



ZOOM EVENT REFERENCE GUIDE

This document is meant to help you identify the best virtual format for your online events along with technical information and best practices.

CHOOSE YOUR ZOOM EVENT TYPE AND REQUIREMENTS

The following criteria, and the detailed chart below, will help you identify whether you should use a Zoom meeting or webinar for your online event.

Define your audience

- Size (2-3,000)

Define your requirements

- Interaction (Q&A, chat, polling, breakout rooms)
- Registration

	Zoom Meeting	Zoom Webinar
Size	2-300 (500 [16 total] and 1,000 [10 total] seat licenses, for temporary use and based on availability, obtainable by request through the MSU IT Service Desk)	2-500 (1,000 [15 total] and 3,000 [2 total] seat licenses, for temporary use and based on availability, obtainable by request through the MSU IT Service Desk)
Scope	Internal & external	Internal & external
Interaction	Collaborative focus. Everyone – video, audio, chat, poll, and share capabilities along with breakout rooms if needed.	Presentation style. Hosts and panelists – video, audio, chat, and share capabilities. Attendees – Q&A, chat, and poll.
Captions	Automatic live captions (English) * See captions section below on how to enable	Automatic live captions (English) * See captions section below on how to enable
Registration	Available	Available



GLOBAL SETTINGS

The following suggested global settings will apply to all of your meetings and webinars. Navigate to msu.zoom.us and click **Settings** on the left to get started.

Meeting tab

- Security Section:
 - Embed passcode in invite link for one-click join - allows attendees with the link to access the session without having to enter a passcode
 - Using a passcode prevents “Zoom-bombers” from randomly guessing a Zoom session number and entering
- In Meeting (Basic) Section: Chat settings – there are several chat options that can be set/changed during your Webinar
 - Chat to all participants
 - Allow Private Chats
 - Auto-save – saves text file to local Zoom folder after leaving meeting. Can prevent participants from saving chat. Private chats only visible to you in chat file.
- In Meeting (Basic) Section: Polling – turn on if using polls
 - Can be created before or on the fly

Recording tab

- Cloud Recording
 - Record active speaker with shared screen (default)
 - Record gallery view with shared screen
 - Gallery view is the default
 - Switches back to active speaker configuration when screen is shared

SECURITY OPTIONS

When *scheduling* your Zoom meeting or webinar, there are security options that help against unwanted guests.

Passcode

Turned on by default, this requires users to enter a passcode before they can enter your event.

- Prevents “Zoom-bombers” from gaining access by randomly guessing your Zoom event link
- Passcodes can be embedded in the webinar link for easier access
- DO NOT share the passcode on public platforms

Authentication

Requires attendees to log in to a Zoom account before they can access your event.

- The default setting limits logins to users with msu.edu accounts



- Can add additional domains separated by commas (e.g. msu.edu, lcc.edu, umich.edu) – DO NOT add gmail.com or other free mail services
- Users not logged into Zoom will be prompted to log in with their MSU account – users logged in using an account not on the safe list will be prompted to switch accounts

Require Registration

This limits access to registered attendees.

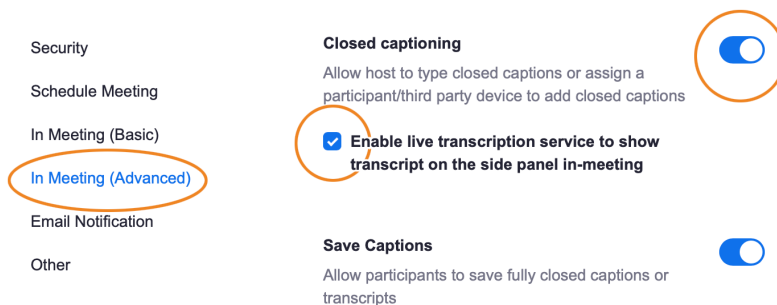
- Registration link is provided rather than meeting or webinar link
- Reply can be automatic or manual – option set after event is created
- Options change if configuring a recurring event
 - Attendees register once and can attend any (one) of the occurrences
 - Attendees need to register for each occurrence to attend
 - Attendees register once and can choose one or more occurrences to attend

CAPTIONING

For better accessibility, Zoom has a live transcription service that will automatically produce English captions during your meeting or webinar. Follow the instructions below to enable this option.

Global Settings

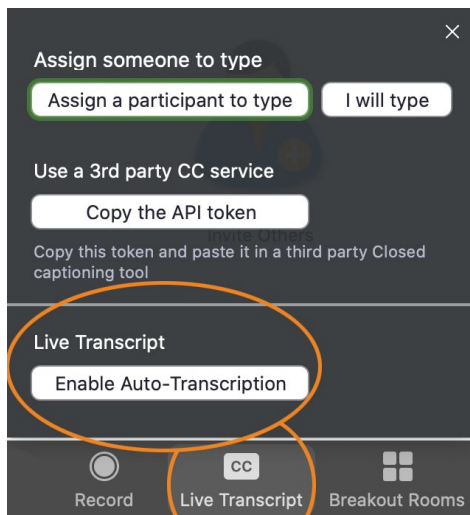
1. Navigate to **msu.zoom.us** and click **Settings** on the left
2. Under the **In Meeting (Advanced)** section, toggle on **Closed captioning** and place a check in the **Enable live transcription service** check box



In Meeting or Webinar

1. Once you're in a meeting or webinar, click **Live Transcript** at the bottom of the Zoom toolbar.
2. Click **Enable Auto-Transcription**.





Note: If the meeting is being recorded, and you have enabled auto-transcription, you will receive a copy of the transcript in the same location of your recorded meeting.

CREATE A WEBINAR

This is where you complete the initial setup of your webinar. All of these settings can be edited after clicking the **Schedule** button.

Roles

- **Host**
 - Creator/owner of the webinar. Highest permission level, full control of webinar functionality.
- **Co-hosts**
 - Shares most of the controls that hosts have, allowing the co-host to manage the administrative side of the meeting, such as managing attendees. The host must assign a co-host during the meeting. Co-hosts cannot start a meeting. If a host needs someone else to start the meeting, they can assign an alternative host.
- **Alternative hosts**
 - Shares the same controls as co-hosts, but can also start the meeting. Hosts can assign alternative hosts when they schedule a meeting.
- **Panelists**
 - Full participants in a webinar. They can view and send video, screen share, annotate, etc. Host can disable some features for panelists, including starting video, sharing your screen, and recording.
- **Attendees**
 - View-only permissions. Can use Q&A, chat, and polling.



Steps & options to create a webinar

1. Navigate to **msu.zoom.us**, click on **Webinars** on the left side, and click the **Schedule a Webinar** button
2. **Topic** and **Description** are included in invitation emails
3. **Date/time, duration, recurrence**
 - Duration is for attendee information only; it does not affect when you are able to start or how long the webinar will run
 - Options
 - Single
 - Recurring
 - No fixed time – allows you to use at your discretion for an unlimited number of days/times
4. **Registration**
 - Registration link is provided rather than Webinar link
 - Reply can be automatic or manual – option set after Webinar is created
 - Options change if recurring meeting
 - Attendees register once and can attend any (one) of the occurrences
 - Attendees need to register for each occurrence to attend
 - Attendees register once and can choose one or more occurrences to attend
5. **Passcode**
 - Checked by default
 - Can provide custom code
 - Can be embedded in the webinar link – turn this feature on in Zoom Settings menu
6. **Video**
 - Host: Off
 - Setting to “On” turns host video on when starting the webinar
 - Panelist: On
 - This allows panelists to turn their video on during webinar without host permission
 - Can be controlled by host during the webinar
7. **Audio**
 - Use default settings unless there is a specific need to switch
 - “Telephone and Computer Audio” option gives attendees the most flexibility
8. **Webinar Options**
 - Q&A – if checked can configure options after scheduling webinar
 - Enable Practice Session
 - Allows for host and panelist practice session and joining before attendees on day of event to address and=y tech issues or last-minute notes
 - Only Authenticated Users Can Join
 - Additional layer of security
 - Defaults to msu.edu users
 - Can add additional domains separated by commas (e.g. msu.edu,lcc.edu,umich.edu) – **Do not** add gmail.com or other free mail services



- Users not logged into Zoom will be prompted to log in with their MSU account
 - Users logged in using an account not on the safe list will be prompted to switch accounts
- Automatically Record
 - This will start the recording as soon as you start the webinar
 - Local recording saves the file to the host's computer
 - Cloud recording saves the recording to Zoom cloud for 24 hours and uploads a copy to the host's Kaltura MediaSpace account

9. Alternative hosts

- Use for adding another person/people who will be able to start the webinar
- Cannot create polls on the fly
- Should not be used to add panelists

10. To finish creating your webinar, click the **Schedule** button

Reminder: All of these settings can be edited after scheduling the webinar

ADDITIONAL WEBINAR SETTINGS

Additional settings, functions, and restrictions can be configured using the tabs at the bottom of your scheduled webinar.

The screenshot shows the Zoom webinar settings interface with the following tabs and content:

- Invitations** (highlighted with an orange border):
 - Invite Panelists
 - No panelists invited
 - Import from CSV
 - Edit
- Email Settings**:
 - Webinar Size: 500 attendees
 - Copy Invitation
 - Send Invitation to Me
 - Link to join Webinar
 - <https://msu.zoom.us/j/94994994994>
- Registration Settings**:
 - No Registration Required
 - Edit

Invitations

This area is used to invite panelists and attendees, adjust registration settings, and manage attendees.

- Invite Panelists
 - Click Edit to add panelists
 - Panelists will receive a unique webinar link after they are added
 - Anyone (assistants, etc.) using the unique link to access your webinar will show up in your list as the panelist
 - **Best practice**; resend invitations the day of your event to ensure they are accessing using their unique link
- Invite Attendees
 - Contains the webinar link and invitation
 - If requiring registration this area will contain the registration link and invitation



- Approval Options (only appears if requiring registration)
 - Approval can be automatic or manual
 - Send email to host
 - Other Options
 - Close registration after event date
 - Restrict number of registrants – up to license cap (500 default)
 - Allow attendees to join from multiple devices
 - Show social share buttons on registration page
 - Questions tab
 - Choose additional questions asked during registration process
 - Questions can be set to required or optional
- Manage Attendees – only visible if requiring registration
 - Lists number of registrations and method of approval
 - Links to upload CSV for bulk registration and View link to see registration list

Email Settings

- Set language, contact email, and format
- Limited editing for attendee message/email – draws info from webinar topic and description
- Set reminder and follow-up emails for all participants

Branding

- Additional formatting and information that is applied to the invitation email

Polls/Survey

- Polls
 - Used during the webinar
 - Host can create polls before or during the webinar – ONLY HOST
 - Pre-created polls can be initiated by alt-host and co-host
 - Allows anonymous answers
 - Limitations
 - Only single and multi-select question types
 - 255-character limit in text and foils
 - 10 questions per poll
 - 25 polls per webinar
- Surveys
 - Used for post webinar follow-up – linked in attendee email through Branding tab
 - Single choice, Multiple choice, Rating scale, Short text
 - Allows anonymous responses
 - Questions can be required
 - Limitations
 - 255-character limit
 - 50 questions per survey



Q&A

- If Q&A is enabled, this tab allows you to configure when attendees see questions, if they can post anonymously, and if they can up-vote and comment on other questions

More

- Do we have livestream activated?
- Can be used for events that are over capacity
- Shared in message to attendees who attempt to register after you are at capacity

DURING A WEBINAR

The following settings are available during the webinar.

Participants panel

- Tabs for Panelists/Hosts and Attendees
- Invite attendees
- Mute All
- More options
 - Set video layout
 - Control panelist video permissions
 - Control participant abilities (mic and rename)
 - Lock webinar

Chat

- Control who attendees can chat with

Share Screen

- Basic
 - Share entire desk or individual window
 - Whiteboard
 - Share iPhone/iPad via Airplay, plugin, or cable
 - Must check **Share computer sound** if sharing audio from your computer
- Advanced
 - Portion of screen
 - Music or Computer sound only
 - Content from second camera
- Files
 - Share files from MS OneDrive and SharePoint
 - Requires login to Microsoft Office 365

Polling

- Only **host** can start existing polls or create new polls on the fly



Record

- Start/Pause/Stop recording
- Stopping and restarting recording creates a separate file each time you restart

Q&A

- Can be fully configured during a webinar
- Answer live, type answer, or dismiss questions
- Visibility of questions depends on configuration

Live Captions

- *Refer to the captioning section above*

POST-WEBINAR STATISTICS

Navigate to **msu.zoom.us** and click **Reports** on the left to download the following CSV reports.

- Registration Report
- Attendee Report
- Q&A Report (if function was used)
- Poll Report (if function was used)
- Survey Report (if function was used)

