Webinar Series

How to Zoom - Essential Tools

By Miguel Pacheco
Miguel Pacheco is a seasoned Instructor and nonprofit professional with more than ten years of leading technical training in higher learning, community organizations, and government contracts.

He was previously a visiting Instructor at the City University of New York (CUNY) teaching courses in Finance, Programming, Software Development, and Web DevOps.

Miguel has also launched multiple tech startups in software and web development training. Before joining the Hispanic Federation, he helped CUNY in the launch of its first software Bootcamp, at Queensborough Community College. He also served on the advisory board of CUNY's TechWorks program, assisting in the curriculum development of computer science courses, with an emphasis on project-based learning.
You are muted upon entry into the webinar

Click the Q&A icon to submit your questions anytime.

Like submitted questions to ensure they get asked

Use chat for comments or to elaborate on surveys

We will send you the recording
How to Zoom – Essential Tools
AGENDA

1. Meeting and Webinars
2. Settings
3. Zoom Graphical User Interface
4. Reports & Recording

Zoom
Essential
Tools
1. How many meetings and webinars do you host every month?
   a) 0-5
   b) 5-10
   c) 10-20
   d) 20+

2. Which subscription level do you or your organization currently have?
   a) Free Basic Plan
   b) Pro
   c) Business
   d) Enterprise
   e) I don’t know
Basic Term Definitions

Host
The host has control over all functions and features in both meetings and webinars

Participant and Attendee
Invited guests

Panelist
Guest Speakers
Meeting and Webinars

Selecting the correct meeting type

**Meeting**
- Ideal for hosting more interactive sessions
- **All participants can mute/unmute their own audio**
- Host can mute/request to unmute participants
- The Host can set all participants to mute upon entry

**Webinar**
- Webinars are ideal for large audiences or events that are open to the public
- Only the Host and panelists can mute/unmute their own audio
- **Attendees join in listen-only mode**
- The Host can unmute one or more attendees
- Participant list visible to host and panelist
Meeting and Webinar Capacity

Meeting
- Up to 100 with free license, up to 1,000 depending on plan and large meeting add-on.
- No QA option
- Chat feature
- Non-verbal feedback

Webinar
- Up to 100-10,000 participants, depending on the license.
- QA Option (upvote and comment)
- Raise Hand, Chat option for attendees
- Attendees join in listen-only mode*
Upon registering for zoom, the zoom member is given a unique zoom id known as a PMI.

A PMI is a dedicated 10 digit number which is assigned to each individuals account. This becomes the user personal virtual room.

NOTE: Once a participant has the link to your PMI, they can join it at any time the meeting is in use.
Profile Settings

Zoom profile

- The Account Profile page gives you the visibility of your basic account information. An account can include an entire company or an individual user, depending on your subscription plan level.

- Change default picture – This is the picture everyone will see when video feed is turned off.
Profile Continued

Zoom desktop client

- The zoom desktop client is useful to set audio and video settings. For instance virtual backgrounds, profile pictures, chat, meeting calendars, or joining a meeting with a PMI.
Scheduling a meeting Settings

General Settings

• Scheduling a meeting settings allows you to enable or disable features

• **Host and participants video** - Enable or disable upon entry

• **Join before host** - Allows participants to enter the meeting room without the host

• **Audio type** – Host can restrict meeting for computers or telephones only

• **NOTE:** Some features can be enabled/disabled when Scheduling a meeting
In Meeting Settings
Basic settings

- **Chat** - can be turned off for participants
- **Polling** - can be enabled within the meeting
- **Renaming** and **Profile Picture** for participants can be enabled
- **File Transfer** - enable/disable for everyone in your meeting to share files
- **Screen sharing** - enable or disable for participants
- **NOTE:** Some features can be enabled/disabled when Scheduling EACH meeting
In Meeting Settings
Advanced Settings

- **Breakout rooms** - mostly used in academics, they allow the host to assign participants in groups

- **Closed Captions** and **Language interpretation** require third party or another host to type or audio translate

- **Waiting room** – Permits hosts to select participants for their meeting by bringing all participants to a waiting room

- **Live Streaming** – can be set to enable and function via the zoom toolbar

- **Virtual Background** – This feature allows participants to select an image as background under camera settings

- **NOTE**: Some features can be enabled/disabled when Scheduling a meeting
Scheduling a meeting

Meeting settings

- **Topic & Description** - This is what people will view when registration is enabled or sharing the invitation via zoom.

- **Duration** - Meeting will not cancel if it goes beyond the set time duration.

- **Registration** – if enabled, participants will require to register via a link.

- **Meeting Password** – Adds a layer of security to your meeting. Only participants with the password can enter.

- **Muting Participants upon entry** - Participants can be muted upon entry. However, during a meeting they can unmute themselves.

- **NOTE**: Some features can be enabled/disabled for all meetings under settings.
Meeting Invitation
Sharing meeting invite

- Zoom generates a link for sharing the upcoming meeting
- The host can either share the link or send an invitation using the zoom meeting invitation
- Meeting invitation includes dial in phone number
- **NOTE**: Link can be access through mobile device or computer. Dial in participants would need the meeting id and password
Meeting Toolbar

Participant View
Meeting Toolbar

Mobile View

Access Camera Settings

Headphones Audio Settings

Dial in

More - Interactive

Video Preview

Unable to access camera
Allow Zoom to access your camera from device menu: “Settings” - “Privacy” - “Camera”

OK

Join with Video

Join without Video

To hear others please join audio

Call using internet Audio

Dial in

Cancel

Chat

Meeting Settings

Cancel
Meeting Toolbar
Sharing Screen

Select a Screen to Share

- Screen
- Whiteboard
- iPhone/iPad

Share computer sound
Optimize Screen Sharing for Video Clip
Share
Questions?
Webinar Settings

Scheduling a webinar

- 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.

- **Registration** - Enabled to capture data

- **Enabling practice session** - Allows for host and panelists to enter the webinar room before the live broadcast

- **NOTE:** Attendees will not be able to enter the room until live broadcast begins
Webinar Registration

- Customize the registration process for webinars, such as approving attendees, enabling email notifications for registrations, and adding registration questions

- **NOTE**: Webinar Capacity for this account is set to 500 attendees
Webinar Registration

- Automatically approve or manually approve registrants
- Allow for registrants to share via social share buttons on registration page
- Enable attendees to join using mobile devices
- **NOTE:** If enabled, notifications to the host can be sent when someone registers (Not recommended)
• **Confirmation Email** sent to registrants can be customized

• Default meeting **subject** topic

• Edit **body of the email** message of the email

• **NOTE**: Confirmation email are sent to all approved registrants
Registration Continued

• **Registration** questions can be added from the list or host can create custom questions

• The host can either share the link or send an invitation using zoom invitation template

• **NOTE**: Link can be access through a mobile device or a computer
Branding

- **Banner** – Top of Registration page
- **Logo** – Side of Registration page
- **Post Survey** – After the webinar ends, attendees can provide feedback
Registration Sample

- Upon registering, attendees are provided with the link to access the webinar.
- **NOTE**: Link can be shared, however, the name of the registrant can appear multiple times.
Panelist Invitations

- **Panelist** invitations are only done via the zoom webinar settings.
- **Name** and **email** are required for panelists to receive an invitation from zoom.
- **NOTE**: Panelist invitation links are unique to each speaker. Sharing panelist link is NOT recommended.
Polls and QA

- **Polls** can be added before the webinar begins (recommended) or during the webinar or meetings.

- **QA** can be set up to allow anonymous questions and for attendees to upvote questions in the queue.
Webinar Toolbar
Host View
Webinar Toolbar
Attendee View

• No **Audio** or **Video** settings

• **Raise hand** option can be enabled or disabled

• **Chat** comments can be sent to panelists or panelist and all attendees

• Attendees can **dial-in** to hear audio. Phone number are sent with the registration confirmation email
Webinar
Mobile View

- Attendees can enter a webinar via their mobile devices
- Panelist speakers can also use their mobile devices
- **NOTE:** Audio is always better with a microphone or a built-in computer mic. Mobile devices can make the speaker sound far or lead to high level of static
Meeting and Webinar Reports
Download all Reports

- **Registration** Report displays a list of registrants and their registration details.
- **Attendee** Report displays details about each attendee.
- **Performance** Report displays engagement statistics on registration, attendance and feedback.
- **Q&A** Report displays questions and answers from the webinar.
- **Poll Report** displays each attendee poll result.

**NOTE:** Attendee Report, Performance Report, Q&A Report and Poll Report are available after the webinar has ended.
Recording

• **Recordings** can be enabled via the zoom toolbar. Hosts can record locally to their computers or in the cloud (recommended).

• Upon **completion** of the webinar or meeting, the host can edit the video using zoom “My Recordings” (20 minutes after event).

• **NOTE:** If recording locally to the computer more editing might be needed.
Helpful Tips

• Muting and unmuting are essential for smooth zoom events
• Establish meeting and webinar housekeeping rules in the beginning of all your events
• Make use of the practice mode for webinars by inviting panelists 30 minutes before broadcast
• Secure your meetings by using a password
• Review your surroundings before meetings and webinars
• Build a team for your webinars. For instance, management of polls, audio, ppt slides, and Q&A.
• Rehearse webinars, possibly a day before the main event
• Record in the cloud not the local computer
• Encourage panelists and attendees to use their computers for better audio and video feed
• **Dress Professionally if hosting a Webinar 😊**

https://support.zoom.us/
Questions?