COLLEGE of AMERICAN
PATHOLOGISTS

Zoom Meetings

Zoom Meeting Admin (ZMA) Reference Guide

WORK-IN-PROGRESS Document
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ABOUT THIS DOCUMENT

This document is intended to be a handy reference guide for the Zoom Meeting Admin (ZMA) for planning and conducting Zoom based Committee and Council meetings. Please be aware that a companion document (the '***Checklist for ZMA***') provides a checklist of tasks for planning and conducting a Zoom meeting.

HELPFUL HINTS:

- When creating a Zoom meeting, the ZMA can designate an '**Alternate Host / Co-Host**' (an alternate host has the same rights as the meeting creator). *However*, an Alternate Host should have:
  - a (paid for) Zoom meeting **license**
  - an email that belongs to the same **email domain** (e.g. @cap.org) as the meeting creator

  EXCEPTION: Once the meeting is started, the host can designate any meeting attendee (CAP staff of Member) to become a co-host
- Attendees can run a self-test to check microphone and speaker sound quality by visiting http://zoom.us/test before the scheduled meeting

BEST PRACTICES FOR CREATING A ZOOM MEETING INVITE

Below are a list of best practice settings/selections to be made when creating a Zoom meeting. In consultation with your meeting chair, you may choose these settings/selections:

To create a Zoom meeting, click on the '**Schedule a Meeting**' Zoom icon in Outlook and then click on '**Advanced Options**' in the subsequent pop-up. This will bring up an interface similar to the screenshot above. Therein:

1. **Meeting ID**: ensure that the '*Generate Automatically*' option is selected
2. **Password**: ensure that the '*Require Meeting Password*' option is selected
3. **Audio**: ensure that the '*Telephone and Computer Audio*' option is selected
4. **Enable Waiting Room**: select this option; meeting attendees will not be able to enter the meeting until you or the Alternative Host explicitly allows them in. This helps ensure meeting security.
5. **Mute participants upon entry:** select this option; this will minimize open mics and the disturbance they cause when participants enter a meeting
6. **Alternative hosts**: if possible, designate at least one more CAP staff to be the alternative host – the alternative host will have the same meeting rights as you and can start the meeting if you are running late. (NOTE: Alternative host too should have a Zoom meeting license; *workaround* detailed in the '*Assign Co-Host After Meeting Starts*' section of this document)
7. Be sure to attach your Committee or Council specific '**Zoom Meeting Housekeeping**' slides as an attachment to your meeting invite and request the meeting attendees to review them in advance

RECORDING A MEETING

<< DO NOT RECORD ANY COMMITTEE OR COUNCIL MEETINGS TILL LEGAL CONFIRMS THIS. GOVERNANCE IS WORKING WITH LEGAL ON THIS >>

NOTE:
- By default, only the host or alternative / co-host host can record a meeting
  NOTE: recordings started by the alternative hosts will appear in the host's web portal, not co-host's
- The host can allow any participant to record the meeting by giving that named participant an explicit permission.
- Participants joining via their mobile devices cannot record to their device; they need to have a paid for Zoom license that allows for cloud recording
- When a meeting is recorded in the cloud, the video, audio, and chat text are all recorded in the Zoom cloud. Only chat messages sent to everyone will be part of cloud recording.
- Recorded files are be downloaded or streamed from a browser.
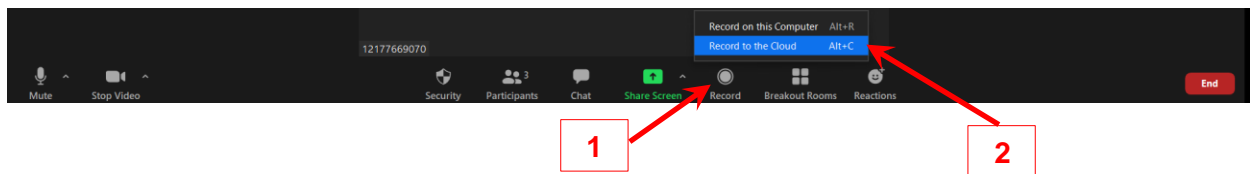
To record a meeting:
1. Once in the Zoom meeting, click on '**Record**'
2. Then, select '**Record to the Cloud**'
3. Once a recording is started:
   - **Phone only participants**: will hear a '*This meeting is being recorded*' message
   - **Video participants**: will see a '*Recording*' notification on their screen
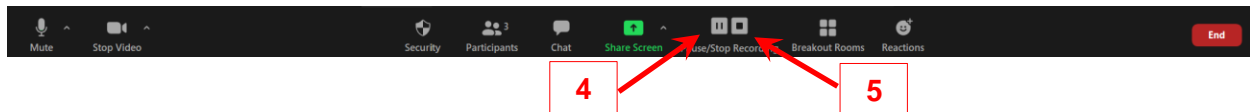
Once a recording is started, two new icon will appear in the black bar that allows you to:
4. **Pause Recording**: to temporarily pause recording
5. **Stop Recording**: to end recording and to process the recording

Once the recording is processed, an email will be sent to the meeting host.

Additional details and video available at https://support.zoom.us/hc/en-us/articles/203741855-Cloud-recording

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MERGING AN ATTENDEE'S DIAL-IN AUDIO WITH VIDEO FEED

Sometimes, a meeting participant may choose to join the meeting audio via their desk phone and join the video feed through their computer. In such cases this participant will appear twice in the participant's list, once as the phone number they've dialed from, and then as the name on their video feed. This can be confusing to other participants and challenging for the ZMA to unmute if many participants choose to use their desk phone for audio, and their computer's web cam for video.

Fortunately, Zoom allows the ZMA to 'merge' a participants phone dial-in with their video feed.
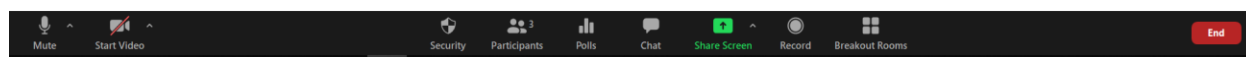
1. Click on '**Participants**' icon in the black bar; this will bring up a list of participants as shown in the dialog box below
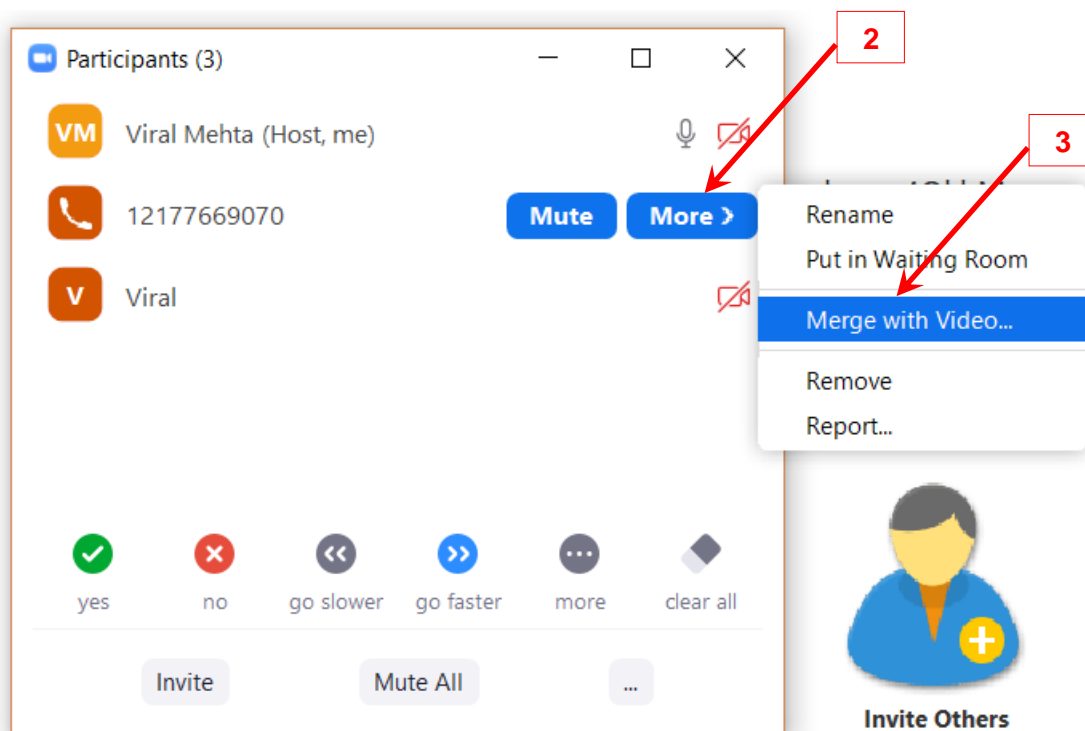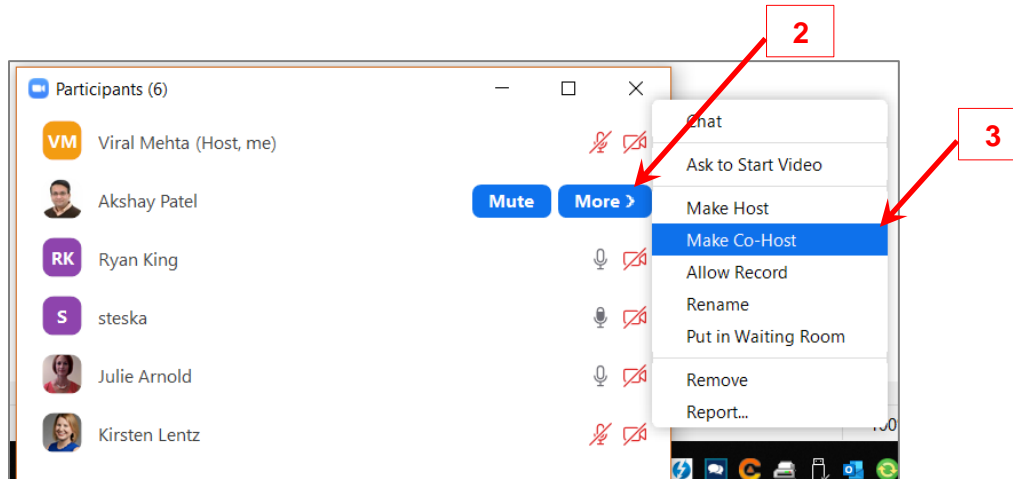

2. Click '**More**' next to the phone number you want to merge
3. Then click '**Merge with Video…**'
4. The subsequent pop-up will list names of participants without an audio feed; select the appropriate name

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ASSIGNING A CO-HOST/NEW HOST AFTER MEETING STARTS

A co-host has the same rights as a meeting host – co-host can start & stop a meeting, assign privileges to attendees, stat/stop/pause recording, etc. The meeting host can assign co-host privileges to any attendees (CAP staff or Member) once the meeting has started. To do so:

1. Click on '**Participants**' icon in the black bar; this will bring up a list of participants as shown in the dialog box below
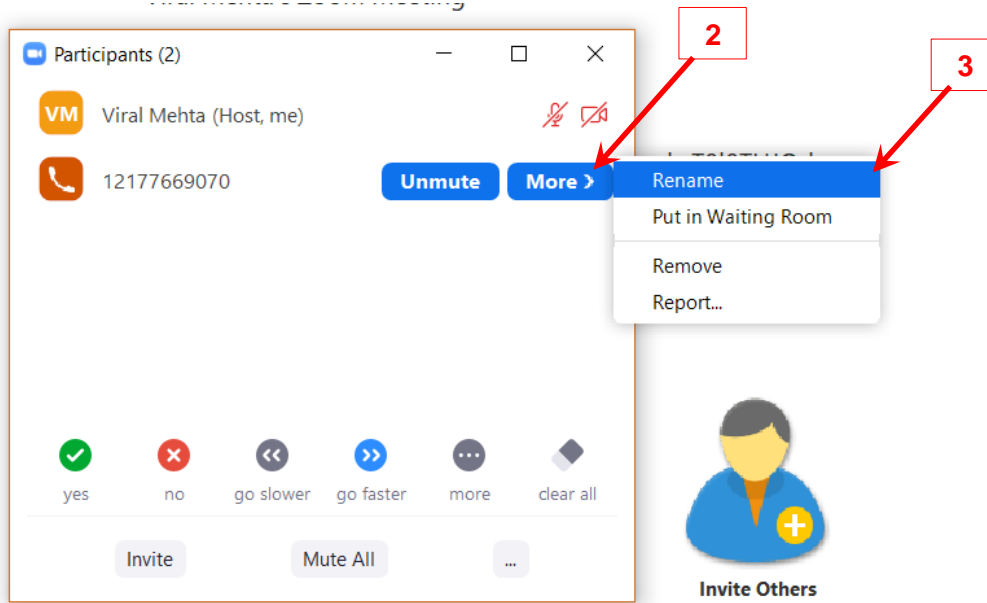

2. Click '**More**' next to the name of the person you want to assign co-host rights
3. Then click '**Make Co-Host**' (or '**Make Host'**)
4. A subsequent pop-up will ask you to confirm your choice for co-host. Click '**Yes**'

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CHANGE AN ATTENDEE'S PHONE NUMBER TO A NAME

If a meeting participant uses a phone dial into the meeting, then Zoom displays that phone number. This may make it hard for other participants to know who that person is, especially if that person is speaking. The meeting host/co-host can rename that phone number to the a name as shown below:

1. Click on '**Participants**' icon in the black bar; this will bring up a list of participants as shown in the dialog box below

2. Click '**More**' next to the phone number you want to rename
3. Then click '**Rename**''
4. In the subsequent pop-up, type in that person's name and click '**OK**'

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UNDERSTANDING THE ORDER OF RAISED HANDS

The list of participants who have raised their hands is available by clicking the '**Participants**' icon in the black bar. Names of participants is listed in the order in which they were raised. Thus the raised hand at the top of the participant list has been raised for the longest, the second raised hand in the participant list has been raised for the second longest, and so on down that list. This should help you determine priority for allowing attendees to ask questions.

Once an attendee raises their hand, Zoom elevates his/her name in the list of participants and will be placed in a queue that prioritizes attendees who have raised their hands before that attendee. This priority list of hand raisers is correctly visible to the host and the ZMA; given how Zoom arranges attendee names in the participant list an attendee may not see the relative position of their raised hand vis-à-vis other hand raisers in that meeting. Zoom lists all participants using the following schema:

1. < Attendee's name first >
2. Host(s)
3. Co-host(s)
4. Prioritized list of participants who have raised their hands, starting with the oldest hand raise
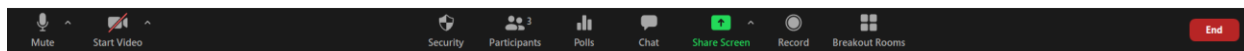5. All other participants

Attendee's name is always displayed

Next, the host name(s)

Then, a prioritized list of 'Hand Raisers'; oldest first

Everyone else
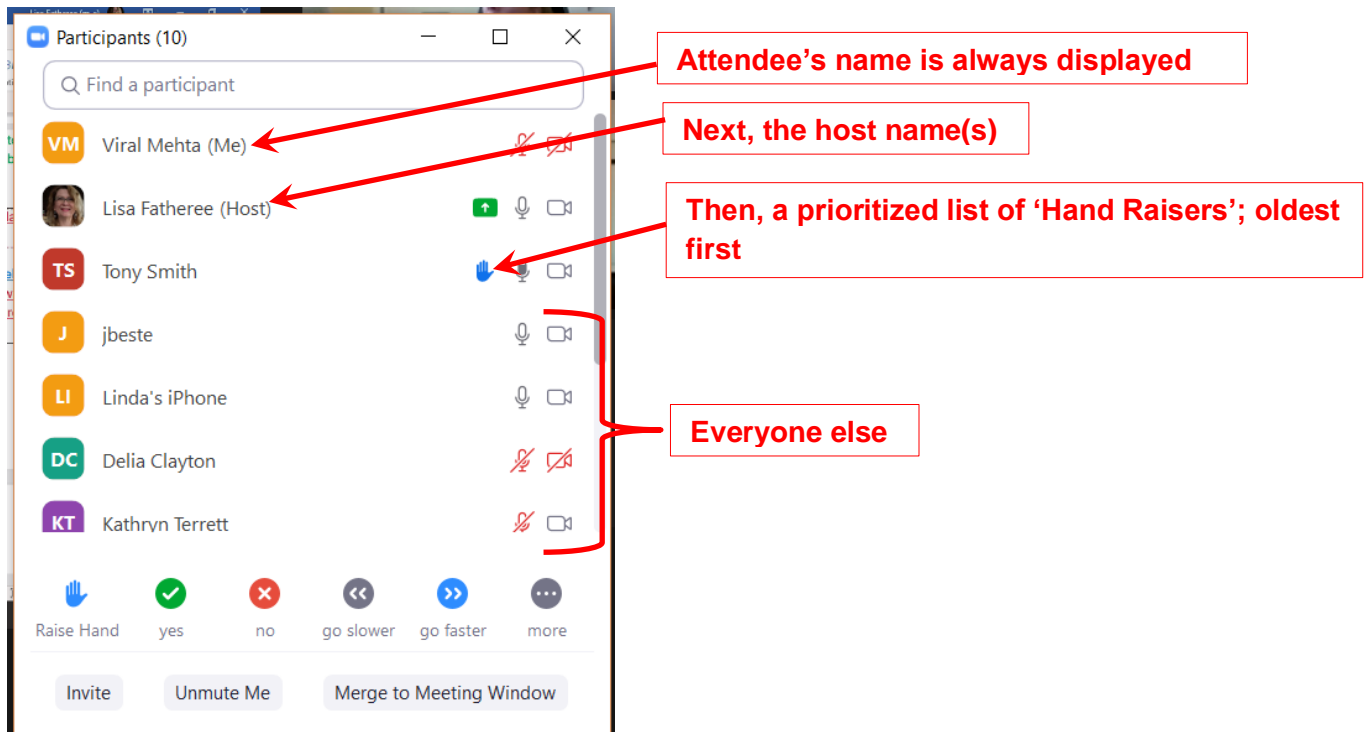
TIP: Be sure to lower the attendee's hand once they've asked their question!

TIPS FOR USING THE 'WAITING ROOM' FEATURE

When the '*Enable Waiting Room*' option is selected, attendees are put into a waiting room till the meeting host/co-host admits them.

Admitting attendees from waiting room into meeting

'Participants'

- Click '**Participants**' icon in the black bar; this will bring up a list of participants waiting to be admitted to the meeting
- Then, click either '**Admit**' next to an attendee's name to admit only that attendee, or '**Admit All**' to admit all waiting attendees

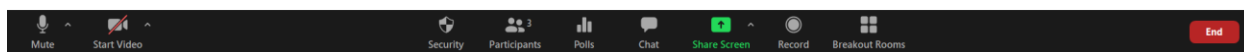## Placing meeting attendees in the waiting room

Sometimes it may be necessary to excuse a meeting attendee for part of the discussion. While that attendee can certainly log off and then log back into the meeting, another option available to be ZMA/co-host is to put that attendee in the waiting room. To do so:

1. Click '**Participants**' icon in the black bar; this will bring up a list of participants waiting to be admitted to the meeting
2. Click '**More**' next to that attendee's name and then select '**Put in Waiting Room**'
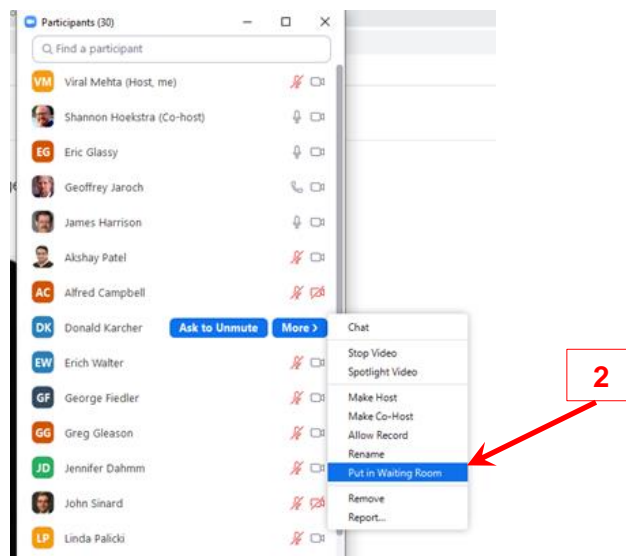
Sending a message to waiting room attendees

The meeting host/co-host can send a message to attendees in the waiting room to inform them that they will be admitted soon, the previous discussion is running over by *x* mins, etc. To do so:

'Chat'

- Click the '**Chat**' icon in the black bar
- In the dropdown next to '**To**' select '**Everyone (in Waiting Room)**'
- Type and send your message; this message will be displayed to all attendees in the Waiting Room

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CREATING A POLL

Zoom allows for in-meeting polls/surveys; polls can be conducted anonymously or not. As a courtesy, let your attendees know if the poll is being fielded anonymously or not.

NOTES:
- Only the original meeting host (creator of meeting) can create a poll. Co-hosts can launch an existing poll but not create one
- Polls are available for scheduled meeting only, not impromptu meetings i.e. meetings set up via Outlook/Zoom's web portal and wherein attendees are invited via email/meeting links.
- To create a poll before the meeting, login to Zoom's web portal at www.zoom.com

Creating a poll BEFORE the meeting *(only the original meeting host/creator can do so)*
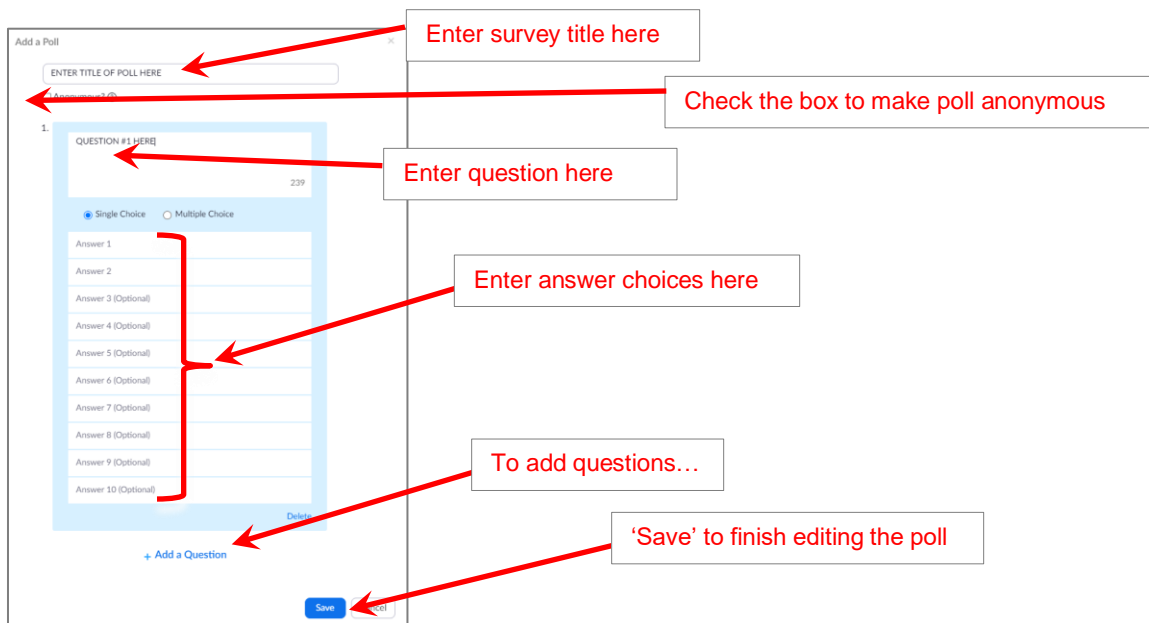1. Go to **www.zoom.com** and then login to your Zoom account
2. After logging in, click '**Meetings**' link in left hand
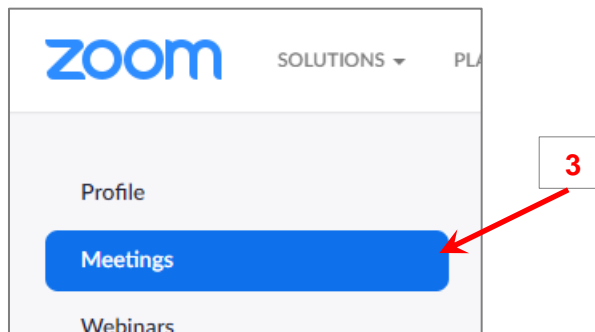
3. Select the appropriate meeting
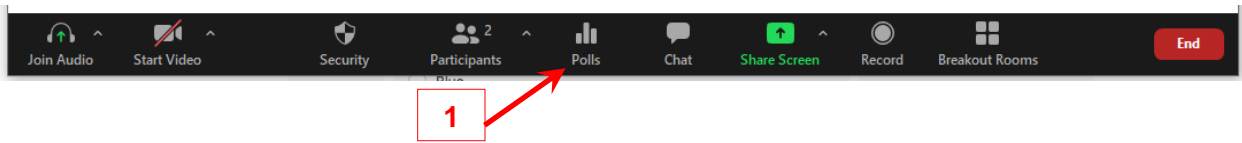4. Then scroll to the bottom of the page and click '**Add**' to create a new poll
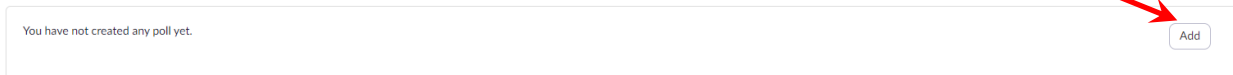
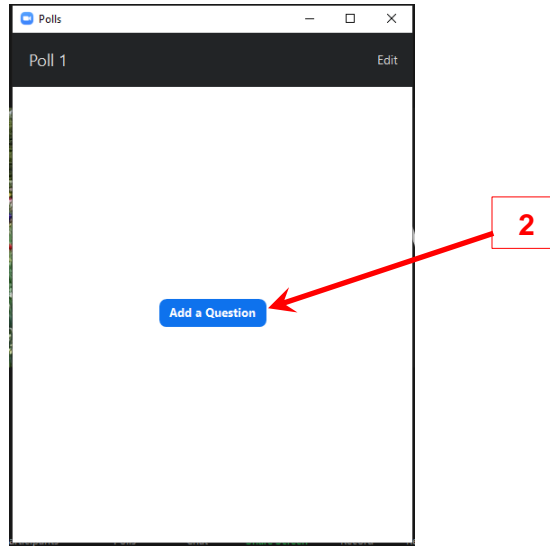5. When prompted, complete the subsequent fields to include a title, question(s) and answers

Creating a poll DURING the meeting *(only the original meeting host/creator can do so)*

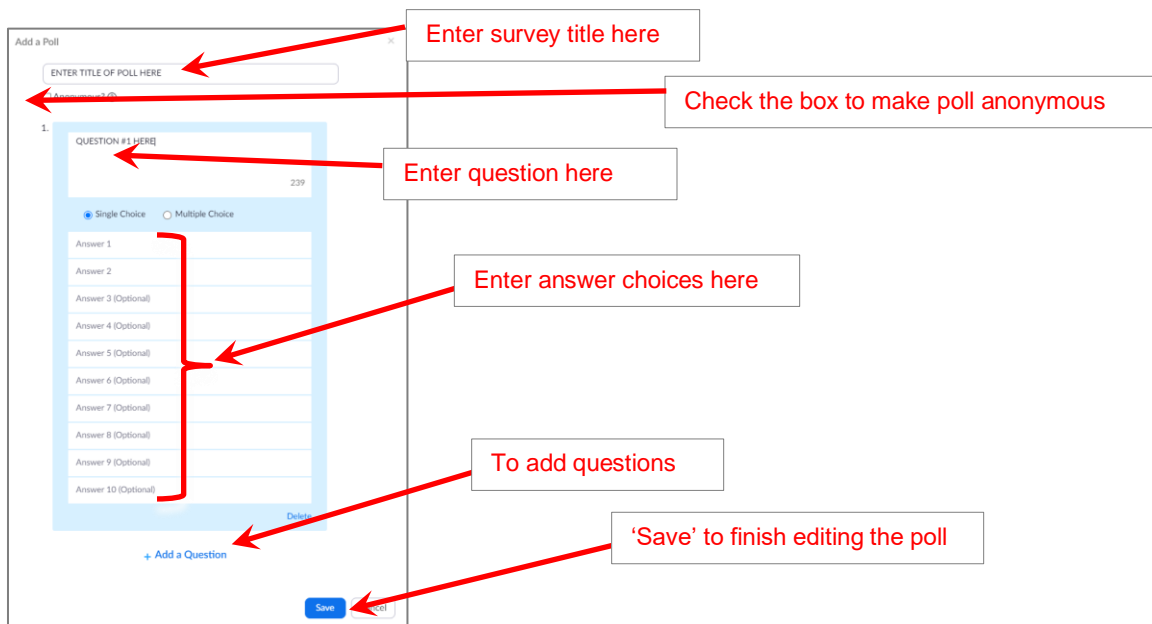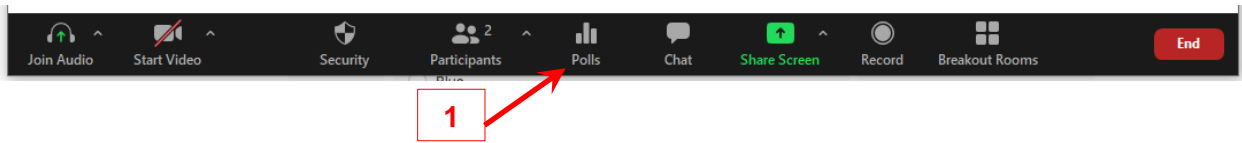1. Click '**Polls**' in the black bar

2. Then click 'Ask a Question'

3. You will then be redirected to Zoom's web portal

4. When prompted, complete the subsequent fields to include a title, question(s) and answers

Launching a poll *(a co-host or alternative host can launch a poll in absence of the original host)*

1. Click '**Polls**' in the black bar

2. Then '**Launch Poll**' in the dialog box; the poll will now appear within the Zoom window for all meeting attendees (if an attendee does not see the poll, ask them to click on the '**Polls**' icon in their Zoom window)

3. The dialog box will show progress as attendees complete the poll
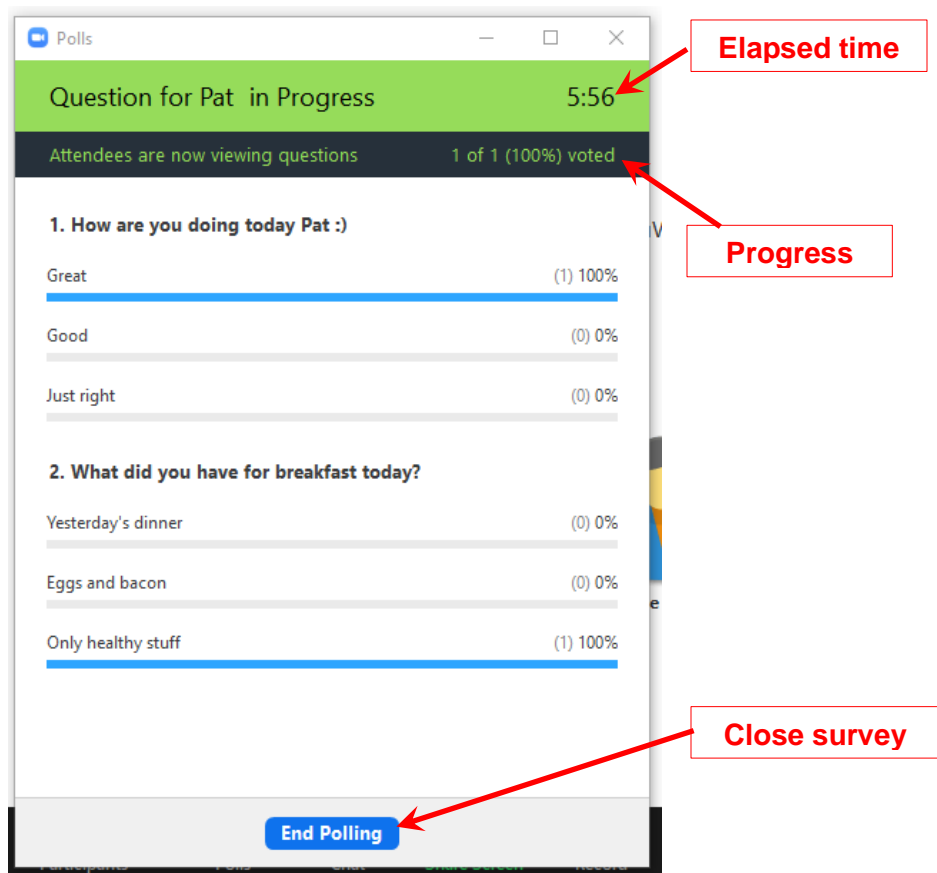
4. To share poll results with all attendees, click '**Share Results**'

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