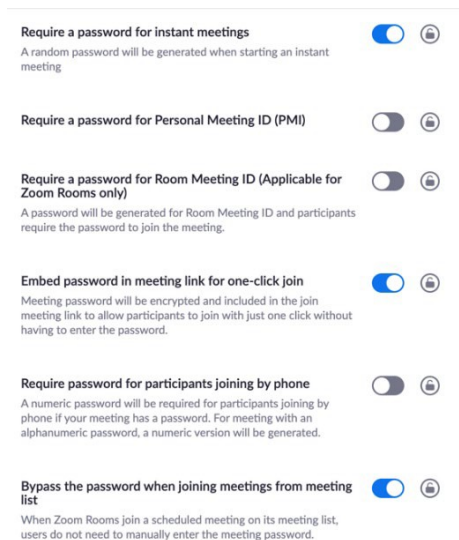
## Require a Password to Join

### Enabling password settings for your account

Sign in to the Zoom web portal as an admin with the privilege to edit account settings.

In the navigation panel, click Account Management then [Account Settings](#).

Navigate to the Meeting tab and verify that the password settings that you would like to use for your account are enabled.



The screenshot displays the 'Meeting' settings section in the Zoom web portal. It contains six settings, each with a title, a descriptive subtitle, a status toggle, and a lock icon:

- Require a password for instant meetings**  
A random password will be generated when starting an instant meeting. **Enabled** (blue toggle).
- Require a password for Personal Meeting ID (PMI)**  
Disabled (grey toggle).
- Require a password for Room Meeting ID (Applicable for Zoom Rooms only)**  
A password will be generated for Room Meeting ID and participants require the password to join the meeting. Disabled (grey toggle).
- Embed password in meeting link for one-click join**  
Meeting password will be encrypted and included in the join meeting link to allow participants to join with just one click without having to enter the password. **Enabled** (blue toggle).
- Require password for participants joining by phone**  
A numeric password will be required for participants joining by phone if your meeting has a password. For meeting with an alphanumeric password, a numeric version will be generated. Disabled (grey toggle).
- Bypass the password when joining meetings from meeting list**  
When Zoom Rooms join a scheduled meeting on its meeting list, users do not need to manually enter the meeting password. **Enabled** (blue toggle).

If the setting is disabled, click the Status toggle to enable it. If a verification dialog displays, choose Turn On to verify the change.

(Optional) If you want to make this setting mandatory for all users in your account, click the lock icon, and then click Lock to confirm the setting.

### Editing a password for a meeting

By default, meetings are assigned a random password. You can update the password to one of your choosing.

Sign in to the Zoom web portal and navigate to [Meetings](#).

Click the topic of the meeting you would like to update the password for.

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Upcoming Meetings Previous Meetings Personal Meeting Room [Get Training](#)

[Schedule a New Meeting](#)

Start Time	Topic	Meeting ID		
Thu, May 30 5:00 PM	Project Omega	471-185-840	Start	Delete

Click Edit this Meeting.  
Under Meeting Options, edit the password.

Meeting Options

☒ Require meeting password 596001

☐ Enable join before host

☐ Mute participants upon entry

☒ Enable waiting room

☐ Only signed-in users with specified domains can join meetings

☐ Record the meeting automatically

Click Save.

## Editing a password for a webinar

By default, webinars are assigned a random password. You can update the password to one of your choosing.

Sign in to the Zoom web portal and navigate to [Webinars](#).

Click the topic of the webinar you would like to update the password for.

Start Time	Topic	Webinar ID		
Today 10:00 AM	Mission Brief	644-159-140	Start	Delete

Click Edit this Webinar.  
Under Webinar Options, edit the password.

Webinar Options

☒ Require webinar password 693056

☒ Q&A

☐ Enable Practice Session

☐ Only signed-in users with specified domains can join webinars

☐ Record the webinar automatically

Click Save.

## Only Allow Registered or Domain Verified Users

Zoom can also give you peace of mind by letting you know exactly who will be attending your meeting. When scheduling a meeting, you can require attendees to register with their e-mail, name,

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and custom questions. You can even customize your registration page with a banner and logo. By default, Zoom also restricts participants to those who are logged into Zoom, and you can even restrict it to Zoom users whose email address uses a certain domain.

Sign in to the Zoom web portal and click [Meetings](#). You will be able to see the list of your scheduled meetings here. You can either [schedule a new meeting](#) or edit an existing meeting. Then check the "Registration: Required" box.

Edit "My Meeting"

Topic: My Meeting

When: 12/29/2016 02:00 PM

Duration: 1 hr 0 min

Time Zone: (GMT-7:00) Pacific Time (US and Canada)

☐ Recurring meeting

Registration: **Required**

Host Video: ☒ on ☐ off

Participants Video: ☒ on ☐ off

After scheduling the meeting, the Branding and Invite Attendees sections will appear. In the Branding section, you can customize your registration page with a banner and logo. In the Invite Attendees section, You can find your meeting link and the list of registrants. You can also set the type of registration for the meeting.

Invite Attendees:

People are required to register before joining this meeting.

Registration URL: <https://success.zoom.us/meeting/register/9f>

**Manage Attendees** [View](#)

Registrants: 1

Automatically Approved

**Registration Options** [Edit](#)

Approval: Automatically Approve

Options: Show social share buttons on registration page

## Manage Attendees

In this section you can generate a list of registrants for the particular meeting. Here you can also copy the invitation that was emailed to the registrant. Clicking on the registrant name will provide addition info about that person.

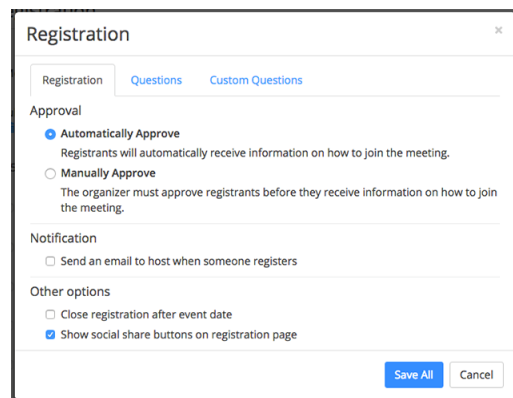
## Registration Options

**Automatic Approval:** Anyone who signs up will receive information on how to join.

**Manual Approval:** Anyone who signs up will need to be approved by the host on the meeting management page.

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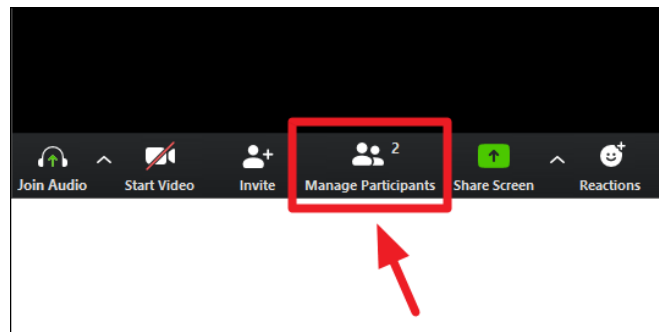
As the host you can opt in or out for email notifications when someone registers. you can also not allow registration after the scheduled meeting time has passed.

A screenshot of the 'Registration' settings window in Zoom. The window has tabs for 'Registration', 'Questions', and 'Custom Questions'. Under the 'Registration' tab, there are three sections: 'Approval' with options for 'Automatically Approve' (selected) and 'Manually Approve'; 'Notification' with a checkbox for 'Send an email to host when someone registers'; and 'Other options' with checkboxes for 'Close registration after event date' and 'Show social share buttons on registration page' (selected). At the bottom right are 'Save All' and 'Cancel' buttons.

## Lock Your Meeting

Once a session has begun, head over to the "Manage Participants" tab, click "More," and choose to "lock" your meeting as soon as every expected participant has arrived. This will [prevent others](#) from joining even if meeting IDs or access details have been leaked.

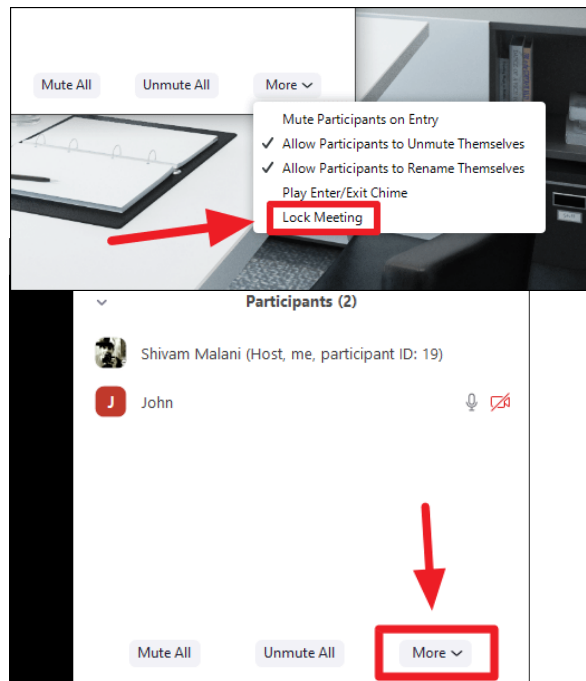
Click the 'Manage Participants' option at the bottom of the Zoom Meeting window.



A 'Participants' panel will open on the right side of the Zoom Meeting window with a list of all participants in the meeting. Click the 'More' button on the bottom right corner of the 'Participants' panel.

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Select 'Lock Meeting' from the available options in the 'More' menu.



## Control Screen Sharing

Allowing participants to screen share in a meeting can be a great way to collaborate, but that can also leave you open to unwanted interruptions during larger meetings. Zoom gives you the ability to determine if you want

In the host controls, click the arrow next to Share Screen and click Advanced Sharing Options.



Under Who can share? choose Only Host.  
Close the window.

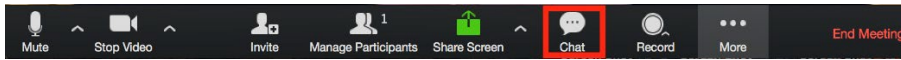
## Disable Private Chat

In-meeting chat adds another dimension of collaboration to your meetings, creating a place for questions to be asked and fielded later, or for supplemental resources to be posted. But sometimes chat can become distracting or unproductive. In those cases, Zoom allows you to disable and enable chat throughout your meeting.



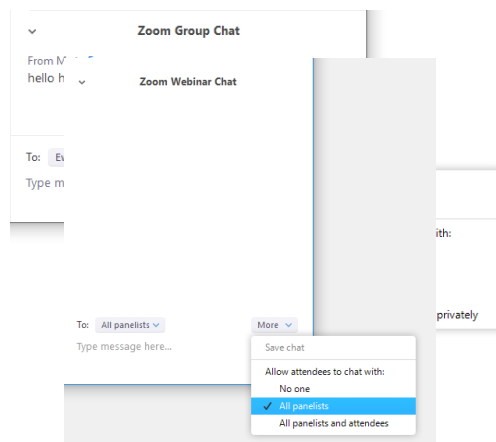
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Start a meeting or webinar as host.  
Click Chat in the Meeting Controls.



At the bottom of the in-meeting Zoom Group Chat window, click More, and then choose an option for Allow attendees to chat with.

For meetings, the host can allow attendees to chat with everyone or with the host only.  
For webinars, the host can allow attendees to chat with no one, with all panelists (including host), or with all panelists and attendees.



## Turn Off Annotation

Like screen sharing and in-meeting chat, annotation can be a great tool when you need it, but it can also be an opportunity for mischief when you don't. To avoid unwanted annotation, Zoom allows you as the meeting host to remove all participants ability to annotate during a screen share. You can disable this for the entire meeting, or just temporarily.

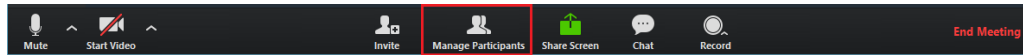
For your account  
Sign in to the Zoom web portal  
In the navigation panel, click Account Management then Account Settings.  
Click the Meeting tab.  
Under Meeting (Basic), verify that Annotation is disabled.

## Mute Participants

We've all been in meetings where somebody forgets to mute, or their microphone picks up some background noise that interrupts the meeting. Zoom allows you to solve this problem with a simple button to mute all participants. For an added layer of security, you can also disable participant's ability to unmute themselves. When you're ready to make the meeting interactive again, you can simply hit the "Unmute All" button or allow participants to unmute themselves.

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Select Manage Participants



Select Mute All

## Make Someone a Co-Host

All the features we've covered so far are only accessible to meeting hosts, ensuring that hosts are the only ones with total control over a meeting. But what if you need a helping hand to manage all your participants? You can promote a trusted meeting attendee to Co-Host, allowing them many of the same privileges and control features available to the meeting host themselves.

To enable the co-host feature for your own use:

Sign into the Zoom web portal and click My Meeting Settings (if you are an account administrator) or Meeting Settings (if you are an account member).

Navigate to the Co-host option on the Meeting tab and verify that the setting is enabled. If the setting is disabled, click the Status toggle to enable it. If a verification dialog displays, choose Turn On to verify the change. Note: If the option is grayed out, it has been locked at either the Group or Account level, and you will need to contact your Zoom administrator.

### Co-host

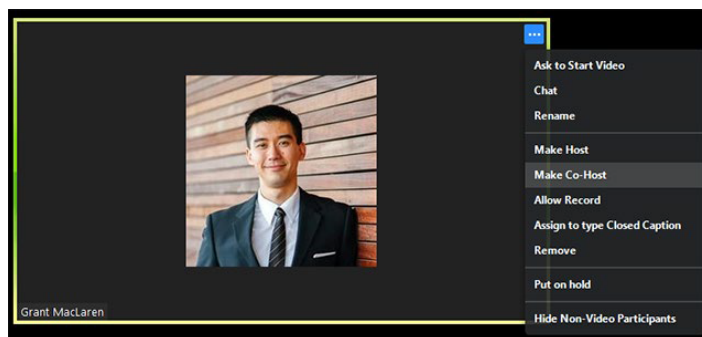
Allow the host to add co-hosts. Co-hosts have the same in-meeting controls as the host.



## Using co-host in a meeting

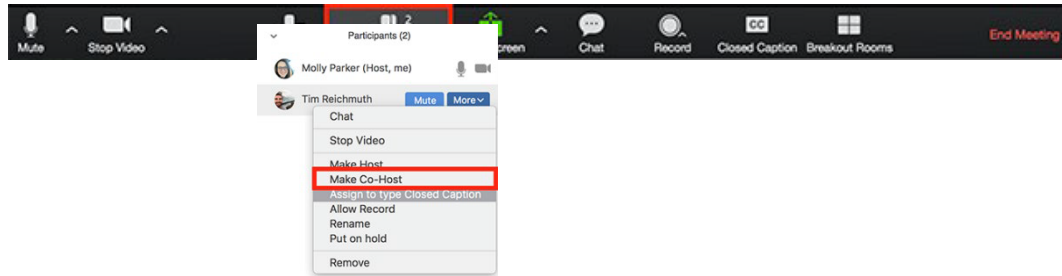
There are two ways that you can make a user a co-host.

In the meeting, the host hovers over the user's video, clicks on the three dots and chooses Make Co-Host.



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Alternatively, the host can make another participant a co-host through the Participants window. Click on Manage Participants in the meeting controls at the bottom of the Zoom window. Hover over the name of the participant who is going to be a co-host, and choose More.



Click Make Co-Host.

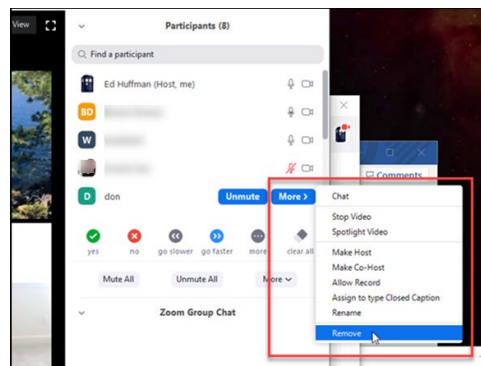
## Remove Participants

If you follow all the best practices in this guide, you should never find yourself in a meeting with an unwanted guest. But if you do need to remove an attendee from the meeting at any point, Zoom makes it easy to kick an unwanted participant out of the meeting. For additional security, you can also choose to not allow participants to rejoin once they've been removed.

### To remove a participant from your meeting

Once in your Zoom meeting, click on Manage Participants on the bottom toolbar in the Zoom meeting window.

Mouse over the participant name you need to remove from your meeting in the Participant list. Click on the More fly-out menu that appears and select Remove.



## Disable Local Recording Account

Sign in to the Zoom web portal as an administrator with the privilege to edit account settings.

Click [Account Settings](#).

In the [Recording](#) tab, navigate to the Local Recording option and verify that the setting is disabled.

If the setting is enabled, click the toggle to disable it. If a verification dialog displays, choose Turn Off to verify the change.

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(Optional) If you want to make this setting mandatory for all users in your account, click the lock icon, and then click Lock to confirm the setting.

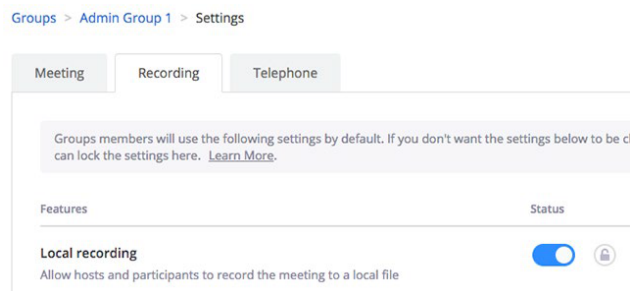
## Group Management

Sign in to the Zoom web portal as an administrator with the privilege to edit user groups.

Click [Group Management](#).

Click the name of the group, then click the Settings tab.

In the Recording tab, navigate to the Local Recording option on the Recording tab and verify that the setting is disabled. If the setting is enabled, click the toggle to disable it. If a verification dialog displays, choose Turn Off to verify the change.



Note: If the option is grayed out, it has been locked at the account level, and needs to be changed at that level.

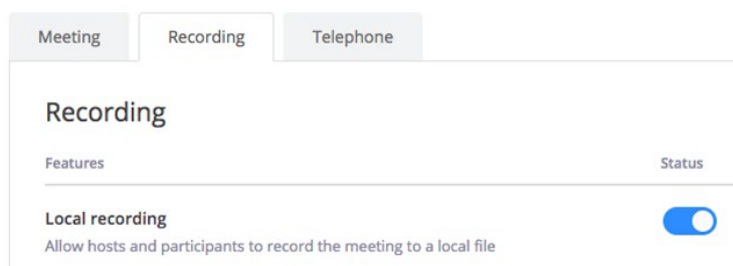
(Optional) If you want to make this setting mandatory for all users in this group, click the lock icon, and then click Lock to confirm the setting.

## User

Sign in to the Zoom web portal and click My Meeting Settings (if you are an account administrator) or Meeting Settings (if you are an account member).

In the Recording tab, navigate to the Local Recording option and verify that the setting is disabled. If the setting is enabled, click the toggle to disable it. If a verification dialog displays, choose Turn Off to verify the change.

Note: If the option is grayed out, it has been locked at either the group or account level, and you will need to contact your Zoom administrator.



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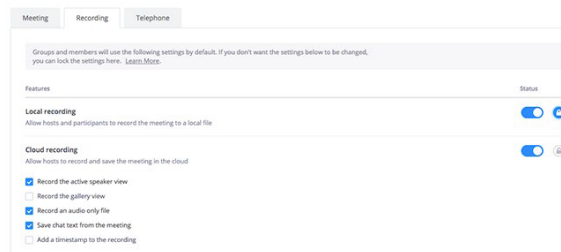
## Disable Cloud Recording for Zoom Rooms Disabling Cloud Recording for All Zoom Rooms

To disable the Cloud Recording feature for all Zoom Rooms of your organization:

Sign in to the Zoom web portal.

Click Account Management > [Account Settings](#).

Navigate to the Cloud Recording option on the Recording tab and verify that the setting is disabled. If the setting is enabled, click the toggle to disable it. If a verification dialog displays, choose Turn Off to verify the change.



(Optional) If you want to make this setting mandatory for all users in your account, click the lock icon, and then click Lock to confirm the setting.

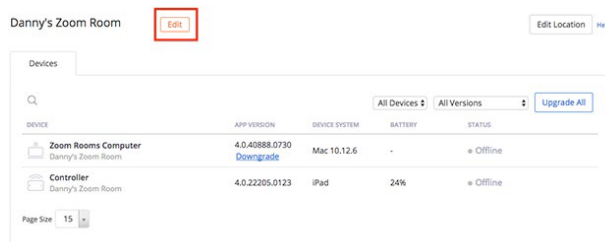
## Disabling Cloud Recording for a Specific Zoom Room To disable the Cloud Recording feature for a Zoom Room:

Sign in to the Zoom web portal.

Click Room Management > [Zoom Rooms](#).

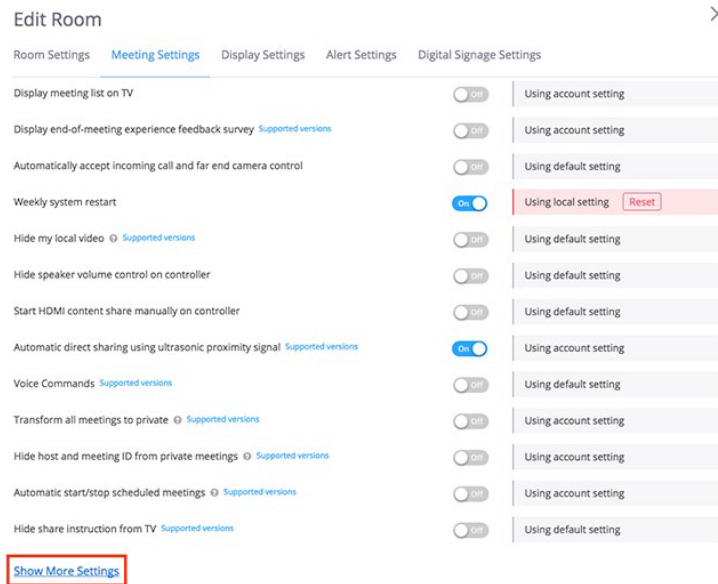
Click on the room name.

Click Edit to view the room settings.



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Click the Meeting Settings tab and click Show More Settings.



Navigate to the Cloud Recording option and verify that the setting is disabled. If the setting is enabled, click the toggle to disable it. If a verification dialog displays, choose Turn Off to verify the change.



Note: If the option is grayed out, it has been locked at a higher level in the hierarchy, and you will need to contact your Zoom administrator.

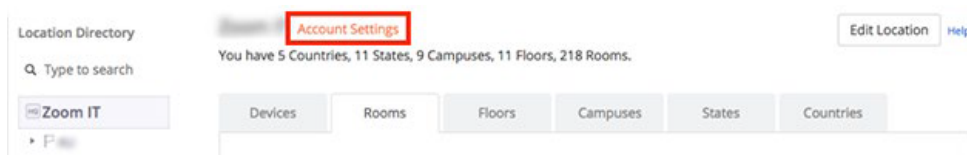
## Disabling Cloud Recording for Instant Meetings for all Zoom Rooms

To disable the Cloud Recording for instant meeting feature for all Zoom Rooms of your organization:

Sign in to the Zoom web portal.

Click Room Management > [Zoom Rooms](#).

Click Account Settings.



Click the Meeting tab

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Navigate to the Cloud Recording for instant meetings option and verify that the setting is disabled. If the setting is enabled, click the toggle to disable it. If a verification dialog displays, choose Turn Off to verify the change.

Cloud recording for instant meetings

Allow cloud recording for meetings started from the "Meet Now" button on the Zoom Rooms controller



(Optional) If you want to make this setting mandatory for all users in your account, click the lock icon, and then click Lock to confirm the setting.

## Disabling Automatic Cloud Recording for a Zoom Room

To enable the Automatic Recording feature for all Zoom Rooms of your organization:  
Sign in to the Zoom web portal.

Click Account Management > [Account Settings](#).

Navigate to the Automatic Recording section and verify the Record in the cloud option is disabled on the Recording tab. If the setting is enabled, click the toggle to disable it. If a verification dialog displays, choose Turn Off to verify the change.

(Optional) If you want to make this setting mandatory for all users in your account, click the lock icon and then click Lock to confirm the setting.

Automatic recording

Record meetings automatically as they start



☒ Record on the local computer

☐ Record in the cloud

Save

Cancel

## Zoom Meeting Tips

### Review technical requirements

- Review [Zoom's system requirements](#) and ensure your system meets these recommendations. Check your network

### Check your network

- Check your network speeds using one of the free services available online. Zoom's system requirements recommend a minimum of 1.5 Mbps for both upload and download speed. If necessary, check with your internet service provider.
- Power cycle your modem/router, if possible.
- If you're on a wireless connection:
- Confirm that you have a strong signal.
- Connect to a 5 GHz network (rather than 2.4 GHz), if possible.
- Limit the number of devices connected to your wireless router.
- Consider switching to a wired connection.
- Ensure that other devices on your network aren't consuming bandwidth; these could include cloud-connected security cameras, cloud backup solutions, smart TVs, streaming devices, smart hubs, gaming devices, or other cloud or internet-connected devices. You can turn them off, lower the bandwidth they consume by adjusting performance settings, or make other changes that may improve the amount of bandwidth available for Zoom.
- If you're using a network-wide VPN, consider disabling it.
- Important: Do not disable any necessary devices that help protect or otherwise secure your network.

### Adjust your computer's settings

- Restart your Zoom client.
- Restart your computer.
- Update system drivers, especially network drivers, if necessary.
- Close out of any unneeded programs, especially those that use the internet. This could include office applications, additional browser tabs, or anything that uses system or network resources. Closing out of these items will free more system resources for Zoom to use.
- Stop all downloads, uploads, or other unnecessary processes that are using network resources.
- Ensure that your devices are up to date.
- Ensure that your application(s) are up to date, especially the Zoom client.
- Disconnect from any VPNs you may be using.



## Adjust Zoom settings

- Disable HD Video from your Zoom client:
- While not in a call, click the Home tab.
- Click the gear icon (Settings).
- In the left Navigation pane, click Video.
- Uncheck Enable HD.
- Click X in the top right corner to close the Settings window.

Disable “Touch up my appearance” from your Zoom client:

- While not in a call, click the Home tab.
- Click the gear icon (Settings).
- In the left Navigation pane, click Video.
- Deselect Touch up my appearance.
- Click the X in the top right corner to close the Settings window.
- Mute your audio when not speaking.
- Consider disabling your webcam if it’s not necessary.

## Troubleshooting Virtual Meeting Common Problems

### I can't join my meeting

- If you're unable to join a meeting, check these items:
- If you're on a desktop or mobile device, be sure you've [installed the Zoom client](#) and that it's up to date; see [What version of Zoom am I running?](#)
- If you've received any of these messages:
- You are on hold: The host has enabled a waiting room; you'll remain on hold until the host admits you into the meeting room.
- Room connector is not enabled for this meeting: If you are using videoconferencing equipment to join a meeting hosted by a free Zoom account or an account that doesn't have the room connector enabled, you will receive this error. Connect to the meeting using a desktop or mobile device instead.
- Please wait for the host to start this meeting: The [Join before host](#) feature is not enabled, and the host has not yet joined the meeting. Hosts automatically receive email asking them to join. You will be prompted to join the meeting a short time after the host joins.
- Please enter the meeting password: The meeting requires a password; enter the password provided by the meeting host. If you do not know the password, contact the meeting host for assistance.

Note: Certain types of videoconferencing equipment will not allow you to type alphabetical characters into the Zoom password field. If you are using videoconferencing equipment and the password contains alphabetical characters, contact the host.



This meeting does not allow phone dial-in: The host may only have allowed VoIP audio. In this case, if you dial into the general Zoom teleconferencing number and enter the meeting ID, you will hear the message above and the call will disconnect. You will need to [join the meeting](#) with a computer or a smartphone app.

### I've joined my meeting, but no one else is here


- If you've joined a meeting but don't see other participants:
  - Confirm with the meeting host that the meeting has begun. If it has, ask for the meeting ID at the top of the host's Zoom window (for example, Zoom Meeting ID: 123-456-7890) and compare that to the meeting ID at the top of yours. If they don't match, you've joined a different meeting. Ask the host for the meeting ID, and [join that meeting](#).
- If you're the host, ensure that you haven't enabled a waiting room. If you have, you need to manually admit each participant before they can join your meeting.

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## I can't hear or talk to people

- If you're unable to hear or talk to people in a meeting:
- Check the attendee controls at the bottom of your meeting window. If you see the Join Audio icon  on the far left, click it. (If you've already joined your audio, you'll instead see the mute/unmute icon )
- To check whether the issue is related to the Zoom program, see:
  - [How do I join or test my computer audio?](#)
  - [My Audio Is Not Working On The Zoom Mobile App](#) (iPhone, iPad)
  - [Where are my audio settings for iOS?](#) (iPhone, iPad)
- If your audio isn't working in the Zoom client [outside of the meeting](#), try troubleshooting the device itself. For instructions, see [Troubleshoot audio and video issues on your computer or mobile device](#).
- The host may have allowed only telephone audio. In this case, you will not see the message "join meeting with computer audio". You may still be able to join the meeting with video or [via phone](#).

## People can't see me

- If you've joined a meeting successfully but others can't see you:
- Make sure your video isn't turned off by checking the Start Video icon  in the attendee controls at the bottom of your meeting window.
- If your video isn't working in the Zoom client [outside of the meeting](#), try troubleshooting the device itself. For instructions, see [Troubleshoot audio and video issues on your computer or mobile device](#).

## My video is poor quality

- The "Optimize for full screen video clip" setting greatly reduces video quality. Restart the screen share with that setting unchecked.
- If you are experiencing a problem with the internet or the device itself, see [Troubleshoot audio and video issues on your computer or mobile device](#).

## I can't screenshare a video with sound


- Make sure you've muted unneeded microphones (your device and/or the Zoom meeting microphone). After you click Share to share your screen, select Share computer sound in the lower left of the screenshare window.

## I can't access my recordings, I accidentally deleted a recording, or I can't record

- If your meeting is missing from the recorded meetings list in the Zoom client (for example, as

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a result of pressing Delete in the Zoom client for a recorded meeting), you may be able to find the recording on your device in its Zoom recordings folder.

- To see where your Zoom recordings are stored, see the "Change location for Recording" section of [Local recording](#). Recordings will be named in the
- format double\_click\_to\_convert\_01.zoom. When you find the .zoom file you are
- looking for, double-click it.
- Note: Pressing Delete in the Zoom client removes the recording from the recorded meetings list in Zoom, but not from the device itself.
- Only current hosts can record a meeting. If you can't record, check to see whether you're the host by clicking the Participants icon  in the attendee controls at the bottom of your meeting window; if you aren't the host, you can ask the host to record the meeting.
- For more about recording Zoom meetings, see [Create and store recordings of Zoom meetings](#).

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## Downloadable Resources

### Zoom Backgrounds



Other options available for download at: <https://dasa-ncstate.smugmug.com/ZOOM-Backgrounds>