**Scheduling Zoom webinars & meetings**

**Zoom Log in**

www.zoom.com

Username: [sofia.alvarez-castro@portlandoregon.gov](mailto:sofia.alvarez-castro@portlandoregon.gov)

Password: Transition123

(Julia is admin on Zoom)

**Overview of Zoom Webinars vs. Meeting**

|  |  |
| --- | --- |
| **Zoom meeting** | **Zoom webinar** |
| * Max capacity, depends on license * Everyone is shown on the screen w/ camera and microphone * Everyone can send public and private messages * Everyone joins using the same link and password, or call in info | * Can have 100-1,000 attendees * Can enable registration, so folks register ahead of time * Email reminders sent before starting the meetings * Can enable Q&A answer feature * Can launch polls * Has attendee and panelist feature   + Attendees join to listen-only mode, and only the host can unmute/mute them * Panelists get |

**Best practices for public meetings**

* Post agenda on website one meeting before the meeting
* Add any additional meeting materials on the website before
* Add zoom link on website AND call information

**Scheduling Zoom Webinar**

***Scheduling a meeting***

1. Go on the zoom website and log-in
2. Click on “webinars” on the left of the screen, it will then show you all the upcoming scheduled webinars
3. Then click on the blue icon on the right side of screen that says “+ schedule a webinar”
4. Follow the prompts and do the following:
   1. Topic: Meeting name “charter commission meeting”
   2. Ignore description
   3. Ignore template
   4. When: add the date and time starting
   5. Add duration of meeting
   6. Ignore time zone, leave as is
   7. Recurring webinar- unchecked
   8. Registration- unchecked
   9. Authentication- unchecked
   10. Webinar passcode- checked
   11. Video- host should be “on”
   12. Video- panelist should be “on”
   13. Audio- both “on”
   14. Webinar options- Q&A, checked
   15. Webinar option- Enable practice session, checked
   16. Interpretation- checked
       1. Add interpreters’ email and the languages they are interpreting. If you don’t have them at the time, you can go back and add them.
       2. ASL interpreters are added as normal panelists (below)
   17. Alternative hosts- ignore
   18. Hit “save”
5. Scroll down to the bottom of schedule webinar and click on “Email settings” (do this first, THEN invite people)
   1. Invitation email to panelist- make sure it’s checked
   2. Reminder email- Make sure 1 hour and 1 day before webinar is checked

***Sending invites to panelists***

1. Sending invites, click on “Invitations” for PANELISTS
   1. Add people emails who will get a panelist invite including ASL, you can do this by uploading a CSV or by individually adding their emails and names
   2. Click on “edit” to add peoples names/emails or “import for CSV” to upload CSV
   3. To resend invites to panelists who lost it, etc, click on “edit”
      1. List of panelists should pop up, hit “resend” and it will send OR click on “copy” and you can email copy/paste it to an email
2. Public zoom link:
   1. Scroll down to “invitations” and find “invite attendees” ( this is the ink for the public)
   2. Click on copy invitation
   3. Copy the information and post on website, including Zoom link, zoom password, and call-in information.
      1. When adding the phone call-in information on the website also add this: *The following commands can be entered using your phone's dial pad while in a Zoom meeting. To mute/unmute, dial: \*6, and to raise/lower virtual hand, dial: \*9*

**Logistics to do before you start a Webinar (do all these steps before the meeting starts in this order)**

1. Start meeting practice session 15 minutes before meeting
2. Log into zoom, find the webinar, click “START PRACTICE SESSION”, **DON’T** click on “START” meeting
   1. Note: you know you are NOT live if there is a blue broadcast button at the top middle of you screen.
   2. Practice session is a room for panelist, before the actual meeting is broadcasted to the public
3. Enable zoom screen scaring,
   1. On the bottom of your screen there is a green arrow that says “screen share” next to is a little “^” click on that and select “all panelists and close window
4. Change chat settings
   1. Click on the chat icon and a new window will open up
   2. At the right of the chat box there are three little dots, click on those dots and a drop down menu will pop up
   3. Select: Attendees can chat with no one
   4. Close out of that
5. Make someone a cohost
   1. Click on participants and box will pop up
   2. Find who you want to make a cohost
   3. Hover your mouse over their name and “more” will pop up, click on it
   4. Select option “make co-host”
6. Enable closed captioning “CC Live Transcript”
   1. At the bottom of zoom screen click on “cc live transcript” and a pop up will open
   2. Click on “Enable Auto transcript”
   3. ~~Close out of box~~
7. ~~Enabling interpretation~~
   1. ~~Click on the globe icon on your screen that says “interpretation”~~
   2. ~~A pop-up menu will open up that list all the interpreters you assigned above (number 4, letter p). When you are ready to start interpretation, click “start” at the bottom right of screen~~
8. Recording
   1. Click on “record” at the bottom of your screen
   2. Then click on “record on your computer/device”
   3. Before you record, give folks a verbal warning/heads up
9. ~~Broadcasting a meeting to go “live” (open to the public)~~
   1. ~~After you do all these steps, you can broadcast a meeting~~
   2. ~~Click on “broadcast” at the top of you screen and the meeting is live to the public~~

**Zoom logistics Report overview for Zoom webinars:**

Hello everyone— welcome to the **Charter Commission [subcommittee name] Meeting**! We will be here from 6-8pm, I am going to go over some zoom meeting logistics before we get started with our meeting.

* *Recording:* This meeting is being recorded for later viewing. The recording of this meeting will be available on our website, under past meetings & events.
* *Chat setting*: Commissioners, please don't forget to change your chat setting to “everyone” so folks listening in can listen in
* *Q&A:* Folks listening in, welcome! We have the question & answer feature available today. If you have question or thoughts, you can submit those through this Q&A feature. The Q&A feature can be found at the bottom left of your screen.
* *Closed Captioning Available*: We have closed captioning enabled. You can access and turn those on by hitting the closed captioning button on the bottom right of your screen.
* *Interpretation*: We have Spanish interpretation available. Please click on the globe icon at the bottom right of your screen and select the language you’d like to listen this meeting in. We will put these instructions in Spanish in the chat:
  + Hoy dia tenemos interpretación en español, para acceder a la interpretación, haga clic en los incono de un globo, en la parte inferior derecha de su pantalla y seleccione el “Spanish”

**Polls**

To do a poll, you can set it up ahead of time by selecting your webinar and scrolling to the bottom of the screen. You will see Polls on the bottom row of tabs, click Polls and then +create to create a poll for your webinar.

To create a poll during the zoom, the Host has the power to create polls or run a poll. The host will see Polls on the bottom of their screen, open that and you will see the polls you have already created – then hit launch poll. To stop the poll, click end poll. Otherwise, people who are joining the webinar or have not responded - will continue to see the poll.

You can also add polls there from the bottom of the options that the host has.

**How to pull reports**

After your webinar, you can pull reports of attendance, Q and A, Polls and Registration (if you have that turned on), performance and surveys.

1. click on reports on the left-hand side menu.

2. click Webinars or Meetings (depending on what you were doing)

3. select the type of report you would like, then the date of your Webinar or meeting, then your meeting/webinar.

4. click generate CSV report

5. It will download the report to your downloads.