



Using Zoom to hold video calls

This is a guide for LPOs on how to use Zoom, a video conferencing tool.

This will help you to run meetings and keep in touch while it's not possible to arrange face-to-face meetings due to COVID-19. Using Zoom could also make your local meetings and activities more accessible to people who are unable to attend in person in the long run.

Website: <https://zoom.us>

HQ staff use Zoom to keep in touch and it's very easy to use. There are a lot of handy video tutorials available to watch, and Zoom regularly run free training webinars for users.

Please note: in order to meet our Data Protection requirements, you must use the following settings when arranging meetings:

- Opt out of all data regions apart from Europe
- Set a password for all meetings
- Enable the waiting room function so guests cannot join the meeting before you as the host
- Lock the meeting once all participants have joined

You will find guidance on how to do each of these things below. The data regions opt out function is only available if you have a paid-for account. HQ has a paid-for account that you can request access to (at no cost to your local party) by [clicking here](#).

About Zoom

- ✓ Easy to arrange large group calls and 1-1 meetings
- ✓ Use the Screen Share function to give presentations and demonstrations
- ✓ Chat feature available so you can ask questions without interrupting a presentation
- ✓ You don't need a Zoom account to dial into a call you've been invited to

Joining a meeting

You don't need a Zoom account to join a Zoom meeting. Simply click on the link the host has sent you and this will prompt you to click on the dialogue to join the meeting (you will be asked for the password if the host has set one).

If the host has is allowing participants to join by video as well as audio, you will be offered to option to participate by video or just by audio.

Join with Video

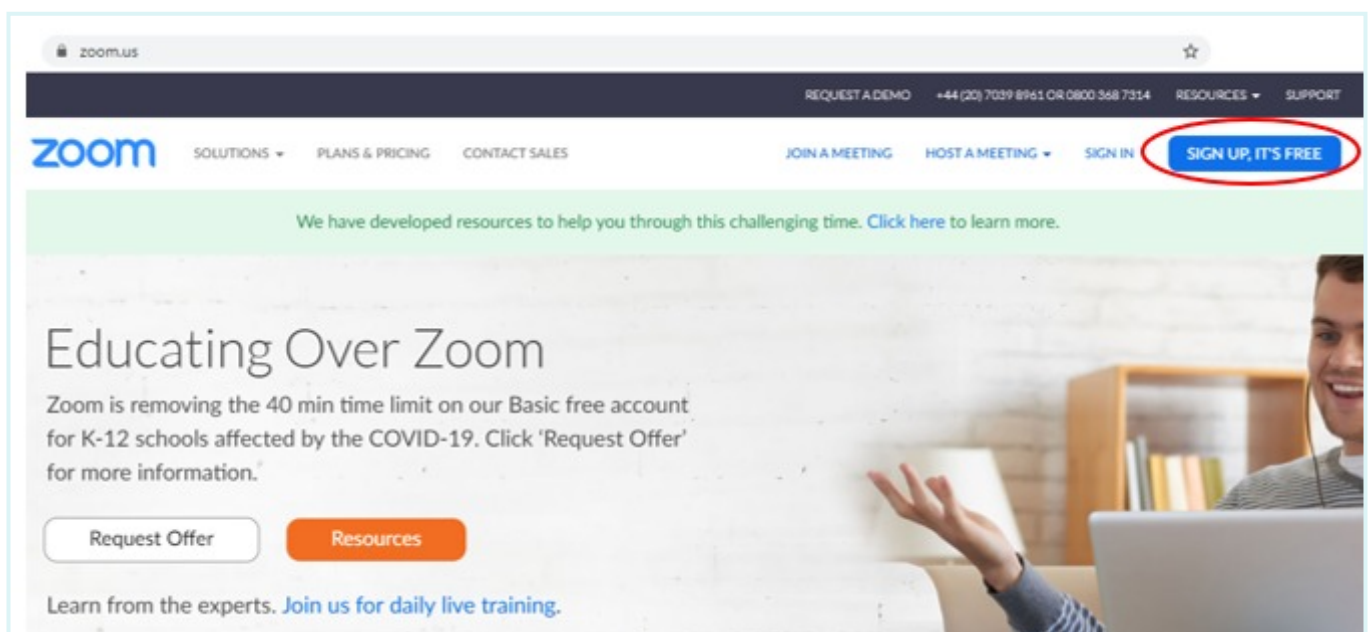
Join without Video



N.B. if you are joining on your phone, you will be prompted to download the Zoom app before joining - you will be taken to your app manager and if you agree, Zoom will start to download automatically. You will then be able to join the meeting.

How to get started to host meetings

In order to arrange a meeting, you will need to register for a free account. Go to zoom.us and click on the sign-up link in the top right-hand corner:



As mentioned above, you will need to sign up for a paid-for version of Zoom in order to access the level of data security features required to run Lib Dem-related meetings.

After entering your registration and payment details, you will receive an email asking you to confirm your registration. Once you have done this, you will then receive a second email with handy guidance on how to schedule and join meetings. You will also be invited to a short webinar to help you get started - we recommend doing this as this covers lots of helpful features.

You can also download Zoom as a free app on your phone - you just need to search for Zoom in your app provider and select ZOOM Cloud Meetings.

Setting up your meeting to maximise data security

Once you have created your account, the first thing you will need to do is edit your settings to enable three features to help with data security.



To access your settings, click on the 'My account' button at the top right of your screen. Please note that these features are mandatory for all Lib Dem Zoom meetings.

Step 1 - Opt out of data regions

Click on 'Settings' on the left-hand side and scroll down to the 'In Meeting (Advanced)' section. Under the data centre regions, untick all regions apart from Europe (United States will also remain ticked, which you cannot edit - this is fine).

The screenshot shows the Zoom settings interface. On the left is a navigation menu with 'Settings' highlighted. The main content area is titled 'In Meeting (Advanced)'. A toggle switch for 'Select data center regions for meetings/webinars hosted by your account' is turned on. Below this, a text box explains that including all data center regions provides the best experience, but opting out may limit certain features. A list of regions follows: Europe (checked), Australia, Latin America, China, Canada, Hong Kong, India, Japan, and United States (checked).

Step 2 - Enable the waiting room feature

Scroll to the Waiting Room options (also in the In Meeting (Advanced) section). Select the All participants waiting room option. With this option selected, no one will be able to join the meeting before you as the host. You will be able to see as participants join your waiting room, and you will be able to choose when to start your meeting.

The screenshot shows the 'Waiting room' settings in Zoom. A toggle switch is turned on. The text explains that attendees will be placed in a waiting room and require individual admission, and that enabling this feature disables the 'allowing attendees to join before host' setting. Below, under 'Choose which participants to place in the waiting room:', 'All participants' is selected with a radio button, and 'Guest participants only' is also an option with a help icon. At the bottom, there is a link to 'Customize the title, logo, and description' with an edit icon.

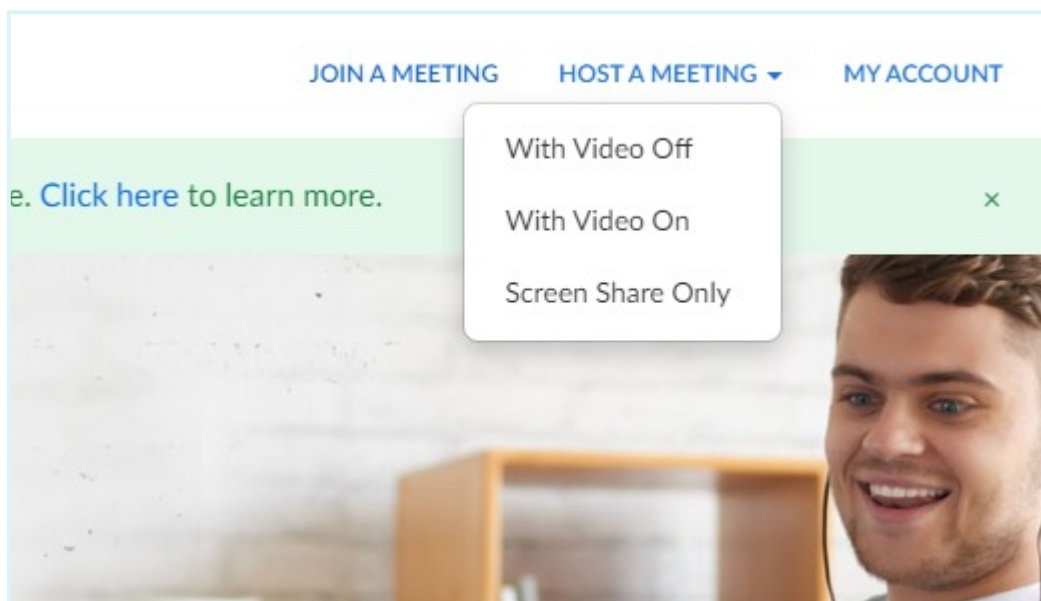


Step 3 - Require meeting passwords by default

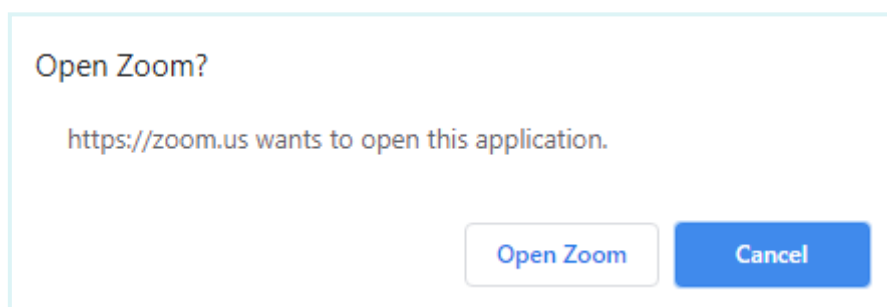
Scroll up to the Schedule Meeting section. Select the 'Require a password' for both instant and scheduled meetings. All meetings should be password protected, and a password will be generated automatically when you set up all new meetings, which you can share with your participants.

Creating a meeting

If you want to set up a quick meeting from your computer and send the link to people to join straight away, log in to Zoom and click on Host a Meeting on the top right-hand side and choose which audio and video option you would like:



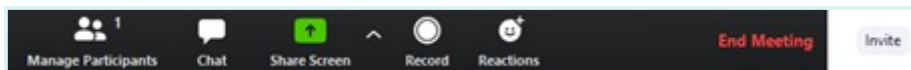
A dialogue box will then pop up and you will need to click on Open Zoom to start your call:



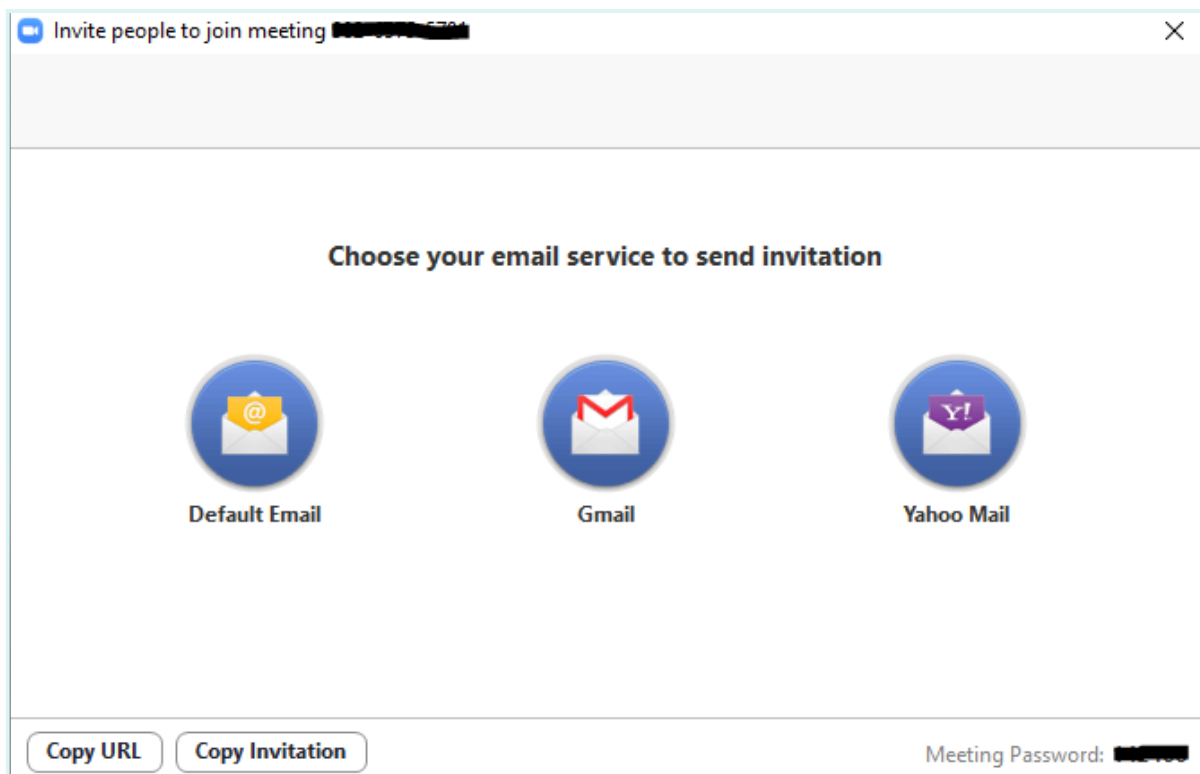


The Zoom application will then open in a new window. Click on the “Join with Audio” button when prompted so other participants will be able to hear you.

To invite other people to join, all you need to do is click on the “Participants” button at the bottom of your screen, then the ‘Invite’ button that appears at the bottom right of your screen.



An Invite options window will open. Click on ‘Copy URL’ or ‘Copy invitation’ to send the details to the people who you would like to invite to the meeting, and the password they need will also appear at the bottom right of this window.



Alternatively, you can click on ‘Invite Others’ and send an invite to people’s email addresses.

Once all participants have joined your meeting, you will need to lock it so no uninvited participants can join. To do so, click on Manage Participants at the bottom of the screen again, then the three dots (highlighted yellow below) at the right end of this tab.





Click on 'Lock meeting' - no new participants will then be able to join unless you allow them by deselecting this option.

Mute Participants on Entry
<input checked="" type="checkbox"/> Allow Participants to Unmute Themselves
<input checked="" type="checkbox"/> Allow Participants to Rename Themselves
<input type="checkbox"/> Play Enter/Exit Chime
<input checked="" type="checkbox"/> Enable waiting room
Lock Meeting

Scheduling meetings in advance

Alternatively, to schedule a meeting further in advance, go to zoom.us/meeting then click on Schedule a new meeting. You will then be able to set the details for your meeting:

Schedule a Meeting	
Topic	<input type="text" value="April catch up"/>
Description (Optional)	<input type="text" value="A chance for the team to catch up"/>
When	<input type="text" value="04/07/2020"/> <input type="text" value="5:00"/> <input type="text" value="PM"/>
Duration	<input type="text" value="0"/> hr <input type="text" value="30"/> min

You can select the recurring meeting option if you want to use the same details on a regular basis, and a meeting password will also be generated for you.

Time Zone	<input type="text" value="(GMT+1:00) London"/>
	<input type="checkbox"/> Recurring meeting
Meeting ID	<input checked="" type="radio"/> Generate Automatically <input type="radio"/> Personal Meeting ID <input type="text" value="████████"/>
Meeting Password	<input checked="" type="checkbox"/> Require meeting password <input type="text" value="████████"/>

You can also choose whether just you or everyone can share join with audio and video:

Video	Host	<input checked="" type="radio"/> on <input type="radio"/> off
	Participant	<input checked="" type="radio"/> on <input type="radio"/> off
Audio	<input type="radio"/> Telephone <input type="radio"/> Computer Audio <input checked="" type="radio"/> Both	
	Dial from	Edit



As you will have set your settings to enable the waiting room function (see above), this will be pre-selected at the bottom of your settings - leave this as it is.

Meeting Options

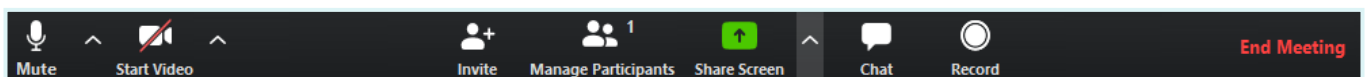
- Enable join before host
- Mute participants upon entry
- Enable waiting room
- Only authenticated users can join
- Record the meeting automatically on the local computer

Save **Cancel**

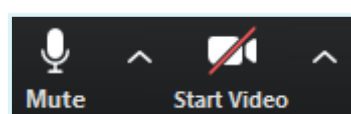
Once you save your meeting, you are given the option of sending invitees a calendar invite or copy and paste the link to your meeting and password to send by email etc.

Features available during your meeting

Once you're in the meeting, there are a few things you can do using your control panel along the bottom (if you can't see the panel, hover your mouse at the bottom of the window and it will appear):

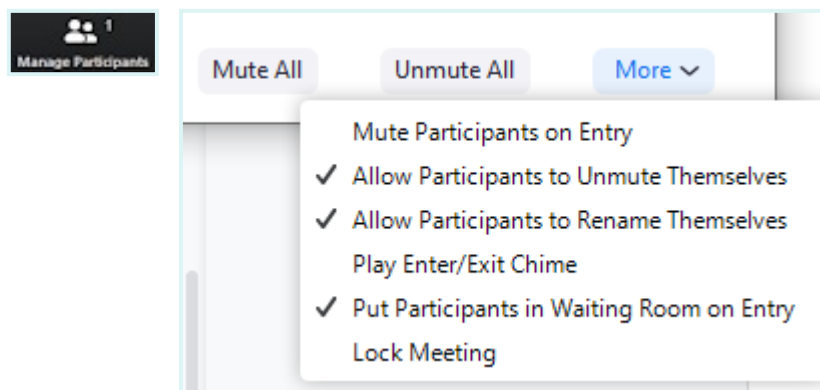


These include the option to mute and unmute yourself and start and end sharing a video of yourself as well - just click on the microphone and camera icons to mute/unmute and add/close the video of yourself (here, other people will be able to hear but not see you):



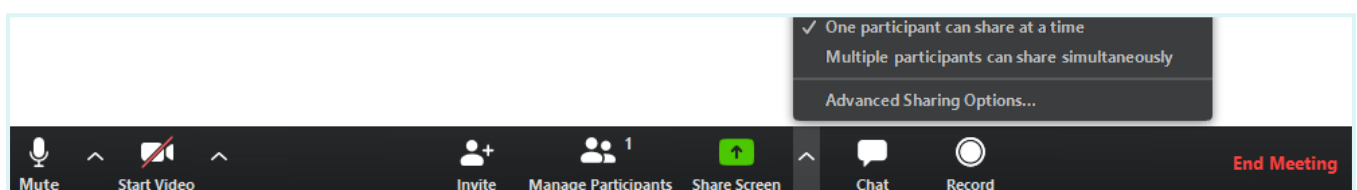


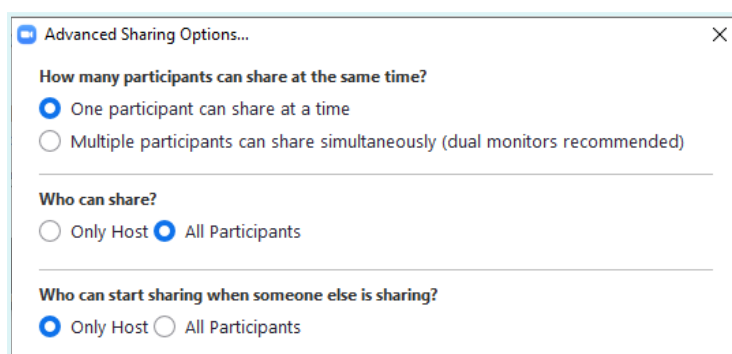
Next to the **Manage Participants** icon, you will see the number of people currently in the meeting - this will go up as more people join. If you click on this icon, a sidebar will open on the right of your screen. As the host, you can mute and unmute people individually or as a group, and if you click on the three dots on the right to access more settings, you can also control whether participants can unmute themselves.



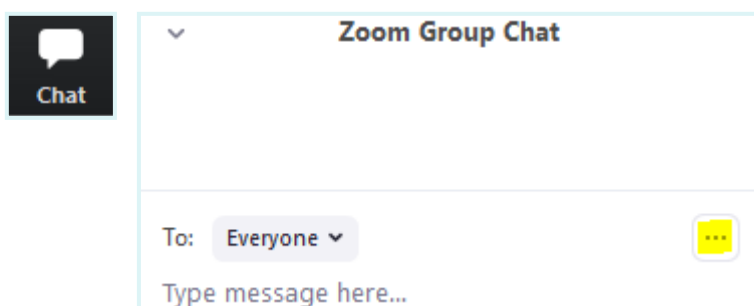
As mentioned above, you must lock your meeting once all your participants have joined. [Click here](#) to read more about how to make sure that unwanted visitors can't access your meeting.

You can choose to share your screen, which is useful if you would like to show PowerPoint slides or another window such as a website. If you would like to limit this option to yourself as the meeting host, you can click on the arrow next to Share Screen then Advanced Sharing Options and you will be given the option to limit who can share their screen and when:





Your participants can use the Chat function to send questions during the meetings, which is helpful if someone is presenting and everyone else is on mute. Clicking on Chat will pull up a chat box on the right of the screen, and by clicking on the three dots to the right of the To: box lets you select whether participants' questions will just be visible to you as the host or to all participants.



You can click on Record to record your meeting, which is useful if some of your invitees are unable to attend. The recording will then be available for download as an MP4 once your call ends. You will also be able to access your recordings later in your account. N.B. just be careful not to discuss or show any sensitive or private data on screen if you are recording your meeting.

To end your meeting, just click on End Meeting on the bottom right of your screen:



Further resources

[Click here](#) to watch a short video on using Zoom created by the Campaigns Team (password: ldhqzoom).

[Click here](#) to read Zoom's collection of how-to guides.

Don't forget to sign up for a free training webinar - you'll be invited in your welcome email when you register.