Scheduling & Hosting a Zoom Meeting

Overview

PDA has a dedicated Zoom account for use by the NRT and NVT. The primary purpose of this account is to support the work of teams that are actively deployed in response to a disaster. In addition, the account can be used for other PDA domestic functions such as ministry team meetings, following up with contacts after a disaster, and other activities that involve several PDA volunteers.

Please note: Zoom makes changes to the account settings and options on a regular basis. If any of the following instructions do not work, please check the Zoom help options once you are logged in.

Setting up a meeting:

Log into the NRT/NVT Zoom account through the username and password Jim Kirk has provided to the team lead prior to the deployment. If you are not deployed, please send a request to Nell Herring nell.herring@pcusa.org.

- Go to *Meetings*

- Click on *Schedule a meeting*

- Fill in the *Topic* box the purpose of the meeting, the presbytery or synod, and your name. For example, "Hurricane Ida Response: Highlands Presbytery (Jim Kirk)" You can add more info in the meeting description box but it's not necessary.

- Set the date and time, remembering that it will default to PM or AM depending on what time it is when you are setting up the meeting. The default is Eastern Time- **DO NOT change this in the settings.** You can set your individual meeting time to the time zone of your choice and the Zoom account will revert back to Eastern as the default. It will show your meeting time in Eastern **and** in the time zone you choose for your meeting in the NRT/NVT account set- up screen and will show the time zone you chose on the Zoom link/invitation.

- Choose how long you want the meeting to be using the drop-down menu. Keep in mind others will need to use the account and only sign up for as much time as you reasonable expect to need- and remember to end on time.

- We recommend checking the *Registration Required* box, which helps avoid unwanted guests. If you are sure the folks you invite won't share the meeting info on social media or you need it to be a more open invitation, do <u>not</u> click on *Registration Required*.

- You will need to choose one of these options: *Passcode, Waiting Room* or *Require Authentication* to join. *Waiting Room* is easiest on participants. If you choose this, you and/or your co-host need to let folks in and watch for it to pop up for late-comers or those lose their connection and need to get back in.

- It's best to have host and participants default to video and audio off and then all can turn this on as appropriate.
- *Meeting Options* will be up to you but we ask that you NOT record meetings unless it is necessary because cloud storage is limited. <u>Please talk with Jim or Nell if you feel you need to record.</u> Generally, you'll want the Zoom meeting to be a safe space where people can share what they need to without it being recorded. If you do record, Zoom will tell everyone that it is being recorded and people can opt out.
- Hit *Save* at the bottom. When you are ready to send the link, scroll up and hit *Copy Invitation*. It gives you a dialogue box and you need to hit *Copy Meeting Invitation*. Then you can paste it into your email you're sending participants.

Managing meeting settings once they are set up:

You can always go back in and edit the meeting if you need to change the time or other settings. Just log in and go to your meeting and hit *Edit*. Remember to hit *Save* at the end.

- If you used *Registration Required*, you can see who's registered for the meeting. Log in, select your meeting and scroll down to nearly the end to see *Participants* and click on that. You'll see their name and email address and when they registered.

- You can click on all participants to re-send the confirmation email if you want to do that near the time of the meeting. Just be careful not to click *Delete registration* unless that is what you need to do.

- If you chose *Registration required*, you can go into "reports" and generate a report that will give you all the emails of registrants. You can use this to send a group email if you want to send attachments or information. It is recommended that you send this to yourself and put the registrants' emails in the BCC line to avoid sharing others' emails.

General tips:

- Start the meeting early and copy and paste Zoom link in an email to send to your participants. You will find the link on the Zoom screen during the meeting in the top left of the screen in the circle with an "i" in it or the green shield with a check mark in it.
- You can mute participants who have a lot of background noise going on but they will see a message that the host has muted them.
- It's a very good idea to make someone in the meeting a co-host (another NRT/NVT or someone from the presbytery) after you start the meeting. This

allows the host or co-host to admit people from the waiting room, monitor the chat, etc. while the other person is talking.

- You can assign anyone to be a co-host or switch from being host to someone else being host. That will be helpful if the host has to leave the meeting early.

Positioning of Zoom/notes/other screens:

- Each Zoom presenter will have their own preference for how to position the Zoom screen, the notes or script they're using for their presentation, and anything they want to screen-share.

- One consideration is how important it is to see the faces of participants. Do you need to see them raise their hand? Will you be using the chat function? Do you have a personal preference for seeing people, or is that distracting for you? You can choose speaker view, side by side and gallery view.

- Another consideration is the placement of your notes or script. Will this be on your computer? We recommend this, because it's easier to be mindful of looking into the camera than if your notes are on a table or in your hand. If your script is on the computer, be mindful of having it sized so that you can read it from the distance your screen will need to show your face on the Zoom.

- It is possible to resize both the zoom screen and your notes document and to position them on the screen. We've however found that a pure split-screen, which has both the Zoom and the document locked into half the screen can be problematic when someone screen-shares.

- Practicing, practice, practice. No matter how familiar you are with Zoom, it is always beneficial to test Zoom meetings and to run through the logistics.

- Decide in advance to what extent you want to use the chat function. (The chat button is on the bottom of the zoom screen when you roll the cursor over the bottom of the screen). Often with a small group, small enough so that everyone can be seen on one screen, it works fine for them just to unmute and make their comment or ask their question. In addition, if people are making lots of comments, it can be distracting for all participants. For a larger group, if the chat function is used, a non-presenter team member will need to monitor the chat room.

Screen-sharing:

Be sure to have the document or PowerPoint you want to share open and minimized **before** you srart the Zoom meeting. Locate the 'Share Screen' button at the bottom of the Zoom screen.

- Select which screen or document you would like to share.

- Click on the share button on that screen. Remember to stop screen-sharing when you're done, using the button at the top of your screen.

- Participants can see your cursor moving while you are sharing your screen, so if you want them just to look at the document, don't move your cursor -it's distracting.

- It is possible to use the chat function or admit late-comers while using screen-share.

Breakout rooms:

If it doesn't matter who goes into any given breakout room, or how many people go into each room, you can set it up so people can choose their own room.

- When you click on Breakout rooms the options are "Assign automatically", "Assign manually", or "Let participants choose room."
- If you select "Assign automatically," participants will be sent to different rooms.
- If you do want specific people in certain rooms, or you want balanced numbers in the rooms, you should choose "Manual assignment" (as below) for room assignments.
  - Open "Breakout Rooms" tab and use "Manually" for room assignment." Create as many rooms as needed.
- Under "Options"
  - **Check** "Allow participants to return to main room at any time."
  - **Check** "Breakout rooms close automatically after . . ." however many minutes you schedule.
  - **Uncheck** "Notify me when time is up." This will automatically close the rooms without you doing anything.
  - For "Countdown after closing" **check** it and choose "Set countdown timer" for **15 seconds.**

Additional questions or concerns:

Please reach out to the PDA IT Team through Dave Thalman dthalman@comcast.net for tech questions or Nell Herring nell.herring@pcusa.org for PDA administrative questions.