



Setting up a Zoom account for your Local

NOTE: Before signing up for a Zoom account, we recommend that the basic setup and Windows updates are complete on new equipment, such as laptops.

Signing Up

Sign up for a Zoom account at www.zoom.us

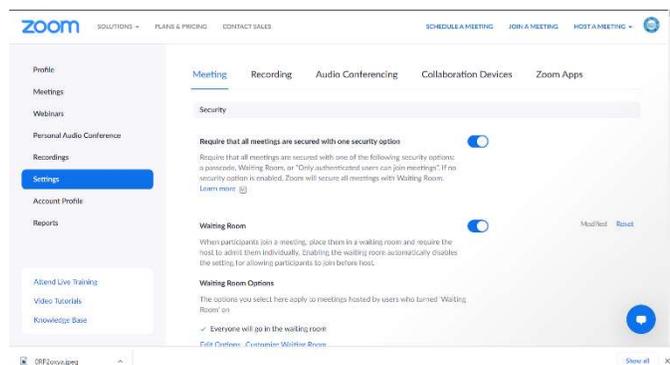
A Basic account is free but has limitations (including a maximum of 40 minutes per session for meetings of over three people).

Use your local's email rather than your personal email for your local's Zoom account. This way, account information for both accounts can be easily passed on to future local executives.

Zoom Settings

Once you've created your account, it's best to go into the account's **Settings** to select a number of options that can be available to you when setting up a meeting.

The following selections are recommended (If not listed, leave it set on the default):



Security:

- Waiting room: ON
- Meeting passcode: ON
- Require password for participants joining by phone: OFF ***
- Embed passcode in invite link for one click join: ON
- Only authenticated users can join meetings from Web client: OFF

Schedule Meeting:

- Host video: ON
- Participants video: OFF
- Audio type: Telephone and Computer
- Allow participants to join before host: ON
- Enable Personal Meeting ID: ON

- Mute participants upon entry: ON
- Upcoming meeting reminder: ON

In Meeting (Basic):

- Chat: ON
- Allow users to save chats from the meeting: UNCHECK
- Private chat: ON
- Auto saving chats: Either
- Sound notification when someone joins or leaves: ON
- Play sound for: Host and co-hosts only
- Send files via meeting chat: ON
- Co-host: ON
- Meeting Polls/Quizzes: ON
- Allow host to create advance polls and quizzes: ON
- Always show meeting control bar: ON
- Show Zoom windows during screen share: ON
- Screen sharing: ON
- Who can share: All participants
- Who can start sharing when someone else is sharing: Host only
- Annotation: ON
- Whiteboard: ON
- Remote Control: ON

- Nonverbal feedback: ON
- Meeting reactions: ON
- All Emojis: Checked
- Allow removed participants to rejoin: OFF
- Allow participants to change their name when joining a meeting: ON
- Hide participant profile pictures in a meeting: OFF

In Meeting (Advanced):

- Breakout room: ON
- Remote support: ON
- Closed captioning: ON but only if you have people that can provide that service
- Virtual background: ON
- Video filters: ON
- Immersive View: ON
- Show a “Join from your browser” link: ON
- Enable “Stop incoming video” feature: ON

Email Notification:

- When attendees join meeting before host: ON
- When meeting is canceled: ON

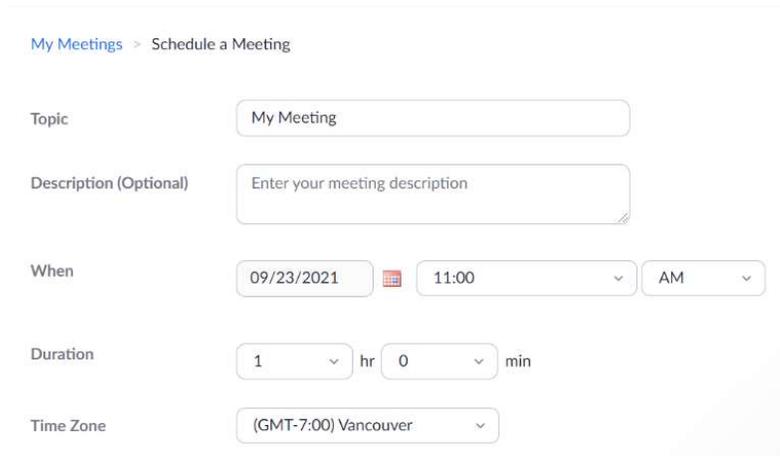
Creating a Zoom Meeting for your Local

Schedule a Meeting

Sign in to your Zoom account at www.zoom.us

Select **Meetings** on the left-hand menu, then click on the **Schedule a Meeting** button on the right side of the page to open the settings for a new meeting.

Topic – Create a meeting name (e.g. HEU Local Meeting), along with a description of the main issues to be discussed at the meeting that will appear on the registration page. Just like a regular meeting notice!



The screenshot shows the 'Schedule a Meeting' interface. At the top, it says 'My Meetings > Schedule a Meeting'. Below this are several input fields: 'Topic' with the text 'My Meeting'; 'Description (Optional)' with the placeholder 'Enter your meeting description'; 'When' with a date field set to '09/23/2021', a time field set to '11:00', and an AM/PM dropdown set to 'AM'; 'Duration' with a dropdown set to '1' hour and '0' minutes; and 'Time Zone' with a dropdown set to '(GMT-7:00) Vancouver'. There is a 'Cancel' button on the right side of the form.

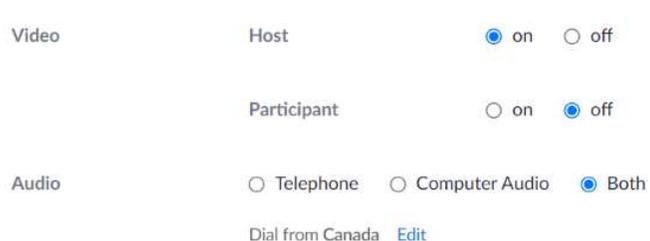
Specify a date, time, and duration for the meeting. Schedule more time than you think you'll need.

The following are some recommended settings for your local Zoom meeting:

Security – Enable **Waiting Room** will allow you to manually admit participants into a meeting rather than allowing participants to automatically join a meeting. You can private chat with participants to verify who they are prior to admitting them. You can also move participants from a meeting back into the Waiting Room if needed or remove them from the meeting entirely.

Registration – Ideally you will require members to register for the meeting rather than sending direct links to the meeting. This will be covered in Level 2.

Video – Turn the Host video on but leave the Participant video off, allowing people to start their video themselves when they are ready.



The screenshot shows the 'Video' and 'Audio' settings. Under 'Video', there are two rows: 'Host' with 'on' selected (radio button) and 'off' unselected; and 'Participant' with 'on' unselected and 'off' selected. Under 'Audio', there are three radio buttons: 'Telephone' (unselected), 'Computer Audio' (unselected), and 'Both' (selected). Below these are the options 'Dial from Canada' and an 'Edit' link.

Audio – Select both telephone and computer audio. This allows people with limited bandwidth to hear the meeting better. But caution: Some people will show up in the meeting as two different participants, as a video and as a phone number.

Be sure to change the dial in numbers to Canada.

Click on **Save** button to save the meeting. Once saved, you can also **Save as Meeting template**, so that you can use it to set up future meetings using the same options. You can also edit the meeting anytime.

Preparing for your Meeting

Assign Roles

In addition to your executive roles, you will want to assign additional duties to help run the meeting:

- Host the meeting, assign co-hosts
- Orientate people to zoom
- Admit or remove people from the meeting
- Verify unidentified people
- Share screen content
- Type motions into the chat
- Launch a poll
- Mute/Unmute participants when necessary

Send Meeting Link and Reminder

- One week before the meeting, send the meeting link and topics for discussion to your email contacts in small batches to avoid being flagged as spam, or use Google groups.
- If you post the link publicly, you **MUST** take extra care in verifying the people attending the meeting
- The day before or the day of the meeting, send a reminder with the meeting link, the agenda, and the Zoom tip sheet and ask that they join the meeting 15 minutes early to work out any tech issues and get orientated to Zoom.

Running the Meeting

1. The “Host” starts the meeting 20 – 30 minutes before the membership meeting begins and support people/executive should sign in shortly after. The host will assign people as “Co-hosts.” The team should test their own sound and video and have any last minute discussions in preparation for the meeting.
2. Members should start to arrive into the “Waiting room.” Send a message in the chat to tell them that the meeting will start shortly, to rename themselves if they are able, and to test their mic and sound.
3. When the Host and Co-hosts are ready, they can start admitting them into the meeting.
4. Verify participants.

- Ask members to rename themselves so that their attendance can be recorded. For those unnamed people that you do not know, a co-host can ask them privately in the chat or in the group to identify themselves. If they are unable to rename themselves, a co-host should do it for them.
 - People attending by phone will only show up as a phone number and they do not have the ability to rename themselves. A co-host will have to ask them to identify themselves by name and their worksite and should rename them.
 - If a participant will not identify themselves as a member of the local, you can put them back into the waiting room until they are able to identify themselves.
5. Start Orientation to Zoom
- Explain (or screen share) how to:
 - Mute and unmute
 - Start and stop their video
 - Change backgrounds (some people wish to be private but this feature can create instability. If the member is having difficulty with internet, it is best to turn off their video. They can still see everyone and be heard, and their internet will be improved).
 - How to open the chat and remind them that everything is recorded, including private chats!
 - Show how the speaker view can be changed to gallery view if they wish
 - How to rename themselves
 - How to use the reactions and raise hand feature
6. Starting the meeting
- Establish meeting agreements:
 - Expectation that people act just as they would at an in person meeting: pay attention, stay on mute until the Chair calls on them to speak, etc.
 - Participate from a private space or use headphones
 - How to pose questions, make comments and vote:
 - Raise physical hand in front of the camera
 - Raise their “virtual hand” in the reaction or participant panel (especially helpful in larger groups)
 - Explain that they can make comments in the chat
 - Chair must ask people participating by phone if they want to speak and provide the extra time for them to unmute and interject

Troubleshooting

As members try to sign on, they may encounter issues. Most can be resolved by going through the orientation with them. Here are some tips to help:

- Have the phone in number, meeting ID, and the meeting link on hand in case you need to provide it quickly
- Some will say the link isn't working, they lost the link, or they are unsure of what the link looks like. Have the link ready to send to them directly again.
- Some say that they “Don't have Zoom.” They should download and install the app on whatever device they are using for the meeting. It's free and provides access to all the features of Zoom. They could also attend through the web browser but it has limited features.

- If someone is still having problems or does not want to use Zoom, suggest that they phone in and provide them the phone number, meeting ID, and passcode
- Where someone is having connectivity problems, ask them to close any background programs that may be running, such as email or Facebook etc, and turn off any animated backgrounds
- If video problems persist, they can turn off their video to reduce the demand on their bandwidth. They can still see and hear everyone, and they can still speak and use the zoom features.
- Where audio is the problem, members can switch their audio from their computer to their phone

Find more information at <https://support.zoom.us> for solutions.