
Zoom – booking a video conference

Document No.: 595
Responsibility: M&C
Approved By: Director, Marketing & Communications
Approval Date: Oct 2020

Objective:

To ensure the correct steps are followed when booking the Zoom account for a video conference; and to ensure there are no double bookings in a given timeslot.

Scope:

Applies to all CSMLS staff.

Definitions:

CSMLS Zoom account (aka Licence): webmaster@csmls.org

External guest: non-staff

Procedure:

1. Confirm that your meeting slot is available in Outlook:
 - a. Select the date and time in Outlook calendar
 - b. In scheduling assistant, go to Add Rooms
 - c. Select Zoom Room and view availability
 - d. If it is free, proceed to next step
2. Go to the website <https://zoom.us>
 - a. Login is Username : webmaster@csmls.org Password: Winter2019
3. Confirm your meeting slot is available in Zoom
 - a. Select *Meetings* (left-hand side of screen)
 - b. Scroll through the upcoming meetings to double check that your desired slot is not already booked. (There may be more than one page of upcoming meetings.)
 - c. If there is a meeting already schedule in the timeslot you wish to use, choose another time, or confirm with the meeting owner whether it is something that can be moved
 - d. If there are no meetings already booked in the timeslot you wish to use, proceed to the next step
4. Select SCHEDULE A MEETING (top of screen) and fill out the information fields
 - a. Topic: enter name of meeting

Document History:

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Revision (date of subsequent amended version noted here – month & year)

- b. Use a Template: **not** needed
- c. Select: When, Duration and Time Zone
- d. Registration: at your discretion. Normally not needed.
- e. Meeting ID: Generate Automatically
- f. Passcode and Waiting Room are security features – one **or** the other need to be checked.
 - i. For internal meetings, passcode can be unchecked
- g. Video for host and participant: off
- h. Audio: Both (for staff use), Computer Audio (external guests)

When external guests are invited: ***Do not** include phone options, unless it is an individual request. Toll number is for Canada but is not free. CSMLS **does not** reimburse long distance phone calls for video conferences. Guests need to be made aware of this before being provided the phone number to join.

- i. Meeting Options: you may **record** the meeting but please advise all participants ahead of time. Choose Record Locally. If in the Boardroom, choose Record on Cloud.
 - j. Alternative Host(s): this feature is not available
5. Save
 6. A meeting link will be automatically generated
 - a. Click on the button that adds it to Outlook Calendar OR
 - b. Copy and paste the meeting link into your outlook calendar invite
 7. **Mandatory:** Add Zoom Room to your invite list
 8. **Optional:** Add NewBoardroom to your invite list if any staff plan to **physically** be in the CSMLS Boardroom to join the meeting
 9. Add guests to your outlook calendar invite
 - a. Optional information to provide to your external guests:
 - You will need to have speakers, and microphone and a camera to participate
 - To join, click on the outlook calendar invite link.
 - First time users will need to download Zoom on their desktop or the app on the phone
 - Find the video and audio functions displayed as icons on your screen
 - Keep your microphone on mute unless you are speaking to the group

10. Send

11. To start the meeting, go to <https://zoom.us>.
 - a. Once in the meeting, release attendees from the waiting room

Please note:

- Co-Host: this feature is **only** available when the meeting has started.
 - Click on Manage Participants in the meeting controls at the bottom of the Zoom window. Hover over the name of the participant who is going to be a co-host, and choose More. Click Make Co-Host.

Responsibilities:

Web Developer

- Account manager of Zoom licence
- Receives auto notifications from Zoom when any account features are updated
- Notifies Executive Assistant, Marketing and Communication of these updates

Executive Assistant, Marketing and Communication

- Notifies CSMLS staff of any Zoom account updates
- Updates internal procedure accordingly

Associated Policies and Procedures:

N/A

Associated Documents:

Zoom Screen Sharing in the Boardroom