Appendix B: Zoom Virtual RTP Meeting Step by Step

Additional Zoom resources are available online:

- Zoom Help Center
- <u>APSU Distance Education Zoom website</u>

Creating an APSU Zoom Account

In general, an APSU Zoom account is not required to *attend* meetings. An APSU Zoom account is only required for the meeting host. Though APSU Zoom uses your single sign-on credentials you must claim your APSU Zoom license first before you can use APSU Zoom to attend or host a meeting. To claim your license, simply go to <u>https://apsu.zoom.us</u> and log in with your single sign-on credentials.

Special Notes:

- A Zoom account created directly with Zoom using your APSU email is not the same as an APSU Zoom account created at https://apsu.zoom.us. That account will have limitations (length of meeting, length of recordings, etc.). You can still create an APSU Zoom account at https://apsu.zoom.us, but you may receive a notice that Zoom needs a few days to transfer your account so do this well in advance.
- The only time an APSU Zoom account is required to attend a meeting is if the meeting host is requiring user authentication. More about that setting below under Schedule a Meeting.
- The meeting host (specifically the person hosting the meeting when the poll is launched) must not only be logged into their activated APSU Zoom account, they must host the meeting on a desktop computer using the Zoom desktop app. This requirement is due to polling.

Accessing Zoom

The **host must** be logged into their APSU Zoom account **and** use the Zoom desktop app to see the Poll button and launch the polls. Attendees that join from their browser can now participate in polling; however, it is recommended that they still join with the Zoom desktop or mobile app and use their APSU Zoom account for the best overall experience. When accessing Zoom through the desktop or mobile apps, you must select to "Sign in with SSO" and then enter your single sign-on credentials.

Downloading the Zoom App on a Desktop Computer

Enter your email		1	٩	Sign In with SSO
Enter your password	Forgot?	or	G	Sign In with Google
) Keep me signed in	Sign In		f	Sign In with Facebook

Schedule a Meeting

- 1. Log into APSU Zoom at https://apsu.zoom.us
- 2. Select "Meetings" and then "Schedule a Meeting."

ZOOM SOLUTIONS	PLANS & PRICING CONTACT SALES	SCH	HEDULE A MEETING JOIN A MEETING HOST A MEETING +
Profile	Meetings		Get Training
Meetings	Upcoming Previous Personal Room	Meeting Templates	
Webinars			2
Recordings	苗 Start Time to End Time		Schedule a Meeting
Settings			
Account Profile			
Reports		The user does not have any accorning meetings.	

- 3. Complete the form as follows:
 - a. Topic use the format RTP [DEPT NAME] [Promotion or Retention], example = RTP Biology Promotion
 - b. Optional description consider entering the names of those candidates that will be discussed or ensure you have a list somewhere of which candidates were discussed when so that you can tie it back to a particular meeting for attendance and poll reports.
 - c. Set date, time, duration, and time zone. Please note, it is not recommended to use "Recurring Meeting" as there is a 25 poll limit on meetings.
 - d. Do not require registration
 - e. Set Meeting ID to "Generate Automatically"
 - f. Check "Passcode"
 - g. Check "Waiting Room"
 - h. Notes on "Require authentication to join"
 - i. This requires attendees to 1. Have already created an APSU Zoom account and 2. Use that account to attend the meeting.
 - ii. Attendees do not know if a meeting requires this in advance. Host must inform them in advance.
 - iii. We have received reports of users having issues joining meetings with this feature.
 - i. Recommend Video Off for Host and Participants
 - j. Set Audio to Both
 - k. Do NOT "Allow participants to join anytime"
 - I. Check "Mute participants upon entry"
 - m. No breakout rooms
 - n. No recording
 - Alternative Hosts enter the email address of the chair/dean for the meeting. They must already have created their APSU Zoom account. Anyone you list as an Alternative Host will come into the meeting as a co-host if they log into their APSU Zoom account to attend.
- 4. Save

Торіс	RTP + Dept Name + Promotion or Retention	
Description (Optional)	Optional candidates' names listed here	9 000 000
When	01/06/2021 🗰 11:00 ~ AM ~	
Duration	1	
Time Zone	(GMT-6:00) Central Time (U ~	
	Recurring meeting	
Registration	Required	
Meeting ID	Generated ID 822 6572 0765 Personal Meeting ID 931 221 7259	
Security	Passcode 126739 Only users who have the invite link or passcode can join the meeting	
	Waiting Room Only users admitted by the host can join the meeting. Require authentication to join	
Video	Host On Onf Participant On On Off	
Audio	O Telephone O Computer Audio O Both Dial from United States of America Edit	
Meeting Options	Allow participants to join anytime	
	Mute participants upon entry	
	Breakout Room pre-assign	
	Automatically record meeting	
	Approve or block entry to users from specific regions/countries	
Alternative Hosts	deanchair_email_here@apsu.edu	
	Save Cancel	

Share the meeting information.

After saving, you will see the confirmed meeting information. From this page, you can:

- a. Use the "Add to Outlook Calendar" option to open an Outlook meeting appointment.
- b. Use "Copy Invitation" to copy the complete meeting information and paste it into an Outlook meeting invitation.

			Start this Meeting
Topic	RTP + Dept Name + F	Promotion or Retention	
Description	Optional candidates'	names listed here	
Time	Sep 2, 2020 11:00 AM	M Central Time (US and Canada)	
	Add to Outle	ook Calendar (.ics) Yahoo Calendar	
Meeting ID	989 8830 9934		
Security	 Passcode 	Show - Waiting Room	
Invite Link	https://apsu.zoom.us/]/98988309934?pwd=V0l4QXcxY0FWN2I3V29HQkVqSXk1QT09	Copy Invitation
Videa	Host	Off	
	Participant	Off	-
Audio	Telephone and Comp	uter Audio	

Set Up Polls

a. Scroll to the bottom of the page and select "Add"

neeung	setting Start this N	Edit this Meeting	is a Meeting Template	Delete this Meeting
Add	[You have not created any p
0	[You have not created any p

- b. Enter the candidate's name as the poll title so that you know which poll to launch during the meeting
- c. Check "Anonymous"
- d. Enter the question to be consistent with guidelines from Dr. Crosby. You must enter the candidate's name here as well for accurate poll reporting.

Do you recommend retention of NAME?

Do you recommend tenure for NAME?

Do you recommend promotion of NAME?

- e. Check "Single Choice"
- f. Enter "Yes" and "No" only as answer choices; be consistent with the order.
- g. Save

Ca	ndidate's Name		
C 🛛 A	nonymous? ⑦		
1.	Do you recommend retention of NAME?		
	Single Choice O Multiple Choice		
G	Yes		
	Answer 3 (Optional)		
	Answer 4 (Optional)		
	Answer 5 (Optional)		
	Answer 6 (Optional)		
	Answer 7 (Optional)		
	Answer 8 (Optional)		
	Answer 9 (Optional)		
	Answer 10 (Optional)		
		Delete	
	+ Add a Question		
		G	

h. You can select "Add" again to add additional polls to an individual meeting. There is a limit of 25 polls per meeting. This applies to recurring meetings as well, 25 polls across all recurrences.

u have created 1 poll for this meeting.			Add
Title	Total Questions	Anonymous	
Poll 1:Candidate's Name	1 question	Yes	Edit Delete

Host/Co-Host In-Meeting Controls

A complete resource for <u>host and co-host in-meeting controls</u> is available on the Zoom website. Below are special considerations for RTP meetings.

Special Notes:

- Since "Waiting Room" was enabled during meeting set up. Meeting participants will be filtered into the waiting room for your admittance. Use this time as a "staging area" to prepare the meeting before you allow in attendees. Anyone you listed as an Alternative Host will come into the meeting as a co-host as long as they are logged into their APSU Zoom account when joining the meeting.
- If you are new to waiting rooms, review this resource on Using Waiting Rooms.
- As soon as the meeting starts follow the steps below for "4. Chat" so that the attendees can only chat with the host/co-hosts.



1. Security

- a. Use the updated "Security" button to help manage your meeting security and participants' permissions. Please note, the meeting can be locked to keep people from joining. Please note, this will impact people that are supposed to be in the meeting as well including those that were in the meeting and were kicked out due to tech issues.
- b. Check "Share Screen" any time during the meeting if participants besides the host and co-hosts will need to share their screen



2. Participants

From the Participants list, you can see who is currently the host and who is a co-host. Hover over a participant's name and select "More" to open additional settings. This is where you can make the dean/chair the host with "Make Host" so that you can switch and un-switch for voting. The host or co-host can start a poll but only the attendees can respond to polls. Anyone that needs to vote cannot be listed as host or co-host. Make sure you check this before polling.

"Ask to Start Video" and "Rename" can both help make sure you know who is in your meeting

"Put in Waiting Room" can be used in cases where the committee wants to discuss without chair/dean in the room.

-	Participar	nts (2)			
Dis	tance Education (Host, r	ne)	× 1/2		
TA Tes	Attendee		More >	Chat	
		_	-	Ask to Start Video	
				Make Host	
				Make Co-Host	
				Rename	
				Put in Waiting Room	
				Remove	
				Report	

3. Polls

The host and co-hosts can launch polls but only attendees can vote so a non-voter like the dean or chair needs to be made the host during voting. The **host must** be logged into their APSU Zoom account **and** use the Zoom desktop app to see the Poll button and launch the polls. Attendees that join from their browser can now participate in polling; however, it is recommended that they still join with the Zoom desktop or mobile app and use their APSU Zoom account for the best overall experience.

In case of the attendance of a non-voting department representative on the college committee, the presiding officer of the college committee should place the non-voting department representative in a waiting room (so they cannot vote) prior to making the dean the meeting host.

To launch a poll:

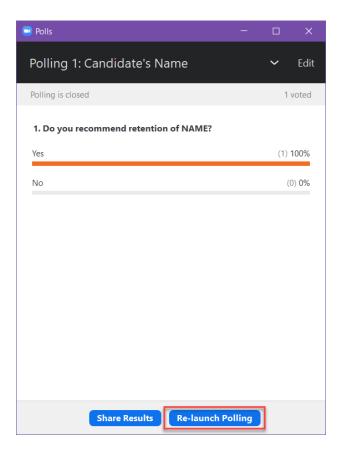
- a. Select the Polls button on the Zoom menu bar
- b. Use the down arrow button to open a list of available polls and select one. Select "Launch Polling"

Polls.	-	П	×
Polling 1: Candidate's Name		~	Edit
 Polling 1: Candidate's Name Polling 2: secondone 			
U Yes			
O No			
Launch Polling			

c. The poll will be sent out to the meeting attendees and the green bar and text denotes this as well as how long the poll has been open and how many people have voted. As votes come in, the votes will tally. This information is only viewable to the host/co-hosts at this time. Select "End Polling" once everyone has voted.

Polls	-		×
Candidate's Name in Progress		0:	48
Attendees are now viewing questions	1 of 1	(100%) vo	ted
1. Do you recommend retention of NAME?			
Yes		(1) 1	00%
No		(0)	0%
End Polling			

d. If there was an issue, the host can "Re-launch Polling." This will re-launch the poll and automatically and permanently delete the previous poll results.



e. After the poll is over, the current host (the non-voting dean/chair) will NOT share the poll results. Instead, the current host will use the Participants list to make the presiding officer the host again. Select the Participants button, locate the presiding officer's name in the participants list, hover over the name and select "More," and then select "Make Host." See "2. Participants" above for images.

At the college committee, the presiding officer should admit the non-voting department representative from the waiting room.

- f. Once the presiding officer is the host again, select the Polls button to access the results.
- g. After reviewing the results, they can X-out of the poll, "Share Results" to the attendees, or "Re-Launch Polling."
 - a. Refer to guidance from Dr. Crosby on when it would not be appropriate to share the Zoom poll results i.e. if there were proxy votes.
 - b. The presiding officer should not re-launch the poll since as the host they will not be able to vote.

You may consider taking a screen shot of the results. There is a poll report, see Reports below; but, it may be beneficial to have a back up. Ensure there are no faces/names/etc. in any images.

😑 Polls —	
Polling 1: Candidate's Name	✓ Edit
Polling is closed	1 voted
1. Do you recommend retention of NAME?	
Yes	(1) 100%
No	(0) 0%
Share Results Re-launch Polling	

h. If you Share Results, the green bar and text denotes that you are sharing. Select "Stop Share Results" when done.

📼 Polls	-		×
Sharing Poll Results			
Attendees are now viewing the poll n	esults		
1. Do you recommend retention of NAME?			_
Yes		(1) 1	00%
No		(0) 0%
Stop Share Results Re-launch	Polling		

4. Chat

You will need to disable chat so that the attendees can not have discussions outside the main verbal meeting discussion.

a. Open Chat and then select the ellipses button (...).

To: Everyone 🗸	🗅 File \cdots
Type message here.	

b. Then select, "Host Only."



Reports

After the meeting, the host that scheduled the meeting can access reports on the meeting.

Attendance Report

- 1. Log into APSU Zoom at https://apsu.zoom.us
- 2. Select "Reports" and then "Usage"

zoom	SOLUTIONS -	PLANS & PRICING	CONTACT SALES	SCHEDULE A MEETING	JOIN A MEETIN
Profile		Usage	e Reports		
Meetings		_			
Webinars		U	sage		
Recordings		Vi	ew meetings, participants and	meeting minutes within a specified time	range.
Settings		M	leeting		
Account Profile			ew registration reports and po	Il reports for meetings,	
Reports					

3. Use the search feature if necessary to find the meeting, then select the number in the Participants column for the meeting in question.

rom: 09/01/2020 🛅 7	o: 09/02	2/2020		Search								
laximum report duration: 1 Month	1											
he report displays information for	meetings th	nat ended at l	east 15 minutes ago.									
Export as CSV File											Toggle co	umns
Торіс	Meeting ID	User Name	User Email	Department	Group	Has Zoom Rooms?	Creation Time	Start Time	End Time	Duration (Minutes)	Participant	s Source
	985	Dictorea	coline@cocu ad	Distance			08/06/202	0 09/01/202	0 09/01/202	0	_	
Zoom Security Review Training		Distance Education	online@apsu.ed u	Distance Education		No	08/06/202 10:07:27 AM	009/01/202 10:45:23 AM	0 09/01/202 12:00:38 PM	0 76	11	Zoom

4. Here you can review the report or "Export" it.

			-
ita			Export
			L
User Email	Join Time	Leave Time	Duration (Minutes)
online@apsu.edu	09/01/2020 11:24:40 PM	09/02/2020 12:10:44 AM	47
	09/01/2020 11:42:35 PM	09/01/2020 11:44:03 PM	2
/lus)	09/01/2020 11:44:03 PM	09/02/2020 12:10:43 AM	27
	User Email online@apsu.edu	User Email Join Time online@apsu.edu 09/01/2020 11:24:40 PM 09/01/2020 11:42:35 PM	User Email Join Time Leave Time online@apsu.edu 09/01/2020 11:24:40 PM 09/02/2020 12:10:44 AM 09/01/2020 11:42:35 PM 09/01/2020 11:44:03 PM

5. Then you can open the report in Excel.

me Leave Time [
Leave mile	Duration (Minutes)
2020 10:08 3/13/2020 10:12 5	i
2020 10:11 3/13/2020 10:12 2	<u> </u>
-	3/2020 10:08 3/13/2020 10:12 5 3/2020 10:11 3/13/2020 10:12 2

Poll Report

- 1. Log into APSU Zoom at <u>https://apsu.zoom.us</u>
- 2. Select "Reports"
- 3. Select "Meeting"

PLANS & PRICING CONTACT SALES	SCHEDULE A MEETING JOIN A MEET
Usage Reports	
Usage	
View meetings, participants and m	eeting minutes within a specified time range.
Meeting	i
View registration reports and poll r	eports for meetings.
	Usage Reports Usage View meetings, participants and me Meeting

- 4. Check the bubble next to "Poll Report."
- 5. Adjust the date range as needed. You must select "Search" after selecting "Poll Report" even if you do not adjust the date range.
- 6. Select "Generate" next to the appropriate meeting

Repor	rt Type	Registration Report	4 Il Report			
Searc	th by time range - Fre	om: 08/31/2020	To: 09/02/2020 🔤 Search 5			
	Ma	iximum report duration: 1 Mo	nth			
a	Scheduled Time	Start Time	Торіс	Meeting ID	Attendees	
		09/01/2020 11:24:40 PM	Distance Education's Personal Meeting Room	931 221 6625	2	Generate
0		08/31/2020 09:44:20 PM	Distance Education's Personal Meeting Room	931 221 6625	3	Generate
a	08/31/2020 01:00:00 PM	08/31/2020 01:29:43 PM	RTP Test	964 3476 7875	2	6 Generate
		08/31/2020 01:17:40 PM	Distance Education's Personal Meeting Room	931 221 6625	2	Generate
	08/31/2020 01:00:00 PM	08/31/2020 12:47:43 PM	RTP Test	964 3476 7875	9	Generate

7. After the report processes, select "Download"

	-	_				
Include reports	s that failed to generate	results				
Report Type	Scheduled Time	Start Time	Торіс	Meeting ID	Generate Time	
Poll Report	Aug 31, 2020 01:00:00 PM	Aug 31, 2020 01:29:43 PM	RTP Test	964 3476 7875	Sep 2, 2020 12:19:59 AM	Download
Poll Report	Aug 31, 2020 01:00:00 PM	Aug 31, 2020 12:47:43 PM	RTP Test	964 3476 7875	Aug 31, 2020 01:13:04 PM	Download
Poll Report	Aug 31, 2020 01:00:00 PM	Aug 31, 2020 12:47:43 PM	RTP Test	964 3476 7875	Aug 31, 2020 01:10:39 PM	Download
Poll Report		Aug 26, 2020 03:36:04 PM	Distance Education's Personal Meeting Room	931 221 6625	Aug 26, 2020 03:48:31 PM	Download
Poll Report		Aug 26, 2020 03:36:04 PM	Distance Education's Personal Meeting Room	931 221 6625	Aug 26, 2020 03:47:27 PM	Download

8. Then you can open the report in Excel

#	User Name	User Email	Submitted Date/Time		
	1 Anonymous	Anonymous	8/31/2020 13:04	Do you recommend tenure for NAME?	Yes
	2 Anonymous	Anonymous	8/31/2020 13:04	Do you recommend tenure for NAME?	No

End of Training Guide

Back to RTP Website