



U.S. Department of Homeland Security
United States Coast Guard Auxiliary



Six Steps to Setting up your Virtual Platform



Zoom Platform

May 31, 2020

Updated February 14, 2021

Updated March 28, 2021





Why?





Opportunity

- **The world is undergoing a crash course in digital.**
- **Great opportunity for us in the Auxiliary to learn and grow**
- **And the strength of the USCG and the Auxiliary is that in fact we operate experientially, we learn by doing, by trial and error**
- **One of the take-aways from videoconferencing is that it is a tool which will have uses after the pandemic passes**
- **So, why not take advantage of it now and develop it as a teaching, training, operating, communications tool?**





Prerequisites

- **To participate, you will need a device with a working webcam and microphone**
- **Either a desktop, laptop or tablet is preferred**
- **While mobile phones work, they may be too small to effectively participate in these virtual classes**





Six Steps

- | | |
|----------------------------------|------------|
| 1. Select Plan | 5 minutes |
| 2. Set Up Settings | 15 minutes |
| a. Profile | |
| b. Personal | |
| c. Administrative | |
| 3. Schedule Meeting | 10 minutes |
| 4. Send out invitations | 5 minutes |
| 5. Familiarize/Practice Controls | 15 minutes |
| 6. Create Reports | 15 minutes |





1. Select Plan – Pro Version is recommended for meetings, training and PE classes

BASIC

Personal Meeting

Free

[Sign Up, It's Free](#)

- Host up to 100 participants
- Group meetings for up to 40 minutes
- Unlimited one-on-one Meetings

PRO

Great for Small Teams

\$149.90 /year/license

[Buy Now](#)

- Host up to 100 participants
- Increase participants up to 1,000 with [Large Meetings](#) add-on
- Group meetings for up to 30 hours
- Social Media Streaming
- 1 GB Cloud Recording (per license)

\$30 SAVINGS

BUSINESS

Small & Med Businesses

\$199.90 /year/license

[Buy Now](#)

- Host up to 300 participants
- Increase participants up to 1,000 with [Large Meetings](#) add-on
- Single Sign-On
- Recording Transcripts
- Managed Domains
- Company Branding
- All features included in Pro and more

\$400 SAVINGS



Zoom Pricing
<https://zoom.us/pricing>



2. Settings – a. Personal Profile

The screenshot shows a settings interface with a left-hand navigation menu and a main content area. The navigation menu is divided into two sections: "PERSONAL" and "ADMIN". Under "PERSONAL", the "Profile" option is highlighted in blue. Other options include "Meetings", "Webinars", "Recordings", and "Settings". Under "ADMIN", there are four expandable options: "User Management", "Room Management", "Account Management", and "Advanced".

The main content area is titled "Calendar and Contact Integration". It contains a paragraph explaining that users can integrate with 3rd party services like Google, Outlook, or Exchange. Below this, there is a list of integrated accounts, with one example shown: "hortensiaes@gmail.com" with "Reauthorize" and "Delete" links. At the bottom, there are two toggle switches: "Allow Zoom to get calendar event" (which is turned on) and "Allow Zoom to sync contacts" (which is turned off).

PERSONAL

- Profile**
- Meetings
- Webinars
- Recordings
- Settings

ADMIN

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

Calendar and Contact Integration

You can integrate with 3rd party services or apps, such as Google, Outlook or Exchange, to sync the calendar and contacts.

hortensiaes@gmail.com [Reauthorize](#) [Delete](#)

Allow Zoom to get calendar event

Allow Zoom to sync contacts





2. Settings - b. Personal Settings



PERSONAL

Profile

Meetings

Webinars

Recordings

Settings

ADMIN

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

Meeting

Recording

Telephone

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](#) ⓘ





2. Settings - c. Account Settings



ADMIN

- > User Management
- > Room Management
- ▼ Account Management

Account Profile

Account Settings

Billing

Recording Management

IM Management

Reports

- > Advanced

Meeting Recording Telephone

Schedule Meeting

Host video

Start meetings with host video on



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3. Schedule Meeting

PERSONAL

Profile

Meetings

Webinars

Recordings

Settings

ADMIN

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

[My Meetings](#) > Schedule a Meeting

Schedule a Meeting

Topic

Description (Optional)

When

Duration hr min

Time Zone

Recurring meeting

Registration Required

Meeting ID Generate Automatically Personal Meeting ID 913 067 0141

Meeting Password Require meeting password





4. Send out invitations

My Meetings > Manage "Flotilla 67 June 2020 Business Meeting"

Start this Meeting

Topic: Flotilla 67 June 2020 Business Meeting

Time: Jun 3, 2020 07:00 PM Eastern Time (US and Canada)

Add to: [Google Calendar](#) [Outlook Calendar \(.ics\)](#) [Yahoo Calendar](#)

Meeting ID: 892 3130 9021

Meeting Password: ***** [Show](#)

Invite Link: <https://us02web.zoom.us/j/89231309021?pwd=T2wzeHJY3RCRlBjWkhkK2xkK2l1QT09> [Copy Invitation](#)

Video: Host Off
Participant Off

Audio: Telephone and Computer Audio

2020 DIV6 VIRTUAL BOAT CREW TRAINING

Saturday, May 16 - 7:00 - 9:00pm
Weekly on Saturday, until Jun 14, 2020

<https://us02web.zoom.us/j/81817852353?pwd=WXL...>

47 guests
13 yes, 2 no, 32 awaiting

Review session - Kindly click reply Yes/No/Maybe to confirm/decline your space and help our security. Please join meeting 15 minutes in advance. Click on hyperlink and follow prompts. Select computer audio and video; run test.

Join Zoom Meeting

<https://us02web.zoom.us/j/81817852353?pwd=WXIKdHBHTzREYzZqajE3cG9QZnh5QT09>

Meeting ID: 818 1785 2353

Password: 488673





5. Familiarize/Practice Controls

Screen: Full, Gallery, Speaker

Meeting Topic: 2020 DIV6 VIRTUAL BOAT CREW TRAINING
Host: Hortensia Sampedro
Password: 488673
Invite Link: <https://us02web.zoom.us/j/81817852353?pwd=WXlKdHBHTzREYzZqajE3c09QZnh5QT09>
Participant ID: 192697

Join Audio
Share Screen
Invite Others

Mute Start Video Security Participants Chat Share Screen Polling Record Breakout Rooms End

Participants (2)

Hortensia Sampedro (Host, me)

Dewey Jackson (Guest) Mute More

- Stop Video
- Make Host
- Make Co-Host
- Rename
- Put in Waiting Room
- Remove

yes no go slower go faster more clear all

Invite Mute All Unmute All More

Chat





6. Create Reports



ADMIN

> User Management

> Room Management

▼ Account Management

Account Profile

Account Settings

Billing

Recording Management

IM Management

Reports

> Advanced

Meeting Participants

Export with meeting data

Show unique users

Name (Original Name)	User Email	Total Duration (Minutes)
Meeting ID : 853 9527 3869 Topic : 2020 DIV6 VIRTUAL BOAT... User Email : Hortensiaes@gmail.com Duration (Minutes) : 181 Start Time : 04/29/2020 06:47:22 PM End Time : 04/29/2020 09:48:12 PM Participants : 27		
Hortensia Sampedro	Hortensiaes@gmail.com	181
Flotilla 65	uscgauxd7.flotilla65@gmail...	181
Sandy Beach	sandy.seaglass@aol.com	181
Francisco		181
BARRY LONAS		180
Tomas		72
Sandy Beach	flygirlphoto@aol.com	3
Trish & Ralph		176
P. Iván R. Buxeda		94
Miguel Minervini		174





Additional Create Reports



ADMIN

> User Management

> Room Management

▼ Account Management

Account Profile

Account Settings

Billing

Recording Management

IM Management

Reports

> Advanced

[Reports](#) > [Usage Reports](#) > Active Hosts

[Document](#)

From: To: [Search](#)

Maximum report duration: 1 Month

The report displays information for meetings that ended at least 30 minutes ago.

[By Meetings](#) [By Users](#) [Report Queue](#)

[Export as CSV File](#) [Generate details report](#)

[Toggle columns](#)

Topic	Meeting ID	User Name	User Email	Department	Group	Has Zoom Rooms?	Creation Time	Start Time	End Time	Duration (Minutes)	Participants	Source
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APPENDIX

- **2. Suggested Personal Settings**
- **3. Suggested Account Settings**
- **6. Additional Create Reports**
- **CGAUX Training**
- **Zoom Self-Study**
- **Thank you!**





2. Suggested Personal Settings

Personal Settings that I use:

- Start with defaults
- Telephone and Computer Audio
- Require Password
- Embed Password
- Require encryption
- Chat – prevent participants from saving chat
- Feedback and Survey
- Co-host & Polling
- Show control bar
- Show Zoom windows during screen share
- Screen sharing
- Annotation & Whiteboard





2. Suggested Personal Settings

- Continued Personal Settings • Email notifications – all
- Non-verbal feedback
 - Report to Zoom
 - Breakout room
 - Virtual background
 - Identify guest participants
 - Waiting room
 - Join from browser link





2. Suggested Account Settings

Admin Settings that I use:

- **Start with defaults**
- **Require a password**
- **Embed password for one-click**
- **Calendar and Contact Integration**
- **Chat**
- **Feedback and Survey**
- **Co-host**
- **Polling**
- **Screen sharing**
- **Annotation & Whiteboard**
- **Remote control**
- **Non-verbal feedback**
- **Rename**
- **Report to Zoom**





2. Suggested Account Settings

Continued Admin Settings:

- **Breakout Room**
- **Virtual background**
- **Identify Guest participants**
- **Waiting Room**
- **Email notifications**
 - **Admin option use default content delivery network (CDN)**
 - **Allow users to contact Zoom's support via Chat**
- **- all**





CGAUX Virtual PE Classes Training

- To schedule individual training classes, group training
- Resource for questions, practice, troubleshooting
- [Hortensia Sampedro](#), DVC-Electronic Media (305) 742-8221
- To receive updates on training and resources, sign up to receive the E-Directorate Blog at: cgauxboatingclasses.org



Feedback and observations welcome



Zoom Self-study

- [Zoom Help Center](#)
- [Video Tutorials](#)
- [Attend Live Training](#)





Thank You

If any questions, contact [Hortensia Sampedro](#),
DVC-Electronic Media (305) 742-8221

To receive updates on training and resources,
sign up to receive the E-Directorate Blog at:
cgauxboatingclasses.org

You may email the E-Directorate at
pe.feedback@cgauxnet.us

