Using Zoom Webinar to hold public meetings

Published April 6, 2020

We've been working to help so many public agencies figure out how to hold remote public meetings using Zoom Webinar that we decided we'd write our own guide! This content is part of a series we've written on helping special districts communicate during a crisis. <u>All of the resources can be found online</u>. Zoom also has many <u>online tutorial videos</u>.

Zoom software will likely be continuously updated and some options may change by the time you're reading this. (Also, we aren't affiliated with Zoom in any way - not even as a reseller or referral partner. Just trying to help!) We are focusing on the Zoom Webinar product (even though it's a bit more expensive than just using Zoom Meetings) because it gives you much more control over public participation.

Because of the nature of public meetings, many of the features that will help other folks control meeting behaviors (password protecting, requiring registration) aren't going to be useful, since your meetings have to be open and public. But you can make this work with just a few tweaks to the standard Zoom Webinar functionality.

It may help you to know that when I use the word Webinar in this document, I am referring to the **Zoom Webinar product**. When I use the word "meeting" I am talking about your **public meeting**, which you will host using the Zoom Webinar product.

Clear as mud? :)) Let's dive in!

– Sloane

What you'll need





- A computer with internet access (preferably with a camera, mic and speakers)
- ✓ 20-30 minutes of time to complete this tutorial



 ✓ A credit card number



 A paid Zoom Meeting account that you will upgrade (what's this?)



 A list of all the board members' email addresses

Additionally, you'll want to devote some time to **practicing** before your first live meeting. Once you get it set up properly, and get some practice under your belt, you'll be great at this!

Table of Contents

Adding the Webinar functionality to your Zoom Meetings account (required)	3
Account settings to check / configure (optional)	5
Disable Chat (maybe)	5
Enable Closed Captioning	7
Save a separate audio file in addition to the video file	9
What people will see when you speak	9
Scheduling your meeting using Zoom Webinar (required)	12
Telling the public how to join and participate	16
Before you click "Start the Webinar"	18
Running a public meeting using Webinar (required)	19
Closed captions	26
Starting the recording	26
Live streaming your meeting	27
Managing your workspace during the meeting (optional but important)	28
Allow your Panelists to share their video	30
Sharing a document	32
Tips for holding a closed session (optional)	33
After the meeting (optional)	34

Adding the Webinar functionality to your Zoom Meetings account (required)

After setting up your initial Zoom Pro Meetings account (the Basic / free account won't work, you need to sign up for the Pro account), you'll need to buy the Webinar add-on for one Host. (You don't need more than one - the Host can set up and configure the Webinar, and everyone else can participate as a Panelist using a Zoom Basic free account, or just via email invite. More on that later.)

Log in at zoom.us and then click on **MY ACCOUNT:**



Left sidebar - click to expand **Account Management**, then click on **Billing.** Purchase one **Webinar** add on using the text link:



Next, click User Management, then Users, and edit the user account you want to add Webinar license to:

→ C	ser#/				☆) 💩 🛈	o 🔻 🗅 I 🖪	🙂 🖻 🛛 🕒 😩
					REQU	IEST A DEMO 1.888.799.5	926 RESOURCES - SUPP
	PLANS & PRICINC	G CONTACT SALES			SCHEDULE A MEE	TING JOIN A MEETING	G HOST A MEETING 👻
nportant Notice: To enhance the secur ike to familiarize yourself with these ch	ity of single-seat l anges and ensure	Pro accounts, starting April 5th, meeting pa that your attendees can join your upcomir	asswords and Waiting Rooms ng meetings seamlessly. Plea:	s will be turned on by def se <u>read this article</u> for st	fault. As the meeting ep-by-step instructi	g host, there are some st ons.	eps you may need to
ERSONAL Profile	Us	You can add 0 more Licensed user(s) ar	d unlimited basic users.				Document
Meetings	Us	ers Pending Advance	ed				
Webinars	Q	Search Advanced Search ~				Import Export	All + Add Users
Recordings		Email/Name ID 🗘	First Name 🗘	Last Name 🗘	Role	Туре	D \$
Settings	/ •	sloane@getstreamline.com	Sloane	DellOrto	Owner	Licensed - Webinar1	Edit
User Management	0	john@getstreamline.com	John	Azevedo	Admin	Licensed	Edit
Group Management	0	chris@getstreamline.com			Member	Licensed - Webinar100	Edit
Role Management		maria@getstreamline.com	Maria	Lara	Member	Licensed	Edit
Room Management							

Add the Webinar feature, then click **Save**:

Using Zoom Webinar to hold public meetings

🔍 🔍 🔍 User Management - Zoom 🛛 🗙 📘 U	sing Zoom Webinar to hole	d pt × +										
← → C (□ ☆) 🚳 (Ð	¥ 🖸	I 👪	;	Q. 💽	• :
ZOOM SOLUTIONS + PLANS & PRICE	NG CONTACT SALES				SCI	HEDULE A	MEETING	S JOIN	A MEETING	HOST	A MEETING	- 🐼
Important Notice: To enhance the security of single-s take to familiarize yourself with these changes and en	Edit User						10	st, there ar	e some stej	os you ma	y need to	×
BEDCONAL	Emails	chris@getstreamline.com										
Profile	User Type	Basic O Licensee	d 💿 💿 On-Prem	1 (1)							<u>Docu</u>	<u>ment</u>
Meetings	Feature	Large Meeting										
Webinars		🥑 Webinar	O 100	1,000				Import	Export A	JI I	+ Add Use	ers
Recordings	User Role	Member	~					Туре		 ,		\$
Settings	Department	e.g. Product										
ADMIN	Job Title	e.g. Product Manager						- Webina	1	Edit		
 User Management 	Location	e.g. San Jose						Licensed		Edit		
Users												
Group Management				(Save	Cancel		- Webina	100	Edit		
Role Management	maria@getstream	line com	Maria	Lara		Member		Licenser		Edit		
> Room Management		me.com	1*10110	Lord		i i ci i bei		Licenset		Edit		
Account Management	ooms_2JIL_OrBC	Qlm6FKkERtxDcQ@	Streamline Lou			Member		Licensed		Edit	0	Help

You only need one **Webinar host** to make this work, although you can pay for more if you'd like. In fact, you only need a single Zoom account (Meeting + Webinar add-on) - <u>you don't have to pay for any additional Zoom</u> <u>Meeting Pro users, or even set up your staff / board members as free Zoom Basic accounts, if you don't want to.</u> There is one benefit to adding them as free, Zoom Basic users, though - if they aren't going to use video during meetings, they can add a profile picture so their pic shows when they speak (more on this later.)

Account settings to check / configure (optional)

Now on to a few settings you may want to configure. These are optional, but highly recommended!

Disable Chat (maybe)

You might choose to keep Chat enabled so that you can use it to chat privately with your Panelists during the meeting. Also, note that if you disable Chat, it not only affects Zoom Webinars, but it won't be available for any of your Zoom Meetings, either.

Zoom Webinar includes a Q&A feature that is much better for public meetings than Chat—at least, for managing public comment. If you don't disable Chat or <u>change the default settings</u>, anyone on the Webinar can chat with anyone else (or everyone on the webinar!) Also, the chat window just keeps scrolling as more people add to it, so it becomes hard to track and you may miss public comments or questions.

The Q&A feature allows you to keep questions open until you answer them (more on this later).

If you want to disable Chat, go to **Settings** in the left sidebar, then scroll down until you find **Chat**.

$\cdot \rightarrow$ C (\blacksquare zoom.us/profile/sett	ing	口 ☆ #	🛯 🛈 🛛	/ 🖸 🗓 🎇 🗄] 📔 🛛 📘	
			REQUEST A D	EMO 1.888.799.5926	RESOURCES 👻	SUP
	PLANS & PRICING CONTACT SALES	SCHEDU	ILE A MEETING	JOIN A MEETING	HOST A MEETING	•
mportant Notice: To enhance the securit ake to familiarize yourself with these cha	ty of single-seat Pro accounts, starting April 5 anges and ensure that your attendees can join	th, meeting passwords and Waiting Rooms will be turned on by default. As th your upcoming meetings seamlessly. Please <u>read this article</u> for step-by-step	e meeting host, instructions.	there are some steps	you may need to	
PERSONAL	Meeting Recording	Telephone				
Profile						
Meetings	Schedule Meeting	Schedule Meeting				
Webinars	In Meeting (Basic)		_			
	In Meeting (Advanced)	Host video			Modified Reso	et
Recordings	Email Notification	Start meetings with host video on				
Settings	Other	Participants video			Modified Pee	ot
	ould	Start meetings with participant video on. Participants can change thi	s		Woulled Res	et
ADMIN		during the meeting.				
> User Management						
Deem Menerent		Audio Type				
7 Room Management		When joining audio, you can let them choose to use their computer	5.			
> Account Management		just one of those audio types. If you have 3rd party audio enabled, yo	ou			
Advanced		can require that all participants follow the instructions you provide for using non-Zoom audio.	or			
		Telephone and Computer Audio				
		◯ Telephone				
		Computer Audio			יפ	Hel

Note that turning off the **first** Chat option will automatically disable the others.



Enable Closed Captioning

Scroll down a bit further until you find Closed Captioning, and turn it on if you'd like to enable this option. This allows you, or any Panelist, to type captions while the meeting is live. It's not automatic, though, and keeping up could be tough. If you decide to try this, assign your fastest typist, remind people to speak slowly, and ask them to pause when needed so you can catch up!

You might consider adding language to all of your meeting notifications, including at the top of each agenda, that you will provide accessibility help (like closed captioning) for those who request in advance. That way you aren't typing away like mad if it's not necessary! Transcripts are created automatically as long as you are recording to the cloud (not your computer) and have enabled "save separate audio file."

(We found a great walk through of how to do this on a college site.)

A separate audio file is not saved by default. To enable this, to to **Account Settings - Recordings** and check the box to save an Audio file:

· → C (ing?tab=recording 💶 🛧) 🍇 🛈 🛇 👻 🖬 📴 🚺 🚺 💆 💆
	REQUEST A DEMO 1.888.799.5926 RESOURCES - SUPI
SOLUTIONS -	PLANS & PRICING CONTACT SALES SCHEDULE A MEETING JOIN A MEETING HOST A MEETING + ages and ensure that your attendees can join your proming meetings seamlessly. Please <u>read this article</u> for step-by-step instructions.
ERSONAL	Meeting Recording Telephone
Profile	
Meetings	Groups and members will use the following settings by default. If you don't want the settings below to be changed, you can lock the settings here. Learn More
Webinars	
Recordings	Local recording
Settings	Allow hosts and participants to record the meeting to a local file
	Hosts can give participants the permission to record locally
DMIN	
User Management	Cloud recording
Room Management	Allow hosts to record and save the meeting / webinar in the cloud
	✓ Record active speaker with shared screen
Account Management	Record gallery view with shared screen 🕐
Account Profile	 Record active speaker, galler view and shared screen separately
Account Settings	Record an audio only file
	Save chat messages from the meeting / webinar
Billing	Advanced cloud recording settings
Recording Management	Add a timestamp to the recording ①
	Display participants' names in the recording

This is a good idea and important if you want to share smaller files with anyone who simply wants to listen to the meeting, or if you need to save the file as your official meeting record.

We'll talk about where to find all these files (including the Transcript) in the After the meeting section.

Believe it or not we're almost ready to set up our meeting (ahem, Webinar). But one last thing you may want to update: what people see when joining your Webinar.

Keep on keeping on! ↓

(...next page please)

What people will see when you speak

When people speak, Zoom shows either:

- 1. <u>Their video</u>, if it is on (only for the Host and Panelists **Participants' video never shows** unless you enable each person individually)
- 2. Or, their Zoom profile photo, if they have a Zoom account (even a free Basic one)
- 3. Or, <u>their name</u>, if they have been invited as a Panelist and don't have a free Zoom Basic account with a profile photo and haven't enabled video.

(If they have joined via phone, their <u>phone number</u> will show.)

I wish I had thought of this before grabbing all the screenshots for this post, I could have used our logo instead of this goofy pic! :))

How do you decide - video, photo, or logo? This really depends on how your organization plans to handle remote meetings. Here are my *personal* preferences, ranked by most to least favorite:

- Board and staff all enable video. This allows you to see each other, and the public to see your faces, too. People tend to behave better when they see a person vs. some disembodied voice! It's also easier to run a meeting without interrupting one another when you can see everyone. (If you haven't already, check out the funny <u>conference call video on this landing page</u> - scroll down, bottom right.)
- 2. **Board and staff use photos.** If they don't want to be on camera, you can create a free Zoom Basic Meeting user account for each of your board / staff members. That way you can add a profile pic to each, and that will show when they speak.
- 3. Or keep it simple names only. Nobody is on video or uses photos, you just have the one Host account and everyone else is invited as a Panelist. Their names show when they speak. If this is your method, it would be great to update your Webinar Host profile photo to use your agency logo.

To change or add a profile photo, click on the **Profile** link in the left sidebar—or, click on your **photo** (the person icon if you have no profile pic) in the upper right corner, then on **your name** right below that when it appears:

ightarrow C ($ ightarrow$ zoom.us/profile		🗔 🖙 ★) 🗟 🛈 🤤 💌 📮	I 🛐 🖸 🖬 🛛 📘
		REQUEST A DEMO	1.888.799.5926 RESOURCES - SUPPOR
	& PRICING CONTACT SALES	SCHEDULE A MEETING JOIN	A MEETING HOST A MEETING -
mportant Notice: To enhance the security of sin ake to familiarize yourself with these changes ar	gle-seat Pro accounts, starting April 5 nd ensure that your attendees can join	th, meeting passwords and Waiting Rooms will be turned on by default. As the meeting host, there a your upcoming meetings seamlessly. Please <u>read this article</u> for step-by-step instructions.	Sloane DellOrto LICENS sloane@getstreamline.com
PERSONAL			SIGN OUT
Profile Meetings Webinars	Change Delete	Sloane DellOrto Company Streamline Account No. 200663	Edit
Recordings Settings	Personal Meeting ID	209-483-6883 https://zoom.us/j/2094836883 Use this ID for instant meetings 	Edit
 > User Management > Room Management 	Sign-In Email	sloane@getstreamline.com Linked accounts: 🖸	Edit
 Account Management Advanced 	User Type	Licensed 😡 Features Webinar1000 🖗	
a llanam va fanafila	Capacity	Meeting 100 😡	D Help

Then click the "Change" link right below your image and upload a new pic on the next screen:

Note that it will crop to a square, so you may want to prep your logo or picture in advance. But it's worth taking a few minutes to get a decent logo or image in place, as that is what will show *every time you speak* if your video is not enabled. (As you can see, my image hasn't gotten less goofy - I look like a bandit with weird hair.) :)))



Whew! Now we're done with configuration, let's schedule our first meeting! (Er, our first **meeting** using the Zoom **Webinar** tools.)

Scheduling your meeting using Zoom Webinar (required)

On the left sidebar, click on Webinars, then click on the Schedule a Webinar button:



Sing Zoom webmar to note pr.	K Schedule a Webinar - Zoom K	+	
- → C (â zoom.us/webinar/sched	ule	· · · O O 🖗 🗸	3 I 🖺 3 🛛 🖉 🚨
		REQUEST A DEMO	1.888.799.5926 RESOURCES - SUPPORT
ZOOM SOLUTIONS - PLA	NS & PRICING CONTACT SALES	SCHEDULE A MEETING J	DIN A MEETING HOST A MEETING -
Profile	Schedule a Webinar		
Meetings		Since you aren't requiring	\mathbf{i}
Webinars	Topic	Board of Directors Meeting April 23, 2020 registration, you can leave t	he)
Recordings	Description (Optional)	Enter your webinar description blank.	
Settings			
DMIN			
> User Management			
> Room Management	Use a template	Select a template v	
> Account Management			
> Advanced	When	04/23/2020 AM V	
	Duration	2 v hr 0 v min	\mathbf{i}
Attend Live Training	Time Zone	(GMT-7:00) Pacific Time (US and Canada)	
Knowledge Base		Recurring webinar Every month on the Fourth Thu, 7 occurrence(s)	
		Recurrence Monthly T	
		Repeat every 1 * month	
		Occurs on Ozy 23 * of the month	
		Fourth Thursday of the month	
		End date By 10/23/2020 Courrences	О Неір

Important note: if you do use the recurring feature, do not put the meeting *date* in the title, as it will be added to every instance (e.g. your May meeting will also be called April 23, 2020).

You probably won't use the registration requirement for any of your meetings, but you may want to check "Require webinar password" for closed session meetings.

If you are going to hold a closed session, your best bet is to schedule it separately from the public meeting. That will make it easier for you to manage who is able to join by either sharing the password, or the separate meeting link with your board.

●●●● E Using Zcom Webinar to hold p x C ← → C ê zoom.us/webinar/928055047/ ZOOOM SOLUTIONS ~ PLANS & PR	Edit Webinar - Zoom X edit?occurrence=15876504000	+ For public meetings, leave these unchecked. Requiring a password for closed sessions is probably a good idea though. Schedule a Meeting JOIN A MEETING HOST A MEETING - €
Should video start automatically?	Registration	Required
(Even if off, you can choose to turn it on once	Webinar Password	Require webinar password
the meeting has begun.)	Video	Host On Off
		Panelists On On Off Q&A is a good option for inviting public
	Audio	Carpeter Audio Both Dial from United States of America Edit
	Webinar Options	♥ Q&A will be created automatically.
		Chable Practice Session Chapter of the session Chapter of the session Chapter of the session of
		2 Record the webinar automatically On the local computer O In the cloud
	Alternative Hosts	Example: mary@company.com, peter@school.edu
		Save Cancel O Help

Click Save.

Now we just need to add our board members and staff as **Panelists** and send invites.

We suggest that you have one or two **Hosts** (the ones who do all the set up and start the webinars), and invite your staff and board members who need to participate in the meeting as Panelists. If you would like your staff and board members to be able to control their video, share their screen, and the like, the Panelist role is perfect for this. They do not need to have a Zoom account to be invited as a Panelist.

If your board members simply want to call in, you can skip this step.

● ● ● ■ Using Zoom Webinar to hold p : ← → C ● zoom.us/webinar/92805	Webinar Information - Zoom	x +	□ ~ ☆) ※ 0 0 ¥ 0 ፲ № 8 0 2 = .
			REQUEST A DEMO 1.888.797.5926 RESOURCES + SUPPORT
	NS & PRICING CONTACT SALES		SCHEDULE A MEETING JOIN A MEETING HOST A MEETING +
PERSONAL Profile	My Webinars > Manage "Bo	aard of Directors Meeting April 23, 2020"	Start this Webinar
Meetings Webinars	Topic	Board of Directors Meeting April 23, 2020	
Recordings Settings	Time	Apr 23, 2020 07:00 AM Pacific Time (US and Canada) Every month on the Fourth Thu, 7 occurrence(s) Show all occurrences Add to Gogle Calendar (ics) O Yahoo Calendar	
ADMIN > User Management	Webinar ID	928-055-047	
 Room Management Account Management 	Video	Host On Panelists On	
> Advanced	Audio	Telephone and Computer Audio Dial from United States of America	If you need to go back and edit the webinar you
Attend Live Training Video Tutorials Knowledge Base	Webinar Options	Q&A Enable Practice Session Only authenticated users can join Record the webinar automatically in the cloud	can do that here
	Save this Webinar as a Te	emplate	Edit this Webinar Start this Webinar
	Invitations Email :	Settings Branding Polls Q&A Integration Live Streaming	
	Invite Panelists	No panelists invited	Edit
	Invite Attendees	Webinar Size: 1000 attendees Link to join Webinar https://zoom.us/j/928055047	over here is where you go to add Panelists.
	Approval	No Registration Required	D Help

If you have added your board as Panelists, they will get an email automatically:

Invite a person or a Zoom room as a	webinar panelist
Name	Email/Zoom Rooms
Mac Clemmens	mac@digit Delete
Sloane the Second	This box allows Zoom to send them an email with the
Name	Email At
Add Another Panelist	

To get the information you need to share with the public, go back to the main webinar screen, copy or email the invitation details:

→ C (â zoom.us/webinar/9280)	55047		💷 🕶 🖈) 🕷 🛈 😋 💙 📮 🎇 🔛 😫 🔯 🛤 🗐
			REQUEST A DEMO 1.888.799.5926 RESOURCES - SUPPO
	ANS & PRICING CONTACT SALES		SCHEDULE A MEETING JOIN A MEETING HOST A MEETING
Mabiaars	ropic.	שטפוע טו שויכנעוס ויוככווון אַטוו בט, בעבט	
Recordings	Time	Apr 23, 2020 07:00 AM Pacific Time (US and Canada)	
Settings		Every month on the Fourth Thu, 7 occurrence(s) Show all occurrences	
orruña.		Add to 🛐 Google Calendar 🛛 🧧 Outlook Calendar (.ics)	endar
DMIN			
User Management	Webinar ID	928-055-047	
Room Management	Video	Host On	
Account Management		Panelists On	
Advanced	Audio	Telephone and Computer Audio	
		Dial from United States of America	
	Webinar Options	√ Q&A	
Attend Live Training		× Enable Practice Session	
Knowledge Base		\times Only authenticated users can join	
		 Record the webinar automatically in the cloud 	
	Save this Webinar as a	Cop Clipboard	by the invitation to your Edit this Webinar Start this Webinar
	Invitations Email	Settings Branding Polls Q&A Integratio can edit it	to share with the public and add to your agenda.
	Invite Panelists	No panelists invited	Edit
	Invite Attendees	Webinar Size: 1000 attendees	Copy the invitation Email me the invitation
		Link to join Webinar https://zoom.us/J/928055047	
	Annenal	No Registration Description	O trail

What you get will look something like this:

You are invited to a Zoom webinar. When: Apr 23, 2020 07:00 AM Pacific Time (US and Canada) Please download and import the following iCalendar (.ics) files to your calendar system. Monthly:
https://zoom.us/webinar/tJYld-ytrj8tr_7CZMGkqgUmEF5hZD086w/ics?icsToken=98tyKuCqpjsvH9SRt139a6otW5X5bPG5lmNx_YBn
sTjuEidmbybQY-p4FuInRs-B
Topic: Board of Directors Meeting April 23, 2020
Please click the link below to join the webinar: https://zoom.us/j/928055047
Or iPhone one-tap :
US: +16699006833,,928055047# or +13462487799,,928055047#
Or Telephone:
Dial(for higher quality, dial a number based on your current location):
US: +1 669 900 6833 or +1 346 248 7799 or +1 301 715 8592 or +1 312 626 6799 or +1 646 558 8656 or +1 253 215 8782
Webinar ID: 928 055 047
International numbers available: https://zoom.us/u/abNJv752yV
Which is really just too much information! We suggest editing it to provide more context and fewer call in

Which is really just too much information! We suggest editing it to provide more context and fewer call in options:

Our board meeting will be held remotely via Zoom. You can join on your computer and/or call in.

Screen share at https://zoom.us/j/928055047

If you are unable to join via computer, or do not have speakers or a microphone on your computer, you can dial in for audio. Call (669) 900-6833 or (646) 558-8656 and enter ID 928 055 047

Note that the public will be muted by default. If you would like to speak during the public comment portion of the meeting, you have the following options:

Online - raise your hand, or use the Q&A panel to submit your comments. Phone - press *9 to raise your hand, *6 to send a request to be unmuted to submit comments.

Note: please replace with your own information before sharing!

If people are primarily used to finding your agendas in a physical location, be sure to share it in a variety of places online, too (website, social channels, etc). And of course continue to email it to anyone who has requested it.

Whew! Ok now we've got our meeting scheduled, our participants invited, and the public notified.

Before you click "Start the Webinar"

- Make sure your host computer has speakers and a microphone, or you have the dial in info handy,
- It is helpful to have two monitors. It's not necessary, but it makes it easier to keep all the Zoom controls on one screen, and whatever you are going to share on another.
- **Practice!** Set up a practice webinar and hop on with your team to make sure everyone knows how to mute and unmute, turn on or off video, etc.
- For people who want to be on video but do not have a camera on their computer, it's possible to download the Zoom app for a tablet or smartphone and join that way.
- Have a PDF version of your agenda packet open on the computer you will be using to host the meeting, if you intend to share your screen and have it viewable as you move through the agenda.
- Have a slide or document open and ready to share when you start the meeting. It should include information like the dial-in number and ID, and how you will invite public comment. Here's an example:

Welcome to the Acme Municipal Utility District Board Meeting - April 23, 2020

This meeting is being held via Zoom and all attendees are muted by default. To join via computer, click the link on the meeting date and time: <u>https://zoom.us/j/928055047</u>

If you do not have speakers or a microphone on your computer, you can dial in for audio. Call (669) 900-6833 or (646) 558-8656 and enter ID 928 055 047

If you would like to speak during the public comment portion of the meeting, you have the following options:

Online - raise your hand, or use the Q&A panel to submit written comments. Phone - press *9 to raise your hand, *6 to send a request to be unmuted to submit verbal comments.

Public engagement is important to us, and meeting remotely is a new process. We appreciate everyone's understanding as we figure this out together.

Note: make sure to replace this with your meeting link and dial-in numbers!

Running a public meeting using Webinar (required)

We suggest that you start your webinar early and ask all of your presenters to join a bit early, too. That way you can get settled in and feel prepared by the time people begin joining.

Go to zoom.us and log in to your account, or click on MY ACCOUNT if already signed in.



Click on Webinars on the left, then click on the meeting name:

→ C			III 🖈 🕷 🛈 🛛 🛩 🗳	🗓 👫 🗉 🛯 🖉 📘 🗐 🌒
			REQUEST A DE	MO 1.888.799.5926 RESOURCES - SUPPOR
	IS & PRICING CONTACT SALES		SCHEDULE A MEETING	JOIN A MEETING HOST A MEETING -
ERSONAL	Upcoming Webinars Previous V	Vebinars Webinar Templates		Get Training
Profile Meetings	Schedule a Webinar			
Webinars	Start Time 💠	Торіс о	Webinar ID	
Recordings	Thu, Apr 23 (Recurring) 07:00 AM	Board of Directors Meeting April 23, 2020	928-055-047	Start Delete
Settings	Thu, May 28 (Recurring) 07:00 AM	Board of Directors Meeting April 23, 2020	928-055-047	Delete
DMIN User Management	Thu, Jun 25 (Recurring) 07:00 AM	Board of Directors Meeting April 23, 2020	928-055-047	Delete
Room Management	Wed, Jul 15 (Recurring) 01:00 PM	Engage your community: Guerrilla marketing for special district n)	ts (Summer editio 265-017-491	Start Delete
Advanced	Wed, Jul 22 (Recurring) 01:00 PM	Engage your community: Guerrilla marketing for special district n)	ts (Summer editio 265-017-491	Delete
	Thu, Jul 23 (Recurring) 07:00 AM	Board of Directors Meeting April 23, 2020	928-055-047	Delete
Attend Live Training	Wed, Jul 29 (Recurring)	Engage your community: Guerrilla marketing for special district	ts (Summer editio 265-017-491	C Help

Click the button that says Start this Webinar:

🔴 🕘 🗧 Using Zoom Webinar to hold pu 🗙	Webinar Information - Zoom	× +	
\leftrightarrow \rightarrow C $($ a zoom.us/webinar/9280556	047?occurrence=158765040000	10	🖙 🕶 🖈) 🕷 O O ⊻ 🗳 🏋 🎇 🗄 🛛 🗖 🗊 🌒 1
			REQUEST A DEMO 1.888.799.5926 RESOURCES - SUPPORT
ZOOM SOLUTIONS - PLANS	& PRICING CONTACT SALES		SCHEDULE A MEETING JOIN A MEETING HOST A MEETING +
PERSONAL	My Webinars > Manage "Bo	ard of Directors Meeting April 23, 2020"	Start this Weblinar
Meetings	Торіс	Board of Directors Meeting April 23, 2020	
Recordings	Time	Apr 23, 2020 07:00 AM Pacific Time (US and Canada)	
Settings		Every month on the Fourth Thu, 7 occurrence(s) Show all occurrences Add to G Gogle Calendar (ics)	ndar
ADMIN User Management	Webinar ID	928-055-047	
> Room Management	Video	Host On	
> Account Management		Panelists On	
> Advanced	Audio	Telephone and Computer Audio	
		Dial from United States of America	
	Webinar Options	~ Q&A	
Attend Live Training		imes Enable Practice Session	О неір
Video Tutorials			

A message will pop up in your browser - your webinar will not begin until you click "Open zoom.us:"

\leftrightarrow \rightarrow C $($ i zoom.us/s/928055047?status=success		💷 🖈 🕷 O 🛛 💌 📮 🎽 🖬 🖉 🖉 🕷 🕄
zoom	Open zoom.us? https://zoom.us wants to open this application.	Support English +
	Cancel Open zoom.us	
	Launching	
	Please click Open zoom.us if you see the system dialog.	
lfr	nothing prompts from browser, click here to launch the meeting, or download If you cannot download or run the application, start from your browser.	& run Zoom.
	Copyright ©2020 Zoom Video Communications, Inc. All rights reserved. Privacy & Legal Policies	

The Zoom app will open (this is not the same as your browser!) Note: sometimes the Zoom app will not open and it will try to launch the meeting in your browser. This is not recommended. It is very important that you use the application, otherwise your meeting quality will be low. If your webinar was set up with video off by default, you will see this screen:



If you've set it up to start with video, you'll see something more like this (but with your face):



In the lower left, click Mute to turn off your microphone (if you have one) while you're getting everything set up and working.

To check your audio settings, click the up arrow right next to the Mute button.

You can test your speaker and microphone (even while muted) to make sure it's all working properly.

As people start to join your meeting, it's a good idea to unmute a few times and let them know you'll get started shortly.

	Select a Microphone	1
	Same as System	
	✓ Built-in Microphone (Internal Microphone)	1
	Select a Speaker	P
	Same as System	16
	✓ Built-in Output (Internal Speakers)	1
	DisplayPort (LG HDR 4K)	
	Test Speaker & Microphone	
	Switch to Phone Audio	
	Leave Computer Audio	
Sloane De	Audio Settings	
Ţ	~ 🗖 ^ 👪	2
Mute	Start Video Participa	nts

Next step: open the Participant and Q&A panes - you'll keep these open during the entire meeting. (Note that Panelists have these options, too.) On the Participant pane, you can switch between viewing the list of Panelists and Attendees - in our scenario, Board and Staff folks will be the Panelists, public members are Attendees. All Attendees will be muted.



The next step is to share the document you prepared to tell people how to participate (see page 18). Click the green **Share Screen** button in the Zoom toolbar. A screen will pop up that allows you to choose what screen, or file you want to share.

Important note: you probably do not want to share your entire desktop! You are much safer only sharing a browser window, or individual documents. This is why you want to open the agenda packet and other documents in advance.

Click on the document or application you want to display, then the blue Share button in the lower right.



You will see a green box around the item you are sharing, and the toolbar will become smaller (and typically move to the top of your screen).

Note that the Q&A and Participant panes will remain persistent (and sometimes overlap your other screens) but Attendees cannot see them.

If you need to share a different file (for example, if you first share a document telling folks how to join audio and participate, then you want to share your agenda packet PDF), click on the "New Share" green button.

To stop sharing, click the red Stop Share button on the Zoom toolbar.

M	ute Start Video Participants Q&A Polling C ID: 239-524-829	New Share Pause Share	Annotate More
Home Tools COVID 19 Emergen × Home Tools COVID 19 Emergen × COVID 19 Emergen × COVID 19 Emergency FMLA ⁽¹⁾ (Constraints) Energency FAMLA ⁽²⁾ (Constraints) From April 1, 2020 until December 31, 24 Expansion Act ("Emergency FMLA ⁽²⁾) policy temporar Leave Act ("FMLA") OB Family and Medical Leave policy. This Emergency FMLA policy may run concurred local, state, or federal law. This policy provides eligible employees the o are unable to work or telework due to a need for lead child's school or place of care has been closed, or s public health emergency. The maximum amount of for use is twelve (12) weeks. Employee Eligibility To be eligible for Emergency FMLA leave, you Have worked at least thirty (30) days for th Currently work for an employer with fewe	As and Paid FMLA Standalone.pdf () () () () () () () () () (Parelists (1) Attendees (2) Total 1 phone call-in listener Iteration (2000) Ite

When questions come in, you can click *Answer live* or *Type answer* to reply. Note that if you type your answer and don't check "Send privately," everyone will see the question and your answer. (This can be helpful if someone asks how to dial in - you can share the information with everyone at once.)

	Van Van
Open(1)	Open(1) Answered(1)
weimer 11:57 Al low can the commo orward sooner? Type your answer	weimer 11:57 AM How can the community help support the orward sooner? Type your answer here Send privately Cancel
	Answered(1)



Closed captions

If you want someone to add closed captions as the meeting is in progress (for anyone watching who is hearing impaired) you can do so if you have enabled that (see prior info on setting up closed captioning, earlier in this document).

You can assign this task to another participant, or choose to do so yourself.



Starting the recording

If you didn't set the meeting up to record automatically, but you want to record your meeting when it starts, you can do so using the **More** button at the bottom of the screen (reminder, if you record to the cloud you'll get a transcript):



Live streaming your meeting

If you want to live stream your meeting, you might think it's something you would do when setting up the Webinar. But no. :))

		Add to		REQUEST A DEMO 1.888.799.5926 RES	DURCES - SUPPO
	PLANS & PRICING CONTACT SALES			SCHEDULE A MEETING JOIN A MEETING HOST	A MEETING 👻
User Management	Webinar ID	928-055-047			
Room Management	Video	Host	Off		
Account Management		Panelists	Off		
Advanced	Audio	Telephone and Compu	uter Audio		
		Dial from United States	of America		
Attend Live Technics	Webinar Options	✓ Q&A		If you click the Live	
Video Tutorials		\times Enable Practice Ses	sion	Streaming option when setting up the webinar, it just tells you to	
Knowledge Base		\times Only authenticated	users can join	start it once you start the	
		\times Record the webinar	automatically	webinar. :)))	
				Editabie Michigan	Mahimut
	Save this Webinar as	a Template		Edit this Webinar	s webinar
	Invitations Em	ail Settings Branding	g Polls Q&A Integra	ion Live Streaming	
	Live Streaming	After launching the w	ebinar, click "More", and then choose the s	vice on which to live stream your webinar.	

During the meeting, click More and then you can choose to live stream:



Managing your workspace during the meeting (optional but important)



You likely want to mute yourself right away, until you're ready to actually start the meeting. To do so, click on the microphone icon lower left.

Hopefully you tested your mic and speakers before this, but if not - click the arrow next to the microphone icon and choose "test speaker and microphone." If they do not work, you'll need to call in to the meeting.

You want to get your workspace arranged so that you can find everything. At the bottom of your Zoom screen, click on Participants, Q&A, and Chat (if using Chat). Move each pane around until you have a layout that works for you.

To move the separate floating panes around your desktop, just click and hold on the top of each pane and drag them to a configuration that works for you:



If you want to allow a participant to speak aloud, you can ask them to press #9 on their phone or click the Raise Hand icon in Zoom to raise their hand.

Hover over the participant to see options, including Unmute.

• • •	Participan	ts
Paneli	sts (2)	Attendees (1)
Total 1 pho	one call-in listener	
120	(Guest, Talking perr	nitted) Unmute More



For this example, I invited my son Chris to be a Panelist on my pretend webinar to grab some screen shots. :)





Sharing a document

If you want to share your agenda packet during the meeting click on the green **Share Screen** button. (If you were already sharing something, the button will say "Share New" instead of Share Screen.)



Another window will open that gives you a bunch of choices for what to share. We strongly suggest that you open the documents you want to share **before you start the meeting.** Whenever possible, sharing individual documents will ensure you don't accidentally share something you shouldn't (like your inbox!)

Your Desktop will be selected by default, so make sure to click on what you want to share and double check that it turns solid blue! If you are going to share your entire Desktop, then close non-essential applications and files before you begin.



It can get a bit confusing at this point, because the Zoom toolbar switches from the bottom of the tool interface to a floating bar that can be moved around (it usually appears at the top of your screen).

The same thing will happen with videos, if they are enabled. They become smaller and floating, and you can move them around your desktop to keep them in view.



Tips for holding a closed session (optional)

A few tips for closed sessions:

- Schedule a separate meeting (or Webinar) with a unique link, and possibly a password. Hold it before or after your public meeting, as you won't be able to have them both running at the same time (you can't switch between two sessions hosted by the same Host).
- 2. You could also simply use a different platform for your closed sessions like freeconferencecall.com and only share the call in number with your board and staff.

After the meeting (optional)

You will receive an email when the cloud recording is available, with a link directly to the recording. Or you can go back to zoom.us and go to the Recordings tab, where you can Share or Download any of your recordings, or click on the recording to access the transcript, if you enabled that functionality:

→ C (zoom.us/recording				📼 🏠 🕷 🛈 🧿 💆	🖿 🍸 🎇 🗒 😫 🔽 🗎 🗮
				REQUEST A	DEMO 1.888.799.5926 RESOURCES - SUPP
	PLANS & PRICING CONTACT SALES			SCHEDULE A MEETING	JOIN A MEETING HOST A MEETING +
RSONAL	Cloud Recordings Local Recordings				Settings
Meetings	From mm/dd/yyyy To 04/06/2020 All Sta	atus 🗘			
Webinars Recordings	Search by ID	earch Export			Delete Selected Delete All
Settings	Торіс	ID	Start Time	File Size	
	My Fantastic Webinar	551-492-328	Apr 6, 2020 03:47 PM	2 Files (1 MB)	Share More -
MIN	Board of Directors Meeting April 23, 2020	928-055-047	Apr 6, 2020 12:00 PM	2 Files (384 KB)	Download (2 files)
User Management Room Management	Sloane DellOrto's Personal Meeting Room	209-483-6883	Apr 1, 2020 03:09 PM	1 File (39 MB)	Delete
Account Management	Special District Communication and Meetings During a Crisis	431-930-673	Mar 19, 2020 09:48 AM	2 Files (78 MB)	Share More -
Advanced	Sloane DellOrto's Personal Meeting Room	209-483-6883	Mar 18, 2020 12:01 PM	2 Files (22 MB)	Share More -
	Sloane DellOrto's Personal Meeting Room	209-483-6883	Mar 13, 2020 09:58 AM	1 File (94 MB)	Share More -
Attend Live Training	Engage your community: Guerrilla marketing for special distri	cts 674-003-616	Mar 11, 2020 12:45 PM	2 Files (59 MB)	Share More -

Lastly, take a deep breath and congratulate yourself! We know this isn't easy and hope this guide proves to be helpful. As we mentioned in the beginning, Zoom software is updated on a regular basis so some of the details in this document may be out of date by the time you are viewing it.

If you need help figuring this out, we're here for you! <u>Access all of our resources for holding remote meetings</u>, or give me a shout:

Sloane Dell'Orto sloane@getstreamline.com

