

How to set up and host CPF Meetings on Zoom



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1) Pricing and Plans

Zoom is a video conferencing app that enables groups of individuals to meet and share documents online, using their computers or smart phones.

With both a free and a paid account you can host up to 100 members.

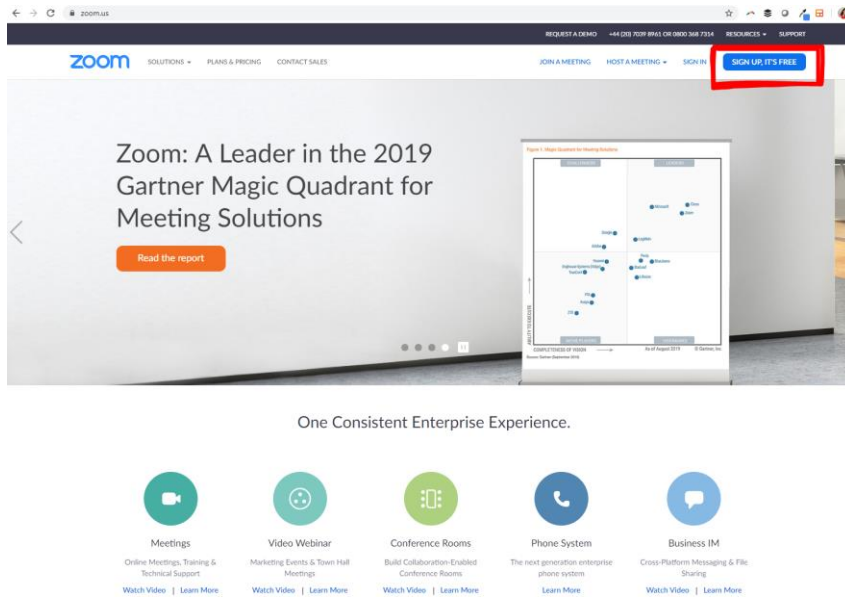
With free accounts, meetings are limited to just 40 minutes, which is less time than most CPF discussions usually take.

CPF therefore recommends that CPF Group Coordinators register for a Pro account (full cost: £14.39 per month including taxes). This compares very favourably with the cost of room hire that many associations otherwise incur for their meetings. It should be considered a worthwhile investment during this period when even more individuals than usual are experiencing loneliness and social isolation.

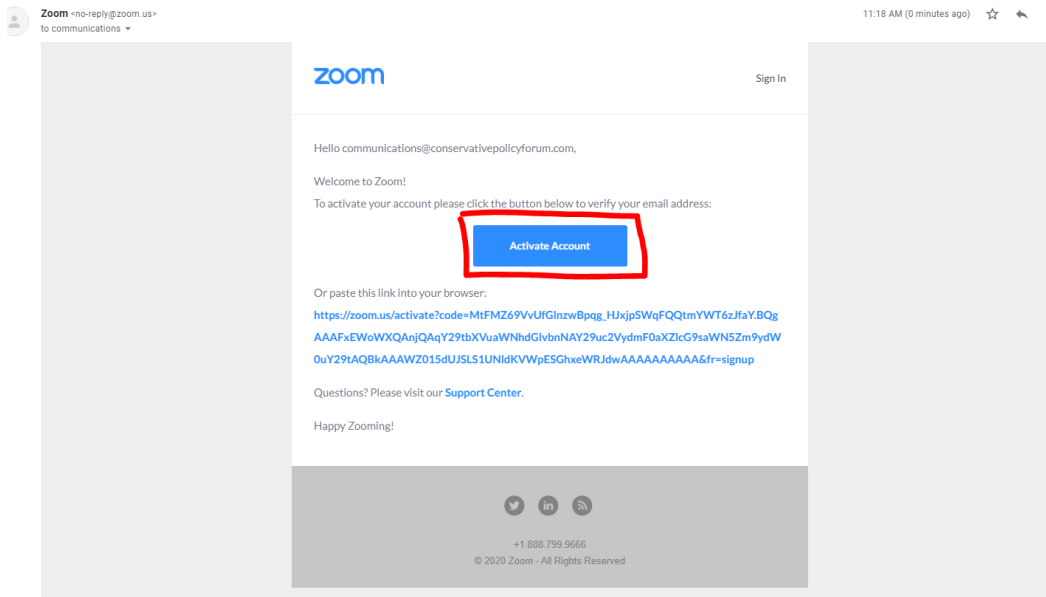
For further details about Zooms pricing, please visit: <https://zoom.us/pricing>.

2) Register for Zoom

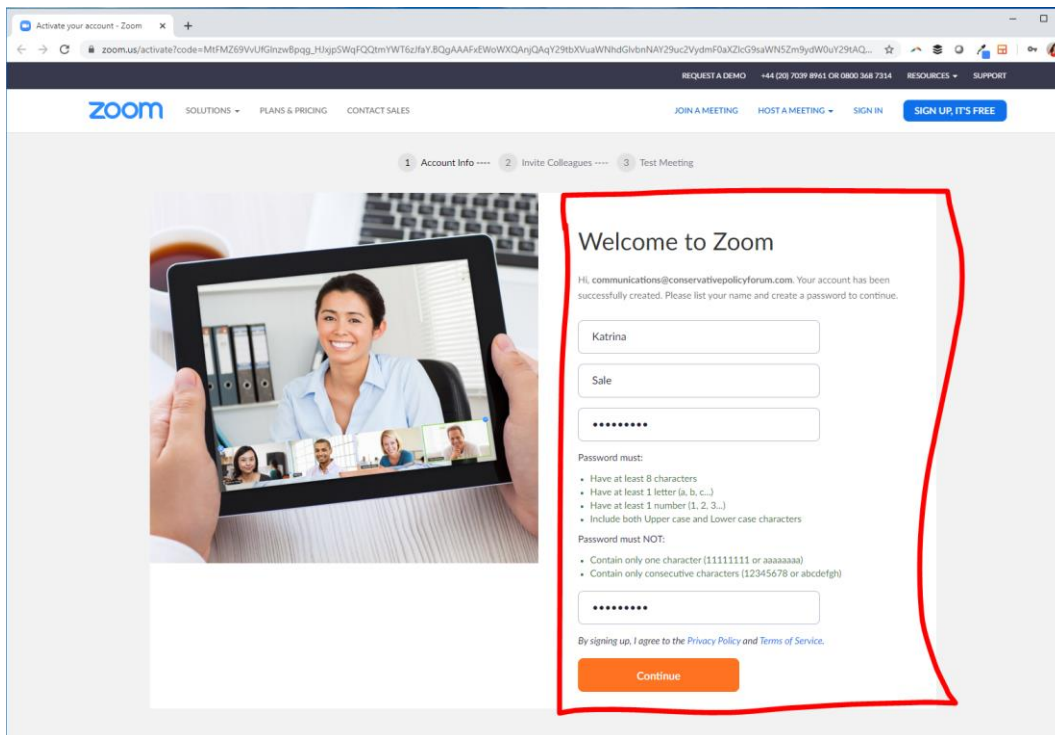
a) Visit www.zoom.us and select 'Sign up, it's free'.



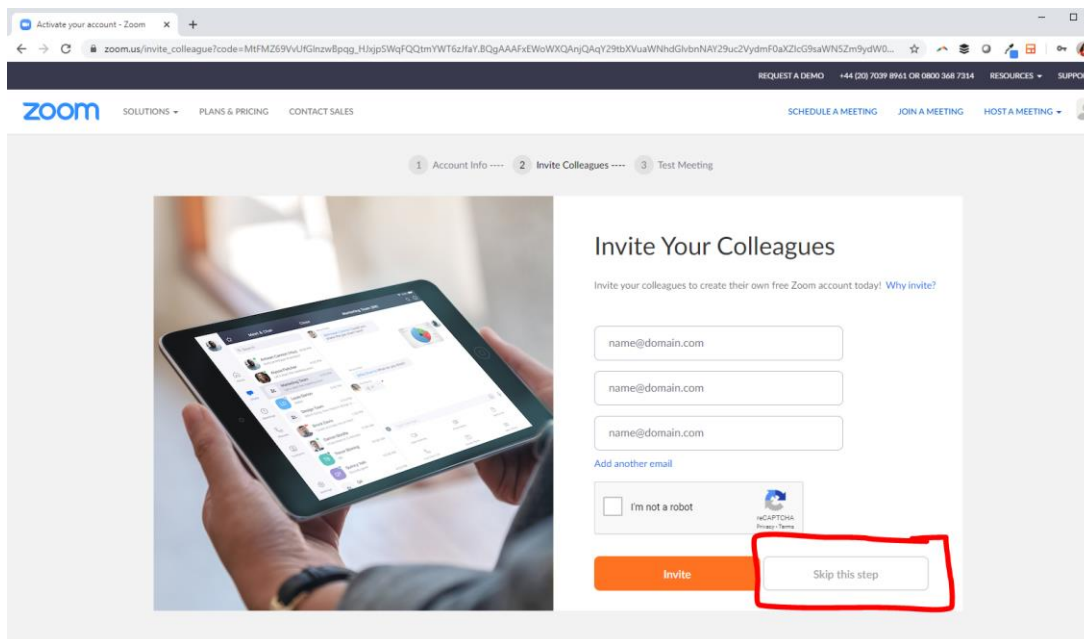
b) Fill in your email address and return to your email inbox to activate the account.



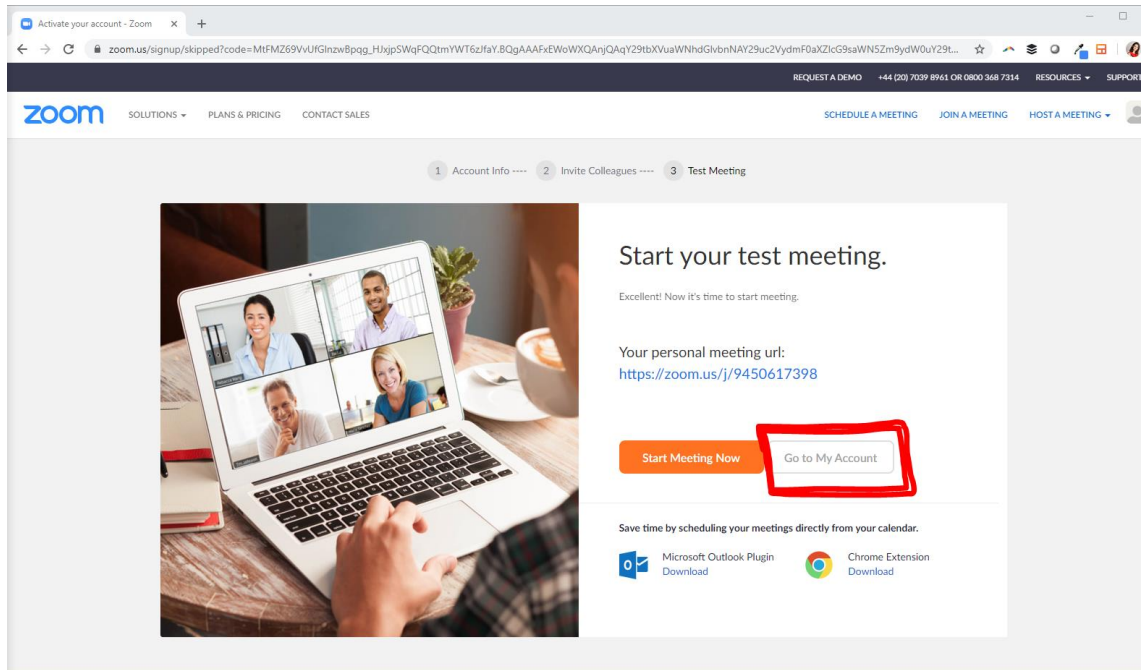
c) You will be redirected to Zoom, where you should fill out your name and password.



d) Skip the option to invite colleagues.

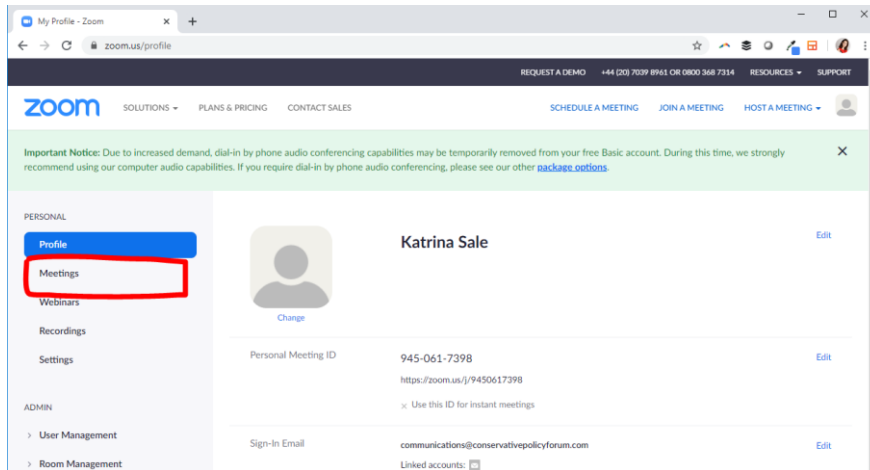


e) Click 'Go to my account' to complete set up.

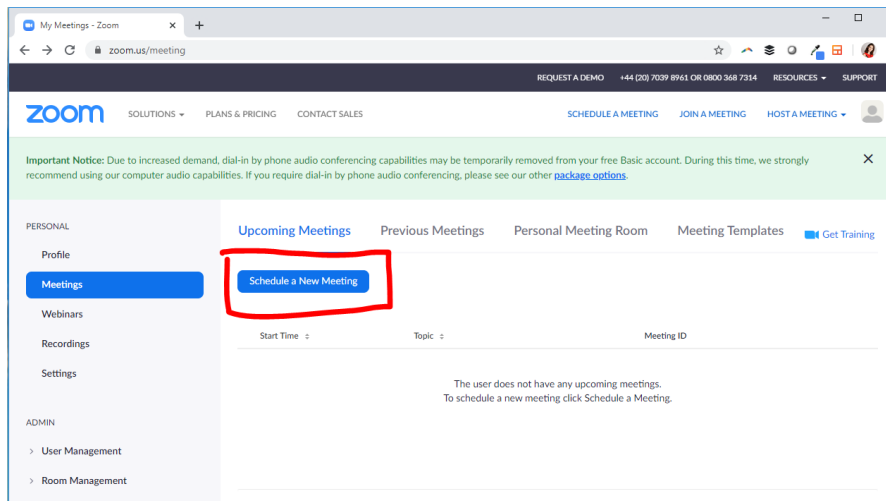


3) Schedule Your Meeting

a) From your Dashboard, click 'Meetings'.



b) Schedule a new meeting.



c) Follow the instructions.

The screenshot shows the Zoom 'Schedule a Meeting' interface. The left sidebar contains navigation links for 'PERSONAL' (Profile, Meetings, Webinars, Recordings, Settings) and 'ADMIN' (User Management, Room Management, Account Management, Advanced). The main content area is titled 'Schedule a Meeting' and includes the following fields:

- Topic:** CPF Meeting 1
- Description (Optional):** Join us for the CPF meeting on XXXX
- When:** 03/26/2020, 12:00 PM
- Duration:** 1 hr 30 min
- Time Zone:** (GMT+0:00) London
- Registration:** ☒ Required
- Meeting ID:** ☒ Generate Automatically, ☒ Personal Meeting ID 668-927-8505
- Meeting Password:** ☐ Require meeting password
- Video:** Host: ☒ on, ☐ off; Participant: ☒ on, ☐ off
- Audio:** ☐ Telephone, ☐ Computer Audio, ☒ Both. Dial from United Kingdom and other 1 country. [Edit](#)
- Meeting Options:** ☒ Enable join before host, ☐ Mute participants upon entry, ☐ Enable waiting room, ☐ Only authenticated users can join, ☐ Record the meeting automatically
- Alternative Hosts:** Example: mary@company.com, peter@school.edu

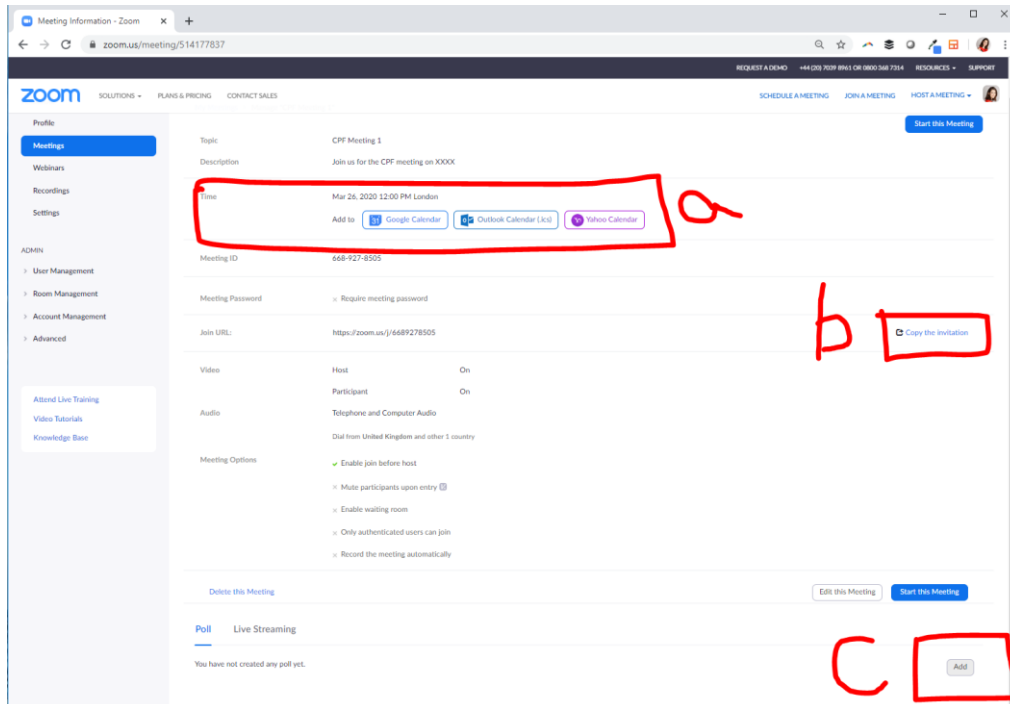
At the bottom are 'Save' and 'Cancel' buttons.

- **Registration:** If you want to know who is coming to your meeting in advance, select 'Registration'.
- **Meeting ID:** If the account is only going to be used for CPF meetings, use the 'Personal Meeting ID'. However, if it is going to be used for different types of meetings (eg, if it is a central association account) select 'Generate Automatically'.
- **Meeting Options:** make it easier for people to join the meeting by selecting 'Enable Join before host'.

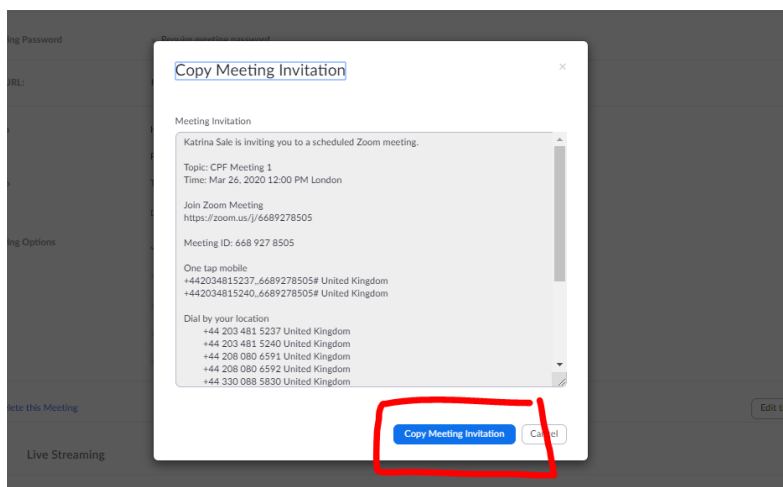
4) Inviting your attendees

Once you have set your meeting up, you can:

- Add it to your calendar by selecting a calendar option.
- 'Copy The Invitation' to send out the invitation to your Zoom meeting.
- Add a poll to the meeting so you can easily collect data from the meeting (see Polling).



When you click 'Copy Meeting invitation', you get a lot of additional information that your members will not need. The easiest way to edit this is to copy the Invitation and paste it into an email or newsletter.



For ease, you can delete all the extra information (highlighted in red, below) and simply provide your guests with the most important parts: the Topic, the link to join the meeting, meeting ID and a landline to call in case they have trouble with the computer audio.

Katrina Sale is inviting you to a scheduled Zoom meeting.

Topic: CPF Meeting 1

Time: Mar 26, 2020 12:00 PM London

Join Zoom Meeting

<https://zoom.us/j/6689278505>

Meeting ID: 668 927 8505

One tap mobile

+442034815237,,6689278505# United Kingdom

+442034815240,,6689278505# United Kingdom

Dial by your location

+44 203 481 5237 United Kingdom

+44 203 481 5240 United Kingdom

+44 208 080 6591 United Kingdom

+44 208 080 6592 United Kingdom

+44 330 088 5830 United Kingdom

+44 131 460 1196 United Kingdom

+1 253 215 8782 US

+1 301 715 8592 US

+1 312 626 6799 US (Chicago)

+1 346 248 7799 US (Houston)

+1 408 638 0968 US (San Jose)

+1 646 876 9923 US (New York)

+1 669 900 6833 US (San Jose)

Meeting ID: 668 927 8505

Find your local number: <https://zoom.us/u/acSSMFDLIW>

5) Setting up a Poll

To run online polls your computer hardware must be up to date.

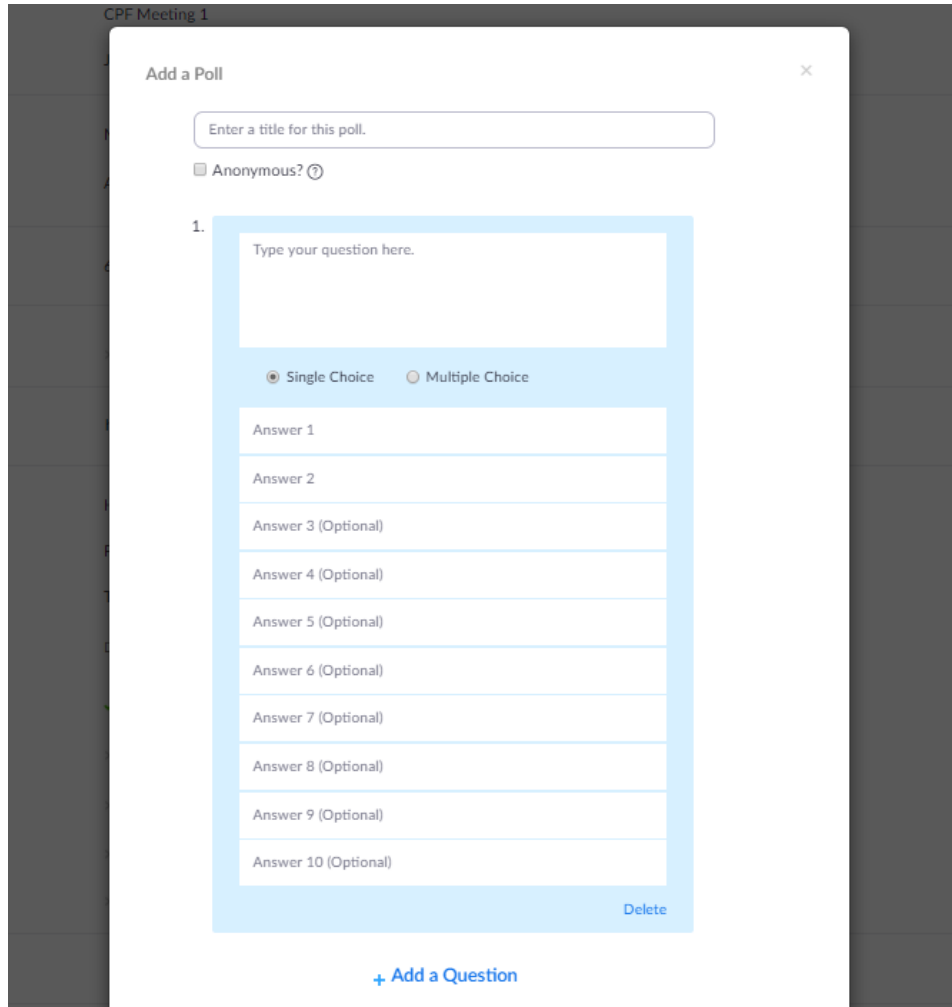
- Host user type must be Licensed
- Windows Desktop Client Version 3.5.63382.0829 or higher
- Mac Desktop Client Version 3.5.63439.0829 or higher
- Linux Desktop Client version 2.0.70790.1031 or higher
- The meeting must be either a scheduled meeting, or an instant meeting using your [Personal Meeting ID](#).

Users on the iOS or Android mobile app can participate in polling, but hosts need to be using the desktop client to manage polling.

Only the original meeting host can edit or add polls during a meeting. If the host or co-

host role is transferred to another user, that user will only be able to launch polls already created.

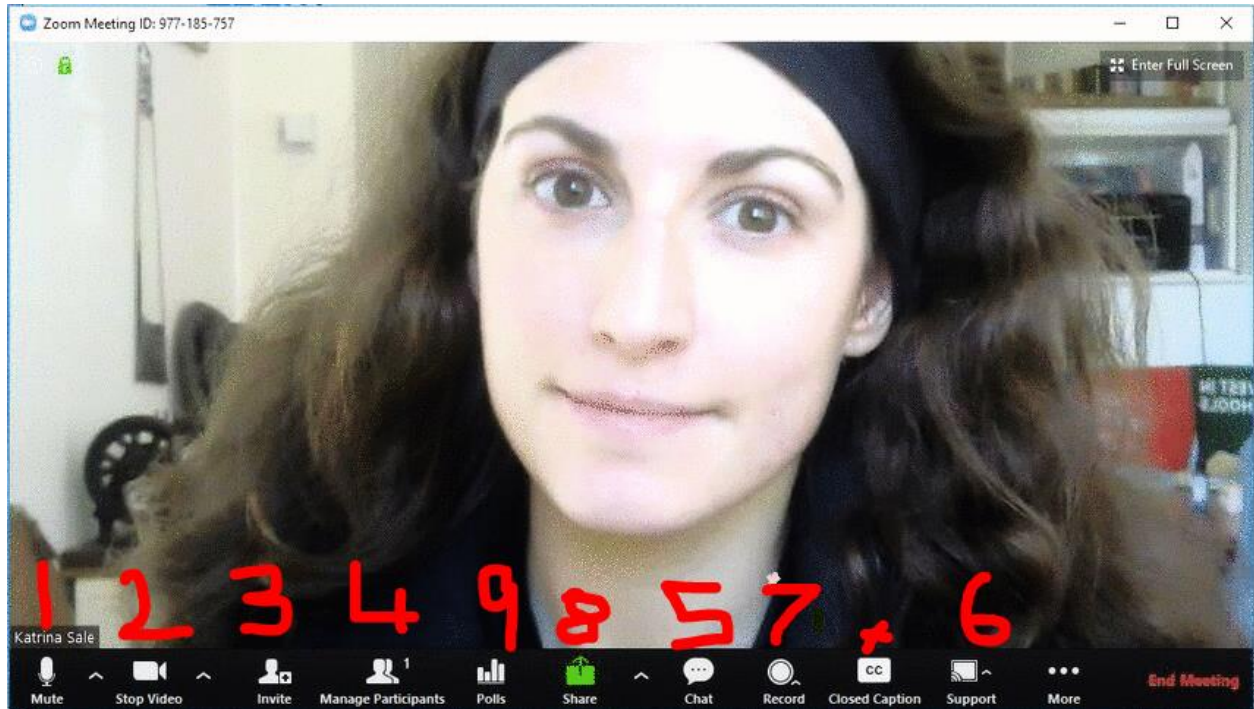
Adding the poll is simple: click 'Add' and fill in the questions and answers. You can add up to 10 questions, each with up to 10 answers.



The screenshot shows a Zoom meeting window titled "CPF Meeting 1". Overlaid on this is a white dialog box titled "Add a Poll" with a close button (X) in the top right corner. Inside the dialog box, there is a text input field with the placeholder "Enter a title for this poll.". Below this is a checkbox labeled "Anonymous?" with a help icon. A numbered list (1.) contains a light blue box for question creation. Inside this box is a text area with the placeholder "Type your question here.". Below the text area are two radio buttons: "Single Choice" (selected) and "Multiple Choice". Underneath these are ten input fields for answers, labeled "Answer 1" through "Answer 10 (Optional)". A "Delete" button is located at the bottom right of the question box. Below the question box is a blue button with a plus icon and the text "+ Add a Question".

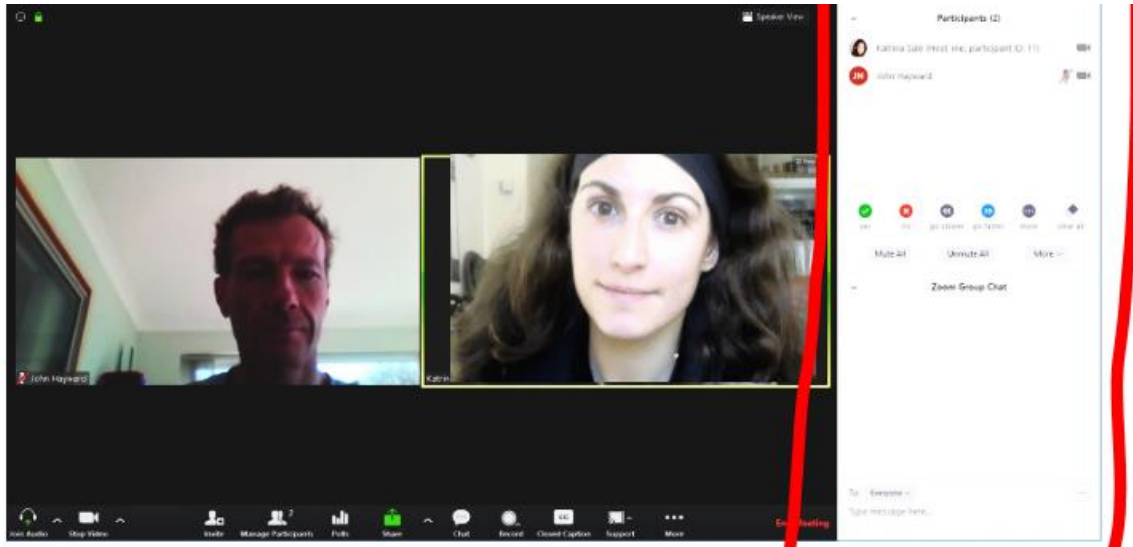
6) Running a Meeting

To host a meeting, you will need to have Zoom downloaded on your laptop, computer or mobile device. It is easier to chair a meeting on a larger screen so you can see all the participants. Here is the task bar you will see when you open your meeting:

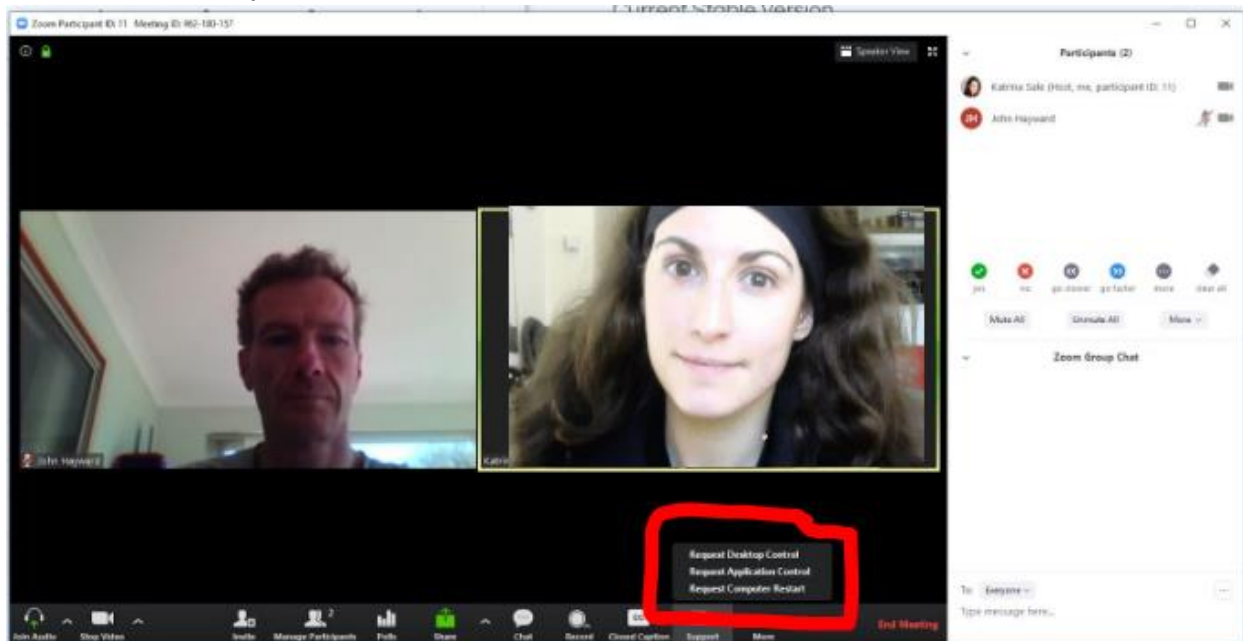


- 1) **Audio:** You can use this to turn your microphone on and off, for example when others are speaking to ensure there is no background sound, or if you need to talk to someone offscreen.
- 2) **Video:** You can use this to turn your video on and off.
- 3) **Invite:** You can quickly send the meeting invitation to a participant who has lost the email at the last moment.
- 4) **Manage Participants:** This button enables you to see meeting participants and any votes they have made, or whether their camera and microphone is on or off.

- 5) **Chat:** This button enables you to see the meeting chatroom. As people join your meeting, it is helpful to have the participants and chat boxes open in case anyone has technical difficulties.

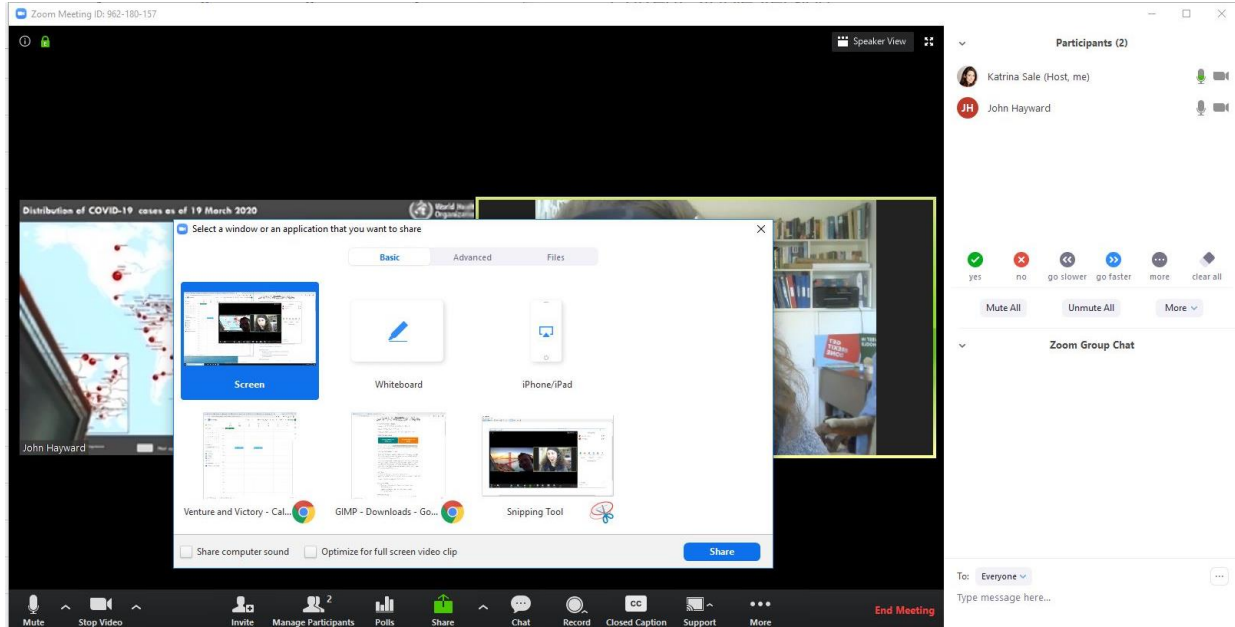


- 6) **Support:** If one of your guests is having technical difficulties, you can offer to help them by taking control of their desktop temporarily. If they are happy for you to do so, you can troubleshoot their access problems. You will temporarily have access to their computer.



- 7) **Record:** You can record your conversation and publish it after the meeting has concluded. Please note, you must have permission from everyone in the video before you do this. Most of the time a video would not be appropriate for CPF meetings.

- 8) **Share:** You can share parts of your screen, which is very helpful when giving presentations. Click the Share button, then select which part of your screen you would like to share. You can share a single browser window; for example, you might have the CPF briefing paper open and want to share that, or a PowerPoint with specific information on it.



- 9) **Polls:** this button will bring up the poll you designed when you created your meeting. Launch your poll, and watch as the results come in. You can close the poll when you have enough information and either keep the results private or opt to 'Share Results' with your meeting participants.

7) Additional Support

If you need any additional support, please email katrina@conservativepolicyforum.com or visit the Coordinator Hub at www.conservativepolicyforum.com that will be launched in April 2020.