ZOOM WEBINAR INSTRUCTIONS

BEFORE THE EVENT

A

Create

Step 1: Schedule a Zoom Webinar
Step 2: Edit settings on Zoom Webinar

B

Communicate

Step 3: Send out email to Panelists
Step 4: Send out Registration email to participants

DAY OF THE EVENT

C

Accept

Step 5: Approving participants' registration requests

D

Start

Step 6: Start Webinar
Step 7: Start Broadcasting

Webinars are different from typical Zoom meetings.
Webinars offer maximum control over the audience.

In Zoom Webinars there are 3 different roles

Participant: Audience members. May be allowed to ask questions, but only to panelists.
Panelist: Presents content. Can speak, share video, answer audience questions.
Host: Conducts all technical aspects of the meeting and act as police to keep meeting secure.

Participant overview:

STEP 1: Receive link to registration.
STEP 2: Fill out registration.
STEP 3: Receive confirmation of registration and link to event.
STEP 4: Open link at the webinar start time to join.

Panelist overview:

STEP 1: Receive Panelist invitation with panelist link to event.
STEP 2: Open link a little before webinar start time to test audio and video.

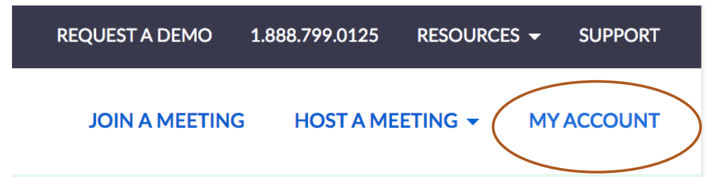
Host overview (detailed instructions to follow):

STEP 1: Schedule a Zoom Webinar
STEP 2: Edit settings on Zoom Webinar
STEP 3: Send out email to Panelists
STEP 4: Send out Registration email to Participants.
STEP 5: Approve Participants' registration requests
STEP 6: Launch Zoom Webinar
STEP 7: Start Webinar – Panelists Admitted and Live Settings
STEP 8: Start Broadcasting – Participants Admitted and Start Recording

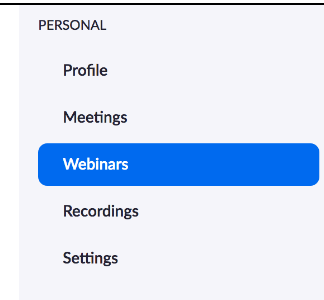
Note: Please ask questions or request training via email: sscs@uci.edu.

STEP 1: Schedule a Zoom Webinar

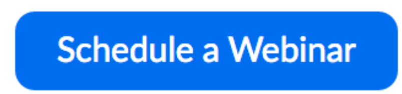
1. Login to https://uci.zoom.us to see your settings. If you don't see your personal settings, select MY ACCOUNT from the upper right-hand corner.



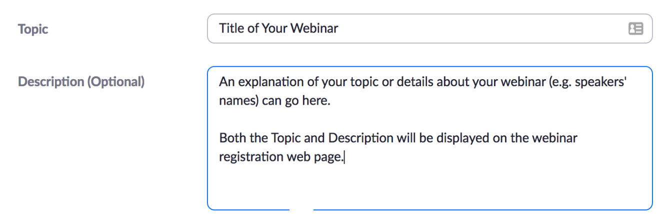
2. On the left-hand side of your account settings page, click **Webinar**.



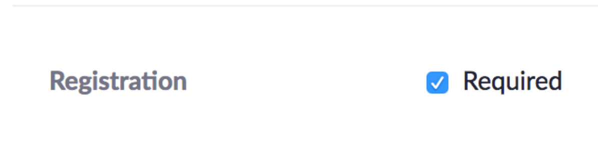
3. Click the blue button **Schedule a Webinar**.



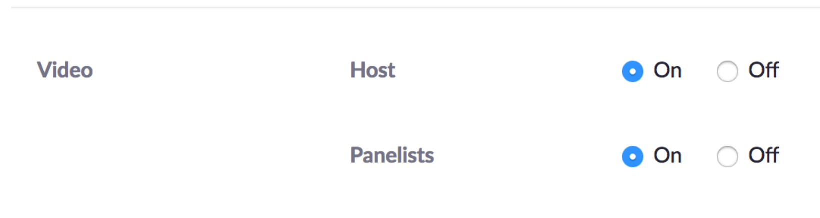
4. Fill in the **Title** and **Description** of your webinar and choose the **date** and **time**.



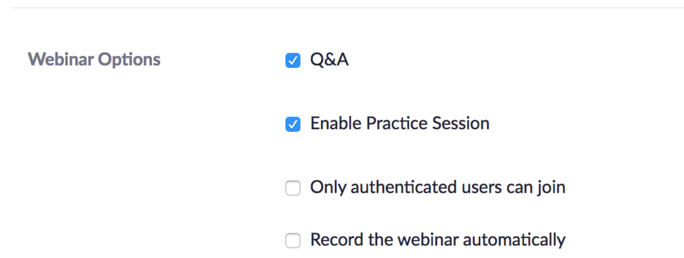
5. Next to **Registration**, check the box next to **Required**.



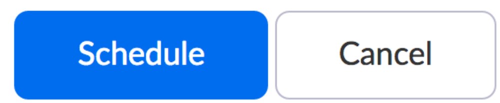
6. Next to **Video**, set to **on** for both the host and the panelists.



7. Under **Webinar Options**, check the box next to **Q&A** and check the box next to **Enable Practice Session**.



8. Click the **Schedule** button at the bottom to finish scheduling the meeting.

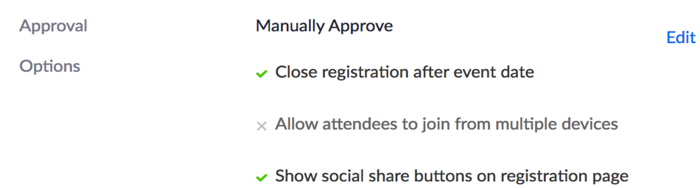


STEP 2: Edit settings on Zoom Webinar

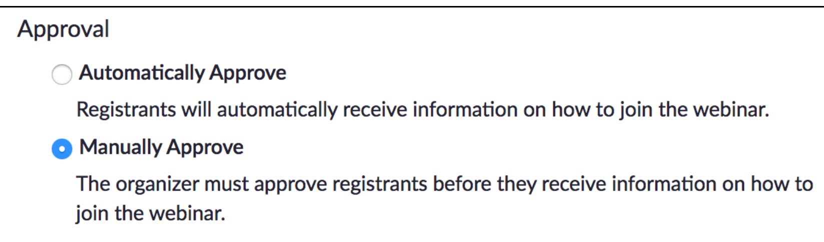
1. After completing STEP 1, you should be on the webinar management page for the webinar you just created. You can edit the settings you just selected by clicking the button **Edit This Webinar**. Instead, please head to the bottom of the page, where you will see a small menu with tabs labeled: **Invitations, Email Settings, Branding, Polls, Q&A, Integration, Live Streaming**. Clicking on any of these links will bring up a small menu of options.

2. Click on **Invitations**.

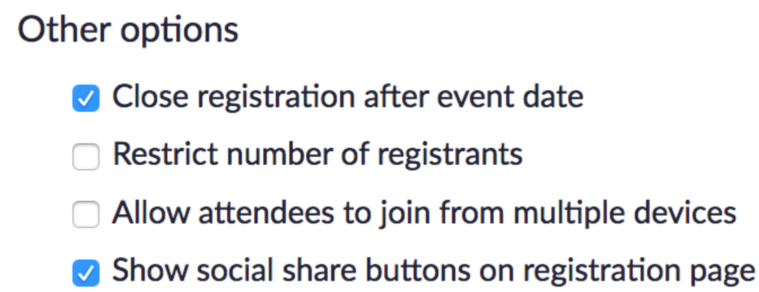
3. Scroll down to the **Approval Options** and click the **edit** link on the right.



4. Change **Approval** to **Manually Approve**.



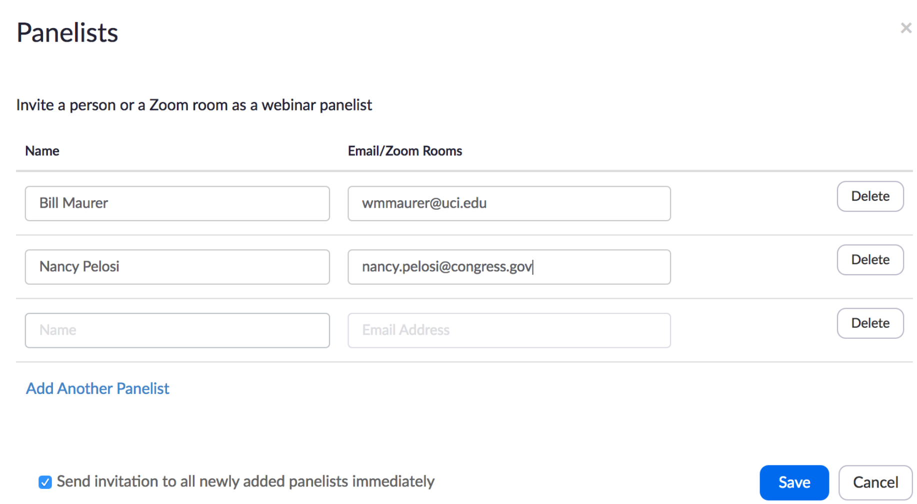
5. Under **Other** options uncheck **Allow attendees to join from multiple devices**.



STEP 3: Send out Invitation email to Panelists

1. Under the **Invitations** menu look for **Invite Panelists** and click the **Edit** link on the right.

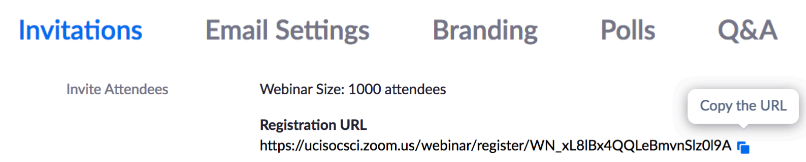
2. Fill in the **Name** and **Email** for each Panelist.



3. When you click **Save** at the bottom, email invitations will be sent to all of your panelists.

STEP 4: Send out Registration email to Participants

1. Under the **Invitations** menu look for **Invite Attendees**. You will find the registration link beneath **Registration URL**.

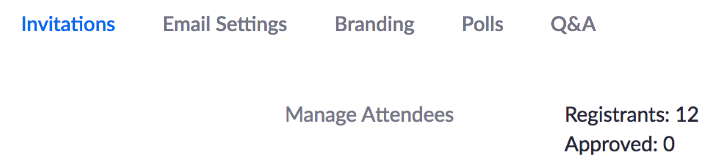


2. Simply copy and paste that link to your email invitation or announcement to allow others to register to attend this webinar.

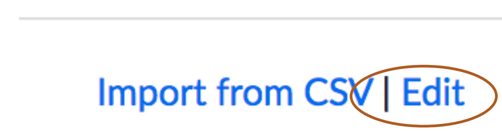
STEP 5: Approving Participants' Registration Requests

Timing	• For added security, we recommend approving registration requests the day of or day before the event. • Many people also register at the last minute, so we recommend taking another look at this section immediately before the event starts.

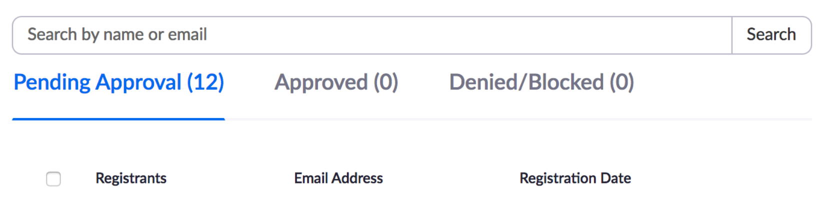
1. Under the **Invitations** menu look for **Manage Attendees**.



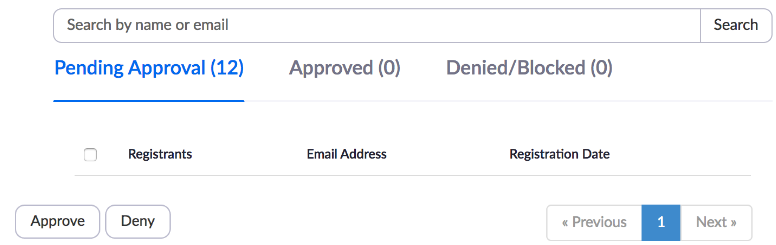
2. Click the **Edit** link to the right.



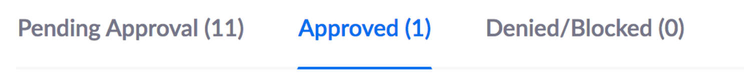
3. That opens your approval screen with three tabs towards the top: **Pending Approval, Approved, Denied/Blocked**.



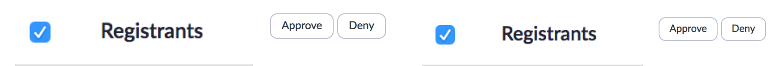
4. Under **Pending Approval**, select some or all of the attendees and click **Approve** below. Those people are now marked as Approved.



5. Approving a group of people will take you automatically to the **Approved** tab, which is annoying. To approve the next set of people, you will need to click on the **Pending Approval** link at the top.

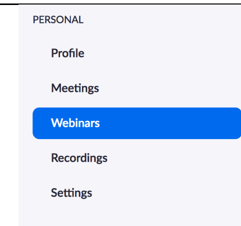
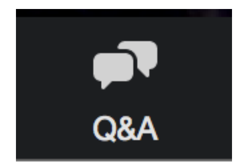
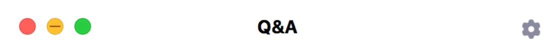


6. Repeat STEPs 4 and 5 until you are finished.

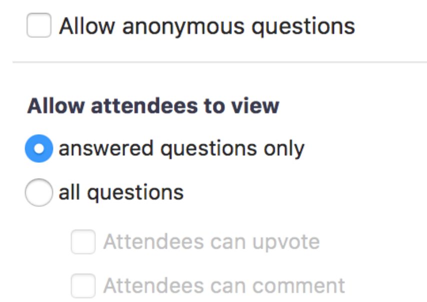


7. You may also deny any of the registration requests if you have reason to do so; this would prevent someone from attending the Webinar and place them in the **Denied/Blocked** group.

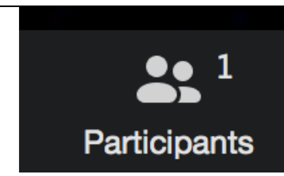
STEP 6: Start Webinar – Panelists Admitted and Live Settings

Tip:	Arrange for your Panelists to connect to the Webinar 10 minutes early if possible.
1. Login to Zoom and click on Webinars.	
2. Find the webinar you are going to run and click the **Start** button on the right.	
3. Once your are logged in, you should see yourself if your camera is on. Look at your toolbar (usually at the bottom) and select **Q&A**.	
4. That will open the Q&A window. From here, find a small gear icon and click on it.	

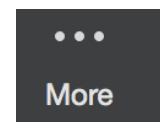
5. Make sure that **Allow anonymous questions** is **unchecked** and that **answered questions only** is selected, then close that window.



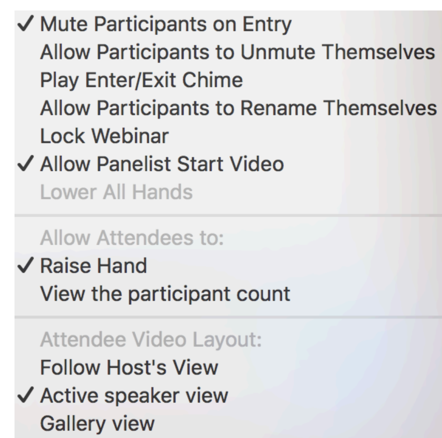
6. Next on your toolbar, find and click on the **Participants** button to open the Participants window (something you should leave open for the entire Webinar).



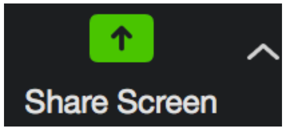
7. Towards the bottom, there will be a button that says **More** or on some clients you will see three dots **…** that you can click on. This will open a small menu.



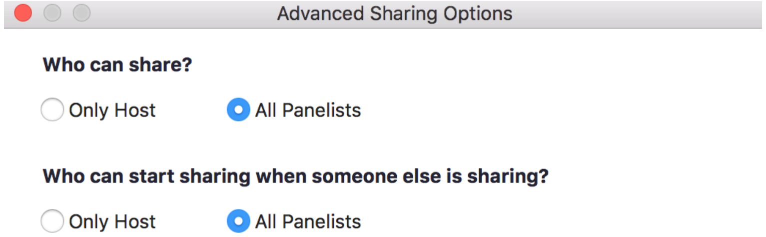
8. <u>Make sure the settings on that menu are:</u>
   Mute Participants on Entry – **checked**
   Allow Participants to Unmute Themselves – **unchecked**
   Play Enter/Exit Chime – **unchecked**
   Allow Participants to Rename Themselves - **unchecked**
   Lock Webinar -**unchecked**
   Allow Panelist Start Video - **checked**
   Allow Attendees to Raise Hand - **unchecked**
   Allow Attendees View Participants Count - **unchecked**
   Select **Active Speaker View** under **Attendee Video Layout** on this menu.

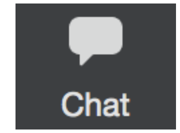
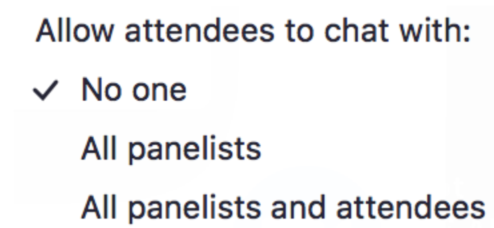


9. Next click on the arrow next to the **Screen Sharing** button on your toolbar to bring up the settings menu.



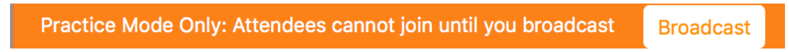
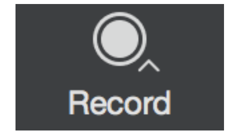
10. On the Screen Sharing Advanced Options, select allow for **All Panelists** under **Who can share?** as well as **Who can share when someone else is sharing?**



11. Next click on the **Chat** button on your toolbar to open the chat window,	
12. At the bottom of the Chat window, click on three dots **…** to open the chat settings menu.	
13. Make sure the menu is set to **Allow attendees to chat with: No One**. Now you are done with the settings and can wait for your Panelists to show up.	

14. When Panelists arrive, ask them to speak to make sure their audio is working.
If it is difficult to see someone’s face, ask them to adjust lighting or camera position.

STEP 7: Start Broadcasting – Participants Admitted and Start Recording

1. When all of your attendees are ready to start, click the Broadcast button in the orange bar at the top of your screen.	
2. Immediately start recording by clicking the Record button (or **More** button on some clients). You should be able to record to the cloud (recommended) or your local computer.	
3. At the end of the meeting, stop recording and click the **End Meeting** link.