Six Steps to Setting up your Virtual Platform
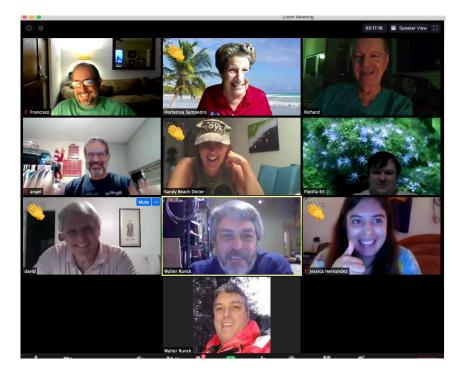
Zoom Platform

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 $30 SAVINGS

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)

BUSINESS $400 SAVINGS

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

Zoom Pricing
 https://zoom.us/pricing

2. Settings – a. Personal Profile

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

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3. Schedule Meeting

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=T2wzeHJjY3RCRlBlWXhtK2xuK21IQT09 Copy Invitation
Video	Host Off
	Participant Off
Audio	Telephone and Computer Audio
	Dial from

🔴 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.
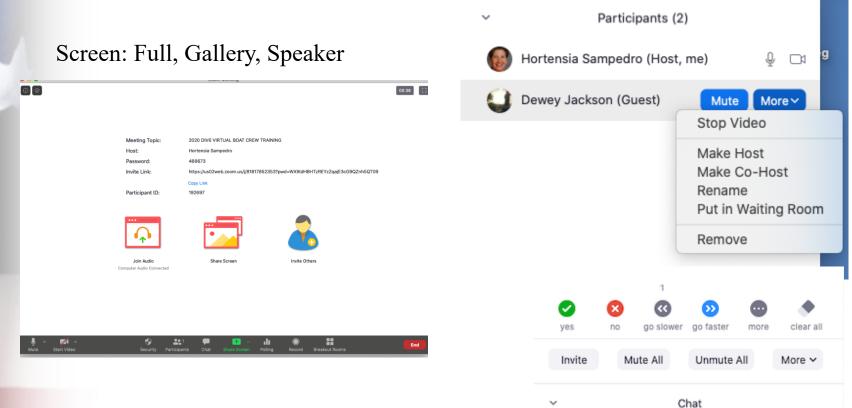Select computer audio and video; run test.

Join Zoom Meeting
https://us02web.zoom.us/j/81817852353?
pwd=WXlKdHBHTzREYzZqajE3cG9QZnh5QT09

Meeting ID: 818 1785 2353
Password: 488673

5. Familiarize/Practice Controls

Screen: Full, Gallery, Speaker

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

Meeting ID : 853 9527 3869 Duration (Minutes) : 181 Participants : 27	Topic : 2020 DIV6 VIRTUAL BOAT... Start Time : 04/29/2020 06:47:22 PM	User Email : Hortensiaes@gmail.com End Time : 04/29/2020 09:48:12 PM

Name (Original Name)	User Email	Total Duration (Minutes)
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

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

- **Non-verbal feedback**
- **Report to Zoom**
- **Breakout room**
- **Virtual background**
- **Identify guest participants**
- **Waiting room**
- **Join from browser link**

- **Email notifications – all**

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 – all**

- **Admin option use default content delivery network (CDN)**
- **Allow users to contact Zoom's support via Chat**

CGAUX Virtual PE Classes Training

- To schedule individual training classes, group training

- Resource for questions, practice, trouble-shooting

- 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