

# Setting up a Zoom Webinar and Webinar Event Settings

## SCHEDULING A ZOOM WEBINAR

- 1 Log in to the Zoom web interface
- 2 Click the **Webinars** button on left side
- 3 Click the **Schedule a Webinar** button
- 4 Fill in the following Webinar details:
  - **Topic**
  - **Duration**
  - **Use a template** (If you have a series or repeat event and the settings for the webinar will be the same you can create a template for easier set up.) (Refer to the **Templates** section below)
  - **Time Zone**
  - **Recurring webinar (Check if needed)**
  - **Registration** - Depending on audience and type of event registration might be needed
    - **Note:** Webinar automatically asks for name and email of all attendees, which allows you to pull an attendee report post-event WITHOUT having to set up registration
    - **Note:** If you require more than name and email address from attendees you will need to set up registration
    - If you check off registration box, you will not be able to update registration questions until AFTER you click “schedule”
    - Once Zoom is saved options will appear at the bottom of your zoom webinar that will allow you to update registration settings (more on this below)
  - **Webinar Password** - Depending on audience and type of event webinar password might be required
    - Check the box for a password
      - Will auto populate
      - Can edit the password if necessary, in this setting section
  - **Video**
    - **Host video** should be set to **ON**
    - **Panelist video** should be set to **ON**
  - **Audio**
    - Select “**Both**”
  - **Webinar Options**
    - If Q/A feature is needed check Q/A box
    - Enable Practice Session box (**recommended**)

- Creates an attendee waiting room and allows host and panelists to enter the Zoom webinar without allowing attendees to join until everything is set up and ready for the event to start
- Host will have a **Broadcast** button on their screen only; once ready host clicks broadcast and all attendees waiting in the waiting room will automatically enter the Zoom
- **Note:** Waiting room in Zoom webinar does NOT allow any slide show or music
- You can decide if only authenticated users can join, record webinar automatically, enable additional data center regions for the webinar. **(Recommend keeping all unchecked)**

5 Click the blue **SCHEDULE** button at the bottom of setup page

## ADDITIONAL WEBINAR SETTINGS AND OPTIONS

Once the Webinar has been scheduled, you will have the following options appear at the bottom of the screen:

[Invitations](#)   [Email Settings](#)   [Branding](#)   [Polls](#)   [Q&A](#)   [Integration](#)   [Live Streaming](#)

### INVITATIONS

1 Click **Edit** to the right of Panelists

- The Panelists window will pop up

- Input panelist(s) name and email
- Anyone who will have a speaking role
- Check the box to send invite immediately to panelists **(recommended)**
- This invite will be different than that of attendees, so if you're planning to use the waiting room use this option so that panelists can enter the event for practice session while attendees are in waiting room

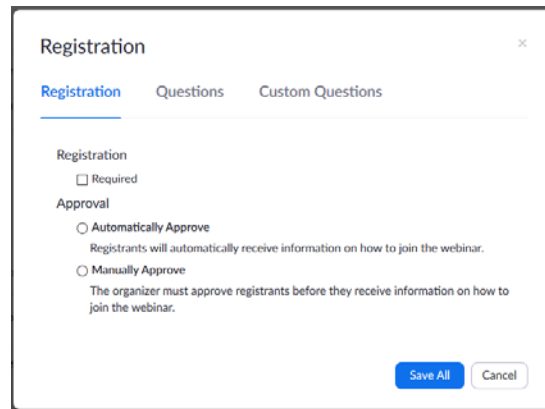
2 Click **Add Another Panelist** (If Needed) or click **Save** when done.

3 Click **Copy Invitation**

- If not using Zoom registration this will include the link to directly join and the call in option numbers
- If using Zoom registration this will include the link to the registration page

#### 4 Click **Edit** to the right of Approval

- The Registration window will pop up



- This section controls registration settings **(if being utilized)**
- Registration approvals (automatically approve or manually approve), notification, other options
- Questions (center option on top)
  - Check boxes for questions you want to ask
- Custom questions (last option on the top right)
  - Click “new question” to create any customized questions for attendees
  - **Note:** if using a template saving these questions once will populate them in your template (recommended if repeat events with same registration questions)
  - **Note:** Using registration through Zoom will populate a registration link that you send to attendees. They can register in advance through this link. Once they’re registered, they will receive an email with the link to join the Zoom on the day of your event. You can edit the registration confirmation email in the “email” section (see below).

## EMAIL SETTINGS

Invitations **Email Settings** Branding Polls Q&A Integration Live Streaming

Select Email Language:English	Edit
Email Co	Edit
Invitation Email to Panelists	Edit
Confirmation Email to Registrants Send upon registration	Send me a preview email   Edit
No reminder email to Attendees and Panelists	Edit
No follow-up email to Attendees	Edit
No follow-up email to Absentees	Edit

- Can modify and control (turn on/off) emails that will be sent out automatically through zoom
- Set up reminder emails for attendees (if using Zoom registration) and panelists

### Reminder Email

Send Reminder Email to Approved Registrants and Panelists

1 hour before the webinar start date and time

1 day before the webinar start date and time

1 week before the webinar start date and time

[Save](#) [Cancel](#)

- Confirmation email for attendees if registration box was checked off in setup
- Can customize this email, but it will automatically include the link to join the event

## BRANDING

- You can add logos and personalize the registration page

Invitations Email Settings **Branding** Polls Q&A Integration Live Streaming

Title	Webinar Registration	Edit
Banner	<p>Your banner is displayed at the top of your invitation page.</p> <p><a href="#">Upload</a></p> <p>Image requirements:</p> <ul style="list-style-type: none"><li>• GIF, JPG/JPEG or 24-bit PNG</li><li>• The maximum dimensions: 1280px by 1280px</li></ul>	
Logo	<p>Your logo is displayed on the right side of the webinar topic on your invitation page, registration page, and in the email invitation to the webinar.</p> <p><a href="#">Upload</a></p> <p>Image requirements:</p> <ul style="list-style-type: none"><li>• JPG/JPEG or 24-bit PNG</li><li>• The maximum dimensions: 600px by 600px</li></ul>	
Post Attendee URL	https://zoom.us/postattendee	Edit
Post Webinar Survey	Zoom will open a survey page in attendees' browsers after leaving the webinar	<input type="checkbox"/>

## POLLS

Invitations Email Settings Branding **Polls** Q&A Integration Live Streaming

You have not created any poll yet.

Add

- You can create polls to be utilized during the event
- The poll button will be on the bottom of the Zoom event screen once it's started
- You can start the polling at any point during the event
- If you have more than 1 polling question you can start them at different points throughout the event.

## Q&A

- You can update Q&A settings for attendees here

The Q&A settings configured is for the default settings when you start this webinar. You can change the settings in this webinar.

Allow anonymous questions

Allow attendees to view

answered questions only

all questions 

Attendees can upvote

Attendees can comment

Save

Cancel

## ADDITIONAL CO-HOST SETTING

In order for a host to have the option to manually change the role of speakers to co-host. You have to enable this setting prior to the webinar.

- 1 Click the Settings option on the left side panel
- 2 Scroll down to the Co-Host section

Co-host

Allow the host to add co-hosts. Co-hosts have the same in-meeting controls as the host.



- 3 Click the button to the right of the Co-host option to enable it.

## TEMPLATES

### SAVING A WEBINAR AS A TEMPLATE

- 1 On Zoom web interface > webinars select the webinar you want to use as your template
- 2 Scroll down the webinar page and click on **Save this Webinar as a Template**

- 3 Name your template and click **Save**

## TO CREATE A NEW ZOOM WEBINAR USING THIS TEMPLATE

- 1 On Zoom web interface > webinars > **Webinar Templates**
- 2 Pick the template you want to utilize and click Schedule a **Webinar with this template**
- 3 From there you can update details as needed

You have saved 1 template(s) so far. You can save up to 40 templates.

Template Name	Modify Time	Action
<a href="#">SAS Tech Test Webinar 01</a>	Jul 23, 2020 09:35 AM	<a href="#">Schedule a Webinar with this template</a> <a href="#">Delete</a>

## STARTING A ZOOM WEBINAR

- 1 Host
  - Log into your Zoom account
  - Click **Webinars**
  - Find your webinar
  - Click **Start**
  - Zoom will open up and the event is started
- 2 Panelists
  - Click the link sent to them in the Zoom email

Hi Tech,

You are invited to a Zoom webinar.

Date Time: Jul 23, 2020 09:30 AM Eastern Time (US and Canada)

Topic: SAS Tech Test Webinar 01

Join from a PC, Mac, iPad, iPhone or Android device:

[Click Here to Join](#)

Note: This link should not be shared with others, it is unique to you.

- 3 Waiting Room
  - When the Practice Session option is enabled.
    - Attendees will see the following message when logging into the webinar.

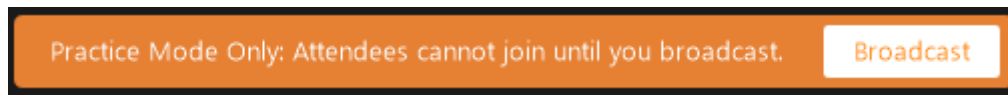
○ Please wait. The webinar will begin soon.

Start: 9:30 AM

SAS Tech Test Webinar 01

Test My Speaker

- Hosts will see all the panelists and the following message at the top of their meeting window.



- Click the **Broadcast** button to allow attendees to enter the webinar.

## HOSTS / CO-HOSTS / PANELISTS

### 1 Zoom Host Controls



### 2 Host is the person who sets up the event using the Zoom Webinar web interface

- Host can manually change the role of panelists to co-host
- Host can manually change the role of attendees to panelists
  - Hover over the Panelist's name or Attendee's name and click More to change their roles

### 3 Can share personal screen as needed

### 4 Turn their camera on/off as needed

### 5 Muted/Unmuted when needed

- Host can monitor and change settings of co-hosts if needed

### 6 Can view participant panel (side bar) which has panelist and attendee tabs

- Hover on bottom of Zoom screen and click "participant button"

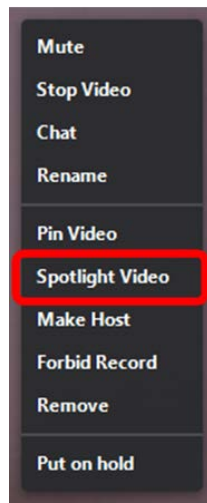
### 7 Host can control the view for attendees

- You can toggle between Gallery and Speaker Views in the upper right corner of the host Zoom screen



### 8 Spotlight video puts a participant as the primary active speaker for all participants. All participants will only see this speaker as the active speaker. This feature is often used to spotlight a keynote speaker.

- Host can right click on the speakers video and select Spotlight Video

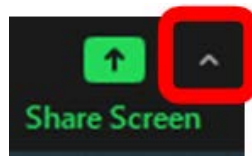


## ATTENDEES

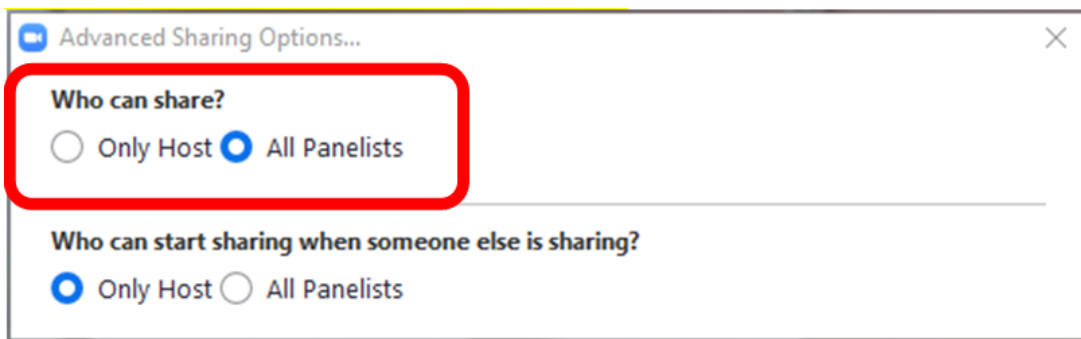
- Capacity – 500
- Automatically - muted through entire event
- Automatically - cameras off for entire event
- The host can change the role of an attendee by hovering on name and clicking **More** and change to

## SCREEN SHARE

- 1 Host and Co-Host can share screen
- 2 Host can allow panelists to share their screen
  - Click the settings on the Share Screen icon



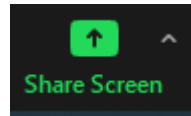
- Select **All Panelist** under the “Who can share?” Section



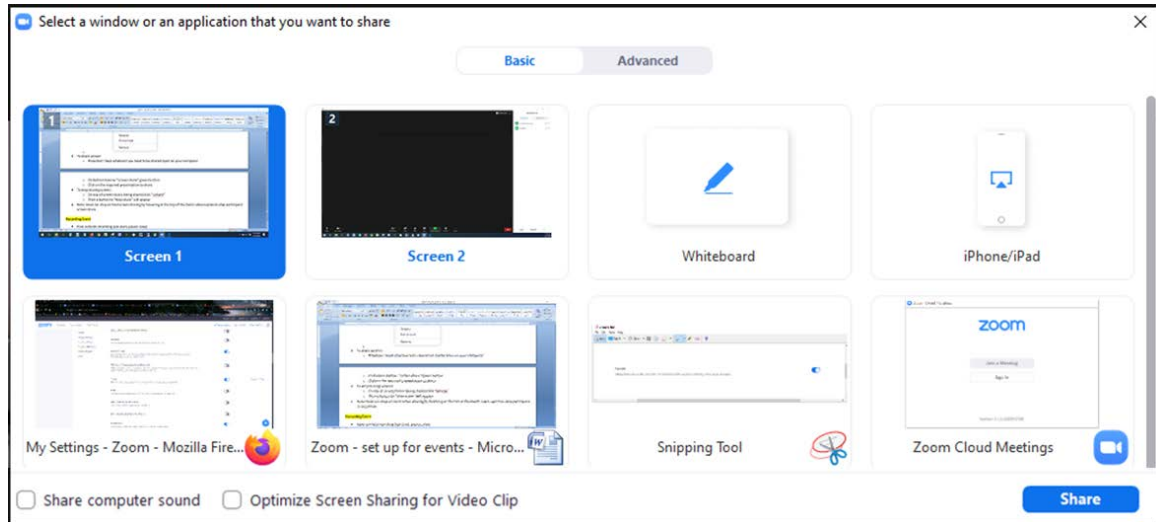
- 3 To share screen:



- **NOTE:** The presenter should have whatever will be shared opened on their computer
- On bottom banner “screen share” green button



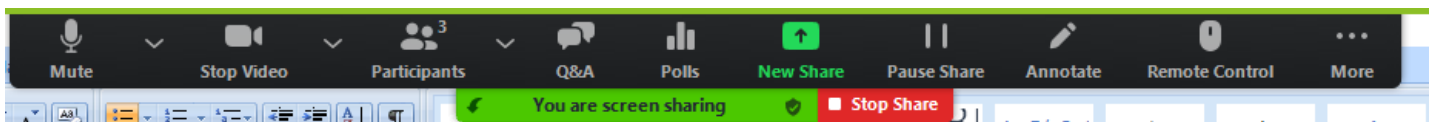
- Select the required presentation to share



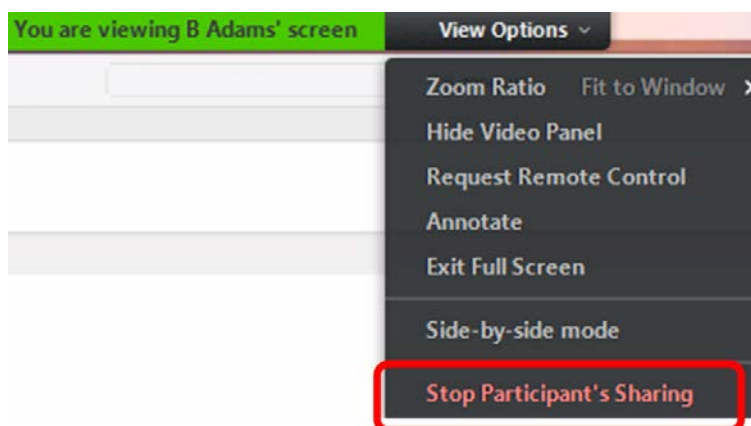
- Click the **Share** button

4 To stop sharing screen:

- On top of screen that is being shared click the **Stop Share** button

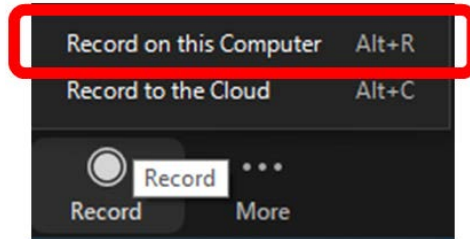


5 **Note:** Host can stop a participant’s screen sharing by hovering at the top of the Zoom video > Click **View Options** > Click **Stop Participant’s Sharing**



## RECORDING EVENT

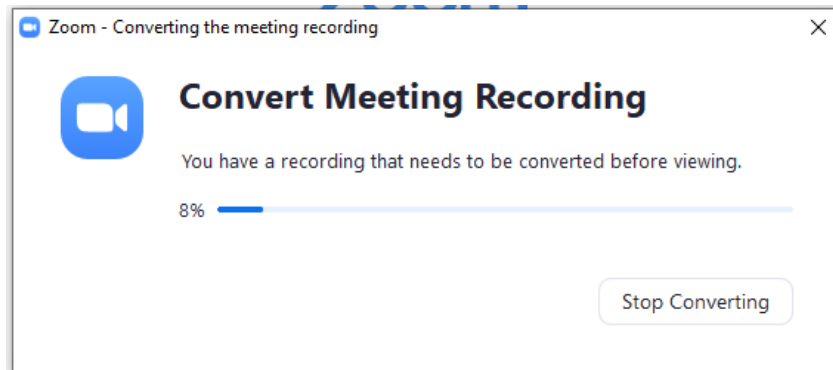
- 1 Host controls recording (can start, pause, stop)
- 2 Record event - save to computer or zoom web interface
  - Click **Record**
  - Select **Record on this Computer**



- "Recording..." will show at top of screen through entire event



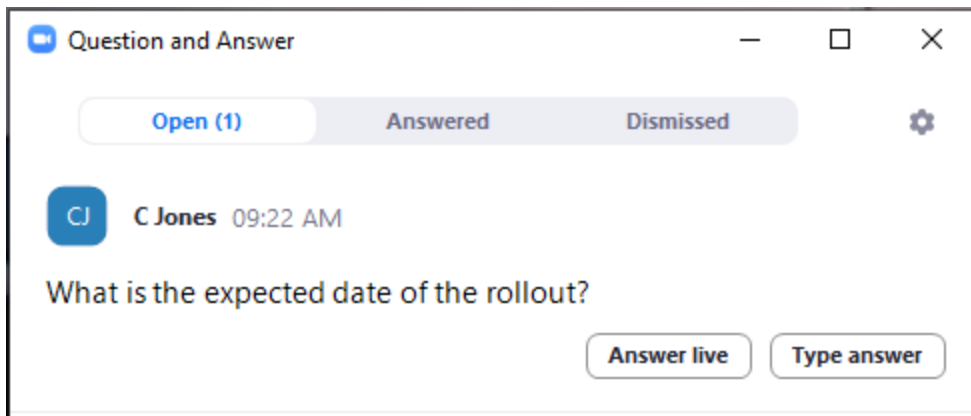
- You have the option to pause the recording
- Once presentation is over click the **Stop** button
- Recording will begin downloading once the event is ended




- Once it's finished downloading a pop-up will ask you where to save the file

## Q&A

- 1 Option must be checked off on web-interface set up for Q&A to appear in Zoom webinar
  - **NOTE:** If you forget to check it off but already started the Zoom, you can NOT go back and modify on the interface. You will have to restart the Zoom webinar for the Q/A to appear.
- 2 Q&A option – attendees can submit questions
- 3 Q&A box accessed by hovering at bottom of Zoom screen and click the **Q&A** button
  - The Q&A box that pops up, can be closed or minimized, and re-opened if needed
- 4 Host/co-host/panelist – can sort questions and mark them as answered



- Host can click the settings  button in the Q&A box to allow attendees to view all questions, upvote, comment, see only answers

Allow anonymous questions

**Allow attendees to view**

answered questions only

all questions


Attendees can upvote

Attendees can comment

- The above Q&A settings can be updated on the web interface under the settings of the webinar.

## CHAT

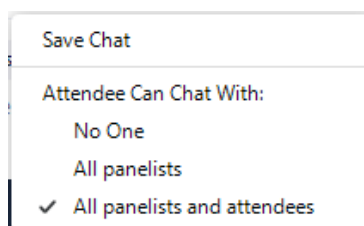
- Chat settings are controlled in the Zoom webinar, not the web interface
- Options include chat with host, panelists, co-hosts, and attendees
- In the chat “...” button settings for attendees can be changed as needed

To: All panelists 

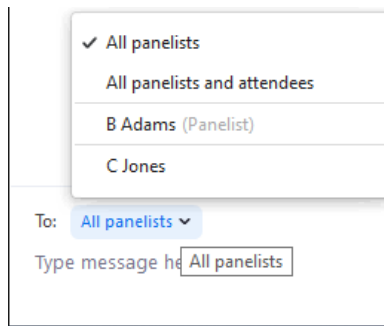


Type message here...

- for example: you can turn off the option for attendees to use chat completely;
  - this can be useful to avoid confusion for a question portion – attendees can only use Q/A feature so whoever is monitoring questions does not have to look at chat and Q/A



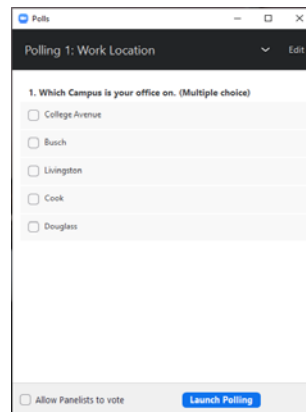
#### 4 Chat is available to panelists to communicate privately



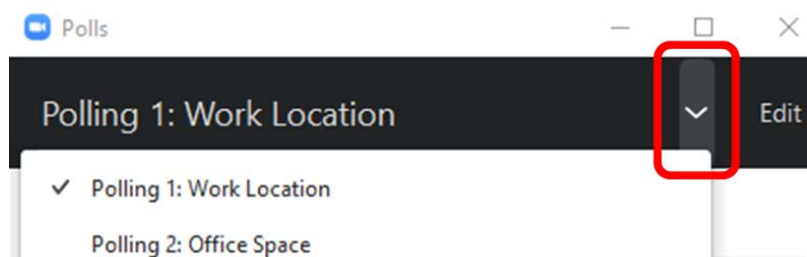
#### 5 Option to save chat

### POLLS

- 1 Click the Polls icon at the bottom of the meeting screen.



- 2 You can edit or create additional questions by clicking on the **Edit** link (**NOTE:** This will open your default browser and take you to the Zoom web interface site).
- 3 Select which question to launch to the attendees by clicking on the drop down menu

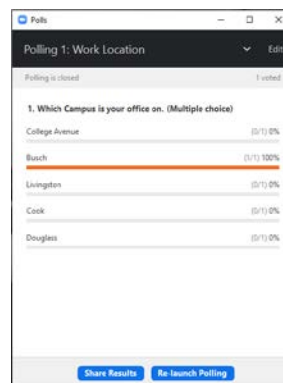


- 4 Click the **Launch Polling** button starting the polling



5 Click the **End Polling** button when finished

6 Once the Poll is finished you can share the results with the attendees by clicking the **Share Results** button



## POST EVENT

### 1 Reports

- Log into the Zoom web interface
- Click **Reports** on the left hand side
- Click **Webinars**

### 2 Attendee report

- All attendees that attended
- Can export as excel spreadsheet

### 3 Registrant report

- If you use Zoom registration you can pull registration reports
- Can export as excel spreadsheet

Step 1: Select Report Type

- Registration Report ⓘ  Attendee Report ⓘ  Performance Report ⓘ  Q&A Report ⓘ  Poll Report ⓘ

Step 2: Choose a Webinar

Step 3: Generate Report