Digital event guide | Zoom Meeting

You can find full Zoom Meeting support guides in their Help Centre: [https://support.zoom.us/hc/en-us/categories/201146643-Meetings-Webinars](https://support.zoom.us/hc/en-us/categories/201146643-Meetings-Webinars).

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1. Scheduling your Meeting

Sign in with a Zoom account via [https://zoom.us/signin](https://zoom.us/signin)

Setting up the meeting is recommended via the online version as it gives you more options and control during set up. Once logged in on the Zoom website, select 'Meetings' on the left-hand side of the page and then click on 'Schedule a New Meeting'.
2. Meeting settings

The Zoom Help Centre guide for setting up a meeting can be found here: [https://support.zoom.us/hc/en-us/articles/201362413-Scheduling-meetings](https://support.zoom.us/hc/en-us/articles/201362413-Scheduling-meetings)

### Meeting Options
- Enable join before host
- Mute participants upon entry
- Enable waiting room
- Only authenticated users can join
- Breakout Room pre-assign
- Record the meeting automatically

### Suggested Settings:

- **Enable join before host**
  We recommend that you don’t select this option as it means that guests will be able to access the event before its launch.

- **Mute participants upon entry**
  For larger events it is advised that this is ticked. However for events under ten, this is entirely up to you. Ticking this box can confuse guests if they do not realise that they cannot be heard. As a host, you will have the option to unmute them.

- **Password**
  You should include a password following the UIS security guidelines. If you want to change the password of your webinar, select ‘generate automatically’ and tick ‘require meeting password’. Creating a strong password adds a level of security and ensures that only those invited to the meeting can access it.

- **Enable waiting room**
  A waiting room is a great way to ensure that any speakers-hosts/facilitators have a chance to check-in before the event and check their slides. With Zoom meetings, the host will have to provide earlier access to the speakers as they are not provided unique links as with Zoom Webinars. Hosts can admit individuals e.g. panellists or other hosts from the waiting room.

- **Only authenticated users can join**
  We recommend reading this guide to see if this is something you wish to enable: [https://support.zoom.us/hc/en-us/articles/360037117472-Authentication-Profiles-for-meetings-and-webinars](https://support.zoom.us/hc/en-us/articles/360037117472-Authentication-Profiles-for-meetings-and-webinars)

- **Record the meeting automatically**
  This is very useful if you want to record your meeting without having to press record. You can also manually...
press record at any point in the meeting.

→ **Polls**

Once you have set up and saved your meeting, scroll to the bottom of the page and click on 'Add' in the created a poll box.

a. Information on creating polls can be found here: https://support.zoom.us/hc/en-us/articles/213756303-Polling-for-meetings.

b. You can have more than one question per poll or create individual ones

c. Once you have created your polls, it should look like this:

3. **Roles and responsibilities during the event**

**Roles**

**HOST**
This person has complete control over setting up the meeting, behind the scenes tools – muting, unmuting, screen sharing and assigning additional co-hosts.

**CO-HOST**
This person has 90% of the shared control – screen sharing, muting, unmuting etc. They can take up the audio or slide roles described below but cannot assign additional co-hosts.

**PARTICIPANT**
You can have up to 200 participants per event on a pro account (49 visible per page). They have limited control but can post comments, turn on/off their videos and microphones (if allowed in settings). Unlike hosts and co-hosts, they cannot unmute other participants, control cameras or share their screen. Participants can 'raise their hand' virtually if they have an issue/question and can be unmuted by the host if needed.

**Responsibilities**

**TECHNICAL (host and co-host roles)**

It is wise to have two or three team members, each with defined roles. To enable communication during the event set up a separate chat stream on another platform e.g. Microsoft Teams or WhatsApp:

→ **AUDIO**: Muting and unmuting the speakers and participants when they need to present or speak. Please note that it is best to select 'mute participants upon entry' if any of your speakers or participants will be joining the meeting at a later stage.
CAMERAS: If an audience member has forgotten to turn on their video, you can 'ask to start video' to prompt them to put it on. You can also turn off videos if you need. You can do this via the Participants Panel.

![Participants Panel](image)

Hover over the camera icon next to a person name to highlight the 'More' button.

SCREEN SHARING/SLIDES: A different member of your team should operate slides during your event – preferably someone with two screens. If a speaker is unfamiliar with Zoom, it is easier for a team member to control the sharing of screen and slides. Remember to tell your speakers that they will need to confirm when they would like the next slide to appear if you are controlling them. Suggest that they indicate to move to the next slide in the most natural way as possible – for example 'on my next slide.'

You can read more about these technical features in section 6 'During the live event.'
4. Technical rehearsal

This is your opportunity to run through the event and test the relevant technical functions in Zoom with the speaker(s). For this reason, we advise running the technical rehearsal in the same platform as the event, in this case Zoom meetings. You may wish to use this time to confirm the following:

- The speaker’s technical and visual set up, i.e. what's in the background, ensuring they have hard-wired internet etc
- The running order and any cues for slides/videos
- Confirm any details or visuals with the Speaker, i.e. slides, names to be displayed
- Demo technical functions, i.e. muting and un-muting, turning cameras on and off, screen sharing, how Q&A will work
- Agree an alternative communication platform i.e. WhatsApp or Teams in case any technical issues occur during the event

This meeting should take place ideally before the day of the event. If this is not possible, then a couple of hours before the event is advisable.

Each meeting/webinar has an individual link, so you will need to set up a separate meeting/webinar for the technical rehearsal.

We suggest sharing the 'Digital events – Speaker Info' document with speakers so that they can check their camera set-up, lighting and audio is correct.

It is a good idea to have a function sheet or running order to guide you through your slide transitions, and so you can keep track of time.

As you go through your technical rehearsal, make sure that everyone understands the running order and what is expected of them from a technical point of view.

Once you are in the rehearsal, you should check your settings; they should look like the images below.

In the Participant Panel, click on the \( \ldots \) to show the settings below:

- Mute Participants upon Entry
- Allow Participants to Unmute Themselves
- Allow Participants to Rename Themselves
- Play Enter/Exit Chime
- Enable Waiting Room
- Lock Meeting

Chat settings:
5. **Facilitator opening remarks, speaker introduction and closing remarks**

We highly recommend having a digital event facilitator or host – this can be the speaker if they are comfortable to do so. They will introduce the session and the speaker(s) (or themselves), welcome guests and confirm the housekeeping arrangements.

It is best to provide the facilitator with talking points for their introduction. They need to include a small delay once the meeting has gone live, to allow the audience members’ audio to connect (around 10 seconds). You can display a slide with essential information for those joining slightly later to reinforce this welcome message.

Once the speaker has finished their presentation, in most cases, there will be an opportunity for participants to ask questions. The facilitator can either select attendees with their hands up, or via the chat option (more information on this can be found in section 6a).

As with the opening remarks, we recommend supplying closing remarks for the facilitator to help them smoothly end the session. At this point, it is good to mention if the talk has been recorded for later viewing or to direct participants to an email address if they have any further questions or follow-up requests. If the event is part of a series, this is an excellent opportunity to promote the next event.

6. **During the live event**

To give the audience a positive digital event experience, you can edit settings in the toolbar at the bottom of your screen:

- **Polls and Q&A**

  The poll function can be used with the audience to seek feedback and to ask questions.

  To use the Poll function, click the 'Poll' button on the toolbar, a poll box will pop up on your screen. Your pre-uploaded polls will be available – or you can create live poll options.

  In Zoom Meetings, there is no Q&A widget, so participants can either use the 'raise hand' button in the participant window to ask a question or physically raise their hand on the webcam. If you have lots of participants, it can be challenging to see when they have their hand raised, so the addition of the digital 'raise hand' is a useful feature. Participants can also ask questions through the chat function, but the speaker or facilitator will need to keep an eye on the chat box.

  You can raise your hand at the bottom of the participant window:

  ![Invite Mute Me Raise Hand](image)

  And see raised hands in the top half of the window:

  ![Sarah Jeffs (Me) Dar Alumni Events (Host)](image)
b. Slides (screen sharing)

→ To learn more about effective screen sharing, read this guide.

→ To share your screen, click on 'Share Screen' on the toolbar at the bottom of your screen, select the application you would like to share in the basic tab (close other tabs and programmes that you do not wish to share).

→ We recommend that a second staff member operate any slides during your event if possible:
  o If a panellist is unfamiliar with Zoom, or only has one screen, a staff member controlling the slides means that there is one less thing they have to think about
  o The person controlling the slides will not be able to do or see anything else. Thus we recommend the primary host is not responsible for the slides.

→ Remember to tell your panellists that they will need to give a verbal prompt when they would like the next slide to appear. We recommend that they say something along the lines of “on my next slide” so that it sounds as natural as possible.

→ We recommend that speakers send their slides to the team a minimum of 24 hours before the meeting. If you have multiple speakers, this also allows you to combine them into one beforehand.

Please note that we recommend you select the application (i.e. Word, Chrome, PowerPoint) rather than just your screen or ‘screen 1’. If you screen share in this way, the audience will not see any other windows on your computer (i.e. Outlook) even if you accidentally open these applications during the webinar.

Presentations should be made to a 16:9 ratio to fit the screen the best.

As the host, you will need to make speakers a co-host so that they can share their screen or slides if they wish to control them. Alternatively we recommend that another member of the team take responsibility for sharing slides/screens.

We recommend that any media (slides/video) is downloaded to the personal computer that will be sharing the information with the audience. We have found sharing directly from a web browser doesn’t work well.
You can also enable screen sharing for all participants in the ‘Advanced Sharing Options’; however, we don’t recommend this as participants may accidentally share their screen during the event:

![Advanced Sharing Options](image)

**How many participants can share at the same time?**
- One participant can share at a time
- Multiple participants can share simultaneously (dual monitors recommended)

**Who can share?**
- Only Host
- All Participants

**Who can start sharing when someone else is sharing?**
- Only Host
- All Participants

See section d below about playing videos within PowerPoint and sharing audio.

c. **Sound settings for speakers**

→ If panellists are happy to do so encourage them to mute and unmute themselves during the event. We recommend that you select “allow panellist to unmute themselves” in the participant panel.

→ It is also advisable to select 'mute participants upon entry' if any of your speakers will be joining the webinar at a later stage. This setting can be found in the webinar participants panel under the three dots.

→ When the you or panellists are unmuted, the audience can hear 'pings' from computers, i.e. Outlook, remind the speakers that they should either turn off their notifications or shut down the applications for the duration of the webinar. Alternatively, you can disconnect from the webinar audio. This can be found by clicking the small ^ arrow next to the microphone on your toolbar and choosing ‘Leave Computer Audio’. Please note that if you leave computer audio, you cannot hear or be heard by other participants.
d. **Sharing audio 'computer sounds'**

This is a useful feature if a speaker’s PowerPoint contains audio. Click 'share screen' and tick 'Share computer sound' and 'Optimise Screen Sharing for Video Clip'. The audio will then match the volume set by the person sharing the presentation or audio.

The audio should be set to around 50% as if participants are using headphones this audio could come through much louder than the actual meeting.

![Image of screen sharing options]

To share audio only, click 'advanced' and 'Music or Computer Sound Only' before sharing:

![Image of advanced screen sharing options]

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e. **Recording**

When recording meetings, you have the following options with a Pro Licence or above:

- **Active Speaker** – will only record the panellist who is currently speaking
- **Gallery View** – will record up to 25 participants in a grid format
- **Shared Screen with active Speaker** – will record the slides (large) and the image (small) of the Speaker in the top right corner
- **Shared Screen without active speaker/gallery view** – will only record slides

In settings > recording, you have the options to configure what you would like to record. We tend to tick all options to provide us with multiple formats to pick up. Below are the settings we have found to work the best.
You will notice that "Display participants’ names in the recording" is not ticked, we do this due to GDPR. We also suggest that you don’t record any chat or allow participants or speakers to save the chat.

Please note, by ticking all the above options you may run out of cloud storage quicker.

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<tr>
<td>Business</td>
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<td>0.5 GB/Pro User</td>
</tr>
<tr>
<td>Zoom Rooms</td>
<td>1 GB/Zoom Room</td>
</tr>
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</table>

You can purchase additional storage or set up auto-deleting in settings

<table>
<thead>
<tr>
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<th>Additional 1 GB</th>
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<tr>
<td>$500 per Month</td>
<td>3 TB</td>
<td>$0.1/GB</td>
</tr>
</tbody>
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f. **Breakout Rooms** -

Breakout rooms are useful collaborative spaces for small groups of participants (around ten people per room). It can be difficult to have uninterrupted conversations if the number is higher than this.

The box for 'enable breakout room' must be ticked when you create your meeting. Note that you can only assign one breakout room to each participant.

You can change the name of the breakdown room when you hover over the room in the breakout settings. You can also delete rooms here:

![Breakout Rooms - Not Started](image)

As host, you have to assign participants into one breakout room, and they can join and leave it as they wish. They do not, however, have the option to move between rooms. As the host you can move them between rooms:
As a host, you can also broadcast a message to everyone in the breakout rooms as above.

There are several options that you can edit in the options tab:

You can also pre-assign people to breakout rooms before the meeting starts if you have email addresses for all attendees (this will need to be the email address they use to join the meeting).

Sign in via https://zoom.us/signin, click on Meetings (left-hand side) and then located your meeting. Click on the meeting name and then click edit this meeting. Under Meeting Options click ‘Breakout room pre-assign’
Click on + Create Rooms and then the + next to Rooms. You won't be able to rename the rooms here (see above to do this).

You can add participants one at a time or upload a CSV file.

For more information on how to host meetings, please see the Zoom Help Centre:

https://support.zoom.us/hc/en-us/categories/201146643