



# A quick guide to setting up a meeting with Zoom

## What is Zoom?

Zoom is a platform through which you can hold virtual meetings and webinars. It's a great tool for connecting Q members from across the country.

## What's the difference between a meeting and a webinar?

Webinars are typically one person presenting and an audience listening. Virtual meetings are far more participatory and centre around the contributions of those who are in the call.

## How do I set up a Zoom call?

**Before you start setting up your Zoom call, make sure that you:**

- Go to the Q community website's [Events calendar](#) and check that there is no public live Zoom meetings currently to taking – if there is, don't log into Zoom until 30 minutes after the other meeting's end time.
- When logging into Zoom, immediately check the '**Meetings**' page to ensure another meeting isn't currently live. Having more than one person logged in can disrupt the meeting, so if another meeting is live, log out and come back after two hours.
- Go to the [Q Community events calendar](#) and check that the date of your meeting does not clash with an already-scheduled meeting. This is essential because the account can only run one meeting at a time. If another meeting is scheduled for when you would like to hold yours, please find an alternate time. (Leave 30 minutes after the end of a previous meeting (unless you've checked with its organiser that less is fine).

We have set up a Zoom account specifically for Q groups to use. Please contact [the Q comms team](#) to be sent the log in details. Do not share this password with people outside the community.

**Once logged in**, you can find scheduled meetings via the '**Meetings**' button on the menu on the left hand of the screen. Be careful not to click into any of the scheduled meetings.

**To set up your meeting**, click '**Schedule a New Meeting**'. Get started by inputting the title description, date, time and duration of your meeting. Below, we've explained a few of the options on the form you'll also need to fill in.



You can choose whether or not to make **registration** required;

- If you opt not to require registration, you'll be given a 'join URL' that you can use to invite people. You won't be able to keep a check on how many people have signed up.

The screenshot shows a settings panel with the following options:

- Registration:**  Required
- Meeting ID:**  Generate new meeting ID  Personal Meeting ID (PMI) 982-566-4356
- Video:**
  - Host:**  on  off
  - Participant:**  on  off
- Audio:**  Telephone  Computer Audio  Both

Below the audio options, it says "Dial from United Kingdom" with an [Edit](#) link.

- Requiring registration allows you to see how many people have signed up in advance. This is helpful for monitoring the number of people signed up, as well as seeing who has registered to attend. This also creates a few more options for your invite; this is explained in the next section.
- Under the **Video** options, ensure 'On' is selected for both Host and Participant to allow people to join using their webcam
  - Under the **Audio** options, click both to allow both options for joining. Check the country it lists as 'Dialling in from' and ensure it has selected the UK.

- Under **Meeting options**;

- We recommend ticking 'Enable join before host' to make the joining process smoother for participants – it allows them to join before the meeting organiser.

The screenshot shows the following Meeting Options:

- Require meeting password
- Enable join before host
- Mute participants upon entry
- Enable waiting room
- Record the meeting automatically  On the local computer  In the cloud

- If you'd like to have a recording of your call after, tick 'Record the meeting automatically'. Then select '**On the local computer**'. You can then also share the recording with people who weren't able to join.

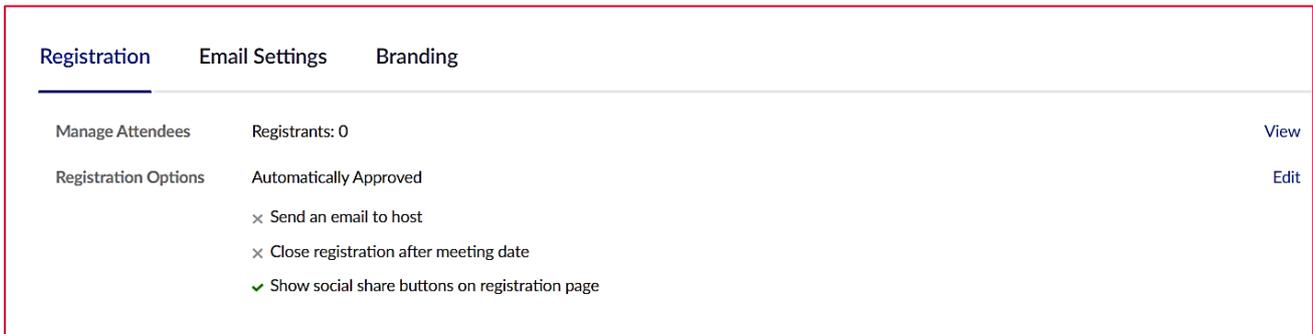
Once you've got your fields filled in, click save and you'll have scheduled your call.

You can click '**Copy the invitation**' to have an invite to send to people. (Don't forget to distinguish between the 'official' start of the meeting and the earlier time they can join from, e.g. You can join from 12.30, meeting starts at 13:00).



## A couple of extra details:

- If you chose to make registration required, you're able to edit your invite more specifically, including the option of adding in custom questions to the registration process. Valuable questions might include 'What topics would you like a meeting on in future?' and 'What help can you offer this group?'



Here's how to find this option;

Click into your scheduled meeting and scroll down to '**Registration**'. Then to go to: Registration options > Edit > Questions

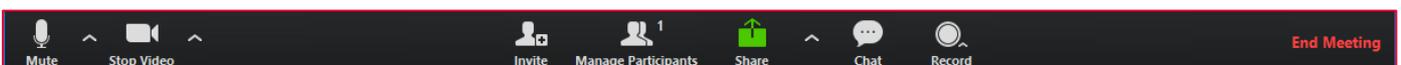
Make sure the email contact details are changed from 'Matthew Mezey/Qgroups@health.org.uk' to yours. You can do this through '**Email settings**', as shown in the image above.

- Make sure you add your Zoom call to [the event listing](#) on the Q website so members of the community can find the details (and avoid meeting clashes)
- If you have required registration, we recommend sending a reminder to attendees the day before. If you haven't chosen to make registration required, you can post reminders on relevant platforms for your audience.

## What do I do on the day?

Go to your scheduled meeting and click '**Start this Meeting**'. We recommend starting your call at least 15 mins before the meeting is due to start, this allows some time for people to enter the call and get a feel for how to use the platform.

There will be a tool bar running along the bottom of your screen, you might need to move your mouse down to make it appear:



- The **Mute** button allows you to mute or unmute your mic. You can also test your mic by clicking the up arrow next to this icon, and going to audio settings
- The **Start/Stop Video** button allows you to switch your webcam on and off
- **Invite** allows you to invite people to join during the call

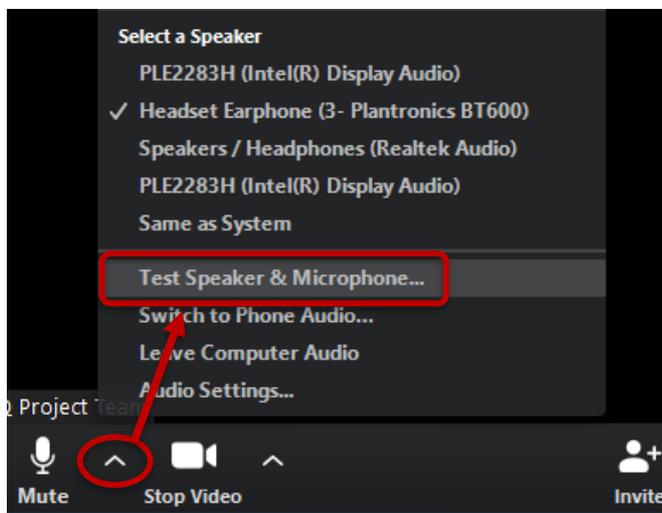


- Manage participants allows you to see who is in the call, and other actions such as muting individuals or all participants
- **Share** allows you to share your computer screen with the call, including **PowerPoint** presentations or creating a Whiteboard
- **'Breakout Rooms'** (bottom right): divide your attendees into smaller rooms for a period of time (eg to discuss together and bring back questions). Can be done automatically (with random allocation of people) or you can place who you want in each room (this can be done in advance too).
- The **Chat** will bring up a side panel where you and other participants can post comments, chat and ask questions (either to everyone, or to particular individuals)
- The **Record** button allows you to start or stop recording the session

Once your meeting is finished, click **End Meeting** in the bottom right.

## Troubleshooting for participants

The most likely problem for participants is with their microphone or speakers not working. Anyone having these issues should be directed to the bottom left corner of the Zoom screen, where there is an up-arrow (next to 'Mute') which brings up a menu including 'Test Speaker & Microphone...'. This will then enable to isolate what the problem is, and change their speaker or microphone settings to ones that work (hopefully).



If someone is still having a problem with video/sound, it might be best if they just dial in using the telephone number on the invitation. Their face won't be seen, but at least the sound will work.

A few organisational firewalls block Zoom, and using the audio dial-in details is the way round this. Zoom also has a mobile app which works well.



## **Do I need to do anything post call?**

If you recorded your meeting 'on the local computer', it will download after the call, which can take a while. It can then be shared. If you organised the call with a Special Interest Group, we recommend posting it in the group space to share the learning.

For a list of attendees from your session, head to **Account Management** on the left-hand menu, then follow:

Reports > Active Hosts > select the date to find your data

To find out details of the attendees, including email addresses and responses to your custom questions, head to:

**Account management** > Reports > Meeting

Zoom has lots of helpful how-to videos, if you have a question we haven't answered here, take a look at their [resources](#):

If you have any further questions, don't hesitate to get in touch: [Q@health.org.uk](mailto:Q@health.org.uk)