



HEU

Additional Tools for Local Online Meetings

Zoom Meeting Settings

Registration Settings

When you create a Zoom meeting, you can enable a registration tool for your meeting by selecting **required** under **Registration**. This is a useful way to track participation and ensure that registrants are local members.

The screenshot shows the 'Edit "Take your online union meetings to the next level"' page. The left sidebar has 'Meetings' selected. The main area shows:

- Topic:** Take your online union meetings to the next level
- Description (Optional):** Level-up your interaction and engagement during your meetings and build connection in this one-hour training.
- When:** 10/15/2020, 7:00 PM
- Duration:** 1 hr 45 min
- Time Zone:** (GMT-7:00) Vancouver
- Registration:** Required

Once your meeting is saved, you can customize your meeting's Registration

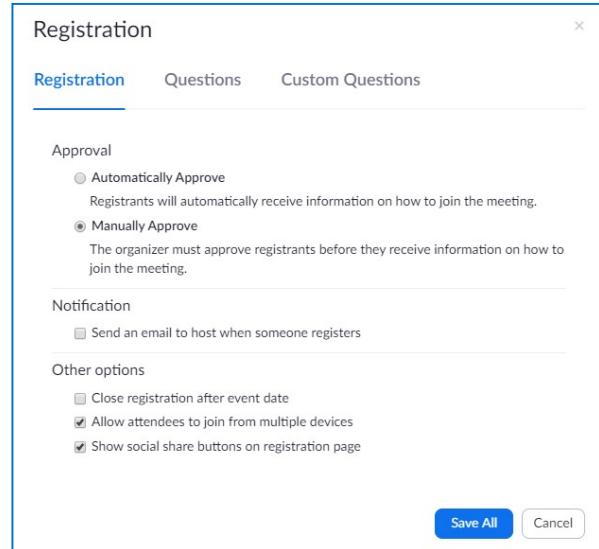
The screenshot shows the 'Registration' tab settings page. The top navigation includes tabs for Registration, Email Settings, Branding, Poll, and Live Streaming. The 'Registration Options' section is expanded, showing:

- Manage Attendees:** Registrants: 0 [View](#)
- Registration Options:** Automatically Approved [Edit](#)
 - Send an email to host
 - Close registration after meeting date
 - Allow attendees to join from multiple devices
 - Show social share buttons on registration page

Manage Attendees - In this section, you can see who has registered and you can approve their registration (if you've selected “Manually Approve” below).

Registration Options – We recommend the following selections for your meeting:

- Approval – Select Manually Approve so that you can verify that registrants are members of your local
- This section also allows you to specify the information you would like participants to give when they register for your meeting
- Questions – First Name and Email Address are required by default. Last Name should also be selected as a requirement
- Custom Questions – It’s recommended that you click on “New Question” and add “Worksite” as a required question. This will make it easier to verify your members when they register.



Email Settings

Here you can specify the contact for the meeting as well as the Confirmation Email (the email participants will receive when you approve their registration). The Confirmation Email will provide details (meeting link, Meeting ID, and dial-in numbers) to the registrants. If you want to add anything to the Confirmation Email, you can do so by clicking “Edit”.

Branding

This section allows you to brand the Registration page that participants see when they click on the Registration link you will send them. It includes the title, description, date, and time of your event (as you've specified earlier). But here, you can also add any images to brand your meeting. There is an **HEU Zoom banner** available for download for locals to use.

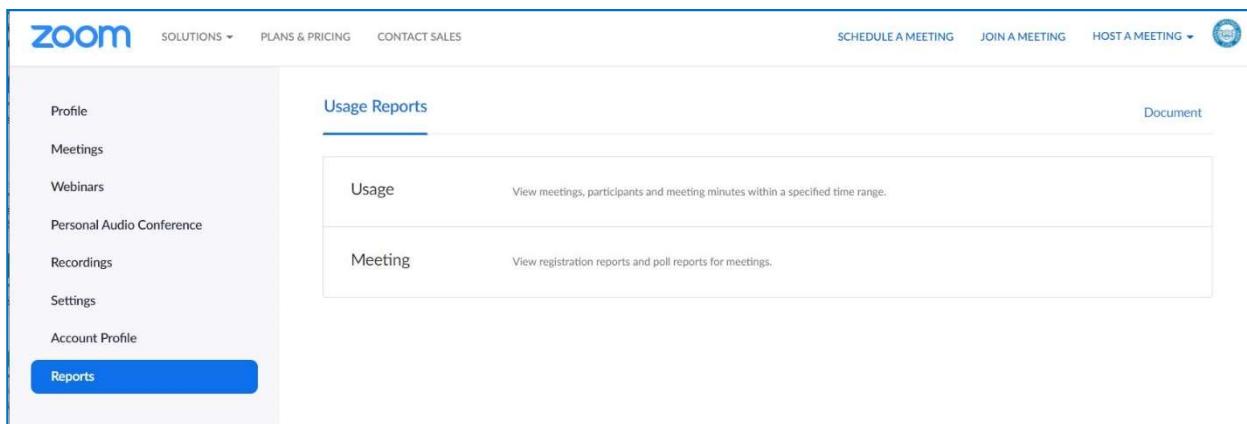
Creating Meeting Reports

In your Zoom account, you can create and download three types of reports.

- **Poll** – Download a report about the poll results used during the meeting
- **Registration reports:**
 - **Usage** – Report on who attended the meeting. This will tell you who was in the meeting, what time they joined, and what time they left. You can use this as back up information for your attendance records.
 - **Meeting** – This report compiles everyone who registered for the meeting, the answers to their registration questions, along with their email address. This is an easy way to compile and build your member database that you can use for future email invites and verifying members at future meetings.

These reports can be exported as CSV file (Excel spreadsheet) and saved.

You can create a **Report** by navigating to the left-hand panel on your Zoom web portal



The screenshot shows the Zoom web portal interface. At the top, there is a navigation bar with links for 'SOLUTIONS', 'PLANS & PRICING', 'CONTACT SALES', 'SCHEDULE A MEETING', 'JOIN A MEETING', 'HOST A MEETING', and a user profile icon. On the left side, there is a vertical sidebar with links for 'Profile', 'Meetings', 'Webinars', 'Personal Audio Conference', 'Recordings', 'Settings', and 'Account Profile'. Below this sidebar, a blue button labeled 'Reports' is visible. The main content area is titled 'Usage Reports' and contains two options: 'Usage' and 'Meeting'. The 'Usage' option is described as 'View meetings, participants and meeting minutes within a specified time range.' and the 'Meeting' option is described as 'View registration reports and poll reports for meetings.' There is also a 'Document' link in the top right corner of the main content area.

Creating Polls for your Zoom Meeting

Polling is not a required part of your online local meeting, but it is a useful tool to have. There are a number of advantages:

- Getting a read: It's great for getting a read from the room about an issue or an agenda item
- Engagement: It's a great tool for breaking up the meeting and keeping people engaged. Sometimes when it feels like one or two people are doing most of the talking, then people start to tune out.
- Motions: In some circumstances, Zoom Polls can be used to vote on motions during the meeting. However, those members attending by phone and those using certain devices cannot vote in a poll.

Note: A disadvantage regarding polls is that participants joining by phone cannot participate in a meeting poll. Generally, you should only conduct these Zoom in-meeting polls when everyone is participating through video or the Zoom app, in order to avoid excluding participants joining by phone.

To create polls for your meeting, ensure firstly that you've enabled Polling in your Settings.

1. When you sign in to the Zoom web portal, go to **Settings** (if you are an account member).
2. Navigate to the **Polling** option on the Meeting tab and verify that the setting is enabled.
3. If the setting is disabled, click the toggle to enable it. If a verification dialog displays, choose Turn On to verify the change.

Creating a Poll in advance of the meeting

From the **meeting management page**, scroll to the bottom to find the Poll option. Click **Add a Poll** to begin creating the poll.

You can create a maximum of 25 polls per meeting.

The screenshot shows the Zoom meeting management interface. At the top, there are buttons for 'Delete this Meeting', 'Save as a Meeting Template', 'Edit this Meeting' (with a pencil icon), and 'Start this Meeting'. Below these are tabs for 'Registration', 'Email Settings', 'Branding', 'Poll' (which is highlighted in orange), and 'Live Streaming'. Under the 'Poll' tab, there are sections for 'Manage Attendees' (showing Registrants: 16, Approved: 15) and 'Registration Options' (set to Manually Approve). Under 'Registration Options', there are several checked checkboxes: 'Send an email to host', 'Close registration after meeting date', 'Allow attendees to join from multiple devices', and 'Show social share buttons on registration page'. At the bottom right of the interface is a blue circular button with a white speech bubble icon.

Enter a title and your first question.

(Optional) Check the box to make the poll anonymous, which will keep the participant's polling information anonymous in the meeting and in the reports.

Select whether you want the question to be single choice(participants can only choose one answer) or multiple choice question (participants can choose multiple answers).

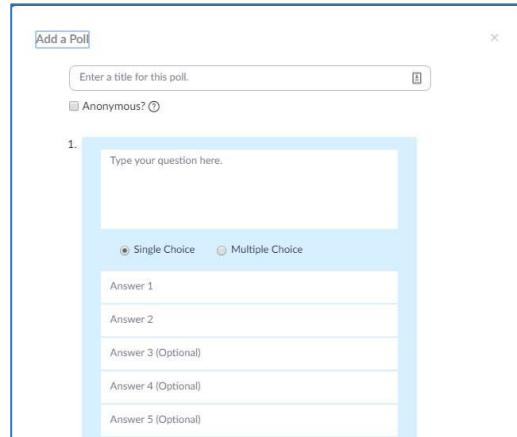
Type in the answers to your question and click Save at the bottom.

If you would like to add a new question, click Add a Question to create a new question for that particular poll.

When you start your meetings, you will find these polls already populated when you click on **Poll**.

Creating a Poll during the meeting

You can create a poll during the meeting by clicking on the **Poll** button on your bottom menu panel. However, only the Host who launched the meeting from the local's account will have this option. To create a poll during the meeting, you need to sign into the Zoom web portal and edit the current meeting to create your poll.



More information about Zoom polls can be found on the Zoom Support page here:

https://support.zoom.us/hc/en-us/articles/213756303-Polling-for-meetings#h_90771265-fee5-4dda-8ae6-981dcb6760e0

Other Zoom Tools

There are many other Zoom tools that you can explore if you are looking for ways to engage with members during a Zoom meeting.

The first step is to make sure that you have these tools enabled in your Settings. If they are not, then you will not be able to access them during the meeting or when you're setting up your meeting.

Note: as with the polling feature, these features are not generally available for those joining by telephone only. Phone participants can participate in Breakout Rooms

- **Annotate** – Allows for members to write, mark, stamp, and draw on a shared screen on a pdf or picture. This can then all be saved as an image file by selecting “Save” in the Annotate menu.
- **Whiteboard** – Similar to annotate but the shared screen is a basic white screen
- **Breakout rooms** – Only the host can launch this feature but it allows for groups of people to temporarily meet separately from the main group and return to the main meeting at a set time or when the host terminates the room.

More information about Breakout Rooms can be found here:

<https://support.zoom.us/hc/en-us/articles/115005769646-Participating-in-breakout-rooms>

Bulk Email Platforms

There are bulk email programs that allow you to send emails to large groups of people, like [Mailchimp](#) and [Constant Contact](#). These programs are worth exploring, especially if you have a large local and your local has some human capacity to learn how to use and manage these bulk email programs.

MailChimp offers a free version that allows you to upload up to 2000 contacts. Constant Contact, however, is a paid program but has a 60 day free trial period. Note: This is the kind of expense that would apply for the Pandemic Fund if this is something that you would like to set up for your local.

Advantages:

- These programs allow you to upload your list of email contacts and send emails to this list
- This is a much easier way to manage a large email list; it provides options for seeing the rate at which your email has been opened.
- You can create splashy, eye-catching emails that include graphics and/or include your local's branding.
- You can create email templates that can be used again and modified so that you don't have to create new versions each time.