Zoom tech support tips

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Set up your account:

Ensure all necessary settings are enabled within your Zoom account under My Account>Settings, specifically:

- File transfer – ON
- Polling – ON
- Breakout room - ON

Once these settings are saved, you won't need to update for each new webinar.

When setting up your meeting:

- We recommend you do not require Zoom registration (it adds an extra step to your attendee's registration process)
  - *If you need to enable registration questions, you will need to enable this step; see How to load registration questions for Zoom meetings*
- Leave all video OFF
- Include both Audio options
- Under meeting options, make sure to check "Mute participants upon entry" and "Enable waiting room"

For your tech support meeting:

Set up a separate Zoom meeting with the same meeting setup as your live webinar to best prepare you. Use this meeting to run through the basic flow. Test run all features you will be using live on the day such as:

- File sharing handouts via the chat feature
- Managing and launching breakout rooms
- Launching poll questions
- Optimizing/sharing computer sound/video if planning to watch a video
- Screen sharing your slides
- Controlling participants:
  - Turning attendee webcams on/off
  - Muting/unmuting participants
  - Giving co-host permissions if necessary
  - Raise and lower hands
- Security settings:
  - Allow participants to share screen (if presenter will change hands during meeting)
  - Enable/disable waiting room
  - Under the Chat window, you can also determine if you want to allow all participants to chat to each other, host only, etc

For your live meeting:

Pre-webinar:

- Pre-load any webinar polls pre-meeting
- Be sure to have all speakers/participating team members log on 15 minutes early. Do not disable waiting room, just admit each speaker/team member individually as they arrive
- Have each speaker test their audio one by one, and practice turning their webcams on/off a few times
- For anyone sharing screen, have them test screen share during this time
- Be sure to enable/disable any other features determined during the tech rehearsal under Security, Chat, Breakout sessions, etc

- HBA finds it helpful to have one team member rename themselves as “HBA Platform” or “HBA Tech Support” so participants can directly reach out via the chat should they have any technical issues without disturbing the other participants

Launching the webinar

Once all tests are complete and you’re prepared to launch the live webinar:

- Have the opening slide already sharing on screen
- In quick succession:
  - Under Security, disable the waiting room
  - Under Participants, click Admit All participants
  - Click record and select "Record to Cloud"
- Once the intro speaker sees that the webinar is recording, they can begin their welcome and continue on as planned

Be prepared throughout the webinar to mute participants if they begin causing a distraction, or turning off video cameras of participants if they come on accidentally so that only your speakers are featured

Good luck!