

# THE UNIVERSITY SEMINARS

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## *Basic Zoom instructions for seminar meetings*

### Version B. For meeting HOSTS (Rapporteurs and Chairs)



All University Seminar meetings are to be held virtually through fall 2021. The University Seminars office will support any seminar that decides to meet virtually while all in-person meetings are suspended.

Seminar chairs and rapporteurs serve as host or co-host for seminar meetings. A moderator will be provided upon request to begin each meeting and ensure that all meetings adhere to The University Seminars' privacy policy. Each attendee and presenting guest must acknowledge the privacy policy at the start of each meeting. The privacy policy, revised for virtual meetings, and the appropriate attendee and speaker acknowledgement forms are found in The University Seminars [Guidelines](#).

For in-depth Zoom instructions refer to the referenced material at the end of this document.

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## Getting onto Zoom

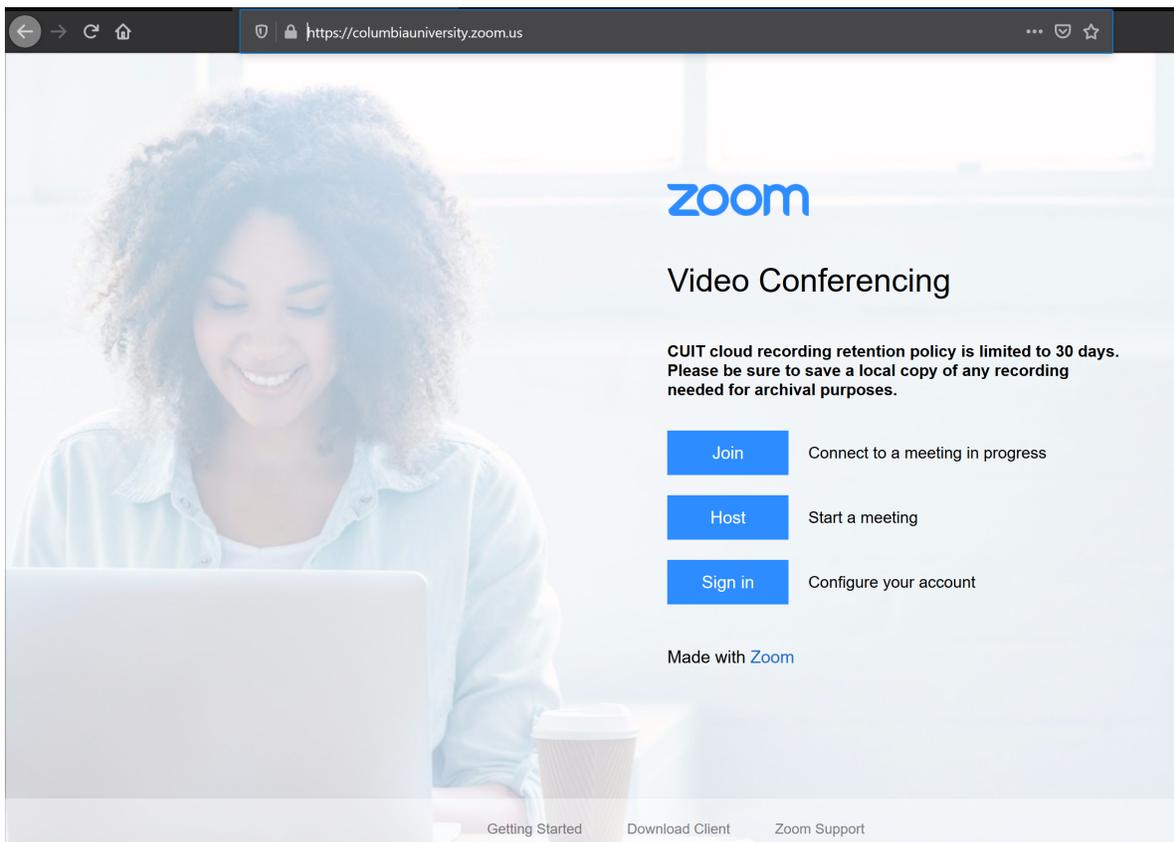
### Non-Columbia University Affiliates

A Zoom account is technically not required if you are only joining a Zoom meeting as an attendee. However, if you wish to create an account, you may sign up for free basic service at: <https://zoom.us/>

### Columbia University Affiliates: Obtaining a Zoom account through Columbia University IT

All faculty and staff of the university are provided a basic Zoom account through CUIT. Go to: <https://columbiauniversity.zoom.us/>

Sign in with your Columbia UNI to access your basic Zoom profile.



# Upgrading to a premium Zoom account through Columbia University IT

In order to host or co-host a meeting over 40 minutes long, the premium version of Zoom is required.

## Non-Columbia University Affiliate Chairs & Co-Chairs

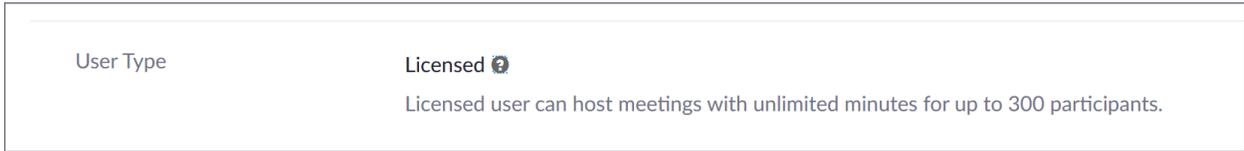
Any chair who wishes to serve as meeting host or co-host will need the premium version of Zoom. Non-CU affiliate chairs have the option to get their own Zoom account (monthly fee) or use one of the general Zoom accounts set up by The University Seminars office. These accounts are shared by any non-CU affiliate who do not have a premium Zoom account for the explicit purpose of hosting or co-hosting a pre-scheduled virtual seminar meeting. If you require access to the shared premium account, contact Pamela Guardia at [PF2106@columbia.edu](mailto:PF2106@columbia.edu) for account access and instructions for use.

## Columbia University Affiliate Chairs, Co-Chairs & Rapporteurs\*

Any Columbia University faculty or staff may request the upgraded version of Zoom from CUIT. Send an email to [askcuit@columbia.edu](mailto:askcuit@columbia.edu) to request the premium version of Zoom. CUIT will send an email within a few days confirming the upgrade.

\*All Rapporteurs are required to have the premium version of Zoom in order to serve as meeting hosts. All new rapporteurs must send an email to Pamela Guardia ([PF2106@columbia.edu](mailto:PF2106@columbia.edu)) with your name, UNI, seminar and email address for upgrade. Log in to Zoom at <https://columbiauniversity.zoom.us/> in order to activate your established account.

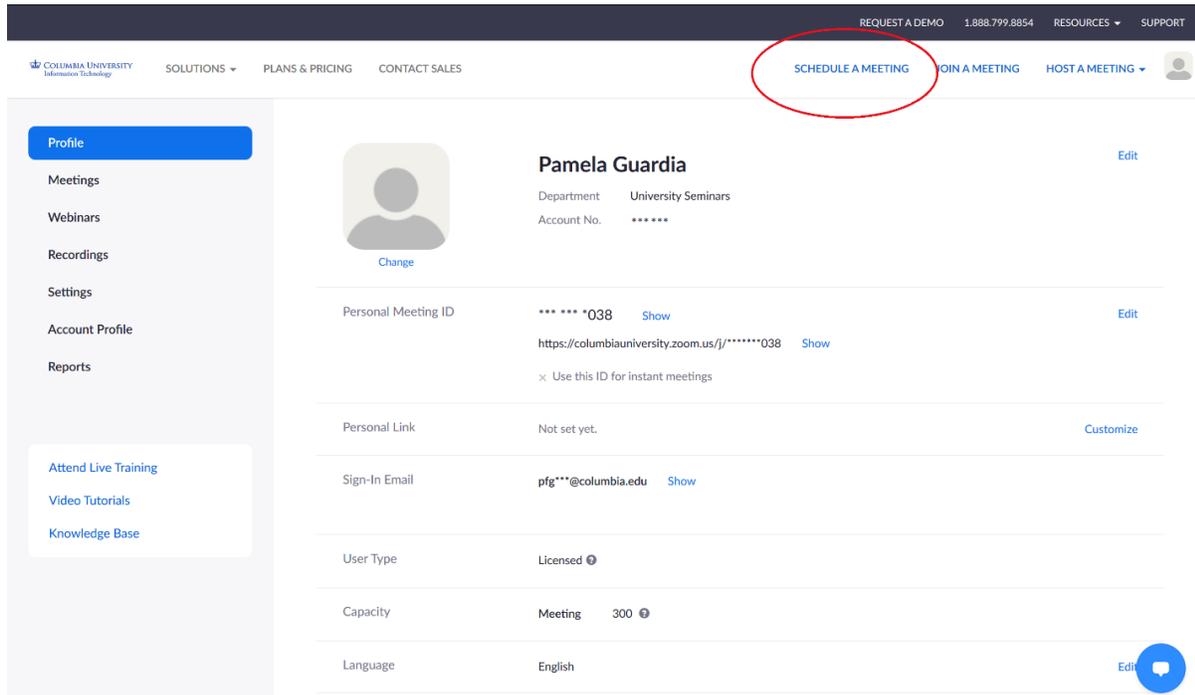
Verify that your account has been upgraded. Log in to Zoom and go to your profile. Under **USER TYPE**, the value should be “**Licensed.**”



Once your account is active, all technical issues should be directed to CUIT at [askcuit@columbia.edu](mailto:askcuit@columbia.edu)

## Scheduling a Meeting

Log into Zoom and select **Schedule a Meeting** from the options at the top of the home page.



REQUEST A DEMO 1.888.799.8854 RESOURCES SUPPORT

COLUMBIA UNIVERSITY Information Technology SOLUTIONS PLANS & PRICING CONTACT SALES SCHEDULE A MEETING JOIN A MEETING HOST A MEETING

**Profile**

- Meetings
- Webinars
- Recordings
- Settings
- Account Profile
- Reports

Attend Live Training  
Video Tutorials  
Knowledge Base

**Pamela Guardia** Edit

Department University Seminars  
Account No. \*\*\*\*\*

Change

|                     |  |           |
|---------------------|--|-----------|
| Personal Meeting ID | **** *038 Show   | Edit      |
|                     | <a href="https://columbiauniversity.zoom.us/j/*****038">https://columbiauniversity.zoom.us/j/*****038</a> Show |           |
|                     | x Use this ID for instant meetings   |           |
| Personal Link       | Not set yet.   | Customize |
| Sign-In Email       | pfg***@columbia.edu Show   |           |
| User Type           | Licensed   |           |
| Capacity            | Meeting 300  |           |
| Language            | English  | Edit      |

The **Meetings** page will open. Set the meeting parameters from within the **Meetings** page. Available options are described below.

1. Set date, time and expected duration. Making this a recurring meeting will create several instances until the end date that you specify.
2. Advanced registration is not necessary for regular seminar meetings. It is helpful for tracking conference attendees.
3. Requiring a meeting password is highly recommended.
4. Allow video for the host and attendees.
5. Allowing both telephone and computer audio will give attendees the option to connect via telephone if they experience slow internet speed.

(continued below image)

Profile

**Meetings**

Webinars

Recordings

Settings

Account Profile

Reports

Attend Live Training

Video Tutorials

Knowledge Base

My Meetings > Schedule a Meeting

Schedule a Meeting

Topic Seminar

Description (Optional) organizational meeting

When 09/01/2020 4:00 PM

Duration 2 hr 0 min

Time Zone (GMT-4:00) Eastern Time (US and Canada)

Recurring meeting

1

Registration  Required

2

Meeting ID  Generate Automatically  Personal Meeting ID \*\*\* \*\* \*

Meeting Password  Require meeting password \*\*\*\*\*

3

Video Host  on  off

Participant  on  off

4

Audio  Telephone  Computer Audio  Both

Dial from United States of America Edit

5

Meeting Options

Enable join before host

Mute participants upon entry

Enable waiting room

Only authenticated users can join

Breakout Room pre-assign

Record the meeting automatically

Enable additional data center regions for this meeting

6

panopto\_folder\_context

Alternative Hosts Example: mary@company.com, peter@school.edu

7

## 6. Meeting Options:

- a. Enable join before host: Selecting this option will allow attendees to enter the meeting space before the host joins. Some participants will join early to make sure they have no technical issues. Others will join early to socialize before the meeting.
- b. Mute participants upon entry: All attendees are visible to each other, but are on mute.
- c. Enable waiting room: Allows the host to control when a participant joins the meeting. As the meeting host, you can admit attendees one by one, or hold all attendees in the Waiting Room and admit them all at once.
- d. Only authenticated users can join: Limits the pool of participants to only signed-in Zoom users or users from a shared domain or email provider. This is an advanced setting and is not commonly used.
- e. Breakout room pre-assign: You can pre-assign breakout rooms or manage breakout rooms during the meeting. If you choose to pre-assign, you will be prompted to create rooms and assign attendees to each room created. Breakout rooms can be used as a means to socialize before or after the meeting. Further instructions on creating and managing breakout rooms can be found on the Zoom help page: <https://support.zoom.us>
- f. Record the meeting automatically: This is **highly** recommended. Rapporteurs are required to take minutes of the meeting. Make sure all attendees are made aware that the meeting will be recorded at the start of the meeting.

7. Alternative Hosts: Hosts have the power to mute all attendees, view raised hands and remove an attendee. Assign alternative hosts via their email addresses. Alternative hosts can be co-chairs, moderators or rapporteurs. You may only assign the role of host to one who has a premium Zoom account.

**Save** settings. You can view created meetings, and change all settings, in the **Meetings** section.

From the **Meetings** section, you can view all scheduled meetings, and start or delete a scheduled meeting from the list. Go to **Previous Meetings** to view the list of past meetings.

REQUEST A DEMO 1.888.799.8854 RESOURCES SUPPORT

COLUMBIA UNIVERSITY Information Technology SOLUTIONS PLANS & PRICING CONTACT SALES SCHEDULE A MEETING JOIN A MEETING HOST A MEETING

Profile  
**Meetings**  
Webinars  
Recordings  
Settings  
Account Profile  
Reports

Upcoming Meetings Previous Meetings Personal Meeting Room Meeting Templates Get Training

Schedule a New Meeting Join a meeting from an H.323/SIP room system

| Start Time                          | Topic          | Meeting ID |              |
|-------------------------------------|----------------|------------|--------------|
| Wed, Aug 12 (Recurring)<br>04:30 PM | Office Meeting | *** ** *   | Start Delete |
| Wed, Aug 19 (Recurring)<br>04:30 PM | Office Meeting | *** ** *   | Delete       |
| Wed, Aug 26 (Recurring)<br>04:30 PM | Office Meeting | *** ** *   | Delete       |

## Invite Attendees

From the above **Meetings** section, select a meeting to go to the **Manage Meeting** page.

Click **Copy Invitation** next to the invitation link. Open your email and paste the invitation contents into an email and send to attendees. A host may decide to send the Zoom invitation only to those who have already responded to the initial seminar meeting announcement.

The screenshot shows the Zoom 'Manage Meeting' interface for a meeting titled 'Office Meeting'. The left sidebar contains navigation options: Profile, Meetings (highlighted), Webinars, Recordings, Settings, Account Profile, and Reports. Below these are links for 'Attend Live Training', 'Video Tutorials', and 'Knowledge Base'. The main content area displays meeting details: Topic (Office Meeting), Time (Aug 12, 2020 04:30 PM Eastern Time (US and Canada)), and a recurrence pattern of 'Every week on Wed, until Sep 2, 2020, 4 occurrence(s)'. There are buttons to 'Add to' Google Calendar, Outlook Calendar (.ics), and Yahoo Calendar. The Meeting ID is 960 4248 0650. The Security section shows a passcode and a 'Waiting Room' option. The 'Invite Link' is highlighted with a red box and includes a 'Copy Invitation' button. The bottom section shows settings for Video (Host: On, Participant: On) and Audio (Telephone and Computer Audio).

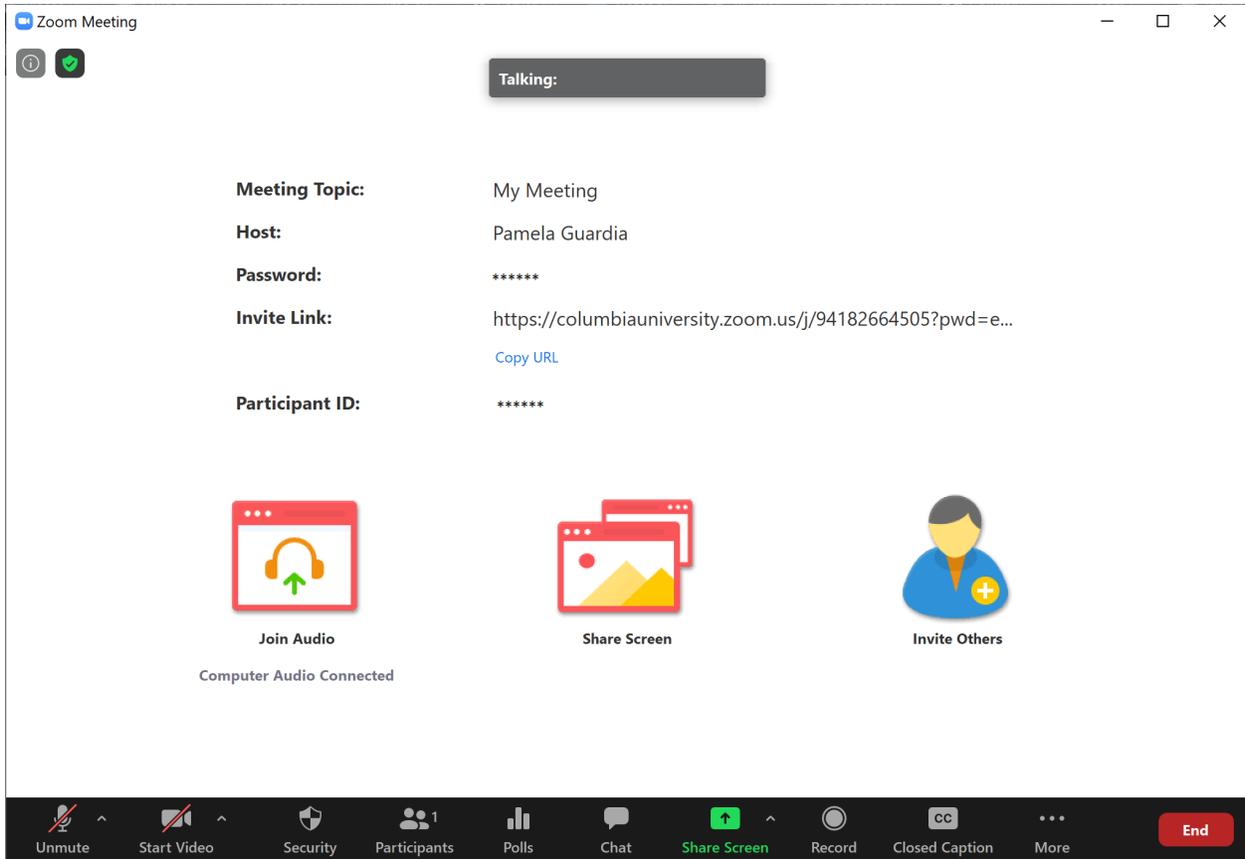
## Start Meeting

Go to **Meetings** from the menu on the left. All scheduled upcoming meetings are listed. Begin the meeting by clicking **Start**.

The screenshot shows the Zoom 'Upcoming Meetings' page. The left sidebar has 'Meetings' highlighted with a red arrow. The main content area shows a list of upcoming meetings under the 'Upcoming Meetings' tab. A 'Schedule a New Meeting' button is at the top. The table lists three recurring meetings for 'Office Meeting' on Wednesdays at 04:30 PM. The first meeting's 'Start' button is highlighted with a red box and a red arrow pointing to it. The 'Delete' button is also visible for each meeting.

| Start Time                          | Topic          | Meeting ID | Start | Delete |
|-------------------------------------|----------------|------------|-------|--------|
| Wed, Aug 12 (Recurring)<br>04:30 PM | Office Meeting | *** ** *   | Start | Delete |
| Wed, Aug 19 (Recurring)<br>04:30 PM | Office Meeting | *** ** *   |       | Delete |
| Wed, Aug 26 (Recurring)<br>04:30 PM | Office Meeting | *** ** *   |       | Delete |

The meeting will begin and display all attendees who have already joined. If none have joined, you will find the image below.

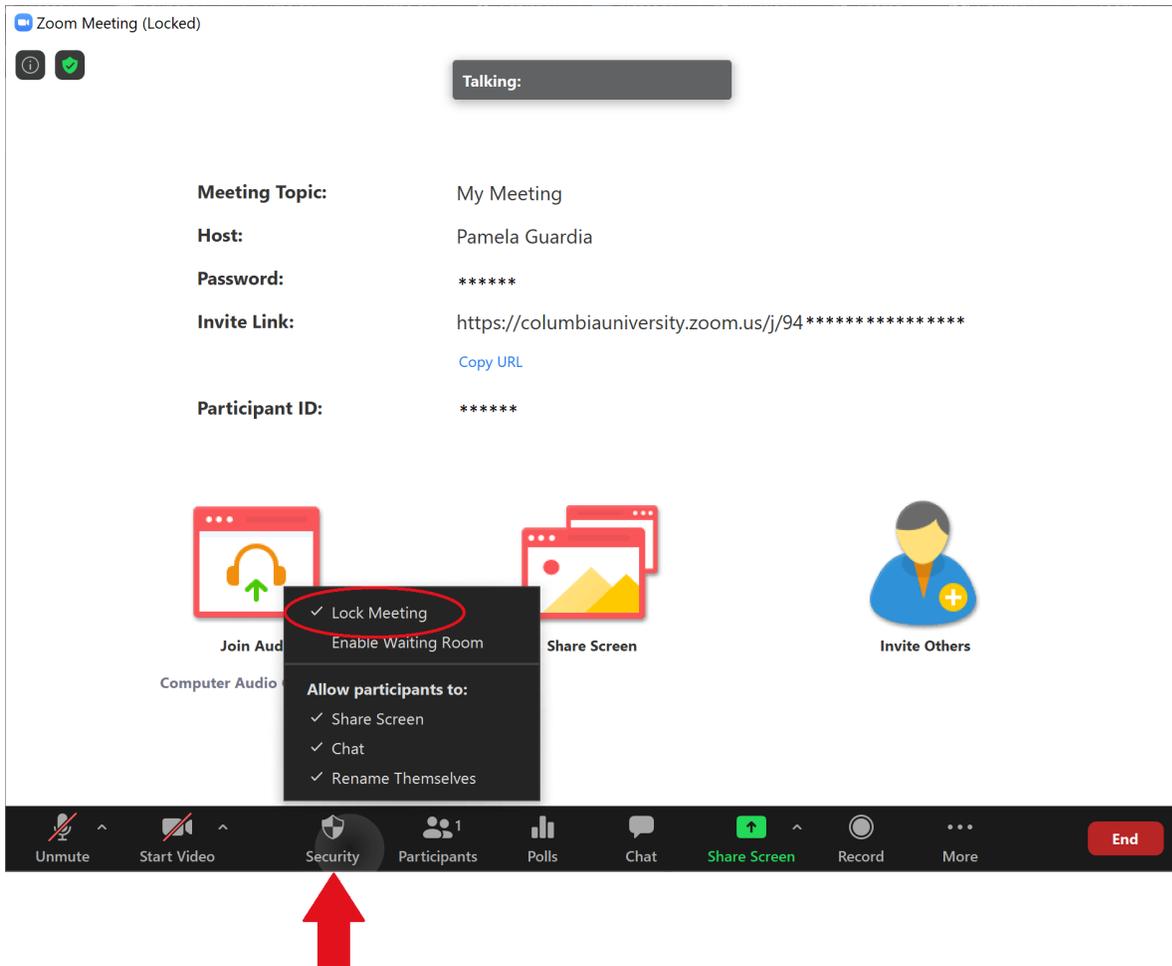


If you enabled a **Waiting Room**, your attendees will need to be admitted into the meeting room when you begin the meeting.

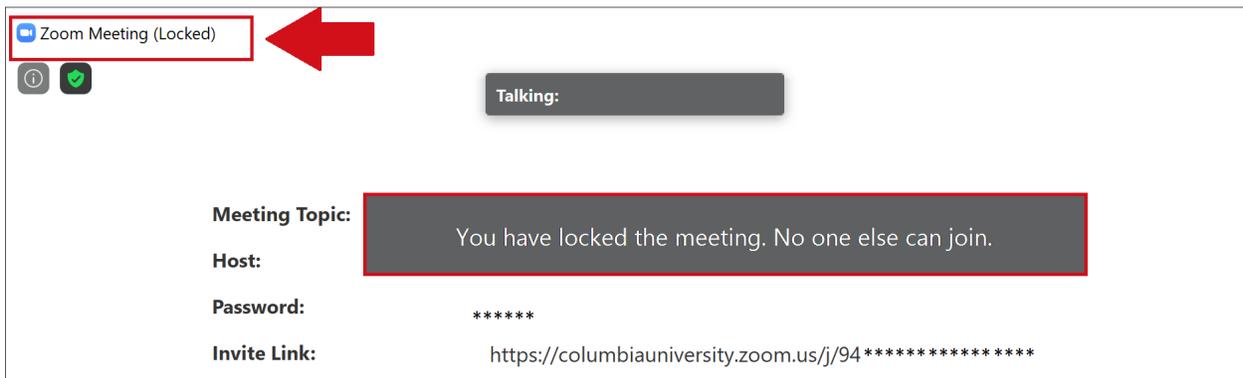
## Locking a Meeting

Once all attendees have joined the meeting, the host may lock the meeting so that no one else can join. This is a redundant security measure. Do not lock the meeting if any attendees will join late or if attendees will drop in and out. (Attendees with an unstable network connection may drop out of the meeting and need to re-join).

To lock the meeting, click **Security** from the bottom menu and select **Lock Meeting**.

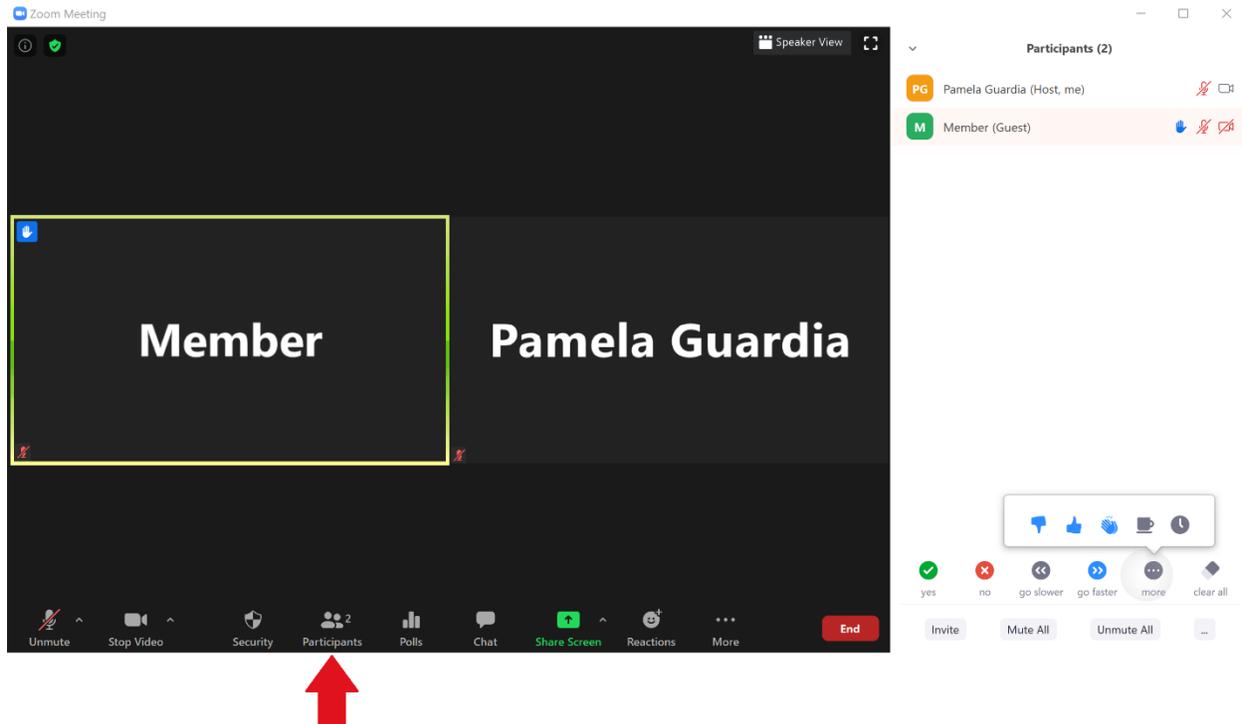


When a meeting is locked, it will be indicated in the upper left-hand corner of the Zoom window.



## Participants:

Go to **Participants** from the bottom menu to view a list of all attendees. From within this list, you can view which participants have a raised hand or have offered any other reactions, such as thumbs up/down, or who have offered answers to a poll.



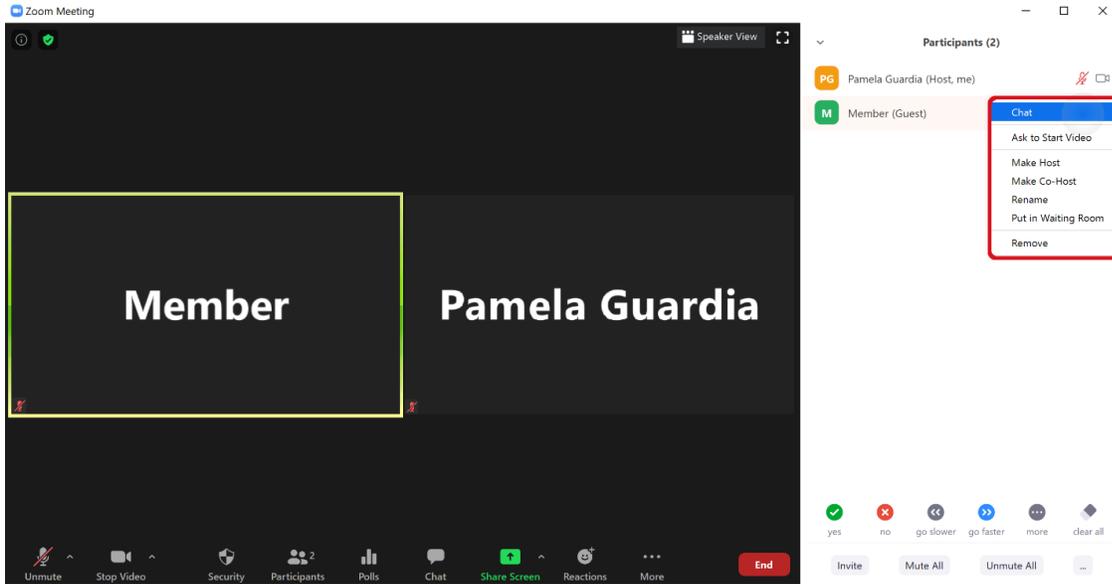
## Action on Participants

From the participant list, select any participant to view other options.

**Make Host / Co-Host:** Share hosting responsibilities with another attendee. This option is limited to those who already have the premium version of Zoom.

**Put in Waiting Room:** Temporarily place an attendee, or several attendees, in the waiting room. This option allows you to have a private discussion, hold a vote, or review information while a key player is not in the meeting space.

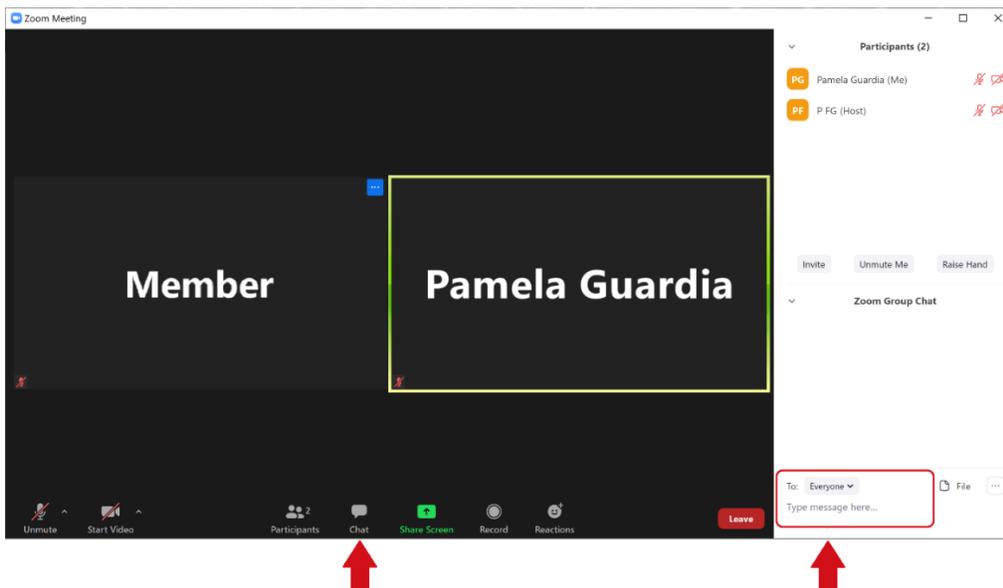
**Remove:** Eject an unwanted, uninvited or disruptive guest. Lock the meeting to prevent further intrusion (**Security** -> **Lock Meeting**).



## Chat

Click **Chat** from the bottom menu to open the chat window. You can elect to send a message to the entire group or to any attendee privately before you type your message. You can also share a file or web link.

**Chat** is the means by which all attendees *sign-in* to the meeting. (See section below entitled *Privacy Policy Acknowledgement and Meeting Sign-in*).



## Privacy Policy Acknowledgement and Meeting Sign-in

At the start of each University Seminar meeting, all attendees must acknowledge the privacy policy which is read out to the group by the host or moderator (See *Moderators* section below). Acknowledgement of the privacy policy is done by each attendee raising their virtual hand and typing their name into chat when prompted by the host or moderator.

All attendees are required to type their names into the chat. Participation is recorded in the meeting minutes by the rapporteur.

## Moderators

The University Seminars office will assign a moderator to each virtual seminar meeting precisely in order to read The University Seminars privacy policy statement and record the acknowledgement of the privacy policy by each attendee.

Moderators will join the seminar meeting before the scheduled start time as [**FirstName (Moderator)**]. The host or chair should introduce the moderator at the beginning of the session. The host (rapporteur, chair) must make the moderator a co-host so that they can view the full list of participants and see who has a hand raised (select the moderator from the **participants** list, right-click and select **Make Co-Host**). No attendee may have a hand raised before the privacy policy acknowledgement is read.

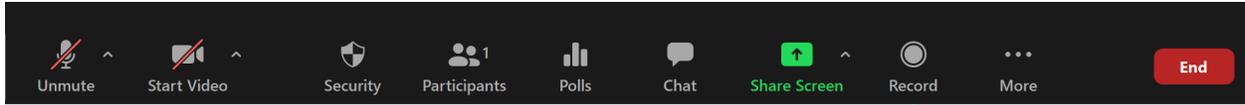
The moderator may also help with any technical issues, if any, and make sure the meeting is recording. Once the meeting begins, the moderator will leave the meeting to run on its own.

Rapporteurs are still responsible for all other duties, especially, but not limited to, taking the minutes of the meeting. Rapporteurs are responsible for hosting or co-hosting the meetings.

## Record Meeting

**\*\*\* Please note that recording, sharing or broadcasting a session requires consent from all participants. The appropriate forms for presenters and attendees are found in the [Guidelines](#). \*\*\***

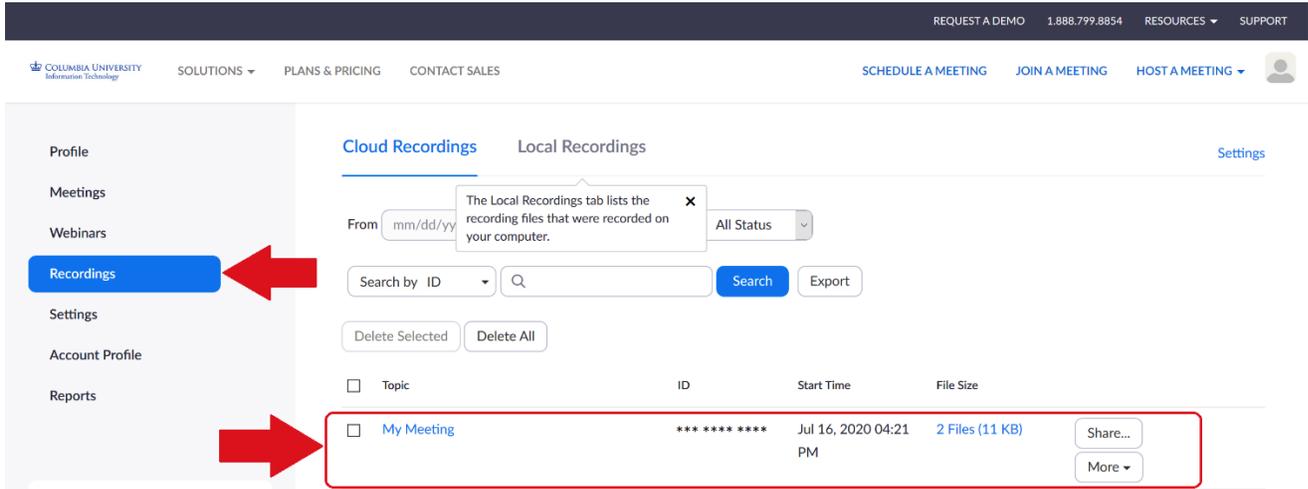
Make sure all participants are aware that your meeting is being recorded. If the meeting is not set to automatically record, select **Record** from the menu at the bottom of the window.



All recordings can be retrieved from the **Recordings** section within Zoom.

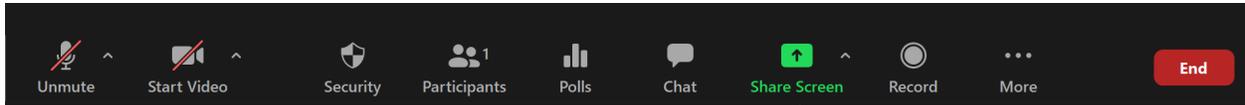
**All recordings saved to the cloud are retained for a maximum of 30 days. Be sure to save a copy of the recording before it is permanently erased.**

The University Seminars does not require a copy of the recording for the archive. The minutes should be submitted by the rapporteur as usual.

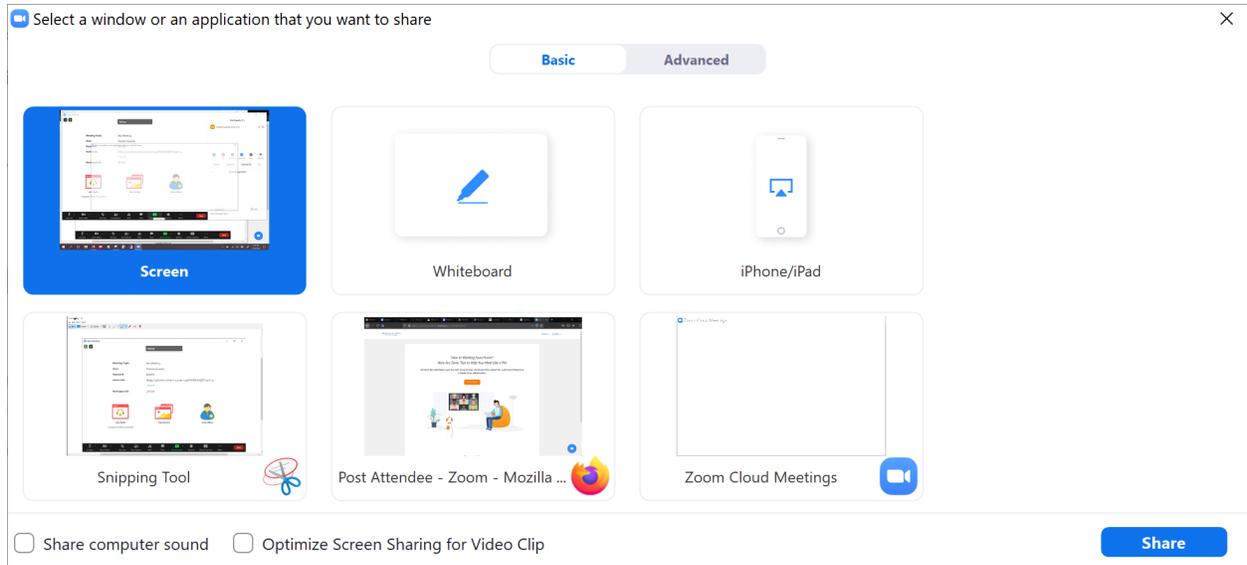


## Screen Share

Any attendee can screen share to show content from their local computer, the web or via the integrated Zoom whiteboard.

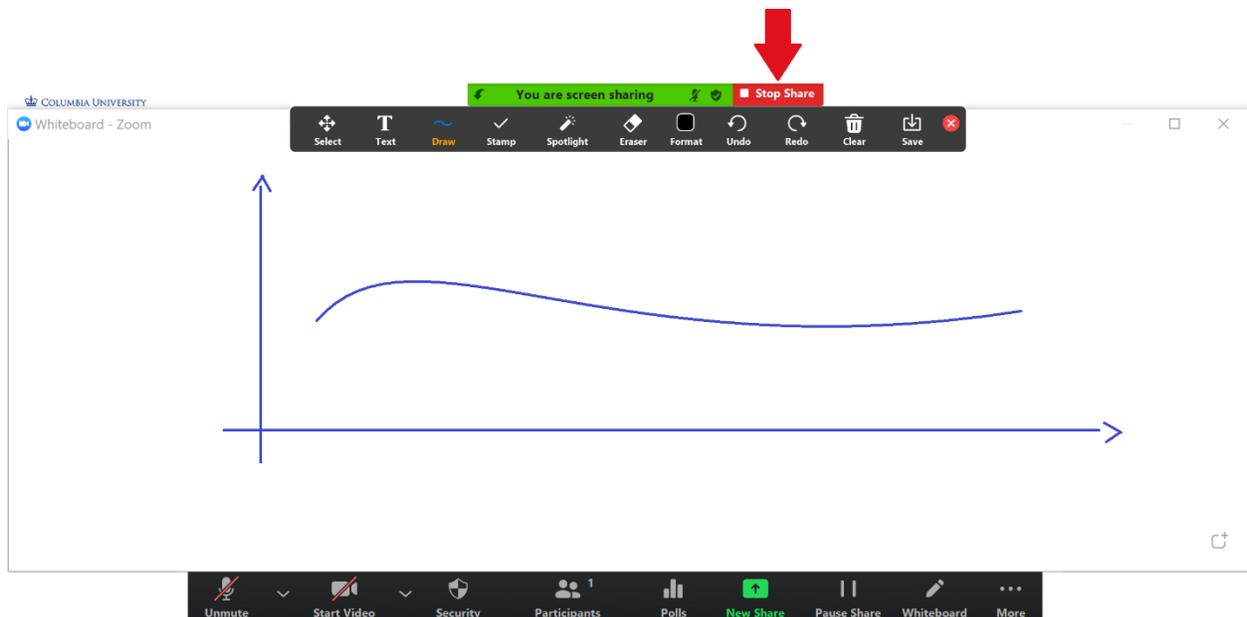


Click **Share Screen** from the bottom menu. Select the application or window that you want to show and click **Share** to confirm.



When you are in share mode, a banner appears reminding you that you are screen sharing.

Click **Stop Share** to exit screen share mode.



## Hiding and Muting Participants for Large or Public Meeting

When holding a large meeting with a panel of participants, you may want to keep your participants hidden to control to the flow of the discussion or to prevent their likeness and voices from being recorded or broadcast publicly.

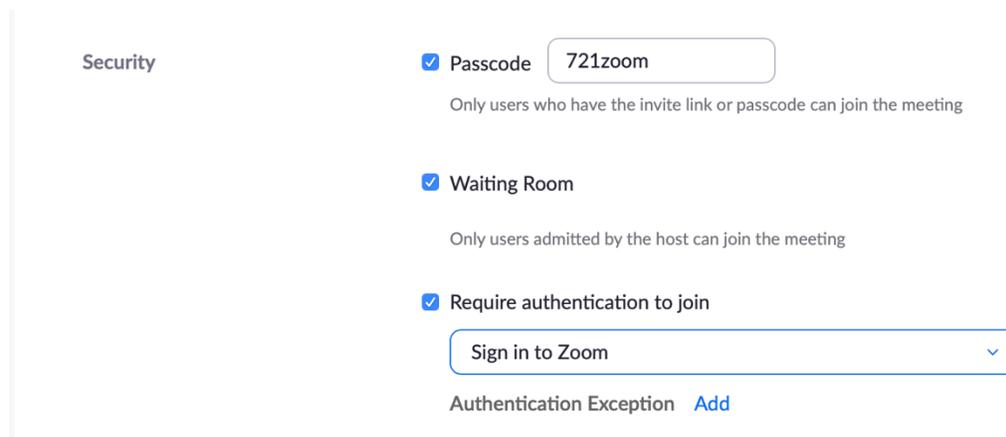
If you are holding a special event, it is best to use Webinar instead of Zoom. If you require Webinar, contact Pamela Guardia for more information.

**\*\*\* Please note that recording, sharing or broadcasting a session requires consent from all participants. Contact The University Seminars office for the appropriate forms. \*\*\***

Settings to hide participants are set in 2 places: when the meeting is created and from within the meeting itself.

### CREATE MEETING:

To hide and mute participants for a given meeting, create a new Zoom meeting. In the meeting settings, under the **Security** section, select the options to require a **password**, and enable a **Waiting Room**.



The image shows a screenshot of the Zoom Security settings interface. On the left, there is a vertical sidebar with the word "Security" highlighted. The main content area contains three checked options:

- Passcode** 721zoom  
Only users who have the invite link or passcode can join the meeting
- Waiting Room**  
Only users admitted by the host can join the meeting
- Require authentication to join**  
Sign in to Zoom (dropdown menu)  
Authentication Exception [Add](#)

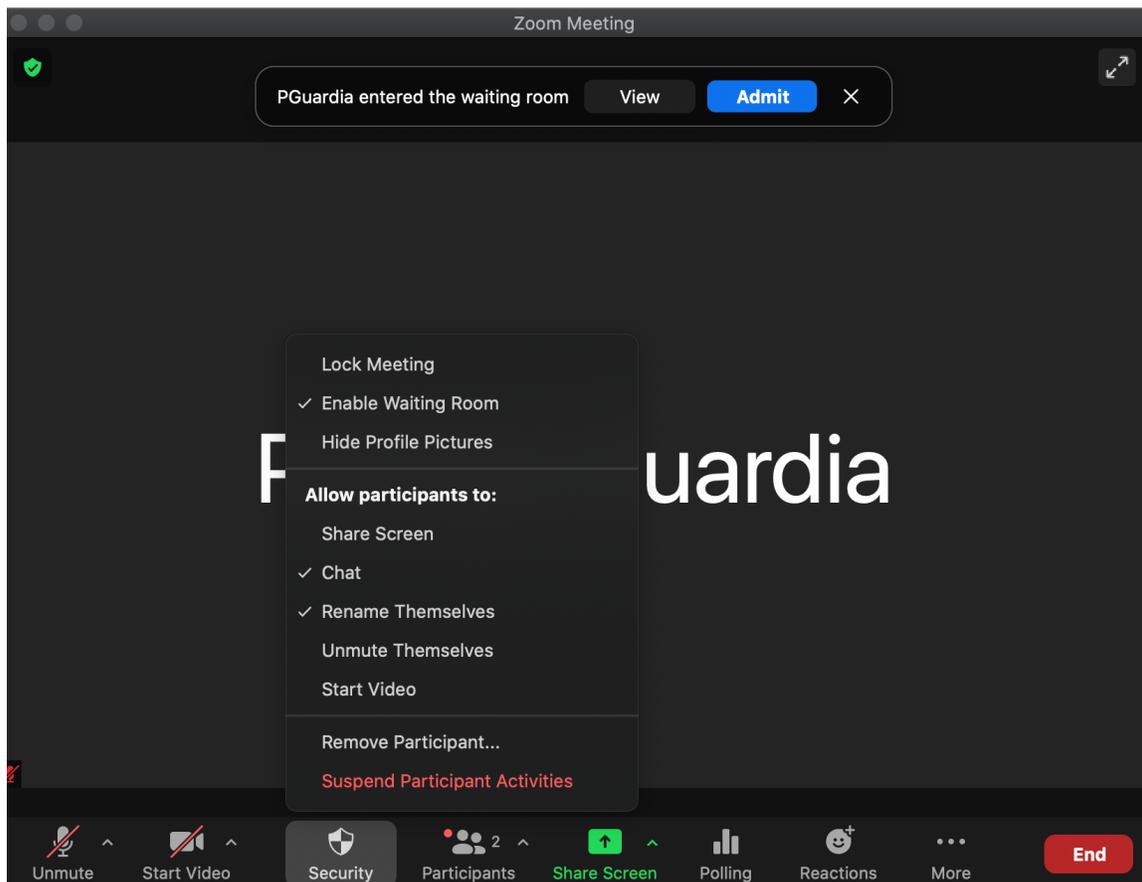
Next to **Participant Audio**, select the radio button 'off' so that everyone enters the meeting with their cameras off.

### BEGIN MEETING:

All participants will enter the Waiting Room until you admit them to the meeting space. In a Waiting Room, each participant is in an individual holding space where they cannot interact with anyone else.

(Using a waiting room in a regular meeting is a great way to have a pre-meeting discussion between the hosts and presenter/s).

From within the meeting, select the **Security** option (badge icon) from the menu at the bottom of the screen. A pop-up menu will appear.



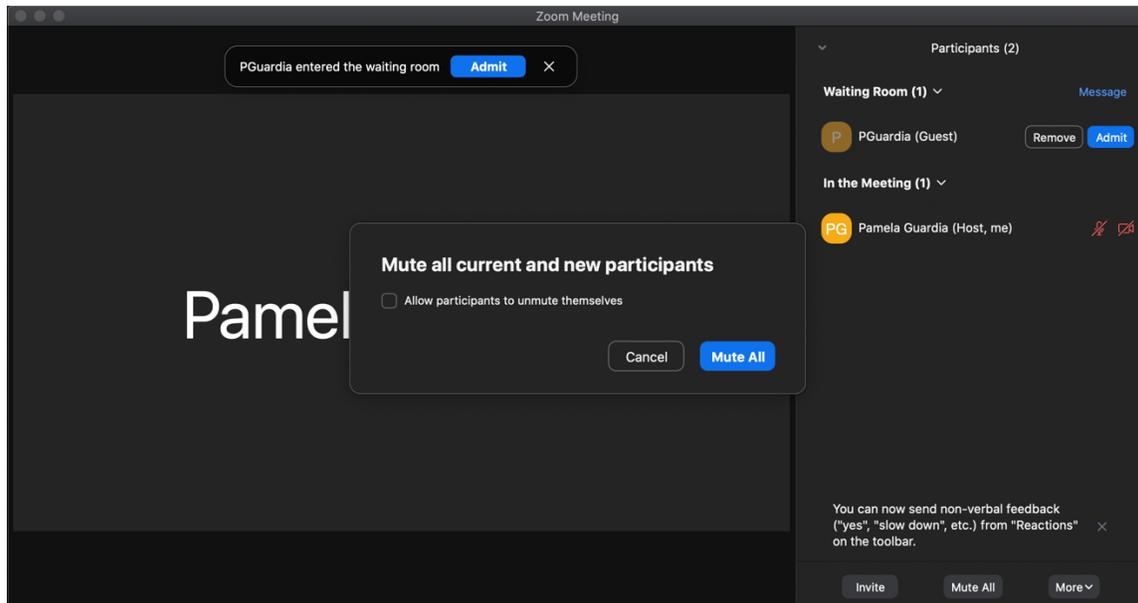
From the menu, UNCHECK the following options to disable them for participants:

- Share Screen
- Unmute Themselves
- Start Video

When the meeting was created, we selected the option to have all Participants enter the meeting with their cameras off. This setting will prevent them from turning their cameras on once they are in the meeting.

Next, we will prevent Participants from unmuting themselves once they are in the meeting.

Select the **Participants** option from the menu at the bottom of the screen. A side screen will appear listing all participants in the Waiting Room.



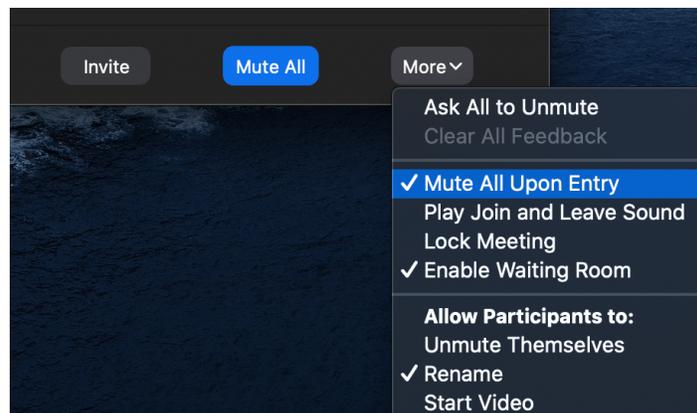
At the bottom of the side screen, you have 2 muting options: **Mute All** and under **More**, the selection **Mute All Upon Entry**.

**Mute All:** This will mute everyone instantly and make sure that anyone who joins later on will enter the meeting muted as well. This feature is redundant if you use Mute All Upon Entry when all participants are still in the Waiting Room.

Select **Mute All** and when the dialog box opens, make sure the check box is not selected and confirm by selecting **Mute All** again.

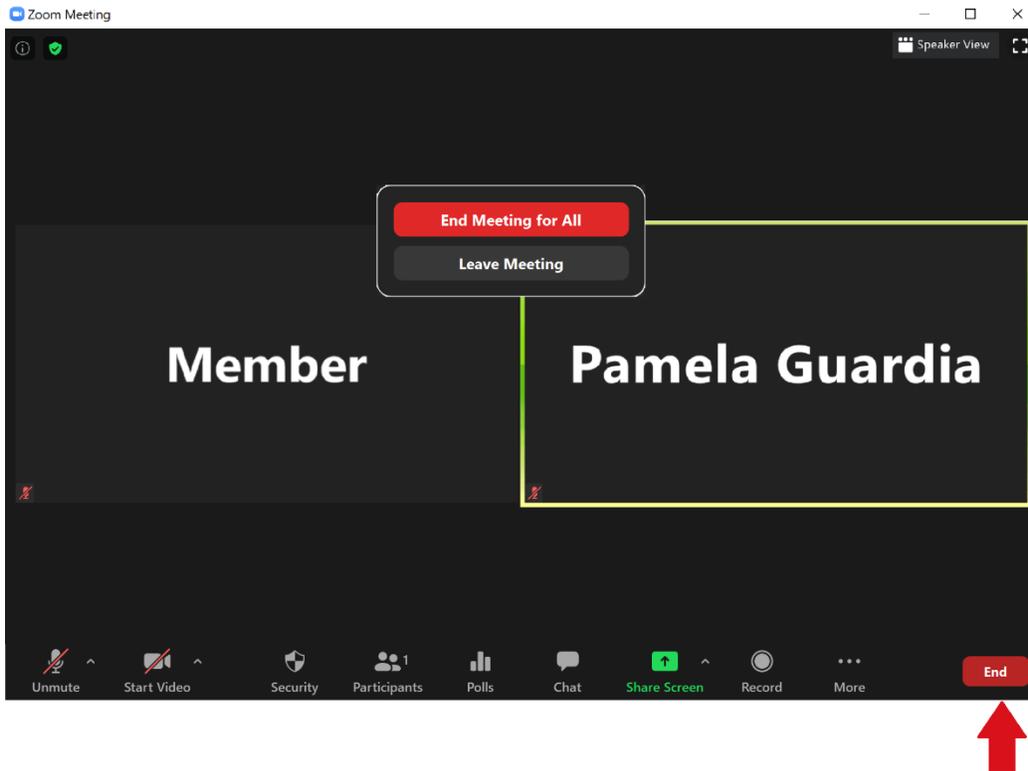
**Mute All Upon Entry:** This option will make sure everyone comes into the meeting already muted. If you disabled all participants' ability to unmute in the Security section (previous step), they will remain muted for the duration of the meeting.

\*You must select **Mute Upon Entry** while everyone is still in the Waiting Room. If you admit everyone to the meeting first, you can use Mute All.



## End or Leave Meeting

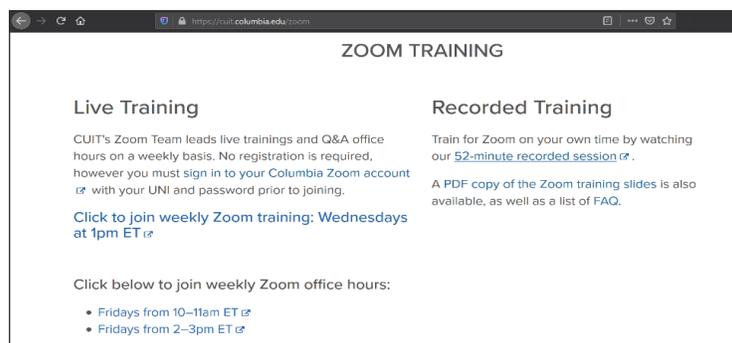
Click **End** at the bottom right hand corner of the screen to either leave the meeting or end the meeting for everyone.



## Further Information, Tips and Training:

### Columbia University Training

Columbia University offers free live or recorded training for affiliates. For information and schedules, visit: <https://cuit.columbia.edu/zoom>



## Zoom Training and Resources

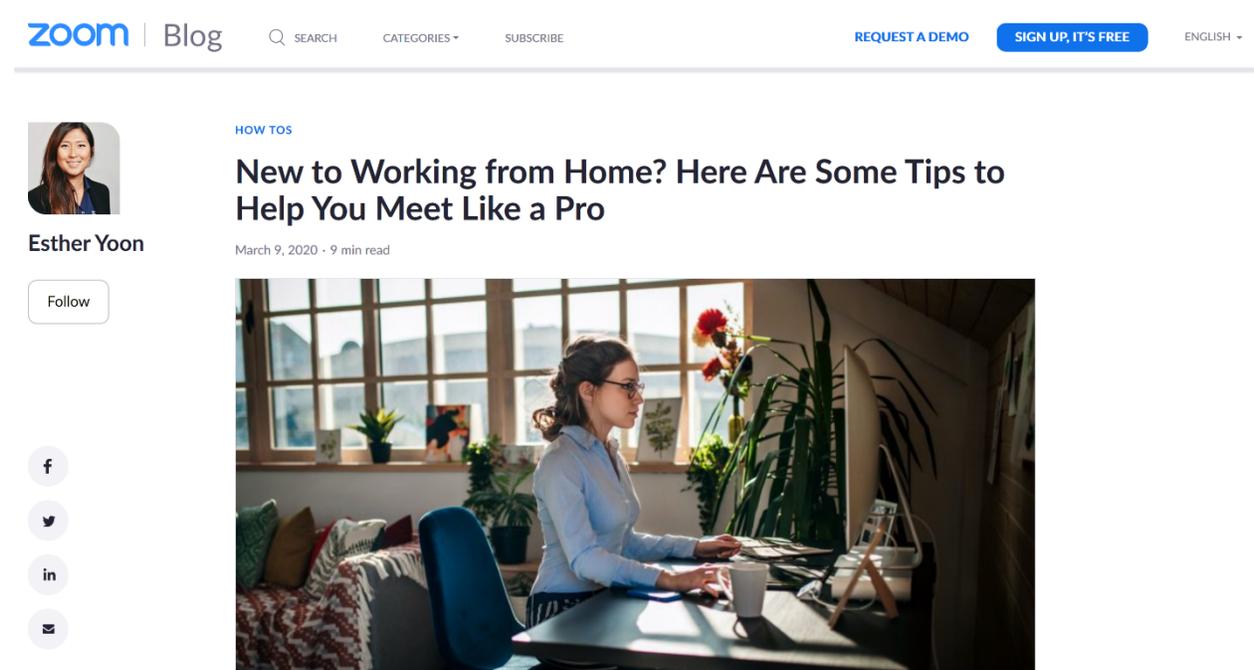
All Zoom users can find help at <https://support.zoom.us>

Training sessions are found here:

<https://support.zoom.us/hc/en-us/articles/360029527911-Live-Training-Webinars>

Visit the Zoom blog for tips on working from home:

[https://blog.zoom.us/working-from-home-tips-to-meet-like-a-pro/?utm\\_source=website&utm\\_medium=postattendee&utm\\_campaign=WFHQ1FY21&zcid=3710](https://blog.zoom.us/working-from-home-tips-to-meet-like-a-pro/?utm_source=website&utm_medium=postattendee&utm_campaign=WFHQ1FY21&zcid=3710)



The image shows a screenshot of a Zoom blog article. At the top, there is a navigation bar with the Zoom logo, 'Blog', a search icon, 'SEARCH', 'CATEGORIES', 'SUBSCRIBE', 'REQUEST A DEMO', 'SIGN UP, IT'S FREE', and 'ENGLISH'. The article features a profile picture of Esther Yoon, her name, and a 'Follow' button. The article title is 'New to Working from Home? Here Are Some Tips to Help You Meet Like a Pro', dated March 9, 2020, with a 9-minute read time. Below the text is a photograph of a woman in a light blue shirt sitting at a desk in a home office, working on a computer. The desk has a monitor, a keyboard, and a mouse. There are plants and a window with a view of a city in the background.