

ZOOM BEST PRACTICES

A SERIES OF ZOOM EVENT BEST PRACTICES AND PRACTICAL TIPS TO HELP YOU PLAN AND EXECUTE A SUCCESSFUL VIRTUAL ZOOM EVENT

Use the following How-To Guide to create & manage all of your Zoom events! This guide will cover the following:

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| 1 Schedule Your Zoom Event | 2 Waiting Room & Welcome Screen | 3 In-Meeting Functions |
| 4 Moderating an Event | 5 Utilizing and Managing Breakout Rooms | 6 Event Registration Forms |

1 SCHEDULE YOUR ZOOM EVENT

*ALL meetings and classes held in Zoom will be required to have a Passcode set or a Waiting Room enabled.

BASIC SETUP:

- When scheduling your Zoom call, click “Schedule” on the Home Page of your Zoom app, and first select the time & date of your event. Next, choose an appropriate Topic to be used as the title of your event. This will be seen by your attendees.
- If you want to use the same link for multiple events/dates, select the “Recurring Meeting” checkbox.
- This link will then be available for use at the same scheduled time on different dates.
- For added security on your event, you can add a password by selecting the “Require Meeting Password” checkbox under the Password heading.
- Once selected, you can type a password of your choice in the text box that will appear beside the checkbox.
- This password can be distributed along with your meeting link in email &/or other communications leading up to your event.

ADVANCED OPTIONS:

- If you are planning a larger-scale event, consider utilizing these advanced options. These functions are useful for managing & facilitating events with a large audience, particularly with external attendees.

- **The following controls can be initially set when scheduling the event, and further managed by the host(s) throughout, by selecting the following checkboxes (under *Advanced Options* heading):**

- Enable Waiting Room
- Enable Join Before Host (we recommend leaving this un-checked)
- Mute Participants Upon Entry
- Only authenticated users can join (we recommend leaving this un-checked)
- Automatically record meeting on local computer (we recommend leaving this un-checked unless you state in the registration form &/or waiting room that the call is being recorded, so all involved consent to it)

■ **Alternative Hosts:**

- Enter the email of any co-host(s) you would like to add - confirm each one by clicking the spacebar after each email. You can have as many co-hosts as you'd like, and they will have the same in-meeting controls as the host throughout the event. Additionally, they can join the event without being placed in the Waiting Room, and will be able to un-mute themselves throughout.
- Click "Save" on the bottom right after all options have been selected. This will schedule the Zoom event and automatically send an email invite to all co-hosts, containing the unique link they should use when joining the event. Your scheduled meeting will appear in the "Meetings" tab on your account, in which you can find the Meeting Invitation and Zoom link that can be distributed to all attendees.

**See below for additional tips to manage functions while on the call - including Waiting Rooms & Welcome Screens, Moderating a Session, Breakout Rooms, and more!*

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WAITING ROOM & WELCOME SCREEN

Waiting rooms are useful when hosting an event for a large audience as it allows you to admit all attendees at once, right at the event's start time. This gives all hosts &/or panelists on the call an opportunity to brief beforehand, without having attendees join the event until everyone is ready. We recommend all hosts/panel members join their event **at least** 15 minutes in advance.

Having a Welcome Screen is recommended for large events, as it is an easy way to notify all attendees of necessary housekeeping items & the structure of the event as they join. They can review these points as the host(s) wait for last minute attendees to join the event.

SETTING UP THE WAITING ROOM:

- To setup and edit the Waiting Room details, head to your account settings through the web browser (<https://westernuniversity.zoom.us>), not on the app.
- In Meeting Settings, you will find the Waiting Room heading. Click "Customize Waiting Room" to edit the content you would like to appear for attendees in the waiting room.
- This will bring you to a pop up, in which you will be able to edit the Title (defaulted as "Please wait, the meeting host will let you in soon"), the Description (with up to 400 characters), and a Logo for your event. The Meeting Topic will be automatically populated beside the logo as the title you chose when initially scheduling the Zoom call.

**Reach out to the Events Team if you would like the Huron Logo we have used for past events, and for recommendations on Waiting Room content (i.e. housekeeping items to include in the description).*

ADMITTING ATTENDEES FROM WAITING ROOM:

- When you are ready to start your event, you will need to admit all attendees who have joined the call and have been placed in the waiting room. You can find the list of attendees waiting under the "Participants" tab on the taskbar of your Zoom screen when on the call.
- If you have a number of people in the waiting room at the start of your event, we recommend clicking the "Admit All" button that will be available at the top of the list. This will bring everyone from the waiting room into the event, taking just a few seconds for them to connect to audio & video.

- For anyone who joins the event late, the host(s) will be notified that they have entered the waiting room. Again, we recommend clicking “Admit All” if there are multiple people, or you can admit people individually if there is only one person now in the waiting room. To do this, hover your mouse over their name, and click the “Admit” button that will appear.

USE OF A WELCOME SCREEN:

- To display a Welcome Screen, we recommend that one of the event hosts screen-shares a PowerPoint slide listing housekeeping items and, if desired, a brief agenda for the event.
- Housekeeping items should include an explanation to attendees that they have been automatically muted and will remain so throughout the event (or a different specified time); questions can be asked using the raise hand feature in their participants tab, in which a moderator will then un-mute them in sequence, or they can ask non-verbally using the chat function; other suggestions to make everyone’s experience as enjoyable as possible, dependant on size & structure of your event.

**For an extensive list of recommended housekeeping items, and to use our Welcome Slide template for your event, please reach out to the Events Team or check Huron’s website to download a copy!*

3 IN-MEETING FUNCTIONS

MUTING PARTICIPANTS:

- Selecting “Mute Participants Upon Entry” in your initial event setup will ensure that all attendees will automatically be muted when they initially join the call.
- **If you would like to keep them muted throughout the event, and restrict their ability to un-mute themselves (recommended for large events), take the following steps:**
 - When joining the call as a host 15 minutes prior, select the “Participants” tab on the taskbar
 - Click the button displaying 3 dots, located at the bottom right of the window that pops up
 - A list of functions will pop up
 - **Uncheck** “Allow Participants to Unmute Themselves”
- As a host, you can choose to “Mute All” and “Unmute All” attendees from the bottom of the Participants tab.
- You can also mute & unmute attendees individually by either selecting these buttons beside their name in the participants tab, or the top right corner of their video if you hover over it with your cursor.

SCREEN-SHARING:

- Sharing your screen will be the best way to display the Welcome Slide, as well as a PowerPoint if the event hosts/panelists wish to use this in their presentation to attendees.
- To share your screen, select the green “Share Screen” button in the middle of your Zoom taskbar once you have joined the call.
- All windows you currently have open will be displayed, allowing you to select which one you would like to screen-share.

- Select the Welcome Slide, PowerPoint presentation, or any other website, etc. that you would like to share. Once selected, this window will be displayed as the main screen for all attendees in the event and they can follow along in real-time.

**For the Welcome Slide, we recommend screen-sharing this prior to admitting attendees from the waiting room so that they see it immediately when joining the event.*

■ **Advanced Sharing Options (for added security):**

- Click the little arrow on the top right of the green “Share Screen” button, and select “One participant can share at a time” from the menu that appears.
- Select “Advanced Sharing Options” from the same menu
- Select “Only Host” for both questions: *Who Can Share?* and *Who Can Start Sharing When Someone Else is Sharing?*

CHAT:

- The Chat function can be found beside the Share Screen button on your Zoom taskbar.
- By selecting this Chat button, you can broadcast a message to all attendees or respond to attendees individually by typing in the chat box window that will pop up. You will be notified if an attendee sends a message in the chat.
- The chat will be pre-set as sending to all attendees in the event. You can see this as it will display as “To: Everyone” in the chat box.
- To send a message to an individual attendee, click the little arrow beside “Everyone”, then select the attendee’s name from the drop down menu that will appear. After selecting, the chat box should read as “To: Attendee’s name (Privately)”
- Messages sent to everyone may include an announcement or additional housekeeping item you want to broadcast during the event, or a response to a general question that was posted by an attendee in the chat. You may prefer to send a message privately if you are responding to a private question from an attendee, or perhaps aiding them with technical difficulties. Only yourself & the selected attendee will be able to view these messages and the chat history.
- You can also upload a file to the chat by selecting the “File” button on the right side of the chat box.

RECORDING YOUR EVENT:

- You may wish to record your Zoom event to be distributed to attendees as a follow-up, and/or for those who registered but could not attend.

****In order to record & distribute an event afterwards, all attendees must consent to being recorded. We recommend adding the following as a checkbox to your Registration Form:***

- **“By clicking this checkbox, you are consenting to being recorded for this event. The recording may be sent to parties who may or may not have registered for this event.”**
- We recommend to manually start the recording once you are on the Zoom call & the attendees have been admitted from the waiting room, rather than selecting the “Automatically Record” option in the initial setup. You can then avoid recording the briefing period when all hosts join early, and having to edit that out later.
- To begin recording at the start of the event, select the “Record” button beside the screen-share function on your taskbar.

- You can stop the recording anytime, or it will automatically stop when you end the meeting.

**The Breakout Room function will be covered in its own section*

4 MODERATING AN EVENT

- In addition to hosts, presenters, panel members, etc. for your event, you should ensure you have at least 1 or more moderators to help facilitate the event.
- These moderator(s) should not have any speaking parts (unless needed to help answer a question) - their sole focus will be to help control the back-end functions highlighted above, and provide technical support if needed.
- Having these moderators will help the presenters focus on their speaking points, and not the technical side of things.
- Moderators should be set as a co-host for the event, to ensure they have the necessary controls.
- It is **highly recommended** that all Presenters & Moderators on any given event are set as Co-hosts so if anyone experiences technical problems, and/or is kicked off the Zoom call, there are multiple people with the necessary controls to continue facilitating the event.

- **Suggestions for functions Moderators can be responsible for throughout the event:**

- Admitting attendees from waiting room
 - Monitoring the chat: answering the quick, simple questions directly in the chat and relaying more extensive questions to the presenters to be asked/answered verbally
 - Monitoring attendees (in the Participants tab) who use the Raise Hand function. Transitioning to these attendees' questions at a break in the presentation by notifying presenters there is a question.
 - Unmuting attendees who raise their hand when it is time for them to ask a question. Muting them when finished.
 - Managing breakout rooms. **Note:** *Only the main host of an event (the person who's account set up the call) has access to create & manage breakout rooms.*
- The Events Team is here as a service unit to you, and we are happy to act as moderators for different events. Please reach out if you require additional assistance as you prepare for, and execute, your event! For larger events, IT staff may also be made available if this is something you require.

5 UTILIZING AND MANAGING BREAKOUT ROOMS

- Breakout rooms are a great tool to use if your event requires moving attendees into smaller groups, different portions you would like to run simultaneously, or if a lecturer wants to divide their students into groups for an assignment or activity.
- Only the main host of an event can create & manage breakout rooms, co-hosts cannot.
- Before sending attendees to breakout rooms, provide clear instructions on when/how this will happen, and what will take place in each respective room.

- Breakout rooms are a great place to encourage more interaction, ideally through audio & video.
- If you have multiple presenters or panelists, make sure they are assigned to the correct breakout room. As a host, moderator(s) should move between breakout rooms during the session to check for any problems and/or help answer questions.

■ **At the end of the session, you can:**

- Bring all attendees back to the main room for closing remarks
- End the event for all while they are still in their breakout rooms
- Allow attendees to leave the event, without returning to the main room, if breakout sessions will be ending at different times

**Communicate to attendees what this process will look like beforehand*

CREATING BREAKOUT ROOMS:

- Once in your event, select the “Breakout Rooms” button on your taskbar.

■ **In the pop up window that appears, select:**

- The number of rooms you wish to create
- Select checkbox beside “Manually”
- Click “Create Breakout Rooms”

ASSIGNING ATTENDEES TO BREAKOUT ROOMS:

- In the new breakout room window, click “Rename” beside Breakout Room 1 if you would like to choose the name that attendees will see. Repeat for all rooms to give each one the same or a unique name.
- To add attendees to their room, click “Assign” beside the room name. A drop-down menu will appear with names of every attendee in the event. Select the checkbox beside each attendee you would like in this breakout room. Repeat for all rooms.
- Click “Open All Rooms” when you are ready to invite & move attendees into their respective breakout room.

CONTROLLING BREAKOUT ROOMS:

- As a host, click “Join” to insert yourself into any of the breakout rooms. To leave the room, click “Leave Breakout Room”.
- Click “Broadcast Message to All” to compose & send a message to all breakout rooms.
- Click “Close All Rooms” to invite everyone back to the main room.

PRE-ASSIGNING BREAKOUT ROOMS:

- As a meeting host, you can split your attendees into breakout rooms when initially setting up the meeting. This can be useful if you already know how you want to split everyone up.
- You can only pre-assign attendees who have a Zoom account. When joining the event, attendees need to be signed into their Zoom account for the pre-assignment to apply.

■ **To Pre-Assign:**

- Sign in to your Zoom account on the web (<https://westernuniversity.zoom.us>), not on the app.
- Click “Meetings” and “schedule a meeting”.
- In the Meeting Options section, select “Breakout Room Pre-Assign” and click “Create Rooms”.

- Click the plus icon beside “Rooms” to add breakout rooms.
- Hover your cursor over the default room name and click the pencil icon to rename it.
- In the “Add Participants” text box, search for participants’ name or email to add them to the breakout room.
- Click “Save”.

■ **Editing the Breakout Rooms Assignment:**

- If you have already pre-assigned attendees to breakout rooms, you can edit the assignments before you start the event.
 - Sign in to your Zoom account on the web.
 - Click “Meetings” and select the meeting you want to edit.
 - In the Breakout Room section, click “View Detail”.
 - Edit the breakout rooms as needed. You can move attendees between rooms, delete or add breakout rooms, etc.
- Once you start your event, you can access & manage the breakout rooms using the same inmeeting controls as explained above.

6 **EVENT REGISTRATION FORMS**

- Creating a Zoom event that requires registration will allow attendees to register with their name, email, and other custom questions for information you wish to collect beforehand. You can also generate registration reports if you want to download a list of people that registered.

ENABLING REGISTRATION FOR A MEETING:

- Sign in to your Zoom account on the web browser (not in the app), and click the “Meetings” heading.
- Select “Schedule a New Meeting”, or you can edit an existing meeting.
- In the Registration section of this setup, select the checkbox “Required”.
- After scheduling the meeting, the registration & branding tabs will appear.
- To manage attendees, click “View” to see a list of people that have registered for the event. Clicking on a registrants’ name will provide additional info about them from the form.

CUSTOMIZING REGISTRATION OPTIONS:

■ **After you schedule the meeting, you can customize the registration options by:**

- Clicking the “Registration” tab
- In the “Registration Options” section, click edit.

■ **You can customize the following options for event registration:**

- 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
- Send email to host when someone registers. Attendees will receive an email when they successfully register.

- Close registration after event date. Check this option if you want to prevent anyone from registering after the event date and projected end time. Attendees can still register on the event date and once it starts, as long as it is before the projected end time of the event. For example, if you schedule your event on Zoom for 9am with a duration of 2 hours, the registration will close at 11am. People who register right before the end time will then have access to a recording, if this is something you choose to send out after the event.
- We recommend disabling “Show social share buttons on registration page”.
- Add the question fields that will appear on your registration page by selecting from Zoom’s pre-set options. You can also add your own custom questions to collect additional information you may need.

CUSTOMIZING BRANDING:

- After you schedule your event, click the “Branding” tab to customize visual options for your registration page.

■ These can include:

- A banner across the top of your registration page. Click “Upload” to add an image.
- A logo that appears to the right of the meeting topic on your registration page. It will also appear in the email invitation. Click “Upload” to add an image.

ADDITIONAL NOTES:

- You can choose to “Save as a Meeting Template” to allow you to save all your settings, registration options, branding, etc. You can then select “Meeting Templates” from the Meetings tab, and “Schedule Meeting with this Template” as a quick & easy way to setup for future events. You then just have to edit the title, date & time.
- The registration link can be sent out to all invitees via email communications, etc. Upon registering, attendees will immediately receive an email with the link to your Zoom event.
- Following your event, you can click on the “Reports” tab in your web settings to view a report on the attendees that joined your event, for how long, etc. to track attendance. You can also generate reports on Polls or other functions you may have used during the call.

EVENTS TEAM:



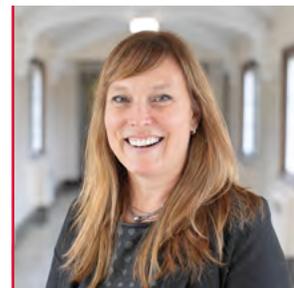
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Once again, the Events Team is here as a service unit to you! Please reach out for assistance after you’ve setup your Zoom event, or if you would like to review/clarify anything from this document. We are happy to meet with you to ensure all settings are correct, host a practice session with you, and support you in any other way we can!