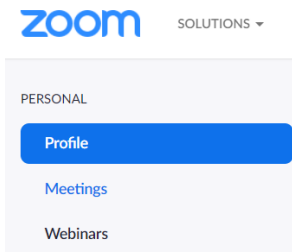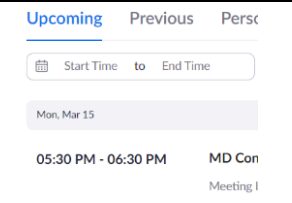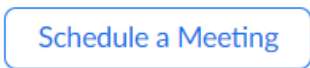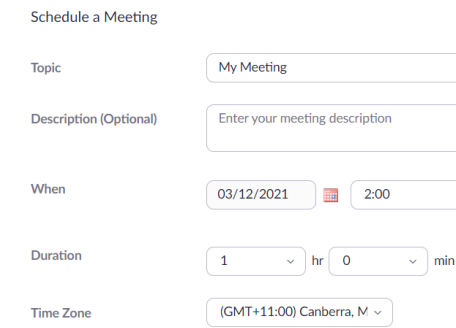# DISTRICT 9810 WORK INSTRUCTION
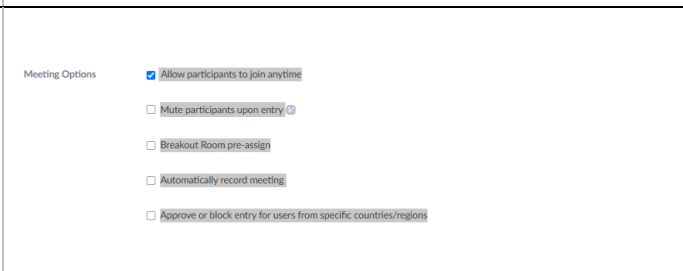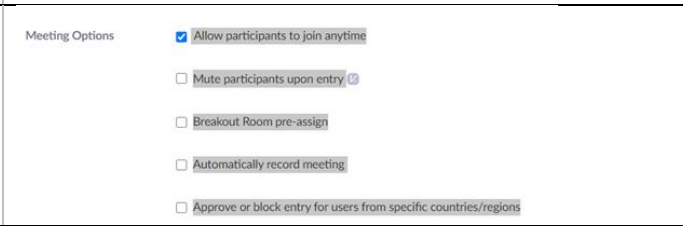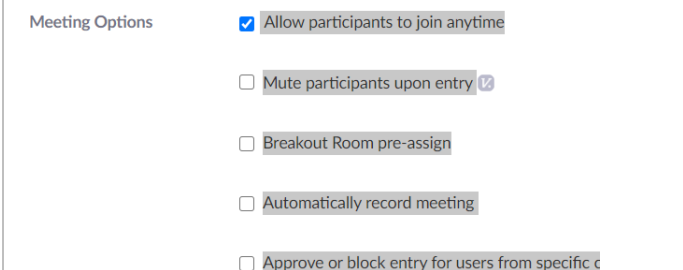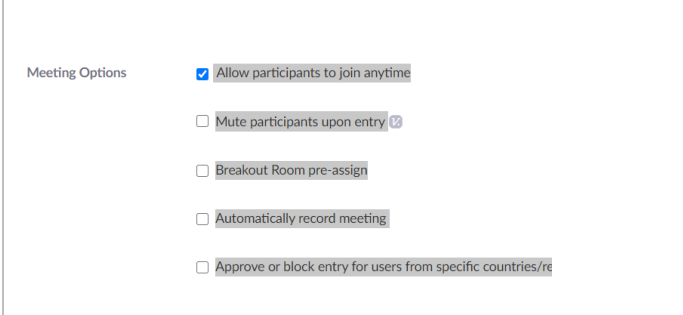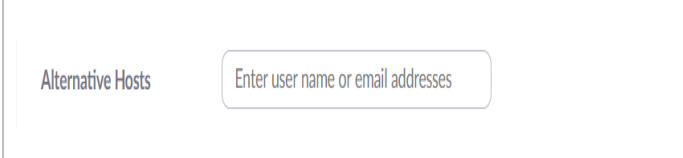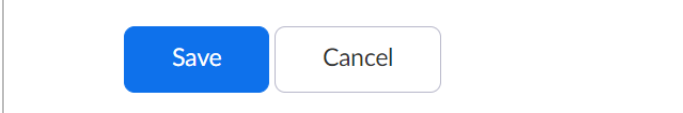
TOPIC	Work Sheet for Scheduling a Zoom meeting
DATE	12 March 2021
AUTHOR / RESPONSIBLE	Joady Barnes
APPROVED BY	

DESCRIPTION	To provide Rotarians with step-by-step instructions to schedule a Zoom meeting including Breakout Rooms and Polling questions
OBJECTIVE/S	At the end of this instruction, the Rotarian will have successfully logged in and schedule a meeting in Zoom. Create and manage breakout rooms and create and post Polling questions during a meeting.

ACTIONS	Step	Description	Example
	1	**First step**	
	1.1	Open your Zoom client and sign into Zoom. Select meetings.	
	1.2	Ensure there are no bookings made for the time you want to have your Zoom meeting	
	2	**Next step**	
	2.1	Select Schedule a meeting. This will open the scheduler window	
	3.	**The scheduler window.** Enter the topic or name for your meeting. **Choose the date and time.** **Start**: Select a date and time for your meeting. You can start your meeting before the scheduled time. You can also manually enter a time. For example, you can enter 15 in the minutes field to schedule a meeting in 15-minute increments. **Time Zone**: By default, Zoom will use your computer's time zone. Click on the drop-down menu f	

		you wish to use a different time zone.	
	3.1	**Recurring meeting:** Choose this if you would like a recurring meeting (the meeting I.D.) will remain the same for each session. **Meeting I.D.** Generate Automatically: Zoom will generate a random unique meeting I.D. **Personal Meeting I.D.** Use your personal Meeting I.D, **Security: Passcode:** Enter a meeting passcode. Joining participants will be required to input this before joining your scheduled meeting. **Waiting Room**: Activating this button means that participants must wait to be admitted by the host.	☐ Recurring meeting Registration ☐ Required Meeting ID ◉ Generate Automatically ○ Personal Mee Template [None] Security ☑ Passcode [578656] Only users who have the invite link or passcode car ☑ Waiting Room Only users admitted by the host can join the meetin
	3.3	**Require Authentication to join:** Restricts access to the meeting so that only signed-in participants can join. **Video Host:** Choose if you would like the host's video on or off when joining the meeting. Even if you choose off, the host will have the option to start their video. Participants: Choose if you would like the participants' videos on or off when joining the meeting. Even if you choose off, the participants will have the option to start their video. **Audio*:** Allow users to call in using Telephone only, Computer Audio only, Both, or 3rd Party Audio (if enabled for your account). **Dial in from:** If Telephone or Both is enabled for this meeting, click Edit to select the dial-in countries to include in the invitation. By default, this includes your Global Dial-In Countries listed in your meeting settings.	☐ Require authentication to join Video Host ◉ on ○ off Participant ◉ on ○ off Audio ○ Telephone ○ Computer Audio ◉ Both Dial from Australia Edit
	3.4	**Advanced Options: Allow participants to join before start time:** Allow participants to join the meeting without you or before you join. The meeting will end after 40-minutes for Basic (free) users if 3 or more people join the meeting. If enabled, you can also choose how far in advance of the scheduled start time you wish them to be able to join: 5	Meeting Options ☑ Allow participants to join anytime ☐ Mute participants upon entry ⊘ ☐ Breakout Room pre-assign ☐ Automatically record meeting ☐ Approve or block entry for users from specific countries/regions

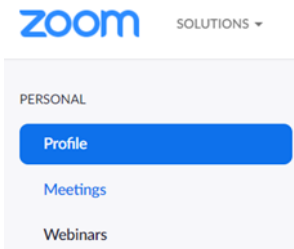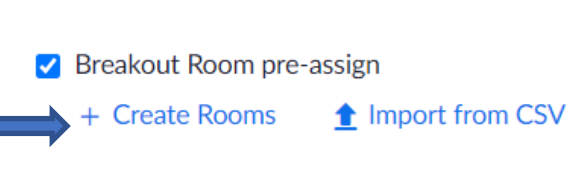|		
	minutes, 10 minutes, 15 minutes, or Anytime	
3.5	**Mute participants on entry:** If join before host is not enabled, this will mute participants as they join the meeting. Participants can unmute themselves after joining the meeting. Note: To mute all participants currently in a meeting, see the options to manage participants	Meeting Options ☑ Allow participants to join anytime ☐ Mute participants upon entry ⊗ ☐ Breakout Room pre-assign ☐ Automatically record meeting ☐ Approve or block entry for users from specific countries/regions
3.6	**Breakout Rooms pre-assign**	See Breakout rooms Point 5.0
3.7	**Request permission to unmute participants:** Participants will be prompted to provide the host with consent to be unmuted at will by the host. If declined, the host will still have the option to Ask to unmute.	Meeting Options ☑ Allow participants to join anytime ☐ Mute participants upon entry ⊗ ☐ Breakout Room pre-assign ☐ Automatically record meeting ☐ Approve or block entry for users from specific countries/regions
3.8	**Automatically record meeting:** Select if you want to record Locally (to your computer) or In the cloud.	Meeting Options ☑ Allow participants to join anytime ☐ Mute participants upon entry ⊗ ☐ Breakout Room pre-assign ☐ Automatically record meeting ☐ Approve or block entry for users from specific c
3.9	**Enable additional data center regions for this meeting*** Approve or deny entry to users from certain regions and countries: Host can either allow only participants from specific counties/regions to join or block all participants from specific counties/regions.	Meeting Options ☑ Allow participants to join anytime ☐ Mute participants upon entry ⊗ ☐ Breakout Room pre-assign ☐ Automatically record meeting ☐ Approve or block entry for users from specific countries/re
4.0	**Alternative hosts:** Enter the email address of another Zoom user who is Licensed, on your account to allow them to start the meeting in your absence.	Alternative Hosts Enter user name or email addresses
5.0	**Click Save to finish scheduling meeting**	Save Cancel

6.0	**Breakout rooms** Breakout rooms allow you to split your Zoom meeting in up to 50 separate sessions. The meeting host or co-host can choose to split the participants of the meeting into these separate sessions automatically or manually, or they can allow participants to select and enter breakout sessions as they please. The host or co-host can switch between sessions at any time.
	Limitations By default, only the host or co-host can assign participants to breakout rooms. They can choose to allow participants to choose their own room, but this must be done in the meeting when launching the breakout rooms. * While both the host and any co-hosts have the ability to assign participants to breakout rooms, only the first submitted set of assignments will be accepted upon clicking **Open All Rooms**. If the meeting is being cloud recorded, it will only record the main room, regardless of what room the meeting host is in. If local recording is being used, it will record the room the participant who is recording is in. Multiple participants can record locally. You can create up to 50 breakout rooms. The maximum number of participants in a single breakout room depends on the meeting capacity, number of breakout rooms created, and if participants are assigned during the meeting or before the meeting. These numbers only apply to breakout rooms created during a meeting. Up to 200 participants can be pre-assigned to breakout rooms.

6.1		Host	Co-Host
	Assigning*, starting, and ending breakout rooms	✔	✔
	Move between breakout rooms	✔	✔
	Broadcast message to all	✔	✔
	Notified of Requests for Help	✔	

* While both the host and any co-hosts have the ability to assign participants to breakout rooms, only the first submitted set of assignments will be accepted upon clicking **Open All Rooms**.
If the meeting is being cloud recorded, it will only record the main room, regardless of what room the meeting host is in. If local recording is being used, it will record the room the participant who is recording is in. Multiple participants can record locally.
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These numbers only apply to breakout rooms created during a meeting. Up to 200 participants can be pre-assigned to breakout rooms.

Number of breakout rooms	Maximum number of participants who can be assigned to breakout rooms*
20 breakout rooms	Up to 500 participants
30 breakout rooms	Up to 400 participants

50 breakout rooms	Up to 200 participants

*The maximum capacities listed require a Large Meeting add-on. If you do not have a Large Meeting add-on, the maximum number of participants is limited by your meeting capacity.

Note: Zoom Support can increase the maximum capacity of your account's Breakout Rooms to allow up to 100 breakout rooms, with a maximum capacity of 1000 per breakout room (depending on account limits). This requires ALL participants to be on Zoom client version **5.2** or higher - anyone joining a meeting on your account who does not have Zoom client version **5.2** or higher will be required to update to join the meeting. If your users do not have administrative control of their computers, this will require assistance from your IT Department to update the client.

6.2	**Pre-Assigning Breakout rooms**
	Limitations You can only pre-assign participants that have a Zoom account (internal or external Zoom users). To pre-assign participants that are external Zoom users, import a CSV file. Up to 200 participants can be pre-assigned to breakout rooms. If you scheduled recurring meetings, the pre-assigned breakout rooms will only work if it's applied to all meetings in the recurrence. You can't edit a single meeting in the recurrence and apply a unique pre-assignment. You can't pre-assign Zoom Rooms. You can only assign Zoom Rooms to breakout rooms during the meeting.
6.3	Sign in to the Zoom web portal. Click **Meetings** and schedule a meeting. See step 1.	
6.4	In the **Meeting Options** section, select **Breakout Room pre-assign** and click **Create Rooms**. Click the plus button beside **Rooms** to add breakout rooms.	

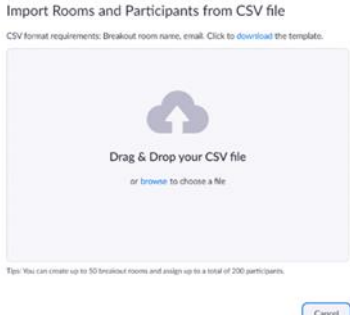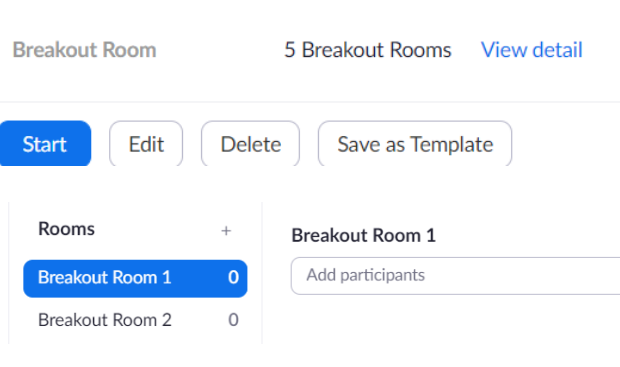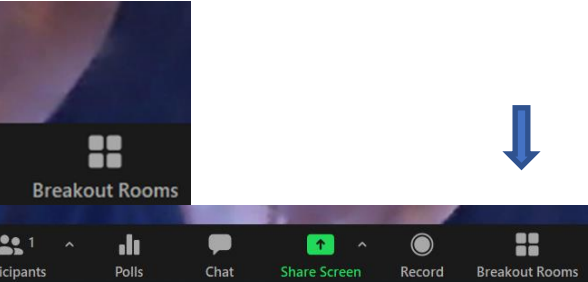|		
6.5	Hover over the default breakout room name and click the pencil button to rename it. In the **Add participants** text box, search for participants' name or email address to add them to the breakout room. **Note**: You can add internal Zoom users that are in the same account. To pre-assign participants that are external Zoom users, import a CSV file. **(See section 5.6 below)** (Optional) Use these options to edit your breakout rooms and participants: Click and drag a participant's email address to change the order. Hover over a participant's name to see options to move them to another room or remove them from the current room. To delete a breakout room, hover the room name in the left panel and click the trash bin icon. Click **Save**	
6.6	Sign in to the Zoom web portal. Click **Meetings** and schedule a meeting. Section 1. In the **Meeting Options** section, select **Breakout Room pre-assign** and click **Import from CSV**.	
6.7	Click **download** to download a sample CSV file you can fill out. Open the CSV file with spreadsheet software like Microsoft Excel. **Note**: You can specify Zoom users that are internal (in the same account) or external (not in the same account). Fill in the **Pre-assign Room Name** column with the breakout room name, and the **Email Address** column with the assigned participant's email address.	
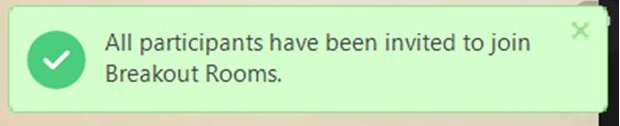
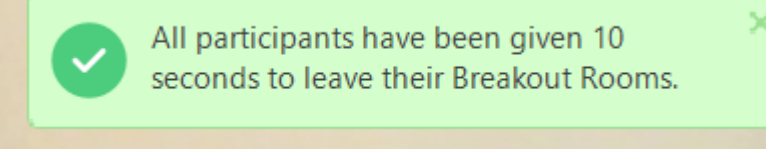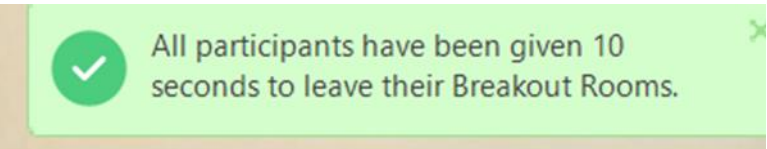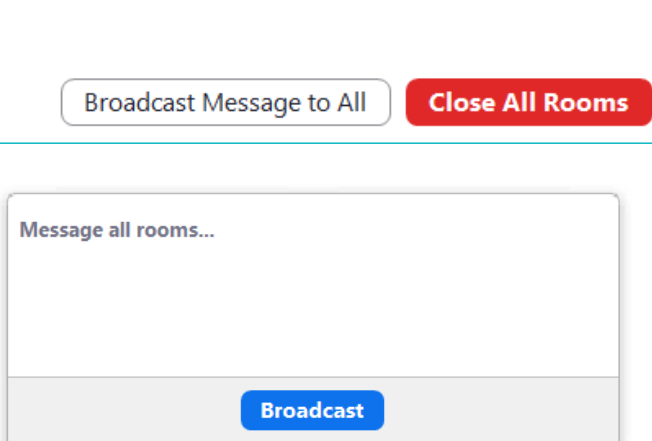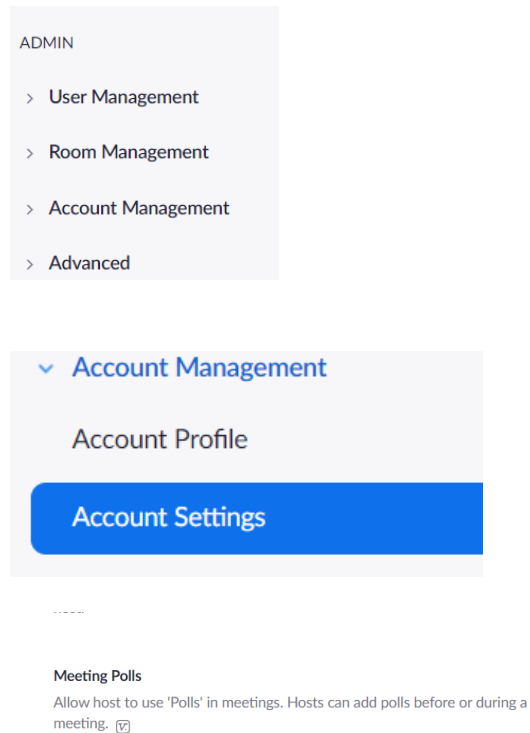|		
6.8	Save the file. **The file must be saved as a*.csv file** Drag and drop the file in the web portal. Zoom will verify that the email address has a Zoom account.	Import Rooms and Participants from CSV file CSV format requirements: Breakout room name, email. Click to download the template. Drag & Drop your CSV file or browse to choose a file Tips: You can create up to 50 breakout rooms and assign up to a total of 200 participants. Cancel
6.7	**Editing breakout rooms assignment** If you have already pre-assigned participants to breakouts rooms, you can edit the assignments before you start the meeting. **Note: You can also manage breakout rooms during the meeting.**	
6.7.1	**Sign in to the Zoom web portal.** (see section 1). Click Meetings and click the meeting you want to edit. (see section 1). In the Breakout Room section, click View detail. Edit the breakout rooms as needed. See the previous section for more details. Click Save.	Breakout Room 5 Breakout Rooms View detail Start Edit Delete Save as Template Rooms + Breakout Room 1 Breakout Room 1 0 Add participants Breakout Room 2 0
	Overview Once the Participants are assigned to the breakout rooms the host or co-host can active the Breakout rooms by clicking on the Breakout Rooms button of the tool bar. Open All Rooms: Start the rooms. All assigned participants will be moved to their respective rooms after confirming the prompt to join the breakout room. If allowing participants to choose their own room, they can open the list of rooms and choose which to join. The host, or co-host that launched the breakouts and the original host, will be left in the main meeting until manually joining one of the rooms. The participants (and the host/co-host when manually joining a room) will see the following message shown when joining the breakout room. You will be prompted to join the room where the request originated from. Click Join Breakout Room to join the room.	Breakout Rooms icipants Polls Chat Share Screen Record Breakout Rooms

6.8	**Managing breakout rooms in progress** Once the breakout rooms have been started, the assigned participants will be asked to join the Breakout Session. The host, or co-host that launched the breakouts and the original host, will stay in the main meeting until joining a session manually. If a participant has not joined the session yet, it will be noted by (not joined) next to their name.	All participants have been invited to join Breakout Rooms.
6.9	**Leave:** Leave the room and return to the main meeting (only shows when in a breakout room).	All participants have been given 10 seconds to leave their Breakout Rooms.
6.10	**Close All Rooms:** Stops all rooms after a 60 second countdown, which is shown to the host, co-hosts, and participants, and returns all participants back to the main meeting.	All participants have been given 10 seconds to leave their Breakout Rooms.
6.11	**Responding to requests for help** Participants in breakout rooms can request that the meeting host join their meeting by clicking Ask for Help.	?
5.12	**Broadcasting a message to all breakout rooms** The host or co-hosts can broadcast a message to all breakout rooms to share information with all participants. This can be done from the main session or from within a breakout room. Click Breakout Rooms in the meeting controls. Click Broadcast a message to all, enter your message and click Broadcast.	Broadcast Message to All Close All Rooms Message all rooms... Broadcast

Polling for meetings

6.00	**Overview** The polling feature for meetings allows you to create single choice or multiple-choice polling questions for your meetings. You will be able to launch the poll during your meeting and gather the responses from your attendees. You also can download a report of polling after the meeting. Polls can also be conducted anonymously, if you do not wish to collect participant information with the poll results	
6.1	**Limitations** Participants on the iOS or Android mobile app can use polling, but hosts need to be using the desktop client to manage polling. Only the original meeting host can edit or add polls during a meeting. If the host or co-host role is transferred to another user, that user will only be able to launch polls already created. You can create a max of 25 polls for a single meeting, with each poll having a max of 10 questions. If a poll is relaunched in a meeting, the poll report will only display the last poll occurrence. If you know you will need to launch the same poll twice and want both sets of data, consider creating a second poll with the same questions as the original to avoid re-launching.	
6.2	**To enable polling for all members of your organization:** Sign in to the Zoom web portal as an administrator with the privilege to edit account settings. **In the navigation menu,** click Account Management then Account Settings. Navigate to the Polling option on the Meeting tab and verify that the setting is enabled. **If the setting is disabled**, click the toggle to enable it. If a verification dialog displays, choose Turn On to verify the change. **(Optional)** If you want to make this setting mandatory for all users in your account, click the lock icon, and then click Lock to confirm the setting. Note: If the option is grayed out, it has been locked at either the Group or Account level, and you will need to contact your Zoom administrator**.**	ADMIN > User Management > Room Management > Account Management > Advanced ∨ **Account Management** Account Profile **Account Settings** **Meeting Polls** Allow host to use 'Polls' in meetings. Hosts can add polls before or during a meeting.

|	

6.3	**Adding poll questions using the web portal**
	Sign into the Zoom web portal.
	Go to the Meetings page and click on your scheduled meeting. If you do not have a scheduled meeting, schedule a meeting now.
	Scroll to the bottom to find the Poll option.
	Type in your question and click **Save at the bottom.**
		You have not created any poll yet. Add
		
		Add a Poll
		
		Enter a title for this poll.
		☐ Anonymous? ⑦
		1.
		     Type your question here.
		
		     ● Single Choice ○ Multiple Choice
		     Answer 1
		     Answer 2
		     Answer 3 (Optional)

6.4	To launch the poll during the Zoom Meeting Click on Polls on the task bar. Once you would like to stop the poll, click End Poll. If you would like to share the results to the participants in the meeting, click Share Results. Participants will then see the results of the polling questions. (Optional) You can choose Re-launch to restart this poll. Note: If a poll is relaunched in a meeting, the poll report will only display the last poll occurrence. If you know you will need to launch the same poll twice and want both sets of data, consider creating a second poll with the same questions as the original to avoid relaunching. (Optional) To view the full report for this poll, click the Download button. This will launch your default web browser so that you can download the entire poll report, which shows what each participant chose, instead of the percentages of each choice. Note: If you do not have this option, contact 9810 Rotary Technical Support to request this feature be enabled. Downloading a report of poll results You can download a report of the poll results after the meeting. When viewing a report of the	
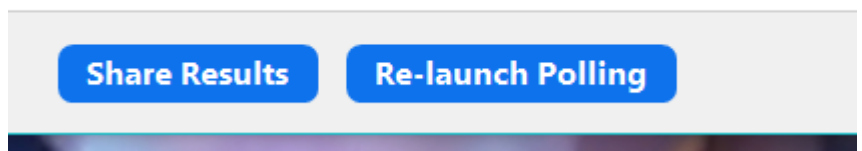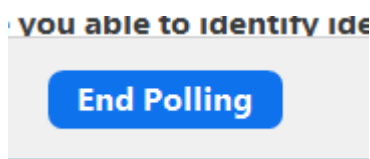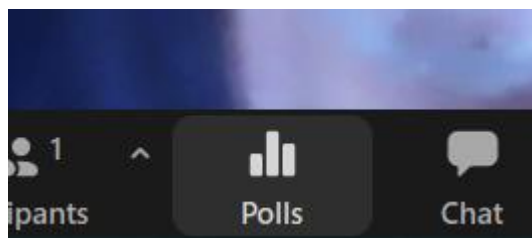
	poll results, take note of these things: If registration was turned on and the poll was not anonymous, it will list the participants' names and email addresses. If registration was not on, the polling report will show the profile names of unauthenticated participants and the names and email addresses of authenticated participants. If the poll was anonymous, it will show "anonymous" for the participants' names and email addresses. Note: If you want to download poll results during a meeting, contact 9810 Rotary Technical Support to request this feature	
6.5	**If you would like to add a new question, click Add a Question.** to create a new question for that particular poll. Launching a poll Start the scheduled Zoom meeting that has polling enabled. Click Polls in the meeting controls. Select the poll you would like to launch. Click Launch Polling. The participants in the meeting will now be prompted to answer the polling questions. The host will be able to see the results live.	 Polls ― □ ✕ Poll 1　　　　　　　　　Edit **Add a Question**