



KCN Guidance on Setting Up Zoom Pro Plan

Local programs –

See below for guidance from the KCN regarding hosting a Zoom meeting using the paid Pro Plan. Note that this will be similar if you are using the free Basic Plan, but some options may not be available to you. For additional guidance, you can view [video tutorials from Zoom](#) and/or [contact Brittany](#).

When you are [setting up your account](#) and [scheduling new meetings](#), the KCN recommends you do these tasks on the web version of Zoom at <https://zoom.us/>. You should also [download the Zoom application](#) to your computer to enable more controls for when you are starting and [hosting a meeting](#).

Setting Up Your Account

Once you have logged in and are in the **My Account** section, you can set up default settings for your meetings. Some suggested settings include:

- **Under ‘Meeting,’ enable:**
 - Audio Type: Telephone and Computer Audio
 - Join Before Host (if you want participants to be in the meeting before the host actually starts the meeting)
 - Chat and Private Chat (allow participants to send message to others in the meeting)
 - Auto Saving Chats (a transcript of the chat will be saved to your computer)
 - File Transfer (allows participants to share documents via the chat box during the meeting)
 - Polling (must be enabled if you want to include any polls during the meeting)
 - Screen Sharing (allows both host and other participants to share their screen to show documents and/or presentations)
 - Nonverbal Feedback (allows participants to click a quick button for feedback vs typing into the chat box)
 - Show a “Join from your browser” Link (allows participants to click a link to load the meeting vs having to download Zoom to their computer)
- **Under ‘Recording,’ enable:**
 - Local Recording (allows you to save a recording to your computer vs saving to the Zoom Cloud to save space in the cloud)

Scheduling a Meeting

When you are logged in to your account, if you don't see the **Schedule a Meeting** button, click on **My Account** and then click **Schedule a Meeting**.

- Enter general meeting information, including **topic, date, duration, and time zone**
- If this is a recurring meeting, check the box and enter in the relevant information
 - You may have a recurring meeting if you are planning a weekly staff meeting or if your VCs are planning regular check-ins with volunteers
 - If you have a recurring meeting that will happen irregularly, you can save this meeting as a template rather than checking the 'recurring meeting' box ([click here for more information](#))
- **Registration**
 - If you would like to know beforehand who is going to be in the meeting, registration is recommended ([click here for more information](#))
 - If you are just wanting to set up an impromptu meeting, you do not need to set up registration
- Select a **Meeting ID** – 'Generate Automatically' is recommended
- **Meeting Password**
 - If your meeting will involve confidential discussions, you can set a meeting password that you share with participants
- **Video**
 - In this section, you are deciding whether you want the host and participant video (webcam) to be automatically started (**on**) or not (**off**)
 - If you want participants to have their videos on at some point in the meeting, it is recommended that you select **ON** for this setting because your participants may find it challenging to start the video themselves
- **Audio** – 'Both' (telephone and computer audio) is recommended
 - **Note:** KCN has found that telephone audio is clearer and provides less of a "techy" background noise than the computer audio. If you have participants using telephone audio, make sure they enter in their 'Participant ID' (automatically generated for them) so that their audio and video are connected in the participant list. Also note that telephone audio may not be available for the free Basic Plan.
- **Meeting Options**
 - 'Enable join before host' is recommended so that your participants can get their audio and video set up prior to the start of the meeting
 - If you are looking for a 'webinar'-like setting, 'mute participants upon entry' is recommended. Note that all participants are able to unmute themselves and that the host is able to mute/unmute all participants at any point during the meeting.

Sending a Meeting Invite Without Registration

- Once you have saved your meeting information (without selecting that Registration is required), you will be able to see the summary of the meeting information.
- Next to 'Invite Attendees,' click **Copy the Invitation** and then click **Copy Meeting Invitation**

- In your calendar invite and/or email to participants, paste the meeting information.
 - **Note:** There is WAY more information on this invitation than your participants actually need. We recommend deleting the unnecessary information so that your invite looks like this (note that underlined sections should be customized based on your meeting):
 - **PROGRAM is inviting you to a scheduled Zoom meeting.**
Topic: MEETING NAME
Time: Mar 18, 2020 06:00 PM Eastern Time (US and Canada)
Join Zoom Meeting: <https://zoom.us/URL>
Meeting ID: 123-456-789
Dial-in by phone: (929) 436-2866
 - Also note that you should just pick one of the phone numbers listed under ‘dial by your location’

Sending a Meeting Invite with Registration

- If you selected that Registration was ‘required,’ you can customize a few things before you send your invitation. These settings can be set up once you have saved your meeting and if you scroll down to the bottom of the page.
 - **Registration > Manage Attendees** – ‘View’
 - You can view who has registered for your meeting here. Note that you cannot export registrants from this page. For more information on exporting, click here.
 - **Registration > Registration Options** – ‘Edit’
 - **Registration**
 - You can either automatically or manually approve registrations. If you are sending the registration link directly to staff and/or volunteer, we recommend automatically approving registrations to save yourself an extra step. If you are concerned about who may have access to the link, then you can select manually approve.
 - The Notification setting enables sending an email to the meeting host when someone registers
 - **Questions**
 - You can select additional questions to be included in the registration process. You may use this feature if you wanted to include the option for registrants to provide questions/comments prior to the meeting
 - **Custom Questions**
 - If you wanted to be more specific with your questions/comments box, you could ask something like: What questions do you have about X topic that you would like addressed during the meeting?
 - **Email Settings > Email Contact** – ‘Edit’
 - You can edit the host’s email for this particular meeting. For example, if your account’s email is an info@email.org address but you wanted a specific VC to be the point of contact for a meeting, you can change this

here. This will also be the email that receives registration notifications if you selected that setting.

- **Email Settings > Confirmation Email to Registrants** – ‘Edit’
 - You can customize your email confirmation in a few places on this page. You may need to remind participants to review a certain chapter, etc. prior to the meeting.
- **Branding**
 - If you choose, you can have your logo and/or a header applied to the registration page.
- **Poll**
 - If you want to have any polls launched during the meeting, you have to set them up beforehand. This is where you set up the polls for the meeting.
- Once you have set up all of these settings to your liking, you can send the registration invitation to participants. Scroll back up to **Invite Attendees** and select **Copy the Invitation**
 - It is recommended that you **Copy Meeting Invitation** and send in an email to your participants or send via calendar invite.

Save as Meeting Template

- If you have created a meeting and plan to use the same settings for upcoming meetings, it is recommended that you save the meeting as a template so that you don't have to input all the settings again. Note that ALL settings will be copied (including host email, if you enable registrations).
- Once you have saved the meeting, scroll down to the bottom of the page and click **Save as a Meeting Template** and then name your meeting template.

Viewing and Exporting Meeting Registrants

- If you enabled meeting registration, you can view who has registered for your meeting.
- To simply **view** registrants, follow instructions [in this section](#).
- To export the registration list to Excel, go to **My Account > Account Management > Reports**
 - Scroll down and click on **Meeting**
 - Report type: **Registration Report**
 - Enter date range to include the date of your upcoming meeting
 - Select your meeting and click **Generate**
 - Once you initiate your report, it will take a few minutes to process, at which point you can download the Excel/CSV file to your computer to view all registrations

Hosting a Meeting

- Start the meeting by either using the link generated from the meeting invitation or by launching the Zoom application on your computer.
- Connect your video (if desired) and audio (via computer speakers/microphone or by phone) by following the prompts on the screen.
- The following meeting controls will come in handy:

- **Manage Participants**
 - You can view who is in the meeting. Note that if the participant has called in from their phone and did not enter their Participant ID, they may show up twice – once for their video and once for their audio.
 - In this panel, you can also mute/unmute participants and request that they turn their video on or manually turn their video off.
- **Share Screen**
 - You can share a tab from your internet browser, the entire internet browser, an open document, or your entire screen with the participants on your meeting.
 - At any point, you can stop sharing your screen and allow another participant to share their own screen, as well.
- **Chat**
 - You can request that all participants enter their information into the chat box to take attendance. If you have enabled the feature to automatically save the chat, a TXT file will be saved to your computer with the transcript.
 - In the chat box, you can chat with the entire group or with participants individually. You can share files this way, as well.
- **Record**
 - If you wish to record the meeting, this can be enabled when scheduling the meeting or it can be done while you are in the meeting. Simply select 'record' or 'end recording' when the meeting is live.
 - The KCN recommends saving the recording to your local computer so that you don't take up too much space on the Zoom Cloud (space is limited). Afterward, to share the video, you can upload to Google Drive and share a link with others or you can upload to YouTube, post the video as 'unlisted,' and share the link that way.
- **End Meeting**
 - At the end of the meeting, be sure to end the meeting for all participants.