



**City of Madison, Wisconsin
Information Technology**

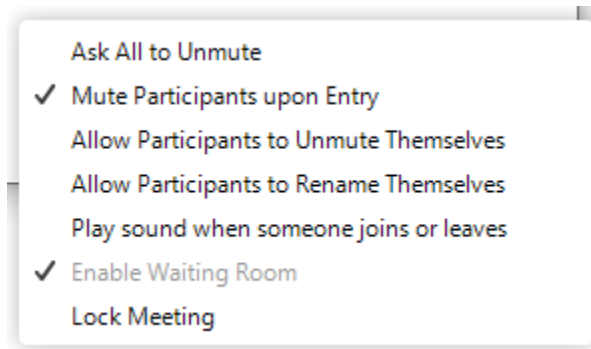
Host User Guide to Zoom Meetings (Neighborhood Meetings)

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Host Steps in Facilitating a Public Meeting

1. Create meeting in cityofmadison.zoom.us.
2. Send registration invitation as requested.
3. Start Meeting.
 - Open Participants Panel More.



- Make presenters and facilitator co-hosts.
 - Verify that Screen Sharing is only available to host.
4. Facilitate Meeting.
 - Find and permit public to speak.
 - Mute public when they are done.
 5. End meeting for all participants.

How to Schedule a Public Meeting





1. Sign in to the Zoom web portal: cityofmadison.zoom.us.
2. Click **Meetings**, and click **Schedule a New Meeting**.



3. Select the meeting options. Note that some of these options are not available if they were disabled and locked to the off position at the account level.
 - **Topic:** Enter the name for your meeting i.e. Westside Listening Session: May 6, 2020.
 - **Description:** Enter an optional meeting description.
 - **When:** Select a date and time for your meeting. You can manually enter any time and press enter to select it.
 - **Duration:** Choose the approximate duration of the meeting. This is only for scheduling purposes. The meeting will not end after this length of time.
 - **Time Zone:** By default, Zoom will use the time zone set in your profile.
 - **Recurring meeting:** Do not create recurring meetings.
 - **Registration:** Yes. Required.

- **Require meeting password:** You can select and input your meeting password here. Joining participants will be required to input this before joining your scheduled meeting.
 - **Host Video:** Yes.
 - **Participant Video:** No. The participants will have the option to start their video.
 - **Audio Options: Telephone and Computer Audio** (both).
 - **Enable join before host:** Does not allow.
 - **Mute participants on entry:** This will mute participants as they join the meeting. Participants can unmute themselves after joining the meeting.
Note: To mute all participants currently in a meeting, see the options to manage participants.
 - **Enable waiting room:** Required.
 - **Record the meeting automatically:** All Neighborhood meetings are pre-approved to record. Hosts are not required to record their meetings, but it is recommended for members of the public that wish to watch the meeting at a later date. If you select to record automatically, the recording will start as soon as the zoom meeting is started, regardless of when your neighborhood meeting actually starts. Which means your pre-meeting talking will be included in the recording.
 - **Import to Mediasite:** Yes
 - **Publish To:** Select Neighborhood_Meeting.
 - **Alternative Hosts:** Leave this blank.
4. Click **Save** to finish.

Once finished, select **Copy the Invitation** to send out the invitation to your Zoom meeting.

Time	Oct 28, 2020 06:00 PM Central Time (US and Canada)		
Add to	 Google Calendar	 Outlook Calendar (.ics)	 Yahoo Calendar
Meeting ID	969 6471 2892		
Security	✓ Passcode	***** Show	✓ Waiting Room
Registration Link	https://cityofmadison.zoom.us/meeting/register/tJlkce2vrzkiE9YaB3ctpE4Gd7fEkTugK54M		 Copy Invitation

Copy the Invitation will open up a window where you can copy the full invitation to send out via email.

Note: If you save the Outlook Calendar ics, when you import that to your calendar, you can add invitees to your meeting.

Public Registration Process

Registration for neighborhood meetings is not the same as for public meetings.

You will be using Zoom's registration so that you can have a safe link to share. The link for sharing is the link to register. By default, it only asks for name and email and all registrations are automatically approved. If you want to customize it, you can ask for additional information at time of registration.

After your meeting you can request a report from meetingsupport@cityofmadison.com with a full list of all registrants for your meeting.

Customizing Registration Options

After you schedule the meeting, you can customize registration options:

1. Sign into the assigned neighborhood meeting account at cityofmadison.zoom.us.
2. Open the meeting that you wish to edit.
3. Click the **Registration** tab at the bottom of the screen.
4. In the **Registration Options** section, click **Edit**.
5. Customize these options:

Registration

- **Automatic Approval:** Anyone who signs up will receive information on how to join.
- **Manual Approval:** Anyone who signs up will need to be approved by the host on the meeting management page.
- **Send an email to host when someone registers:** Check this option if you want to receive an email when someone registers for your webinar. Attendees will receive an email when you approve their registration.
- **Close registration after event date:** Check this option if you want to prevent anyone from registering after the date and projected end time. Attendees can still register on the event date and once the meeting starts, as long as it is before the projected end time of the webinar. For example, if you schedule a webinar for 9AM with a duration of 2 hours, the registration will close at 11AM.
- **Allow attendees to join from multiple devices:** Check this option to allow webinar attendees to be able to join from multiple devices at the same time, such as computers and phones.
- **Show social share buttons on the registration page:** Provides buttons to share the registration page to Facebook, Twitter, LinkedIn, or email.

Questions

You can customize the question fields that appear in your registration page.

1. Click the **Questions** tab.
2. Check the Field(s) you would like to include on your registration page.
3. (Optional) Check the **Required** box if you want to make that field required.
4. Click **Save All**.

Note:

- Name and email address are always required.
- Some fields like **Country/Region** and **State/Province** will appear as dropdown menus for attendees.

Custom questions tab

1. Click the **Custom Questions** tab to add questions to your registration page.
2. Click **New Question** to add a question.
3. Choose the type of question: **Short answer** or **Single answer**.
4. Check whether the question is required.
5. Enter the question.
6. For single answer questions, enter the answer options.
7. Click **Create**. Repeat the above steps to create more custom questions.
8. Click **Save All** to save your customized registration.

Email Question Settings

After scheduling the meeting, you can customize the email address that questions are sent to:

1. Sign into the assigned neighborhood meeting account at cityofmadison.zoom.us.
2. Open the meeting that you wish to edit.
3. Click the **Email Settings** tab at the bottom of the screen.
4. In the **Email Contact** section, click **Edit**.
5. Enter the name and email address of the staff person you want to receive questions.

Confirmation Email Customization

After scheduling the meeting, you can customize the confirmation email sent to registrants:

1. Sign into the assigned neighborhood meeting account at cityofmadison.zoom.us.
2. Open the meeting that you wish to edit.
3. Click the **Email Settings** tab at the bottom of the screen.
4. In the **Confirmation Email to Registrants** section, click **Edit**.
5. In the blank text box field, you may enter a link to a survey, website, or anything else you would like the registrants to access.

Hi [User Name],

Thank you for registering for "Neighborhood Meeting: November 19, 2020".



Please submit any questions to: NeighborhoodMeeting2@cityofmadison.com

Host and Co-Host Controls in a Meeting

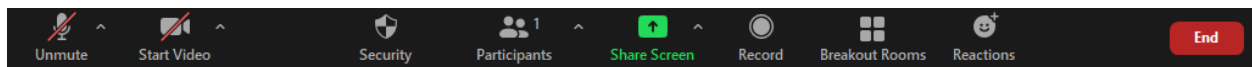
Host controls allow you as the host to control various aspects of the Zoom Meeting, such as managing the participants. In order to see everyone and all controls, please use the desktop application on a computer.

The co-host feature allows the host to share hosting privileges with another user, allowing the co-host to manage the administrative side of the meeting, such as managing participants. The host will assign a co-host at the start of the meeting.

Co-hosts do not have access to the following controls as they are only available as host controls in a meeting:

- End meeting for all participants.
- Make another participant a co-host.
- Start the meeting.

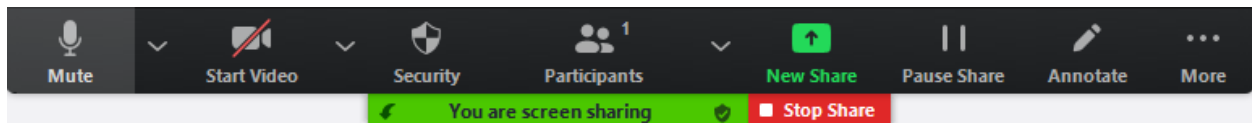
The host controls will appear at the bottom of your screen if you are not currently screen sharing.



- **Mute/Unmute:** This allows you to mute or unmute your microphone.
 - **Audio Controls** (click ^ next to **Mute/Unmute**): The audio controls allow you to change the microphone and speaker that Zoom is currently using on your computer, leave computer audio, and access the full audio options in the Zoom settings. This includes connecting via phone audio.
 - Tip: Use Alt + A keyboard shortcut to mute or unmute yourself. You can also use push to talk if you want to unmute yourself by holding the spacebar.
- **Start/Stop Video:** This allows you to start or stop your own video.
 - **Video controls** (click ^ next to **Start/Stop Video**): If you have multiple cameras on your computer, you can select which Zoom is using, access the full video controls, and select a Virtual Background.
- **Security:** Access in-meeting security options.
 - **Lock Meeting:** Locks the meeting, keeping new participants from joining the meeting.
 - **Enable Waiting Room:** Enables Waiting Room for incoming new participants or to move current participants into the Waiting Room.
 - **Allow participants to:**
 - **Share Screen:** Allows participants to start Screen Shares
 - **Chat:** Chat is turned off by default, but can be turned on. See *Chat Recommendations*.
 - **Rename Themselves:** Allows participants to rename themselves from the Participants panel.
 - **Unmute Themselves:** Allows participants to unmute themselves without the host's permission.
 - **Remove Participant:** Allows the removal of a participant from a meeting. The participant cannot re-join.

- **Report:** Allows you to report a user to Zoom's Trust and Safety team. You will be able to select which user to report and provide details about the problem. You can also upload evidence, such as screenshots.
- **Manage Participants:** Opens the Participants window.
- **Polling:** Allows you to create, edit, and launch your polls. The options to create or launch polls will open up the Zoom web portal in your default browser.
- **Share Screen:** Start sharing your screen. You will be able to select the desktop or application you want to share.
- **Screen Share** controls (click ^ next to **Share Screen**): Select who can share in your meeting. This should be set to only the host can share.
- **Record** (only available to the host): Start or stop a cloud recording.
- **Breakout Rooms** (only available to the host): Start breakout rooms.
- **End Meeting** (only available to the host): This will end the meeting for all participants. If you want to have the meeting continue, you should give another participant host control before leaving the meeting.

When there is screen sharing, the controls will appear at the top of your screen, but you can drag it to another location.




Managing Participants in Meeting

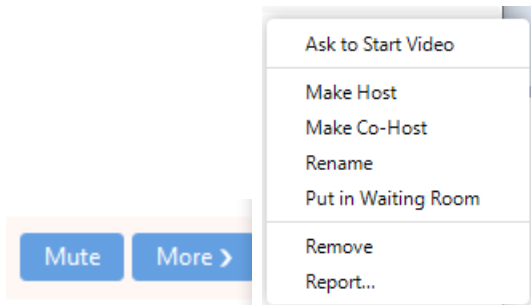
As the host in a meeting, you can manage the participants. By default, any participant in a meeting can share their video, screen, and audio.

Names in the participants list appear in the following order:

1. You
2. The host (If you're not the host)
3. Phone numbers with no names
4. Unmuted participants (sorted alphabetically)
5. Muted participants (sorted alphabetically)

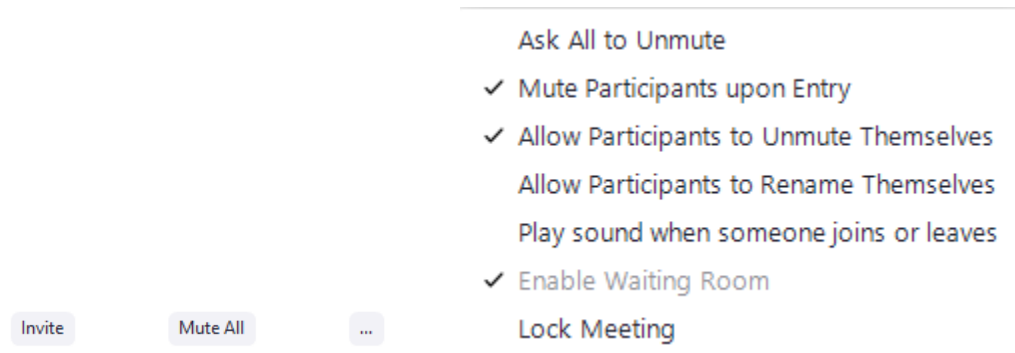
Controls for managing participants

1. Click **Manage Participants** in the host controls to display the participants list:

2. Hover over a participant and click **More** for these options:



- **Ask to Start Video:** Prompts the participant to start their video. If the participant has started their video, you will see the **Stop Video** option. If you stop the participant's video stream so they are unable to restart their video.
- **Make Host** (only available to the host): Assign the attendee to be the host. There can only be one host.
- **Make Co-Host** (only available to the host): Assign the attendee to be a co-host. You can have an unlimited number of co-hosts. In order to present or share their screen, staff must be made a co-host.
- **Rename:** Change the attendee name that is displayed to other participants. This change only applies to the current meeting.
Note: To change your own name that is displayed, hover over your name in the participants list and click **Rename**.
- **Put in Waiting Room:** Place the attendee back in the waiting room.
- **Remove:** Dismiss a participant from the meeting. They won't be able to rejoin.

You will also have access to enable or disable options at the bottom of the participants list by clicking the three dots:



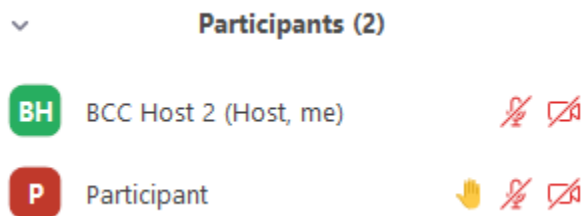
- **Mute All / Ask All to Unmute:** Mute or unmute all participants currently in the meeting. When asking to unmute, they will get a prompt to accept and unmute.
- **Mute participants on entry:** Automatically mute participants as they join the meeting.
- **Allow participants to unmute themselves:** Participants can unmute themselves if they want to speak to others in the meeting. This can make things chaotic, but it is up to you if you want to permit this.
- **Allow participants to rename themselves:** Participants can change their screen name displayed to other participants.
- **Play sound when someone joins or leaves:** Play a sound when participants join and leave the meeting
- **Play Chime for Raise Hand:** Play a sound when participants raise their hand.
- **Lock meeting:** Doesn't allow other participants to join the meeting in progress.

Managing Raised Hands as a Host

The raise hand feature allows participants to raise their hand to indicate that they want to talk. As a Host, inform your participants how you would like to use this feature at the start of the meeting. For example, attendants need to raise their hand to be recognized to speak. Then they will be unmuted to speak. People on the phone only can mute/unmute by pressing *6 and raise their hands by pressing *9.

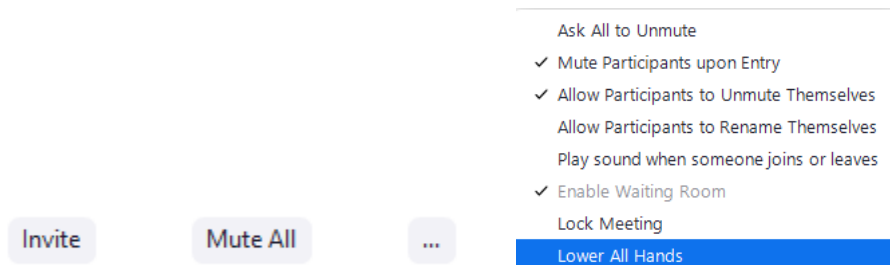
You can see who has their hands raised at any time by viewing the participants list:

1. Click **Participants** in the meeting controls.



Note: The order the Participants are listed in changes. Participants are displayed in the following order.

1. Participants with their hand raised. Participants that raised their hand first are displayed at the top.
 2. Participants without their hand raised.
2. Hover over a participant with their hand raised for these options:
 - **Ask to Unmute:** The participant will receive a prompt to confirm if they want to unmute or stay muted. (If it says Unmute, it will immediately unmute)
 - **Lower Hand:** Lower the participant's hand. Their position in the participants will move down after the participants with their hand raised.
 3. Click the three dots at the bottom of the participants tab, then click **Lower All Hands** to lower all raised hands.



Advanced Features

Chat

The following are recommendations for agencies that choose to host neighborhood meetings with chat allowed:

- Chat should be open for participants to send messages to the **host only**.
 - This allows participants to send questions about the meeting topic, request technical assistance, etc. directly to the host. For some participants chat can become a distraction, and it can quickly spiral into unrelated side conversations. This setting allows for the greatest amount of control over the chat function, other than shutting off the chat entirely.
 - **NOTE:** Since these are shared accounts, **depending on the last user** the chat setting may be turned on or off. This would have to be done in the account settings **prior to the start of the meeting**. To set the chat to host only, the host would have to go into the chat option, click the three dots and select, “Host only.”
- Chat messages are considered public record and must be saved manually.
 - Messages should be stored long-term with other content related to the topic of the neighborhood meeting and must be retained in accordance with Wisconsin State Statutes and the City’s Records Retention Policy. Staff should work closely with their records custodian to ensure chat messages are stored properly to comply with any records request.
- Private chat should **NOT** be allowed in neighborhood meetings at any time.
 - There is no way for the host to save private chat messages or know if they are being sent.
- It is ultimately up to the hosting agency whether chat is available during their neighborhood meeting.
 - You may want an extra staff person facilitating just to monitor chat.

How to turn on chat

1. Sign in to the Zoom web portal: cityofmadison.zoom.us
2. In the navigation menu, click **Settings**.
3. Navigate to Chat option under In Meeting (Basic).
4. Click the Chat toggles to “on”

In Meeting (Basic)

Require encryption for 3rd party endpoints (SIP/H.323)



By default, Zoom requires encryption for all data transferred between the Zoom cloud, Zoom client, and Zoom Room. Turn on this setting to require encryption for 3rd party endpoints (SIP/H.323) as well.

Chat



Allow meeting participants to send a message visible to all participants

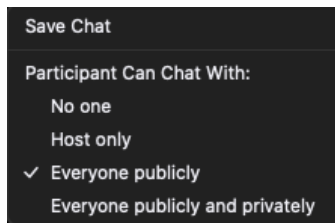
Controlling chat access

1. Start a meeting as host.
2. Click **Chat** in the meeting controls.
3. At the bottom of the in-meeting Zoom Group Chat window, click **More**, and then choose for **Participants Can Chat With: Host only**.

How to save chat manually

You can save your in-meeting chat manually during the meeting. This will save it locally to your computer.

1. When in meeting, click on **Chat**.
2. At the bottom of the chat window, click ..., then **Save Chat**.



3. This will save your chat to your local recording location. The default is your **Documents** folder / **Zoom** / **Folder with meeting name, date, and time**.

Nonverbal Feedback

Overview

Meeting participants can place an icon beside their name to communicate with the host and other participants without disrupting the flow of the meeting. These icons are found in the **Reactions** menu in the toolbar, and when selected, they display on the participant's video and in the participants list for 10 seconds. Participants can change their emoji skin tone in Settings.

All participants can see the icons that everyone else has chosen. In addition, the host sees a summary of how many participants are displaying each icon.

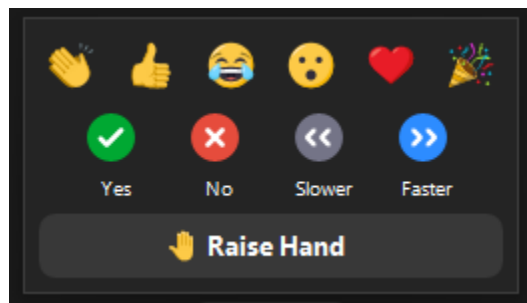
Providing nonverbal feedback during meetings (participants)

To provide nonverbal feedback in the meeting:

1. Join a Zoom meeting as a participant.
2. Click the **Reactions** button.



3. Click one of the icons to provide feedback to the host. Icons will only remain for 10 seconds. **NOTE:** You can only have one icon active at a time.



- Clap
- Thumbs Up
- Laugh
- Open Mouth
- Heart
- Tada
- Yes
- No
- Go slower
- Go faster
- Raise Hand / Lower Hand

The icon will appear next to your name in the participants list.

Raise hand will stay up until lowered by host or the participant, and can be up at the same time as another icon.

Managing nonverbal feedback (hosts)

1. Click the **Participants** button to see a list of participants and their nonverbal feedback.




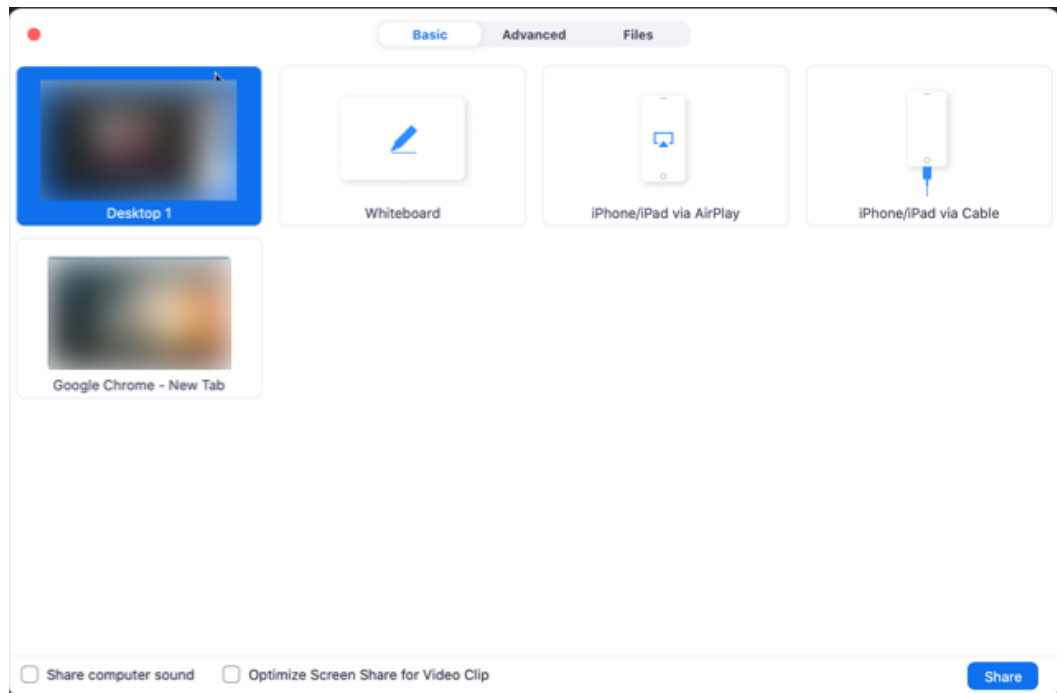
2. In the participants list, you can view and manage feedback using these features:
 - If a participant clicked on a feedback icon, you'll see that icon beside their name.

- At the bottom of the list, it will show you any icons in use, and the number shows how many participants have clicked on that icon.
- If a participant clicked raise hand, you can lower their hand by hovering over their name and clicking **Lower Hand**.

Screen Sharing

Click **Share** in your meeting and choose the screen that you would like to share. Only Hosts and Co-Hosts can share their screens.

- Click the **Screen Share** button located in your meeting controls. 
- Select one of these screen share options:
 - Share your entire desktop, specific application window, [whiteboard](#), or [iPhone/iPad](#) screen.

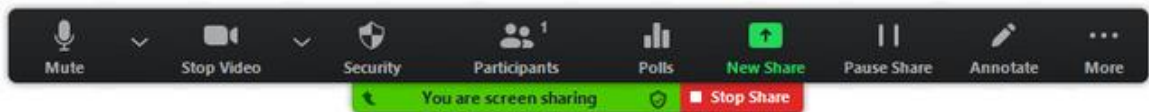


3. (Optional) Enable these features:
 - Check **Share Computer Sound**: If you check this option, any sound played by your computer will be shared in the meeting.
 - Check **Optimize for full screen video clip**: Check this if you will be sharing a video clip in full screen mode. Do not check this otherwise, as it may cause the shared screen to be blurry.
4. Click **Share**.
 - Zoom will automatically switch to full screen to optimize the shared screen view. To exit full-screen, click **Exit Full Screen** in the top-right corner or press the **Esc** key.

- To disable automatic full screen when viewing a shared screen, disable this option in your [desktop client settings](#): **Enter full screen automatically when a participant shares screen.**

Share screen menu

When you start sharing your screen, the meeting controls will move into a menu that you can drag around your screen.



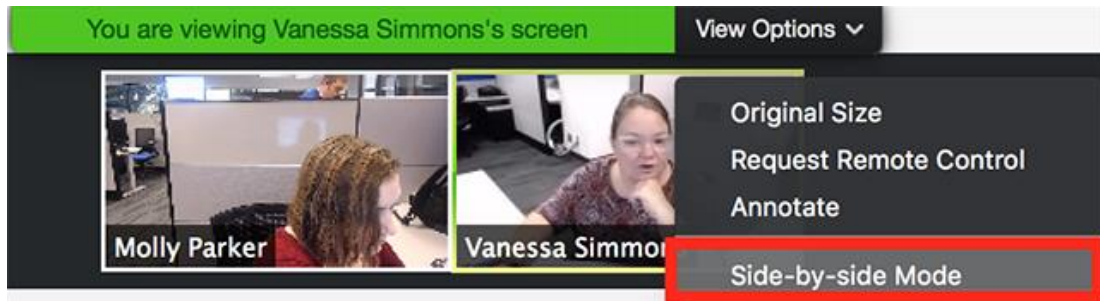
- **New Share:** Start a new screen share. You will be prompted to select which screen you want to share again.
- **Pause Share:** Pause your current shared screen.
- **Annotate / Whiteboard:** Display annotation tools for drawing, adding text, etc.
- **More:** Hover over more for additional options.
 - **Optimize Share for Full-screen Video Clip:** Start optimizing for a video clip in full screen mode.
 - **NOTE:** Do not enable this setting if you are not sharing a full screen video clip, as it will blur your screen share.

Side-by-side Mode for screen sharing

Meeting participants who are viewing a shared screen can switch to Side-by-side Mode. This enables them to see the shared screen alongside either the Speaker View or Gallery View, depending on which view they choose. They can also adjust the location of the separator between the shared screen and video to change the relative size of each side.

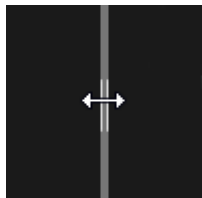
NOTE: Side-by side mode does not work if the dual monitors setting is enabled.

- Sign in to the Zoom Desktop Client.
- Start or join a meeting.
- While viewing a shared screen click on **View Options** and choose **Side-by-side Mode**.



The shared screen will appear on the left and the speaker will appear on the right.

- Hover your pointer over the boundary between the shared screen and participants' video until your pointer changes to a double arrow and you see a grey line separating both views.

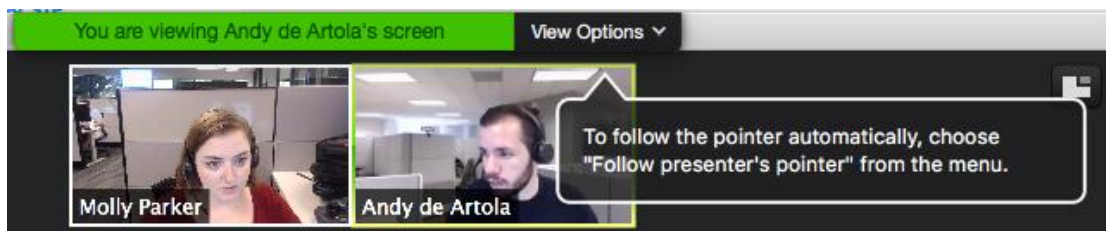


- Click and drag the separator to adjust the size of each view.
- Click **Speaker View** or **Gallery View** at the top to switch between the two.
- To exit Side-by-side Mode, click **View Options**, then uncheck the **Side-by-side Mode** option.

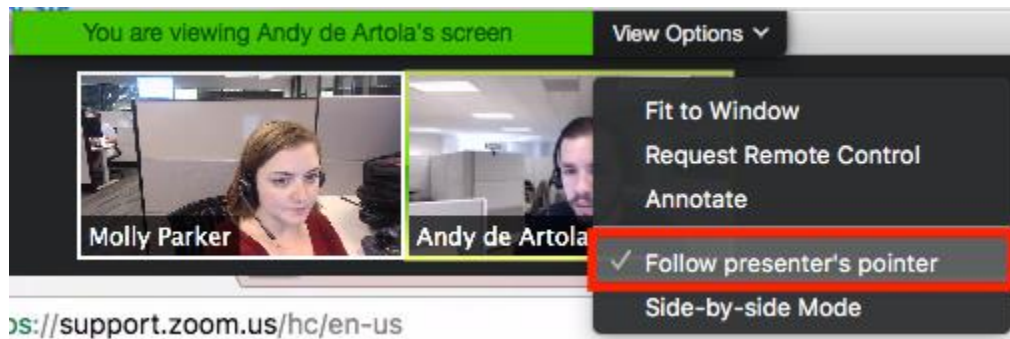
Resize Screen Share

When a presenter is sharing a screen that is at a higher resolution than yours, you can change the size and automatically follow the presenter's pointer on your desktop client. This is particularly useful when only a portion of the shared screen is visible to you, helping you stay focused on the important part of the shared screen.

- Start or join a meeting or webinar on a Zoom Desktop Client.
- When screen sharing begins, click **View Options** to zoom in, out, or fit to window.
- If using **original window size** the **Follow Presenter's Pointer** option is automatically enabled.
- If you manually move the shared content, you see a message that lets you know that the option the presenter's pointer has been disabled.



- To re-enable following the presenter's focus, under **View Options**, choose the option **Follow Presenter's Pointer**.



Breakout Rooms

Overview

Allows the host to split the Zoom meeting in up to 50 separate "breakout rooms." The host can split participants into separate sessions automatically or manually, and switch between the various groups at different times. It is highly recommended to use the Zoom desktop application while hosting breakout rooms.

Limitations

By default, only the host can assign participants to breakout rooms. The co-host can leave and join any breakout room only if they join a breakout room assigned to them by the host. The host can choose to allow participants to choose their own room, but this must be done in the meeting by the host.

Breakout Rooms cannot be managed from the Zoom Mobile App. The Host must be using the desktop application.

If the meeting is being recorded, it will only record the main room, regardless of what room the meeting host is in.

Creating Breakout Rooms in the meeting

1. Start the meeting.
2. Click **Breakout Rooms**.
3. Select the number of rooms that will be created and how to assign the participants.
 - **Automatically:** Let Zoom split your participants up evenly into each of the rooms.
 - **Manually:** Choose which participants you would like in each room.
 - **Let participants choose room:** Participants can select and enter rooms on their own.
4. Click **Create Breakout Rooms**.

Assign 1 participants into Rooms:

☒ Automatically ☐ Manually

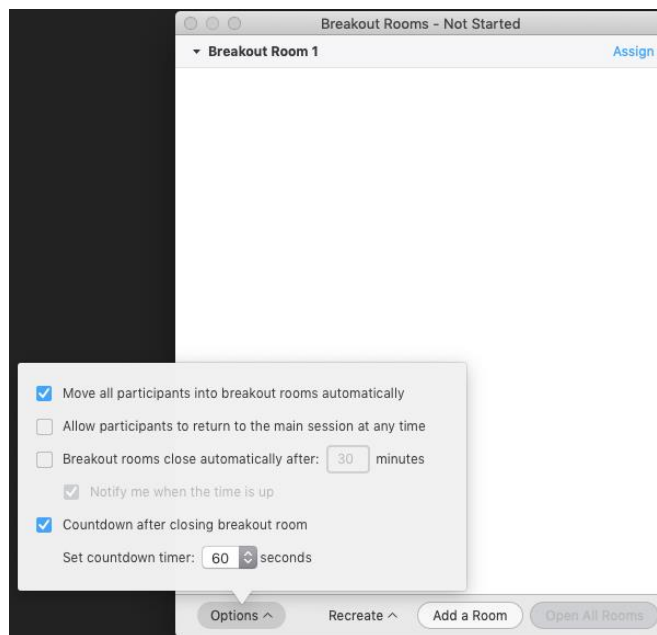
1 participants per room

[Create Rooms](#)

5. The rooms will be created, but will not start automatically. You can manage the rooms prior to starting them.

Options for Breakout Rooms

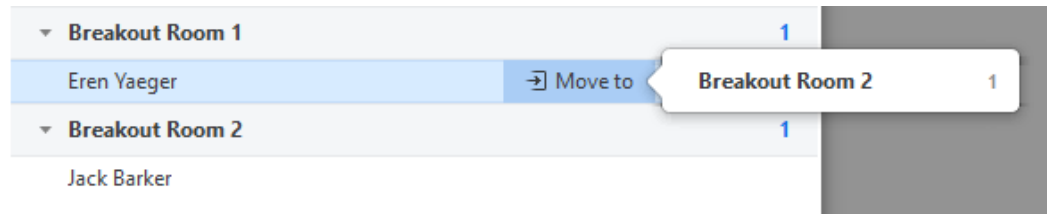
1. After creating the breakout rooms, click **Options** to view additional breakout room options.



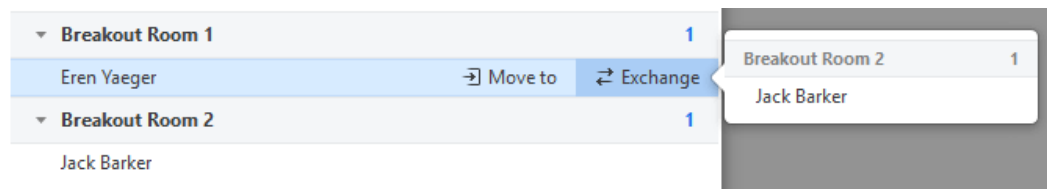
2. Check any options that you would like to use for your breakout rooms.
3. Follow the steps below to assign participants to rooms or click **Open All Rooms** to start the breakout rooms.
4. Select **Assign** next to the room you wish to assign participants to and select participants you want to assign to that room. Repeat for each room.



- Click **Move to** (next to the participant name) to move the participant to another room.



- Click **Exchange** to swap a participant with another.



- Click **Open All Rooms** to start all rooms. Participants will be moved to their respective rooms.

Managing the Breakout Rooms

- The host can stay in the main meeting or join a breakout room manually.
- Click **Join** to join a breakout room.
- Click **Leave** to return to the main meeting after joining a breakout room.
- Click **Close All Rooms** to stop all rooms after a 60 second countdown and return all participants back to the main meeting.

Polling

Overview

The polling feature allows you to create single or multiple choice polling questions for your meetings. You can launch the poll during the meeting and gather responses from participants. Anonymous poll results are available during the meeting, but a report can be pulled for you after the meeting for more detailed response information. Polls can also be conducted anonymously if you do not wish to gather participant information with the poll results.

Participants on the iOS or Android mobile app can use polling, but hosts need to be using the desktop client to manage polling.

Creating a Poll

1. Go to the **Meetings** page and click on your scheduled meeting. If you do not have a scheduled meeting, schedule a meeting now.
2. From the meeting management page, scroll to the bottom to find the **Poll** option. Click **Add** to begin creating the poll.



3. Enter a title and the 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 report.
 - Select whether you want the question to be single choice or multiple choice.
4. Type in the answers to your question and click **Save** at the bottom.
5. Click **Add a Question** to create a new question for the poll.
6. You can add more polls by repeating steps 2-5. **NOTE:** You can create a maximum of 25 polls for a single meeting.

Launching a Poll

1. Start the meeting that has polling enabled.
2. Click **Polls** in the meeting controls.
3. Select the poll you would like to launch.
4. Click **Launch Poll**.
5. The participants in the meeting will be prompted to answer the polling questions. The host will be able to see the results live.
6. Once you would like to stop, click **End Poll**.
7. If you want to share the results to the participants in the meeting, click **Share Results**.

- **NOTE:** Shared results are made anonymous regardless of the full details gathered in the poll.

You can request a report of the poll results after the meeting from meetingsupport@cityofmadison.com. When viewing a report of the poll results, take note of these things:

- If the poll was not anonymous, it will list the participants' names and email addresses.
- If the poll was anonymous, it will show "anonymous" for the participants' names and email addresses.