

ZOOM Virtual Public Meetings 2.0

Updated: 11/18/2020



Table of Contents

Why Zoom?	3
Similarities between GoToMeeting and Zoom	3
Differences between GoToMeeting and Zoom	3
Accessing Zoom.....	4
New Language.....	4
Panelist Features	4
Things to Note for Meetings.....	5
Closed Sessions in Virtual Environment	5
Virtual Background	5
Creating a Webinar in Zoom.....	6
Creating a Meeting Template.....	9
Creating the Board/Committee/Commission Registration Form in Zoom.....	10
Agenda.....	14
Day of Meeting.....	17
Inviting Panelists within Zoom	17
Registrations for Public Comment	19
Testifying/Providing Public Comment	21
Meeting Management.....	22
Promoting Attendee to Panelist.....	23
Chat Feature.....	24
Participant Feature.....	25
Sharing Screen.....	25
End of Meeting.....	26
After the Meeting	26
Registration Forms	26
Chat and Video Recording	27
Appendix A - Zoom Settings.....	29
Meeting Settings Tab.....	29
Recording Settings Tab.....	36
Telephone Settings Tab.....	37
Appendix B: Email to Board/Commission/Committee Members.....	39

Why Zoom?

- Allows members of the public to view the screen
- Allows members of the public to see board/committee/commission members
- Allows members of the public that registered to speak to be seen while testifying
- Security features allow us to:
 - Disable chat for attendees
 - Disable hand raising for attendees
 - “Promote” members of the public from “attendees” to “panelists”
- More people seem to be using Zoom and are more familiar with the platform

Similarities between GoToMeeting and Zoom

- **Cannot be used within Citrix**
 - At the office, you can join the meeting on a thin client to view the meeting, but will need to call in with a phone number in order to get audio. There is no ability for a webcam with the thin client.
- Creating a meeting is very similar within the platform
 - Can only have 1 meeting “running” at a time for one license; if meetings are scheduled at the same time, need to reschedule 1 or use a second license
- The agenda will still need to list the link/call-in information/registration process (different process/language will be used)
- Will still send out the meeting information to board/committee/commission members around 3:00 pm on the day of the meeting
- The person running the board can still mute/unmute panelists. Attendees will join the meeting muted and will stay muted unless they registered to speak
- Meeting will still be recorded

Differences between GoToMeeting and Zoom

- RECOMMEND USING ZOOM WITHIN CHROME
- Board/committee/commission members will need to use their webcams (if they have one)
- SurveyMonkey will no longer be needed for the registration process; will create the registration process within Zoom
- Members of the public will be able to attend virtually AND testify virtually
- People participating in the meeting will either be a “Panelist” or an “Attendee”
 - Different security features for each
- Person running the board will have to:
 - Promote people that testify to a “panelist”
 - Disable the chat feature for attendees
 - Disable the hand raising feature for attendees
 - Ensure “speaker view” is enabled and not gallery view
- Do not need to copy & paste the chat box conversation. It automatically saves.

[Back to Top](#)

Accessing Zoom

- You will be assigned a username from IM and you will create your own account/password
- Login here: <https://zoom.us/signin>

New Language

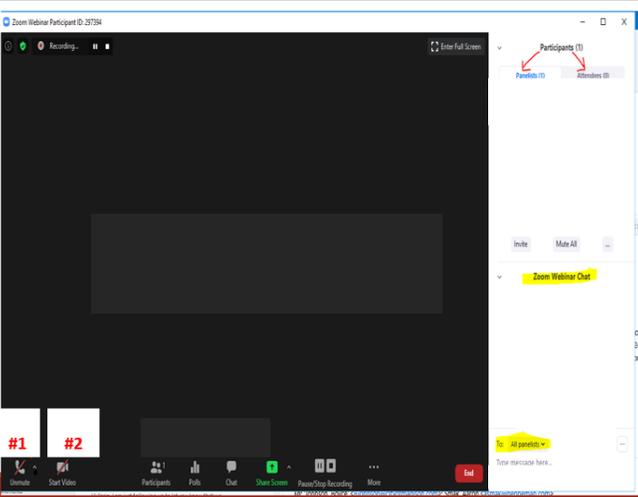
- Panelist=Board/committee/commission member AND Staff
 - Will attend with an invite that is sent to them around 3:00 pm on the day of the meeting
- Attendee=Members of the public
 - Will attend with the information posted at the top of the agenda and will need to register
 - Will join the meeting muted

Panelist Features

Panelist Features

#1 The phone icon will allow you to mute/unmute yourself. To mute/unmute yourself, hit the phone button. **You are still responsible for muting/unmuting yourself.**

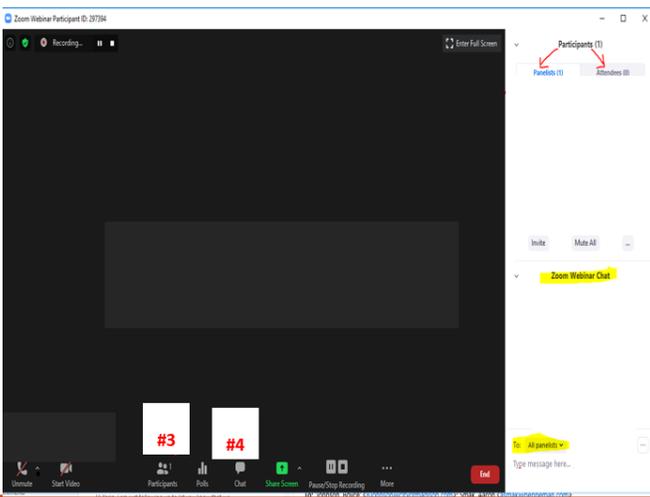
#2 You will automatically enter the meeting with your webcam on; to turn the webcam off, hit the 'Start Video' icon until there is a red bar on the camera icon. **It is encouraged to attend the meeting with your webcam on.**



Panelist Features

#3 To view participants, click the participants button (people icon). The participants list (located in the upper right hand corner) will show you **panelists** (Board members/committee members/ staff) and **attendees** (members of the public)

#4 To use the chat feature, select the chat button and then the chat box will appear in the lower right hand corner. Type here to be recognized by the Chair. **Be sure to send messages to "ALL panelists"**



Things to Note for Meetings

- All attendees will be muted upon joining the meeting
- If, for whatever reason, the meeting freezes/terminates/people can't log in:
 - Recess and restart meeting with the same link
 - Cancel meeting and reschedule
 - DO NOT CREATE A NEW MEETING---information won't be posted and will be in violation of open meeting laws
- Can't have multiple meetings at once---if you do, need to reschedule a meeting or use a second license if available to you

Closed Sessions in Virtual Environment

- Have this item be at the end of the agenda. If not at the end of an agenda, a motion will need to be made to take item up out of order.
 - Have closed session take place after "public comment on items not on the agenda"
- Vote to go into closed session
- Stop recording
- Ask the public/staff to leave---if they don't leave, right click on their name and select "REMOVE"
- Have the vote/discussion
- Then come back into the open meeting
- Then vote to adjourn

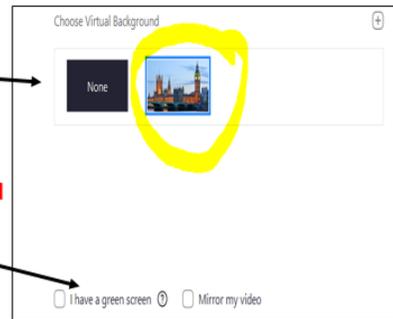
Virtual Background

Some people may not want to have their home/office in the background, if that is the case, they can select a virtual background

- Use a picture saved on your computer or iPad that you want to use as virtual background
- Maneuver to the camera icon
- Select "Choose Virtual Background"
- Select the "plus sign"
- Select 'Add Image' and **then select a photo from your computer to display as your background**
- Click on the background you want to use.
- **Make sure "I have a green screen" and "Mirror my Video" are NOT checked**
- Exit out of the pop-up
- Your virtual background will be displayed

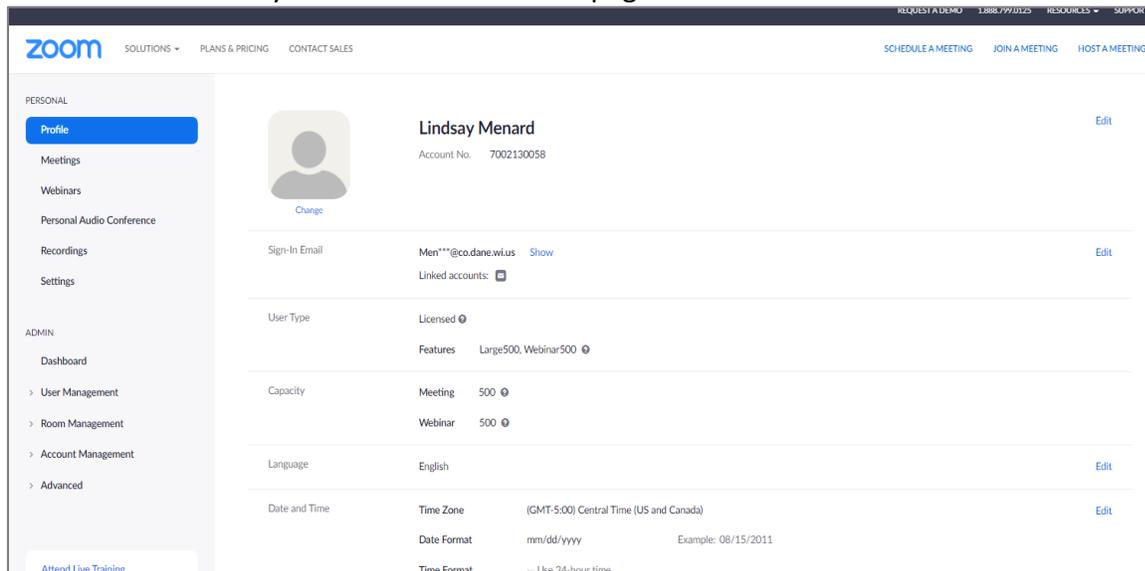
Adding a Virtual Background

1. You can either use a picture saved on your computer or iPad that you want to use as virtual background OR you can use a default background
2. Maneuver to the camera icon
3. Select "Choose Virtual Background"
4. Select the "plus sign"
5. Select 'Add Image' and then select a photo from your computer to display as your background OR use a default image
6. Click on the background you want to use.
Make sure "I have a green screen" and "Mirror my Video" are NOT checked
7. Exit out of the pop-up
8. Your virtual background will be displayed



Creating a Webinar in Zoom

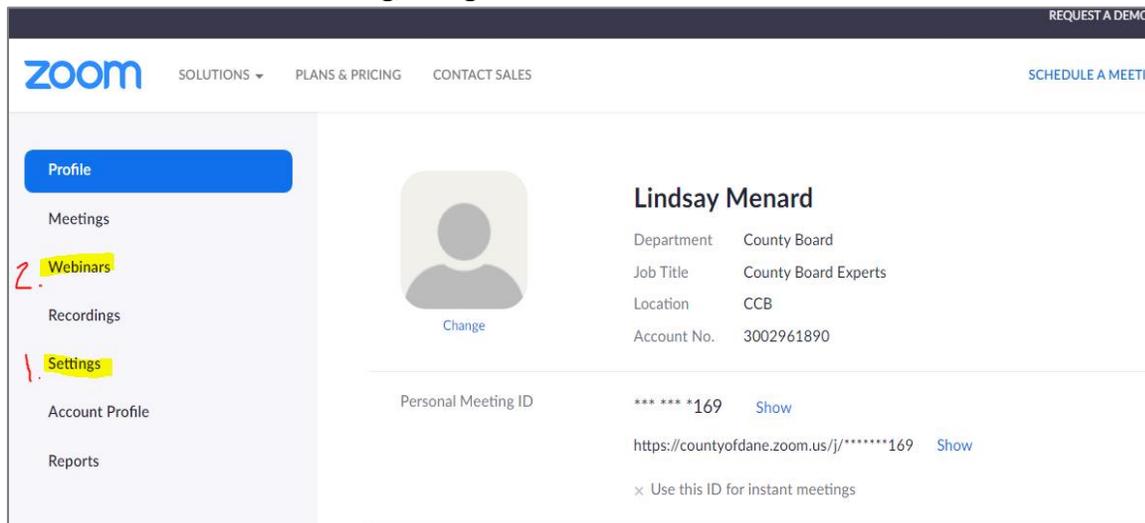
- You will always enter on the "Profile" page



The screenshot shows the Zoom user profile page for Lindsay Menard. The page is divided into a left sidebar with navigation options and a main content area. The sidebar includes 'PERSONAL' (Profile, Meetings, Webinars, Personal Audio Conference, Recordings, Settings) and 'ADMIN' (Dashboard, User Management, Room Management, Account Management, Advanced). The main content area displays the user's name, account number (7002130058), sign-in email (Men***@co.dane.wi.us), user type (Licensed), features (Large500, Webinar500), capacity (Meeting: 500, Webinar: 500), language (English), and date and time settings (Time Zone: (GMT-5:00) Central Time (US and Canada), Date Format: mm/dd/yyyy, Time Format: Use 24-hour time). Each field has an 'Edit' link next to it.

[Back to Top](#)

- First, navigate to “Settings” and update. See [Appendix A](#) for what settings should be turned on/off. **NOTE: Update settings in the Meetings, Recording, and Telephone tabs**
- To schedule a meeting, navigate to “Webinars”



- Select “Schedule Webinar” and schedule your webinar with the settings below (Hit “Schedule” when done).
 - **Topic:** Insert Name of Board/Commission/Committee
 - **Description:** “This is a virtual meeting of the _____ Board/Commission/Committee Meeting”
 - **When:** Date of meeting
 - **Duration:** 2 hours (recommend defaulting to 2 hours)
 - **Time Zone:** Central Time (US and Canada)
 - **Registration:** Required
 - **Passcode:** Leave blank
 - **Video:** Turn on for host and panelists
 - **Audio:** Both
 - **Webinar Options:** Automatically record webinar on local computer
 - **Select** “Schedule”

See settings/screen shots below.

zoom SOLUTIONS ▾ PLANS & PRICING CONTACT SALES

PERSONAL

- Profile
- Meetings
- Webinars**
- Personal Audio Conference
- Recordings
- Settings

ADMIN

- Dashboard
- > User Management
- > Room Management
- > Account Management
- > Advanced

[My Webinars](#) > [Edit Webinar](#)

Edit Webinar

Topic

Description (Optional)

When

Duration hr min

Time Zone

Recurring webinar

Registration Required

Webinar Passcode Require webinar passcode

Video

Host On Off

Panelists On Off

Audio

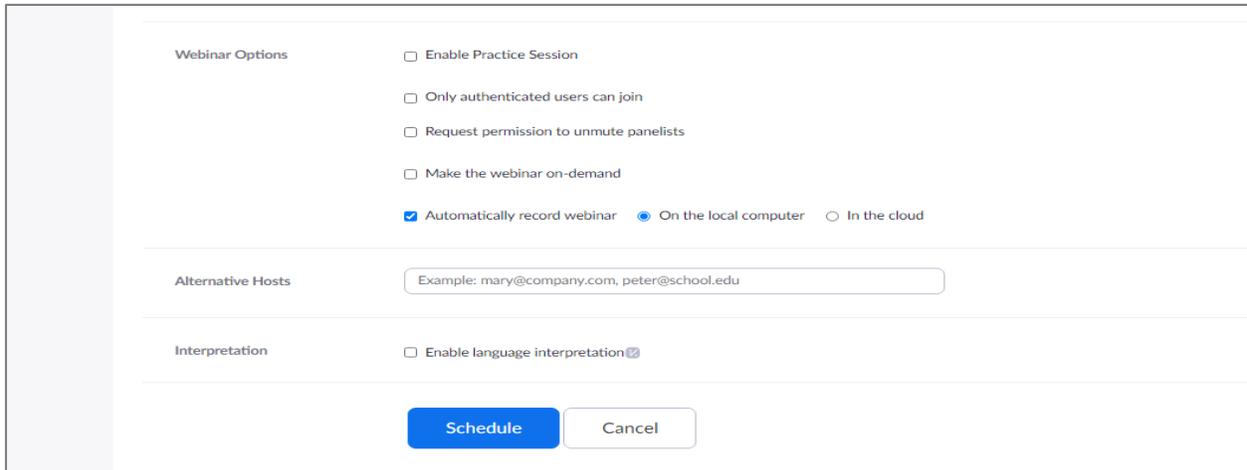
Telephone Computer Audio Both

Dial from United States of America [Edit](#)

For Attendees:

- Attendees will still be able to connect to computer audio to listen to this webinar.

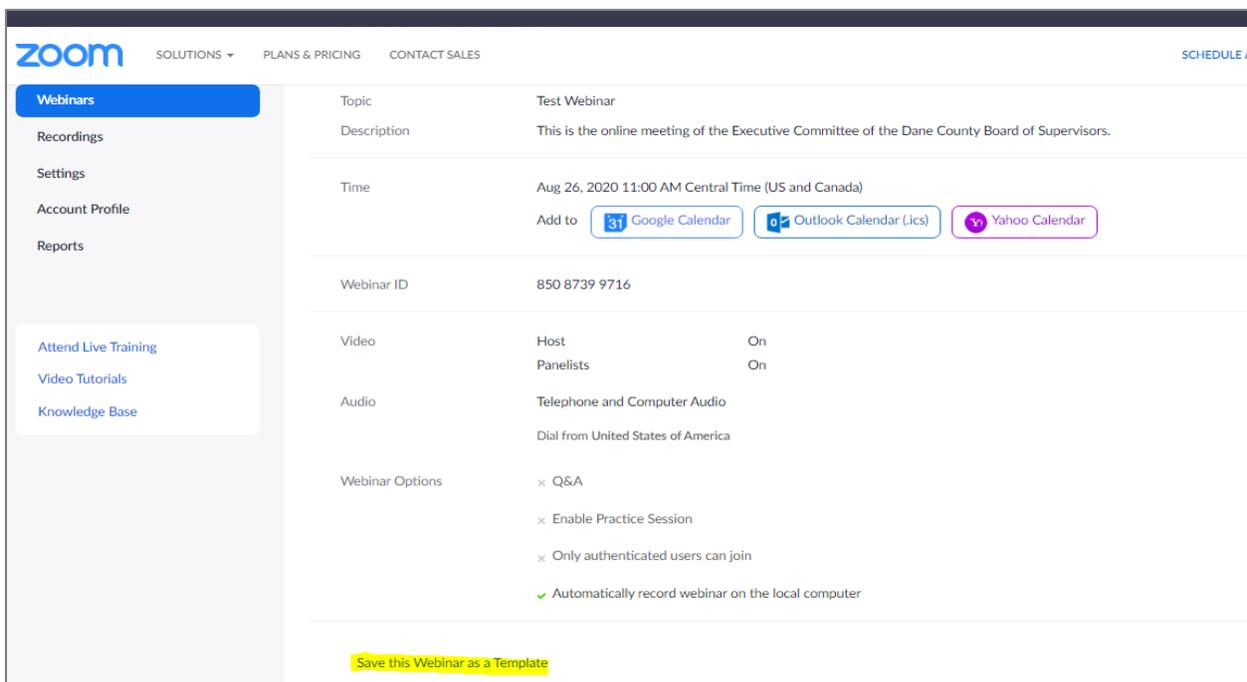
[Back to Top](#)



The screenshot shows the 'Webinar Options' section of the Zoom interface. It includes several checkboxes: 'Enable Practice Session', 'Only authenticated users can join', 'Request permission to unmute panelists', and 'Make the webinar on-demand'. The 'Automatically record webinar' option is checked, with radio buttons for 'On the local computer' (selected) and 'In the cloud'. Below this is an 'Alternative Hosts' text input field with the placeholder text 'Example: mary@company.com, peter@school.edu'. There is also an 'Interpretation' section with a checkbox for 'Enable language interpretation'. At the bottom are 'Schedule' and 'Cancel' buttons.

Creating a Meeting Template

- Once you create one meeting, you can save the webinar as a template
 - Click “save this Webinar as a Template”
 - Name the Template
 - Save



The screenshot shows the Zoom meeting settings page. The left sidebar contains navigation options: Webinars (selected), 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 (Test Webinar), Description (This is the online meeting of the Executive Committee of the Dane County Board of Supervisors.), Time (Aug 26, 2020 11:00 AM Central Time (US and Canada)), and 'Add to' buttons for Google Calendar, Outlook Calendar (.ics), and Yahoo Calendar. The Webinar ID is 850 8739 9716. The Video section shows Host and Panelists both set to 'On'. The Audio section shows 'Telephone and Computer Audio' and 'Dial from United States of America'. The Webinar Options section lists: Q&A, Enable Practice Session, Only authenticated users can join, and Automatically record webinar on the local computer (checked). A yellow highlight is under the 'Save this Webinar as a Template' link at the bottom.

- Next time you need to schedule a meeting, “Select Schedule Webinar”
- Your settings should remain the same (even the registration form!)

[Back to Top](#)

My Webinars > **Schedule a Webinar**

Schedule a Webinar

Topic

Description (Optional)

Use a Template

When

Duration hr min

Time Zone

Creating the Board/Committee/Commission Registration Form in Zoom

- After the Webinar has been created, you will need to create a registration form
- Navigate to Invitations and select “Edit” under approval options

Invitations | Email Settings | Branding | Polls/Survey | More

Invite Panelists No panelists invited [Edit](#)

Invite Attendees Webinar Size: 500 attendees [Copy Invitation](#) [Send Invitation to Me](#)

Registration Link
https://countyofdane.zoom.us/webinar/register/WN_pumMvz28S_G-1c8IH0...

Source Tracking Link + Add

You have not yet created any source tracking links

Approval Automatically Approve [Edit](#)

Options

- ✓ Close registration after event date
- ✓ Allow attendees to join from multiple devices
- ✓ Show social share buttons on registration page

- Under “Registration” Select the following boxes (Ignore Tracking Pixel):

Registration

Registration Questions Custom Questions

Registration

Required

Approval

Automatically Approve
Registrants will automatically receive information on how to join the webinar.

Manually Approve
The organizer must approve registrants before they receive information on how to join the webinar.

Notification

Send an email to host when someone registers

Other options

Close registration after event date

Restrict number of registrants

Allow attendees to join from multiple devices

Show social share buttons on registration page

- Under “Questions” select the following boxes, and select the required check box:

Registration

Registration **Questions** Custom Questions

Add Registration Fields

First Name and Email Address required.

<input type="checkbox"/> Field	<input type="checkbox"/> Required
<input checked="" type="checkbox"/> Last Name	<input checked="" type="checkbox"/>
<input type="checkbox"/> Address	<input type="checkbox"/>
<input checked="" type="checkbox"/> City	<input checked="" type="checkbox"/>
<input type="checkbox"/> Country/Region	<input type="checkbox"/>
<input type="checkbox"/> Zip/Postal Code	<input type="checkbox"/>
<input type="checkbox"/> State/Province	<input type="checkbox"/>
<input checked="" type="checkbox"/> Phone	<input checked="" type="checkbox"/>

- Then select “Custom Questions” and enter in the **Registration Form Questions**
 - Select New Question

The screenshot shows a web interface titled "Registration" with a close button (X) in the top right corner. Below the title are three tabs: "Registration", "Questions", and "Custom Questions", with "Custom Questions" being the active tab. The main content area contains the heading "Create Your Own Question" followed by a warning: "You are prohibited from soliciting confidential personal information (such as credit card information or social security numbers) in your registration questions." Below this warning is a yellow button labeled "New Question". At the bottom right of the interface are two buttons: "Save All" (in blue) and "Cancel" (in white).

Then Add the Registration Form questions:

1. What are your Pronouns? (short answer response)
2. How do you plan on attending the meeting? ** (Multiple choice response)
 - a. Zoom
 - b. Phone
3. Do you wish to provide public comment or register in support/opposition of an agenda item? **
 - a. Yes, Continue to the Next Question
 - b. No, STOP and SUBMIT Registration form
4. Agenda Item Number(s) (Note: If you wish to register/speak on multiple items, enter ALL items here) (Short answer)
5. Do you support or oppose the agenda item?
 - a. Support
 - b. Oppose
 - c. Neither Support or Oppose
6. Do you want to speak?
 - a. Yes, I want to speak
 - b. No, I do not wish to speak
 - c. I do not want to speak, but I am available to answer questions
7. On this occasion, are you officially representing an organization or a person other than yourself?
 - a. Yes – you will need to fill out an additional form. Staff will email you the form.
 - b. No

**=required question

Registration Form:

Webinar Registration

Topic Dane County Board of Supervisors Meeting

Description This is a virtual meeting of the Dane County Board of Supervisors

Time Oct 1, 2020 07:00 PM in [Central Time \(US and Canada\)](#)

* Required information

First Name *	Last Name *
<input type="text"/>	<input type="text"/>
Email Address *	Confirm Email Address *
<input type="text"/>	<input type="text"/>
City *	Phone *
<input type="text"/>	<input type="text"/>

What are your Pronouns?

How do you plan on attending the meeting? *

Zoom

Phone

Do you wish to provide public comment or register in support/opposition of an agenda item? *

Yes, Continue to the Next Question

No, STOP and SUBMIT Registration form

Agenda Item Number(s) (Note: If you wish to register/speak on multiple items, enter ALL items here)

Do you support or oppose the agenda item?

Support

Oppose

Neither Support or Oppose

Do you want to speak?

Yes, I want to speak

No, I do not wish to speak

I do not want to speak, but I am available to answer questions

On this occasion, are you officially representing an organization or a person other than yourself?

Yes – you will need to fill out an additional form. Staff will email you the form.

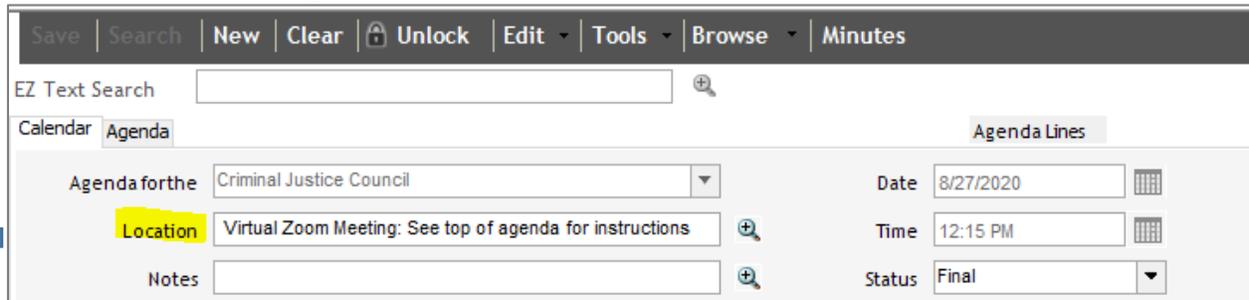
No

By registering, I agree to the [Privacy Statement](#) and [Terms of Service](#).

[Back to Top](#)

Agenda

- After the Webinar is created, you will add the meeting link/call-in information to the agenda
- Open Legistar
- Add the meeting Location. **DO NOT ADD IN THE NOTES FIELD**



Save | Search | New | Clear | Unlock | Edit | Tools | Browse | Minutes

EZ Text Search

Calendar | Agenda | Agenda Lines

Agenda for the: Criminal Justice Council

Date: 8/27/2020

Location: Virtual Zoom Meeting: See top of agenda for instructions

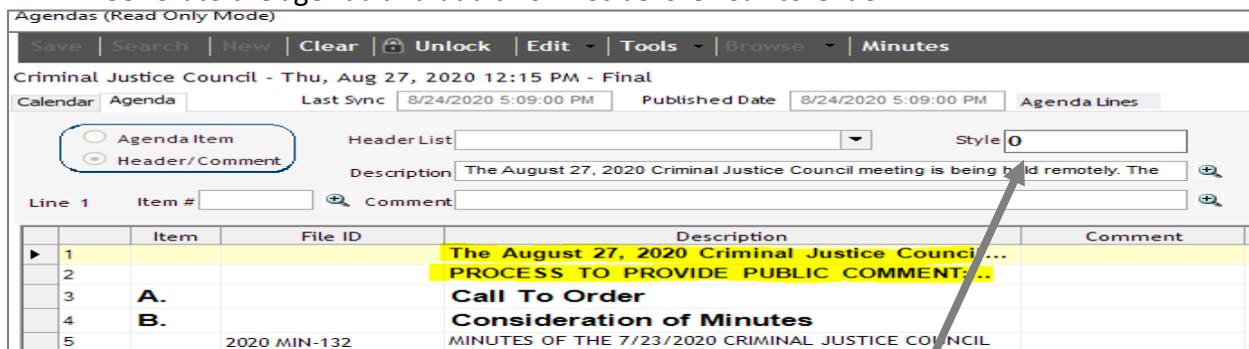
Time: 12:15 PM

Notes:

Status: Final

Add the following language: Virtual Zoom Meeting: See top of agenda for instructions on how to join the webinar or call in by phone.

- Generate the agenda and add two lines before “Call to Order”



Agendas (Read Only Mode)

Save | Search | New | Clear | Unlock | Edit | Tools | Browse | Minutes

Criminal Justice Council - Thu, Aug 27, 2020 12:15 PM - Final

Calendar | Agenda | Last Sync: 8/24/2020 5:09:00 PM | Published Date: 8/24/2020 5:09:00 PM | Agenda Lines

Agenda Item | Header/Comment

Header List: | Style: 0

Description: The August 27, 2020 Criminal Justice Council meeting is being held remotely. The

Line #	Item #	Item	File ID	Description	Comment
1				The August 27, 2020 Criminal Justice Council meeting is being held remotely. The	
2				PROCESS TO PROVIDE PUBLIC COMMENT...	
3	A.			Call To Order	
4	B.			Consideration of Minutes	
5			2020 MIN-132	MINUTES OF THE 7/23/2020 CRIMINAL JUSTICE COUNCIL	

Add the following language on the first line of the agenda: (USE STYLE 0)

The **[Insert Date]** **[Insert Meeting]** is being held virtually. The public can access the meeting with the Zoom application or by telephone.

To join the meeting in Zoom, click the following link (after you fill out the form, the meeting link and access information will be emailed to you): **[Insert link from Zoom]**

This link will be active until the end of the meeting.

To join the meeting by phone, dial-in using one of the following three toll-free phone numbers:

1-833-548-0276

1-833-548-0282

1-888-788-0099

When prompted, enter the following Webinar ID: **[Insert Webinar ID]**

[Back to Top](#)

Registration Link:

The meeting link will be under the invitations tab. Under "invite attendees" copy the registration link and then paste it into the agenda.

Save this Webinar as a Template Edit this Webinar Start this Webinar

Invitations Email Settings Branding Polls/Survey More

Invite Panelists No panelists invited Edit

Invite Attendees Webinar Size: 500 attendees Copy Invitation Send Invitation to Me

Registration Link
https://countyofdane.zoom.us/webinar/register/WN_pumMvz28S_G-1c8IH0...

Source Tracking Link ⓘ + Add

You have not yet created any source tracking links

Webinar ID:

Located in the meeting details section. Copy and paste into the agenda.

Topic	Test Webinar	
Description	This is the online meeting of the Executive Committee of the Dane County Board of Supervisors.	
Time	Aug 26, 2020 11:00 AM Central Time (US and Canada)	
Add to	31 Google Calendar Outlook Calendar (.ics) Yahoo Calendar	
Webinar ID	850 8739 9716	
Video	Host	On
	Panelists	On
Audio	Telephone and Computer Audio	
	Dial from United States of America	

[Back to Top](#)

Add the following language on the second line of the agenda: (USE STYLE 0)

If you want to submit a written comment for this meeting, or send handouts for committee members, please send them to [\[Insert email address info can be sent to\]](#)

PROCESS TO PROVIDE PUBLIC COMMENT: ANY MEMBERS OF THE PUBLIC WISHING TO REGISTER TO SPEAK ON/SUPPORT/OPPOSE AN AGENDA ITEM MUST REGISTER USING THE LINK ABOVE (even if you plan to attend using your phone).

In order to testify (provide public comment), you must be in attendance at the meeting via Zoom or phone, you will then either be unmuted or promoted to a panelist and provided time to speak to the body.

Registrations to provide public comment will be accepted until 30 minutes prior to the beginning of the meeting.

Example Agenda



Meeting Agenda - Final

Criminal Justice Council - Behavioral Health Subcommittee

Consider:
Who benefits? Who is burdened?
Who does not have a voice at the table?
How can policymakers mitigate unintended consequences?

Friday, November 20, 2020	12:00 PM	Virtual Zoom Meeting: See top of agenda for instructions on how to join the webinar or call in by phone.
---------------------------	----------	--

The November 20th Criminal Justice Council Behavioral Health Subcommittee meeting is being held virtually. The public can access the meeting with the Zoom application or by telephone.

To join the meeting in Zoom, click the following link (after you fill out the form, the meeting link and access information will be emailed to you):
https://us02web.zoom.us/webinar/register/WN_ulgxiK9uTUaA6R6Pwo0MRw

This link will be active until the end of the meeting.

To join the meeting by phone, dial-in using one of the following three toll-free phone numbers:

1-833-548-0276
1-833-548-0282
1-888-788-0099

When prompted, enter the following Webinar ID: 846 7555 7860

If you want to submit a written comment for this meeting, or send handouts for board members, please send them to: menard.lindsay@countyofdane.com

PROCESS TO PROVIDE PUBLIC COMMENT: ANY MEMBERS OF THE PUBLIC WISHING TO REGISTER TO SPEAK ON/SUPPORT/OPPOSE AN AGENDA ITEM MUST REGISTER USING THE LINK ABOVE (even if you plan to attend using your phone).

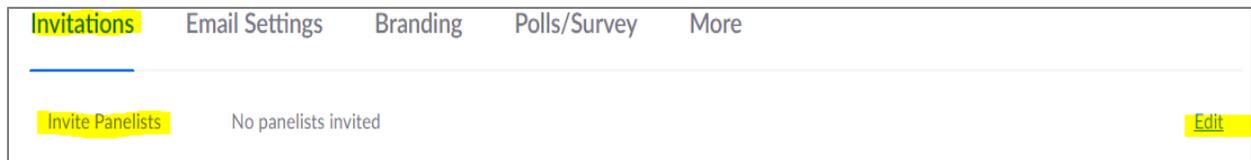
In order to testify (provide public comment), you must be in attendance at the meeting via Zoom or phone, you will then either be unmuted or promoted to a panelist and provided time to speak to the body.

Registrations to provide public comment will be accepted until 30 minutes prior to the beginning of the meeting.

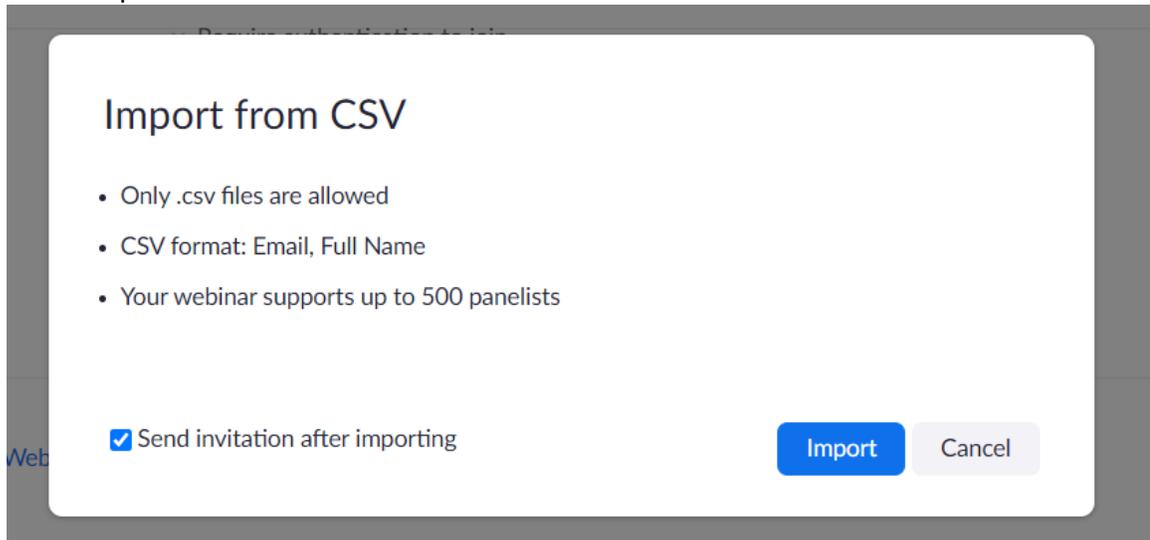
Day of Meeting

Inviting Panelists within Zoom

- Around 2:30/3:00 pm login to Zoom
- Navigate to the “Invitations” tab again
- Under “Invite Panelists” select “Edit”



- Click “import from csv”



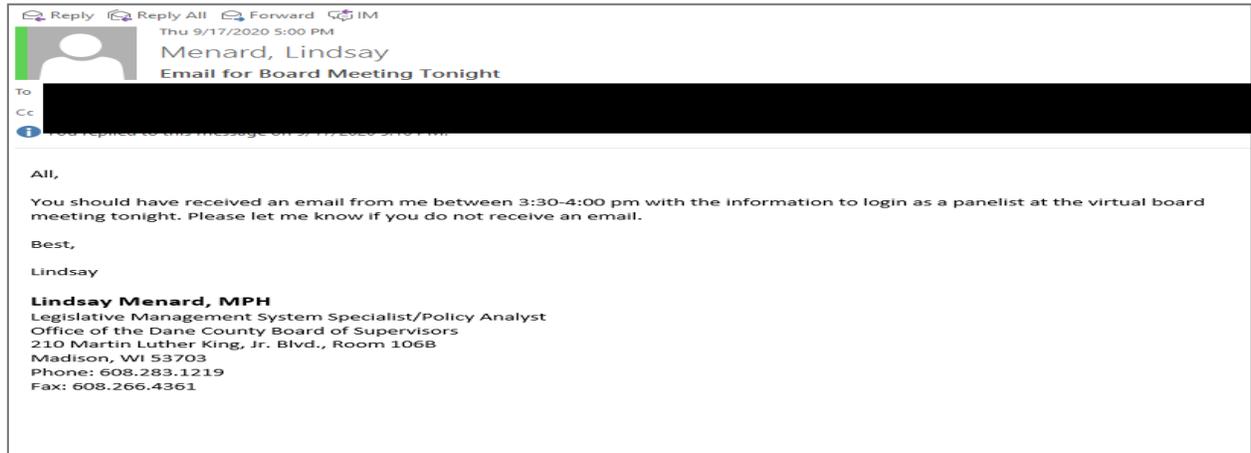
- Click “import”. Make sure “Send invitations after importing” is checked.
- Create and Excel .csv file and save it to your computer
 - The first column (column A) will be the email address
 - The second column (column B) will be the name of the panelist
 - Add each committee/board/commission member (1 person per row)
 - See example:

	A	B	
1	Adkins.Blaire@countyofdane.com	Blaire Adkins	
2	Andrae.Richelle@countyofdane.com	Richelle Andrae	
3	Audet.Kristen@countyofdane.com	Kristen Audet	
4	Bare.Mike@countyofdane.com	Mike Bare	
5	Bayrd@countyofdane.com	Carousel Bayrd	
6	Bollig.Jerry@countyofdane.com	Jerry Bollig	
7	Chawla.Yogesh@countyofdane.com	Yogesh Chawla	
8	Chenoweth.Carl@countyofdane.com	Carl Chenoweth	
9	DeGarmo.Ann@countyofdane.com	Ann Degarmo	
10	Doolan.Michele@countyofdane.com	Michele Doolan	

- In Zoom, select the .csv file for the meeting and click open.
- The names and email addresses in csv file will be brought into the panelist list.
- Click save. Emails will automatically send when you click save. It may take a few minutes for the emails to arrive.

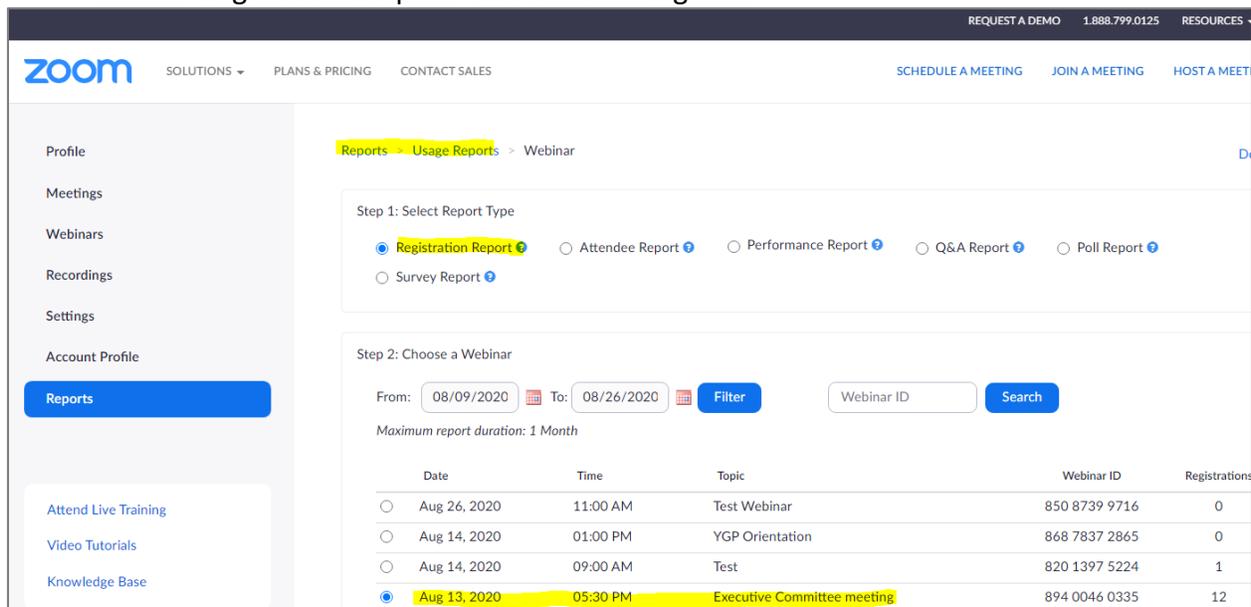
[Back to Top](#)

- **NOTE: If you create a meeting template, you will still need to add the names and email addresses of board/commission/committee members and staff for every meeting. This list is NOT saved in the template.**
- After you have added all of the names and email addresses, send a follow-up email stating that they should have received an email from you generated by Zoom with their login information, and, if they haven't, to email you. See example below:



Registrations for Public Comment

- 30 minutes before the start of the meeting determine if there were any registrations for public comment/support/opposition of an agenda item
- Navigate to “Reports”
- Select “Webinar Reports”, then select “Usage Reports”
- Select “Registration Report” and the meeting date



- Select “All Registrants” and then “Generate” Report

Step 3: Generate Report

All Registrants Approved Registrants Denied Registrants

Generate CSV Report

- An Excel file will be generated; save the file as an **Excel Workbook** in order for the formatting to save; if you save as a .CSV file or Unicode text, any changes you make will not be saved.
- Delete rows 1-5
- Then sort the columns to identify who registered to speak/in support of/in opposition of/etc and what item number(s) they registered to speak on
 - These will be the people you want to promote from “attendee” to “panelist” when the item they registered for is before the board
 - You will also be able to identify if they will be attending virtually or by phone
 - **NOTE: For people attending by telephone that registered to speak, during the meeting, you will have to match their telephone numbers from the Excel spreadsheet to the phone numbers listed in the attendee list and RENAME them. Then, when their item is before the board, hover over their name and select, “allow to talk.” They will then have to select *6. After they are done talking, mute them again.**

First Name	Last Name	Email	City	Phone	Registration Time	Approval Status	How do you plan to attend this meeting?	Do you wish to register to speak on/
			Madison		8/6/2020 12:23	approved	Zoom	No--STOP and submit form
			Madison		8/13/2020 12:46	approved	Zoom	Yes
			Madison		8/13/2020 14:56	approved	Zoom	No--STOP and submit form
			Madison, WI		8/13/2020 15:00	approved	Zoom	No--STOP and submit form
			MADISON		8/13/2020 17:21	approved	Zoom	No--STOP and submit form
			Madison		8/13/2020 17:33	approved	Zoom	No--STOP and submit form
			Madison		8/13/2020 17:39	approved	Telephone	No--STOP and submit form
			Madison		8/13/2020 17:42	approved	Zoom	No--STOP and submit form
			Madison		8/13/2020 17:49	approved	Zoom	No--STOP and submit form
			Madison		8/13/2020 17:56	approved	Zoom	No--STOP and submit form
			Madison		8/13/2020 17:57	approved	Zoom	No--STOP and submit form
			Madison		8/13/2020 18:40	approved	Zoom	No--STOP and submit form

You will want to note the person’s first name, last name, phone number, how they plan on attending the meeting and the ITEMS they registered for.

NOTE: THEY CAN REGISTER FOR MULTIPLE ITEMS ON THE AGENDA!!!!

FYI: This is an outdated example. As the registration questions have been updated.

Testifying/Providing Public Comment

- For people that registered to testify to speak:
 - Testifying within Zoom:
 - Locate name in attendee list
 - Promote to “panelist”
 - Right click on their name and then select “promote” to panelist
 - They will be able to turn on their webcam and control the mute/unmute feature
 - After they are done testifying right click on their name and “change to attendee”
 - Testifying by phone:
 - Members of the public can testify by calling into the meeting as an attendee.
 - Staff will have to compare the phone numbers listed on the registration form to the phone numbers in the attendee list and rename the member of the public. To rename someone, hover over their name, select more, then select rename.
 - Staff will have to select “ask to unmute” next to the person’s name. They will hear, “The host would like you to unmute your microphone, press *6 to unmute”
 - After they are done testifying, hover over their name and select “mute”
 - **PEOPLE WILL NO LONGER BE CALLED INTO THE MEETING. In order to testify (provide public comment), members of the public must be in attendance at the meeting via Zoom or phone, they will then either be unmuted or promoted to a panelist and provided time to speak to the body.**
 - Realizing that some people are unable to be at long meetings, committee staff will do a final check at the end of testimony to see if an individual who has registered has rejoined the meeting either via ZOOM or on the phone; at that time, the person will be able to testify.

FYI: There is a delay between when the person “running the board” promotes someone to a panelist, unmutes them, or calls them in.

Meeting Management

- The meeting will automatically record at the start of the meeting (as it was set-up that way when you created the meeting)
- You can mute/unmute panelists by hovering over names and selecting mute/unmute
- Make sure everyone that should be a panelist is a panelist. If someone is listed under an attendee but should be a panelist, hover over their name, select more, then select, “promote to panelist”

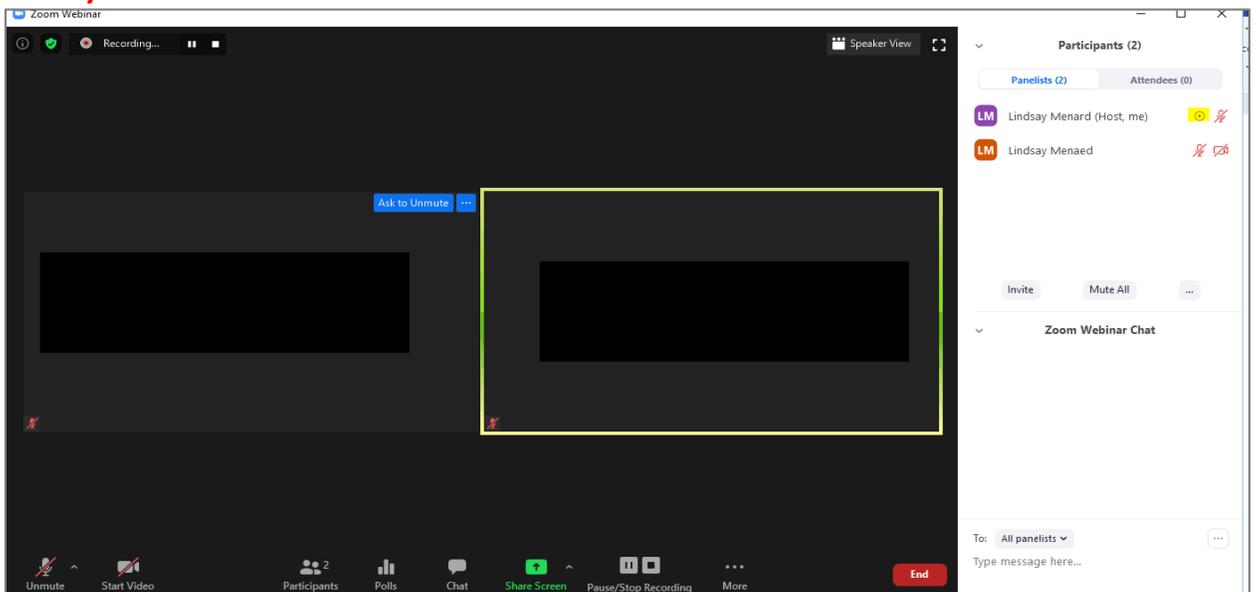


Panelist=Board/Committee/Commission member AND Staff

Attendees=Members of the public.

Attendees cannot see the attendee list or the panelist list

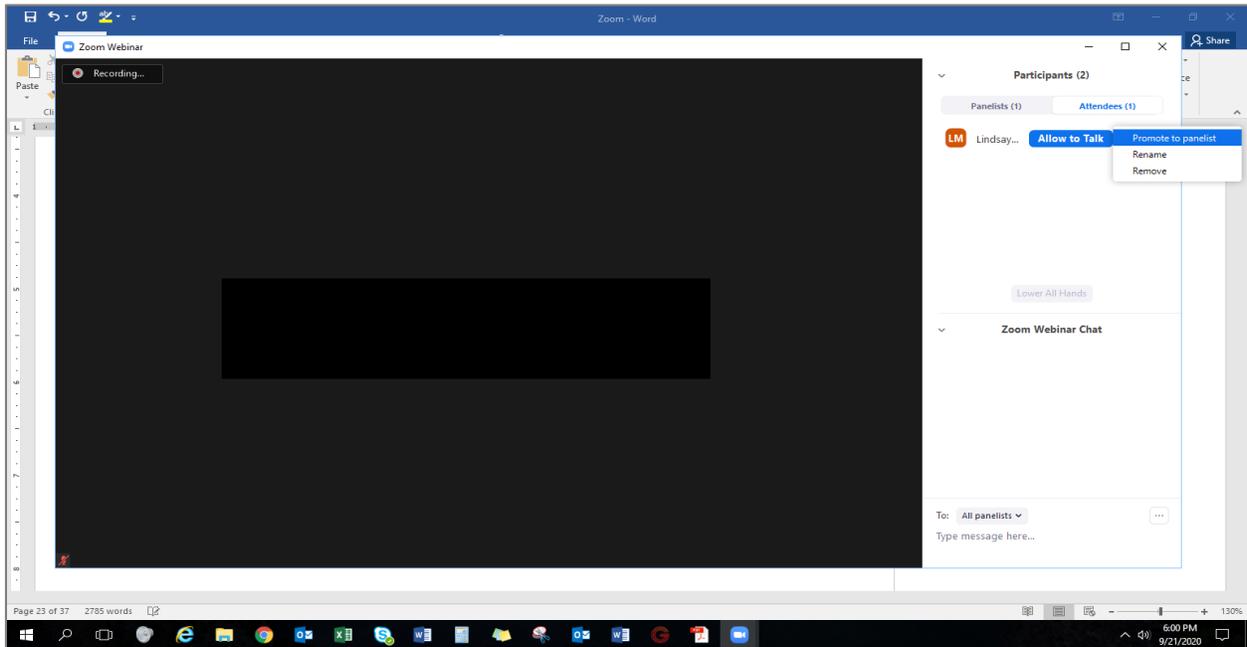
- **Panelists can record, if you see a recording sign (small red dot in black circle) hover over their name and select “forbid record”**



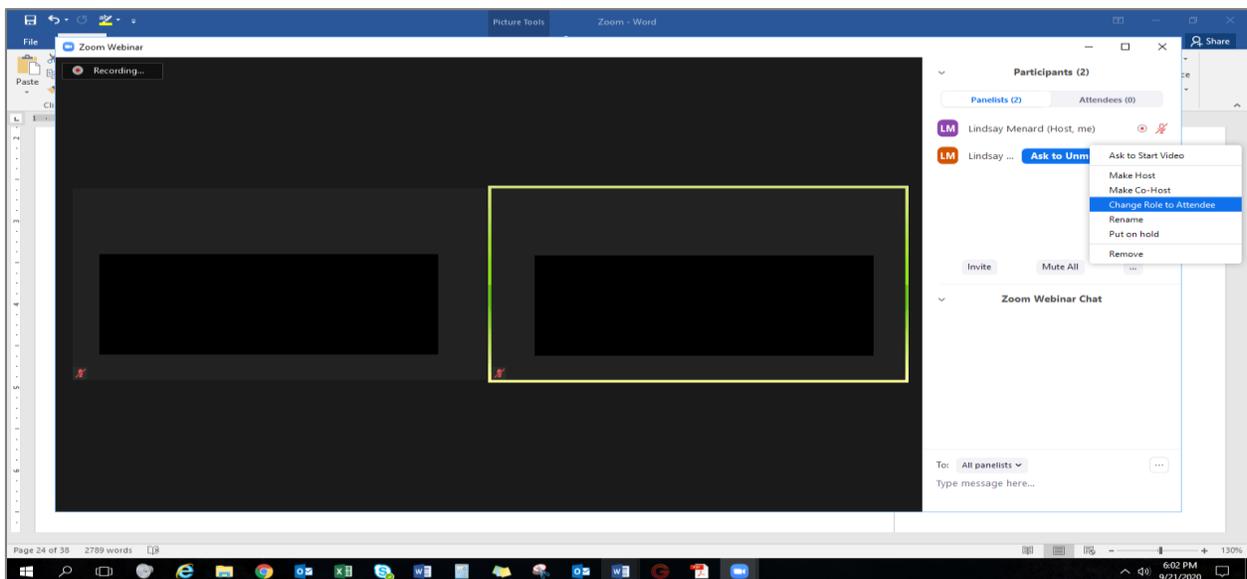
[Back to Top](#)

Promoting Attendee to Panelist

- When the item someone registered to speak on is before the board/committee/commission:
 - Hover over their name in the attendee list
 - Select “More”
 - Select “Promote to Panelist”



After they are done speaking, right click on their name and “change to attendee”

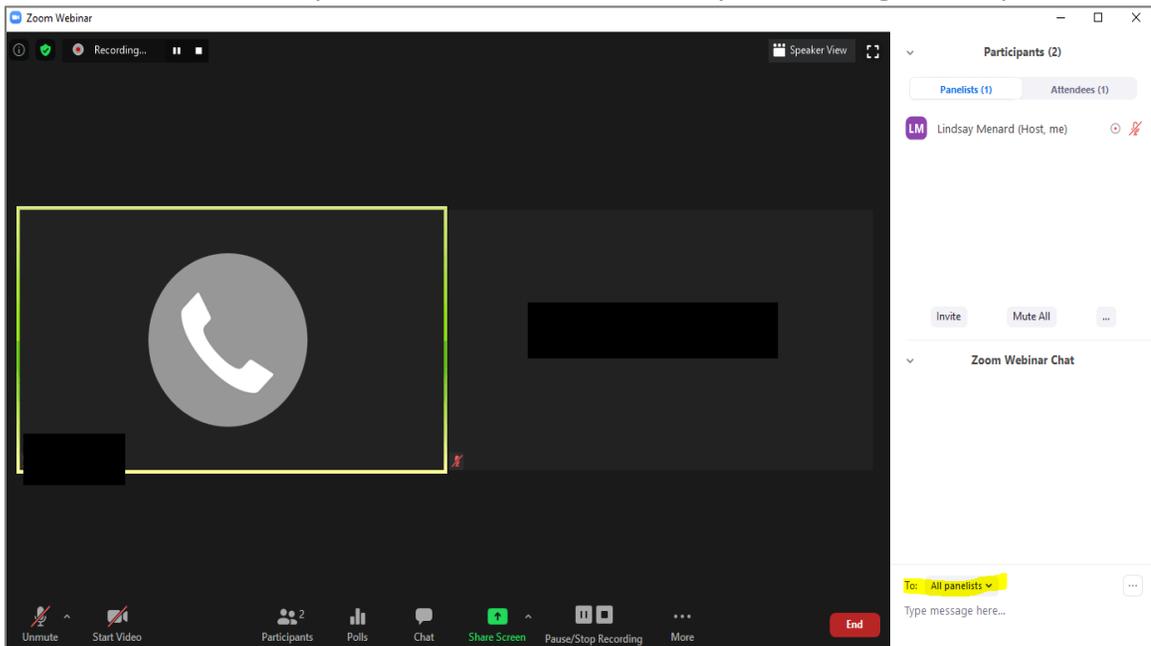


NOTE: There is a 2-3 second delay from when you promote someone from an attendee to a panelist

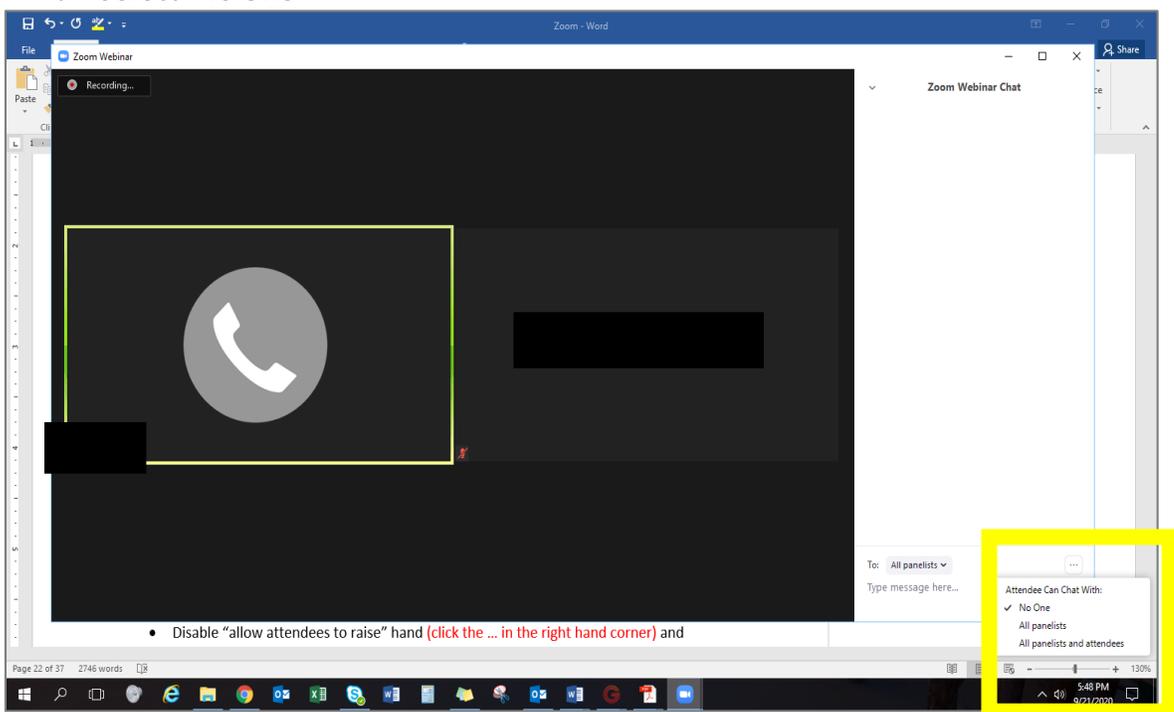
[Back to Top](#)

Chat Feature

- Under the chat feature, panelists should make sure they are chatting to “ALL panelists”



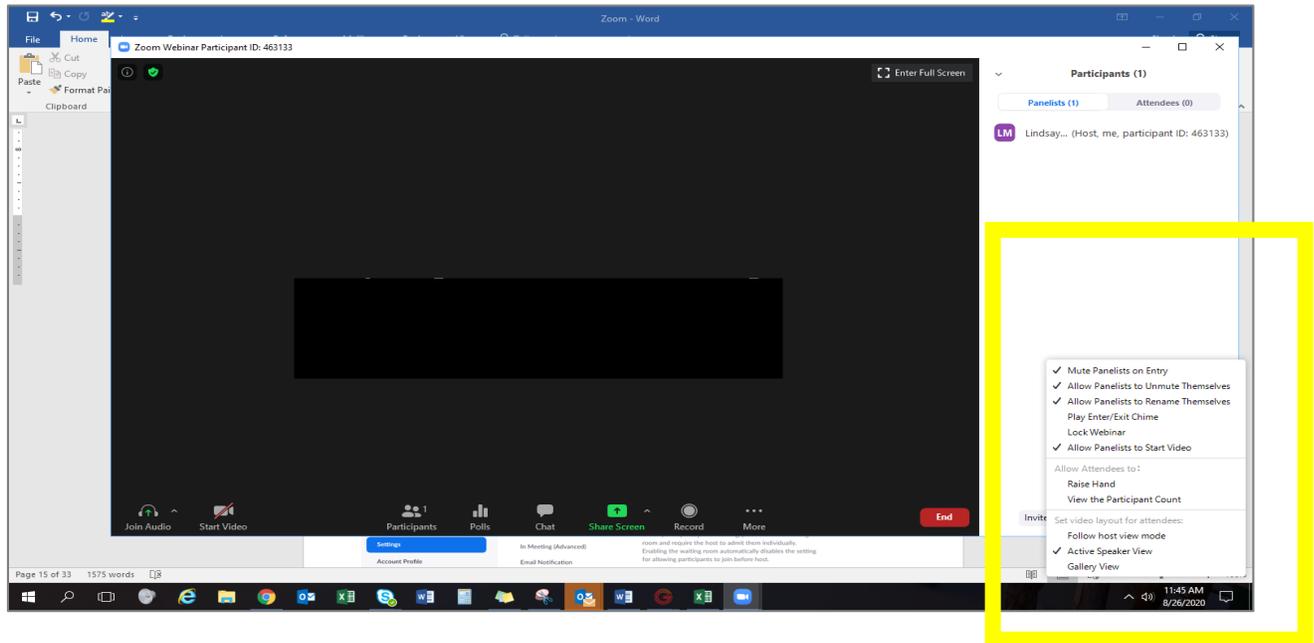
- Under the chat feature:
 - Disable the chat feature for attendees, **click the ... in the right hand corner**
 - Then under “Attendee Can Chat With”
 - Select “No One”



[Back to Top](#)

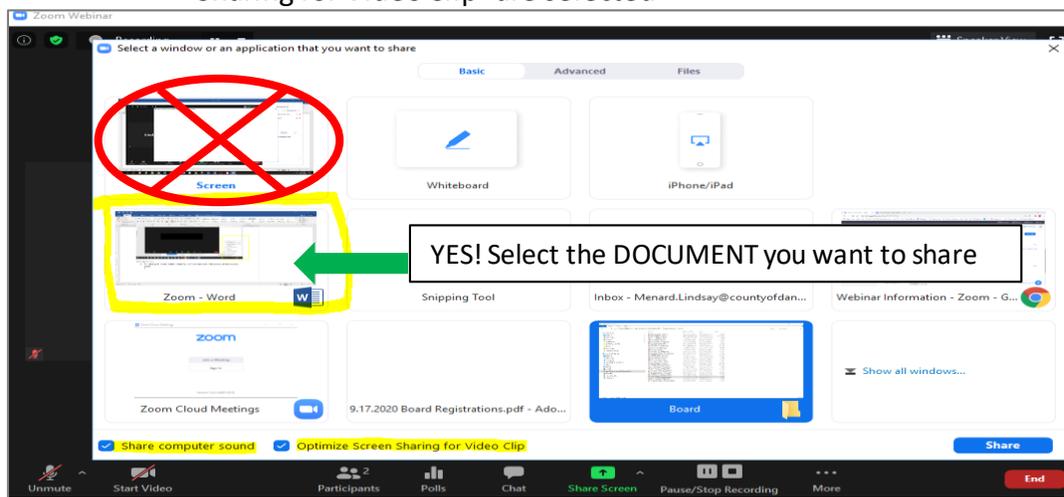
Participant Feature

- Under the participant feature turn on “Active Speaker View”:
 - Click the ... in the right hand corner
 - Then select “Active Speaker View”
- Under the participant feature, disable the raise hand feature:
 - Click the ... in the right hand corner
 - Uncheck “raise hand” under ‘allow attendees to’



Sharing Screen

- To share your screen, select “Share Screen” at the bottom of the screen (highlighted in green) and then select the document you want to share. **DO NOT SELECT SCREEN.**
 - To share a video, make sure “Share Computer Sound” and “Optimize Screen Sharing for Video Clip” are selected

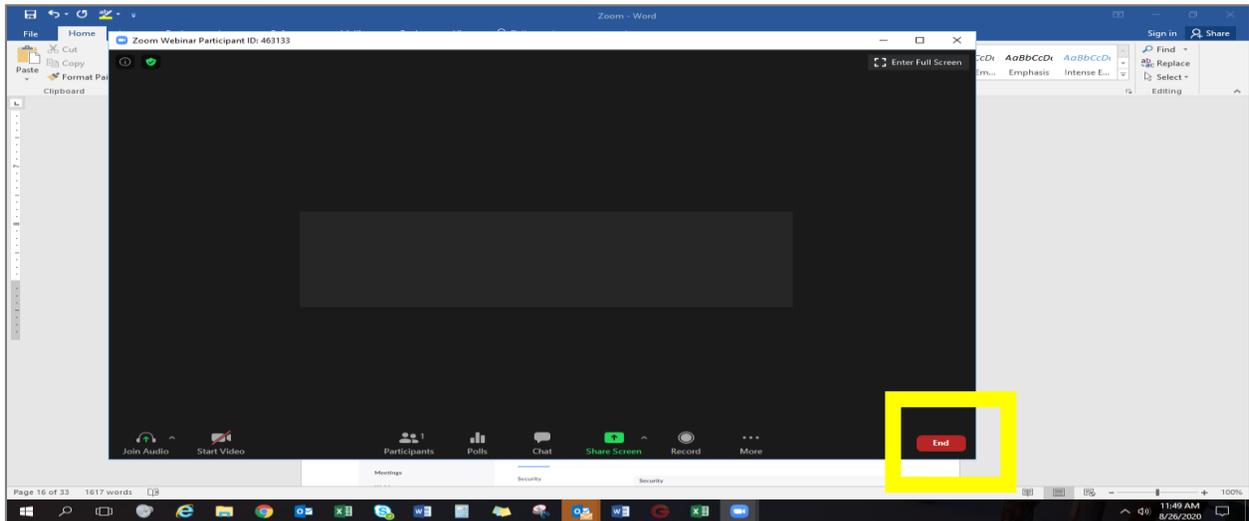


FYI: Panelists will be able to share their screen. Make sure no one shares when they shouldn't. AND if there is a presenter, make sure they share their document and not the screen.

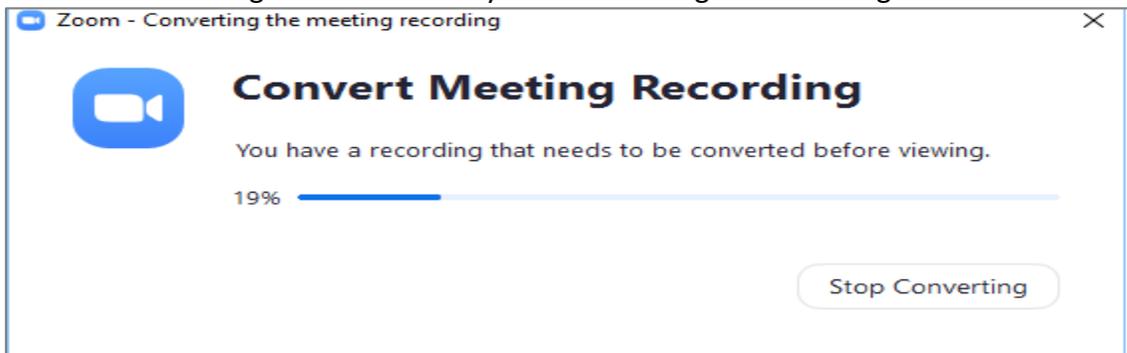
[Back to Top](#)

End of Meeting

- When ready, hit “End” in the lower right hand corner



- Select “End Meeting for All”
- The meeting will automatically start converting the recording:



After the Meeting

Registration Forms

- You will need to attach the meeting registrations to the meeting minutes. After the meeting (usually the next day), you will need to **re-generate** the registration report to capture everyone that registered.

Keep all registrants, regardless if they did not register to speak, register in support of, or register in opposition of an agenda item

- Go back into Zoom and generate the registration report
- Delete rows 1-5 again.
- Delete the email address column
- Delete the phone number column
- Delete the approval status column
- You will need to wrap text/reformat the spreadsheet to make it fit onto one page for the.pdf
- Save the file as an Excel Workbook
- Then save the file as a .pdf

[Back to Top](#)

- Then attach to the meeting minute file in Legistar (the file that is created for the next meeting’s agenda under “Consideration of Minutes”)

Example of registration report to attach to the meeting minutes

First Name	Last Name	City	Registration Time	What are your pronouns?	How do you plan on attending the meeting?	Do you wish to register to speak on/support/oppose an agenda item? NOTE: Registrations to speak need to be submitted 30 minutes prior to the start of the meeting.	Topic(s) I want to address: Resolution #/Ordinance Amendment #/ Subject / Presentation / Item not on the agenda	How I want to take action on that topic:	Would you prefer to be called when the item you registered for is before the board/commission/committee?	On this occasion, are you officially representing an organization or a person other than yourself?
		Madison	9/17/2020 8:19		Zoom	Yes	2020 RES-181 SUPPORTING DANE COUNTY'S CLIMATE ACTION PLAN	Wish to speak in support (provide public comment at meeting)	Yes	No
		Madison	9/17/2020 15:54	she/her/hers	Phone	Yes	K2- 2020 Res 186	Wish to register in opposition (no public comment at meeting)	No	No
		Madison	9/17/2020 15:55	she, her	Zoom	Yes	Res 186	Wish to register in opposition (no public comment at meeting)	No	No
		Madison	9/17/2020 16:27		Phone	No-STOP and Submit Registration Form	186	Wish to register in opposition (no public comment at meeting)	No	No
		Madison	9/17/2020 16:29	she/her	Zoom	Yes	K2- 2020 Res 186	Wish to register in opposition (no public comment at meeting)	No	No
		MADISON	9/17/2020 16:48	she/her	Phone	Yes	K2-2020 Res. 186	Wish to register in opposition (no public comment at meeting)	No	Yes – you will need to fill out an additional form. Please provide your email address below so staff can send you the form

FYI: This is an outdated example. As the registration questions have been updated.

Chat and Video Recording

- The meeting will automatically be saved here:

Name	Date modified	Type	Size
2020-06-16 11.15.17 SJC Virtual Behaviora...	6/16/2020 11:15 AM	File folder	
2020-07-21 15.01.34 Zoom Test 84511410...	7/21/2020 3:36 PM	File folder	
2020-07-23 14.31.40 Zoom test take 2 810...	7/23/2020 2:39 PM	File folder	
2020-07-30 10.59.45 History Webpage me...	7/30/2020 11:00 AM	File folder	
2020-08-12 13.48.25 LM Test 84580878554	8/12/2020 2:51 PM	File folder	
2020-08-26 11.37.20 Test Webinar 850873...	8/26/2020 11:50 AM	File folder	

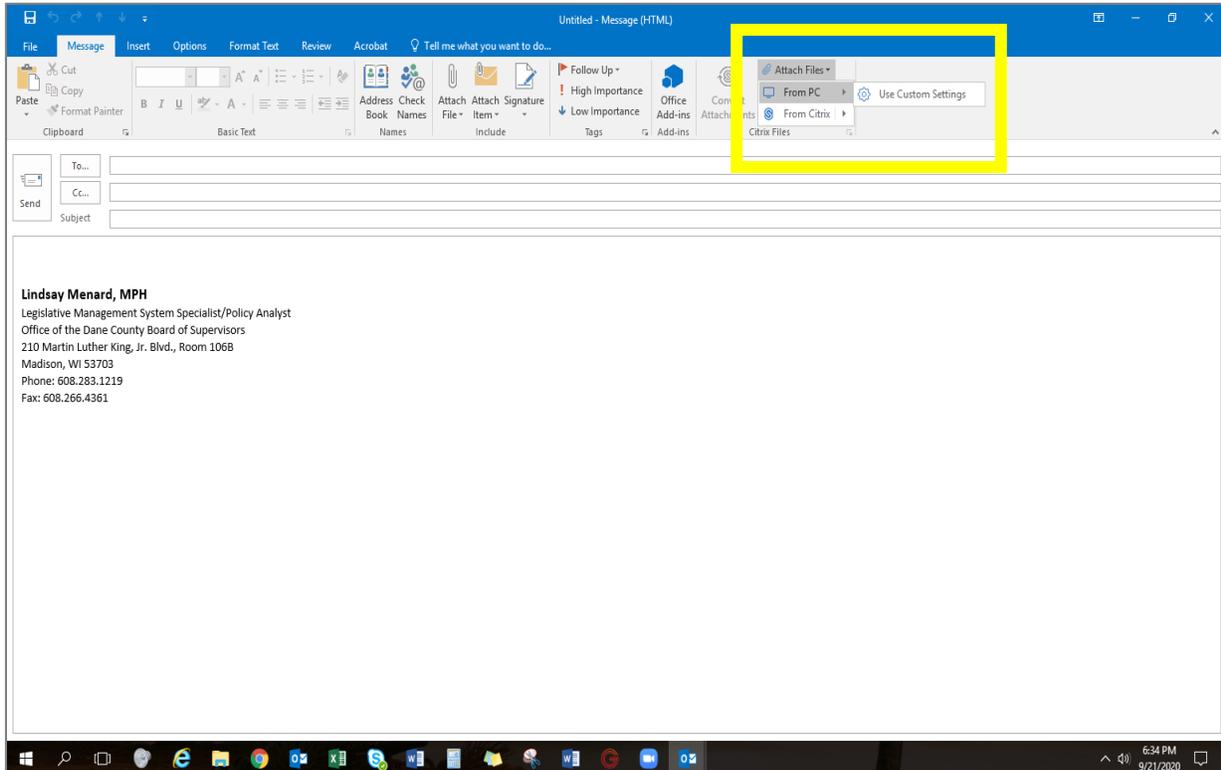
- Click on the folder for the correct meeting
- Within the folder, the chat is automatically saved. You do **NOT** need to do anything with the chat. If requested for a public records request, remember where the file is located.

Name	Date modified	Type	Size
audio_only.m4a.tmp	7/21/2020 3:36 PM	TMP File	2 KB
chat	7/21/2020 3:36 PM	Text Document	2 KB
double_click_to_convert_01	7/21/2020 3:36 PM	Zoom Recording ...	205,533 KB
double_click_to_convert_02	7/21/2020 3:36 PM	Zoom Recording ...	26 KB
zoom_0.mp4.tmp	7/21/2020 3:36 PM	TMP File	29 KB
zoomver.tag	7/21/2020 3:36 PM	TAG File	1 KB

- Find the .mp4 file

Name	Date modified	Type	Size
audio_only	8/26/2020 12:10 PM	MPEG-4 Audio	4 KB
playback	8/26/2020 12:10 PM	M3U file	1 KB
zoom_0	8/26/2020 12:10 PM	MP4 Video	24 KB

- For those that save the video file in the Legistar folder on the S drive, continue to do so and then email the board office at board.office.staff@countyofdane.com once it has been moved and saved.
- For all others, please email the file to board.office.staff@countyofdane.com by attaching it as a Citrix Sharefile attachment
 - Start a new email
 - Select “attach files”
 - Select “from pc”
 - Attach the .mp4 file
 - Send
 - **IF YOU DO NOT SEE THE CITRIX OPTION, CALL THE HELPDESK AT 608-266-4440 OR EMAIL THE HELPDESK**



THE END OF PROCESS

Appendix A - Zoom Settings

Meeting Settings Tab

Meeting	Recording	Telephone
Security		
Schedule Meeting		
In Meeting (Basic)		
In Meeting (Advanced)		
Email Notification		
Other		

Security

Waiting Room

When participants join a meeting, place them in a waiting room and require the host to admit them individually. Enabling the waiting room automatically disables the setting for allowing participants to join before host.

Waiting Room Options

The options you select here apply to meetings hosted by users who turned 'Waiting Room' on

- Everyone will go in the waiting room

[Edit Options](#) [Customize Waiting Room](#)

Require a passcode when scheduling new meetings

A passcode will be generated when scheduling a meeting and participants require the passcode to join the meeting. The Personal Meeting ID (PMI) meetings are not included.

Require a passcode for instant meetings

A random passcode will be generated when starting an instant meeting

Require a passcode for Personal Meeting ID (PMI)

Security		
Schedule Meeting		
In Meeting (Basic)		
In Meeting (Advanced)		
Email Notification		
Other		

Webinar Passcode

A passcode will be generated when scheduling a Webinar and participants require the passcode to join the Webinar.

Require a passcode for Personal Audio Conference

Require passcode for participants joining by phone

A numeric passcode will be required for participants joining by phone if your meeting has a passcode. For meeting with an alphanumeric passcode, a numeric version will be generated.

Embed passcode in invite link for one-click join

Meeting passcode will be encrypted and included in the invite link to allow participants to join with just one click without having to enter the passcode.

Only authenticated users can join meetings

The participants need to authenticate prior to joining the meetings, hosts can choose one of the authentication methods when scheduling a meeting.

Only authenticated users can join meetings from Web client

The participants need to authenticate prior to joining meetings from web client

Schedule Meeting

Host video 
Start meetings with host video on

Participants video 
Start meetings with participant video on. Participants can change this during the meeting.

Audio Type
Determine how participants can join the audio portion of the meeting. When joining audio, you can let them choose to use their computer microphone/speaker or use a telephone. You can also limit them to just one of those audio types. If you have 3rd party audio enabled, you can require that all participants follow the instructions you provide for using non-Zoom audio.

Telephone and Computer Audio
 Telephone
 Computer Audio

Join before host 
Allow participants to join the meeting before the host arrives

Enable Personal Meeting ID 
A Personal Meeting ID (PMI) is a 9 to 11 digit number that is assigned to your account. You can visit [Personal Meeting Room](#) to change your personal meeting settings. [Learn more](#) 

Use Personal Meeting ID (PMI) when scheduling a meeting 
You can visit [Personal Meeting Room](#) to change your Personal Meeting settings.

Use Personal Meeting ID (PMI) when starting an instant meeting 

Mute participants upon entry 
Automatically mute all participants when they join the meeting. The host controls whether participants can unmute themselves. 

Upcoming meeting reminder 
Receive desktop notification for upcoming meetings. Reminder time can be configured in the Zoom Desktop Client. 

In Meeting (Basic)

Require encryption for 3rd party endpoints (SIP/H.323) 
By default, Zoom requires encryption for all data transferred between the Zoom cloud, Zoom client, and Zoom Room. Turn on this setting to require encryption for 3rd party endpoints (SIP/H.323) as well.

Chat
Allow meeting participants to send a message visible to all participants

Prevent participants from saving chat ?

You have enabled "Save chat messages from the meeting / webinar" in cloud recording. You can go to [Recording Settings](#) to turn it off and not share the chat along with the recording. ✕

Private chat
Allow meeting participants to send a private 1:1 message to another participant.

Auto saving chats
Automatically save all in-meeting chats so that hosts do not need to manually save the text of the chat after the meeting starts.

Sound notification when someone joins or leaves

File transfer
Hosts and participants can send files through the in-meeting chat. ?

Feedback to Zoom
Add a Feedback tab to the Windows Settings or Mac Preferences dialog, and also enable users to provide feedback to Zoom at the end of the meeting

Display end-of-meeting experience feedback survey
Display a thumbs up/down survey at the end of each meeting. If participants respond with thumbs down, they can provide additional information about what went wrong. ?

Co-host
Allow the host to add co-hosts. Co-hosts have the same in-meeting controls as the host.

Polling
Add 'Polls' to the meeting controls. This allows the host to survey the attendees. ?

Always show meeting control toolbar
Always show meeting controls during a meeting ?

Show Zoom windows during screen share ?

Screen sharing
Allow host and participants to share their screen or content during meetings

Who can share?
 Host Only All Participants ?

Who can start sharing when someone else is sharing?
 Host Only All Participants ?

Disable desktop/screen share for users Disable desktop or screen share in a meeting and only allow sharing of selected applications. 	
Annotation Allow host and participants to use annotation tools to add information to shared screens 	
Whiteboard Allow host and participants to share whiteboard during a meeting 	
<input checked="" type="checkbox"/> Allow saving of whiteboard content 	
<input checked="" type="checkbox"/> Auto save whiteboard content when sharing is stopped	
<input type="radio"/> Save as PNG <input checked="" type="radio"/> Save as PDF	
Remote control During screen sharing, the person who is sharing can allow others to control the shared content	
Nonverbal feedback Participants in a meeting can provide nonverbal feedback and express opinions by clicking on icons in the Participants panel. 	

Meeting reactions Allow meeting participants to communicate without interrupting by reacting with an emoji that shows on their video. Reactions disappear after 10 seconds. Participants can change their reaction skin tone in Settings. 	
Allow removed participants to rejoin Allows previously removed meeting participants and webinar panelists to rejoin 	
Allow participants to rename themselves Allow meeting participants and webinar panelists to rename themselves. 	
Hide participant profile pictures in a meeting All participant profile pictures will be hidden and only the names of participants will be displayed on the video screen. Participants will not be able to update their profile pictures in the meeting. 	
In Meeting (Advanced)	
Report participants to Zoom Hosts can report meeting participants for inappropriate behavior to Zoom's Trust and Safety team for review. This setting can be found on the Security icon on the meeting controls toolbar. 	
Breakout room Allow host to split meeting participants into separate, smaller rooms	

Remote support 
Allow meeting host to provide 1:1 remote support to another participant

Closed captioning 
Allow host to type closed captions or assign a participant/third party device to add closed captions

Save Captions 
Allow participants to save fully closed captions or transcripts

Language Interpretation 
Allow host to assign participants as interpreters who can interpret one language into another in real-time. Host can assign interpreters when scheduling or during the meeting.

9 languages +

[English](#) [Chinese](#) [Japanese](#) [German](#) [French](#) [Russian](#) [Portuguese](#) [Spanish](#) [Korean](#)

Far end camera control 
Allow another user to take control of your camera during a meeting. Both users (the one requesting control and the one giving control) must have this option turned on.

Group HD video 
Activate higher quality video for host and participants. (This will use more bandwidth.)

Virtual background 
Customize your background to keep your environment private from others in a meeting. This can be used with or without a green screen.

Allow use of videos for virtual backgrounds 

[Manage virtual background](#) 

Video filters 
Turn this option on to allow users to apply filters to their videos 

Identify guest participants in the meeting/webinar 
Participants who belong to your account can see that a guest (someone who does not belong to your account) is participating in the meeting/webinar. The Participants list indicates which attendees are guests. The guests themselves do not see that they are listed as guests. 

Auto-answer group in chat 
Enable users to see and add contacts to 'auto-answer group' in the contact list on chat. Any call from members of this group will be automatically answered.

Only show default email when sending email invites Allow users to invite participants by email only by using the default email program selected on their computer	<input type="checkbox"/>
Use HTML format email for Outlook plugin Use HTML formatting instead of plain text for meeting invitations scheduled with the Outlook plugin	<input type="checkbox"/>
Allow users to select stereo audio in their client settings Allow users to select stereo audio during a meeting	<input checked="" type="checkbox"/>
Allow users to select original sound in their client settings Allow users to select original sound during a meeting	<input checked="" type="checkbox"/>
Select data center regions for meetings/webinars hosted by your account Include all data center regions to provide the best experience for participants joining from all regions. Opting out of data center regions may limit CRC, Dial-in, Call Me, and Invite by Phone options for participants joining from those regions.	<input type="checkbox"/>
Show a "Join from your browser" link Allow participants to bypass the Zoom application download process, and join a meeting directly from their browser. This is a workaround for participants who are unable to download, install, or run applications. Note that the meeting experience from the browser is limited	<input type="checkbox"/>

Allow live streaming meetings	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/> Facebook	
<input checked="" type="checkbox"/> Workplace by Facebook	
<input checked="" type="checkbox"/> YouTube	
<input type="checkbox"/> Custom Live Streaming Service	
Request permission to unmute Select this option in the scheduler to request permission to unmute meeting participants and webinar panelists. Permissions, once given, will apply in all meetings scheduled by the same person. 	<input checked="" type="checkbox"/>
Email Notification	
When a cloud recording is available Notify host when cloud recording is available	<input checked="" type="checkbox"/>
<input type="checkbox"/> Send a copy to the person who scheduled the meeting/webinar for the host	
<input type="checkbox"/> Send a copy to the Alternative Hosts	
When attendees join meeting before host Notify host when participants join the meeting before them	<input checked="" type="checkbox"/>

[Back to Top](#)

When a meeting is cancelled

Notify host and participants when the meeting is cancelled



When an alternative host is set or removed from a meeting

Notify the alternative host who is set or removed



When someone scheduled a meeting for a host

Notify the host there is a meeting is scheduled, rescheduled, or cancelled



When the cloud recording is going to be permanently deleted from trash

Notify the host 7 days before the cloud recording is permanently deleted from trash



Other

Blur snapshot on iOS task switcher

Enable this option to hide potentially sensitive information from the snapshot of the Zoom main window. This snapshot display as the preview screen in the iOS tasks switcher when multiple apps are open.



Invitation Email

Your meeting attendees will receive emails in language based upon their browser/profile settings. Choose languages which your expected attendees will receive content in to edit.

Choose email in language to edit

[Send me a preview email](#)

Schedule Privilege

You can assign users in your account to schedule meetings on your behalf. You can also schedule meetings on behalf of someone that has assigned you scheduling privilege. You and the assigned scheduler must be on a Paid plan within the same account.

Assign scheduling privilege to
No one

I can schedule for
No one

Integration Authentication

key: pZuR1uZdSFmSbVWRCgMu2g
Secret: yuyK0foF2v8KF4HZdndHWIVSdTOiMH24tKRq

[Regenerate](#)

Recording Settings Tab

Meeting **Recording** Telephone

Recording

Local recording
Allow hosts and participants to record the meeting to a local file

Hosts can give participants the permission to record locally

Cloud recording
Allow hosts to record and save the meeting / webinar in the cloud

Record active speaker with shared screen

Record gallery view with shared screen [?](#)

Record active speaker, gallery view and shared screen separately

Record an audio only file

Save chat messages from the meeting / webinar

Advanced cloud recording settings

Add a timestamp to the recording [?](#)

Display participants' names in the recording

Record thumbnails when sharing [?](#)

Optimize the recording for 3rd party video editor [?](#)

Audio transcript [?](#)

Save panelist chat to the recording [?](#)

Automatic recording
Record meetings automatically as they start

IP Address Access Control
Allow cloud recording access only from specific IP address ranges

Only authenticated users can view cloud recordings
The viewers need to authenticate prior to viewing the cloud recordings, hosts can choose one of the authentication methods when sharing a cloud recording.

Require passcode to access shared cloud recordings
Passcode protection will be enforced for shared cloud recordings. A random passcode will be generated which can be modified by the users. This setting is applicable for newly generated recordings only.

Auto delete cloud recordings after days
Allow Zoom to automatically delete recordings after a specified number of days

The host can delete cloud recordings
Allow the host to delete the recordings. If this option is disabled, the recordings cannot be deleted by the host and only admin can delete them.

Recording disclaimer
Show a customizable disclaimer to participants before a recording starts [?](#)

Multiple audio notifications of recorded meeting
Play notification messages to participants who join the meeting audio. These messages play each time the recording starts or restarts, informing participants that the meeting is being recorded. If participants join the audio from telephone, even if this option is disabled, users will hear one notification message per meeting.

Telephone Settings Tab

Meeting Recording **Telephone**

Show international numbers link on the invitation email
Show the link for Zoom International Dial-in Numbers on email invitations

Toll Call
Include the selected numbers in the Zoom client and the email invitation via the international numbers link.
Participants can dial into meeting with the numbers

Only IT admin can make changes for this setting ×

Argentina	+54 112 040 0447
Argentina	+54 115 983 6950
Argentina	+54 341 512 2188
Argentina	+54 343 414 5986
Australia	+61 2 8015 6011
Australia	+61 3 7018 2005
Australia	+61 7 3185 3730
Australia	+61 8 6119 3900
Australia	+61 8 7150 1149
Austria	+43 120 609 3072

[See all numbers](#)

Toll-free and Fee-based Toll Call
Include the selected numbers in the Zoom client and the email invitation via the international numbers link.
Participants can dial into meeting with the numbers

Only IT admin can make changes for this setting ×

Canada (Toll-free)	855 703 8985
United States of America (Toll-free)	833 548 0276
United States of America (Toll-free)	833 548 0282
United States of America (Toll-free)	877 853 5247
United States of America (Toll-free)	888 788 0099

Allow webinar attendees to dial in through above numbers

Call Out
Users can Call Me to join the meeting audio by entering their phone number, and hosts can Invite by Phone to invite others to join the meeting by entering a phone number to be called

Only IT admin can make changes for this setting ×

Require Call Me users to press 1 before being connected to the meeting? ?

Auto
 Always
 Never

[Back to Top](#)

Call Out Countries/Regions

Users can call out to the specified countries/regions

Canada, United States of America

Allow webinar attendees to use Call Me to connect audio 

Choose where most of the participants call into or call from the meeting

An accurate selection can reduce unnecessary phone call delays to improve call quality

United States 

Personal Audio Conference (PAC)

Users can use a Personal Audio Conference (PAC) meeting ID that can be shared with participants at any time



3rd Party Audio

Users can join the meeting using the existing 3rd party audio configuration



Mask phone number in the participant list

Phone numbers of users dialing into a meeting will be masked in the participant list. For example: 888****666



Global Dial-in Countries/Regions

Click the Edit icon to choose countries/regions that frequently have participants who need to dial into meetings. The dial-in phone numbers of these locations appear in the email invitation, and can be used by participants dialing in from those locations.

United States of America 

[Back to Top](#)

Appendix B: Email to Board/Commission/Committee Members

You may want to include additional details to your board/commission/committee members about the process when you send out the meeting agenda. An example email is below.

Hello Executive Committee members:

Here is the link to the agenda for the 9-17-20 VIRTUAL Executive Committee meeting at 5:30 p.m. next week.

<https://dane.legistar.com/View.ashx?M=A&ID=805218&GUID=7777C4A9-B911-4297-9B18-35CD78EE6843>

PLEASE NOTE: We are now using ZOOM Webinar exclusively in order to give the public access to real-time meeting video rather than having a call-in only option (although they can still choose to call in). Public attendees will be muted and not on video themselves unless they are registered to speak on an item.

Committee members and staff will still receive an email the day of the meeting (several hours before the meeting) with your connection information, but it will come as an invitation directly from ZOOM with a link to enter the meeting. When you enter the meeting you will be a “panelist” and will have audio and video access just as in previous meetings.

Please let me know if you will not be able to attend this meeting.

Thank you and have a nice weekend,
Lisa