CBE Zoom Webinar Guide

Not sure if you need a Zoom Webinar or Zoom Meeting? [See this flowchart.](#)
UW-IT has made UW Zoom Pro free to all current students, faculty and staff. Anyone in this category can host meetings of unlimited duration for conducting UW business, with up to 300 meeting participants. If you need to use Zoom Webinar, please contact Erika Harris or Josh Polanski. See [UW Zoom FAQ here.](#)

Roles

- **Managing roles**
  - **Host**
    - The **host** is the internal manager of the webinar who is responsible for setting up the webinar event, ensuring that all settings are appropriate for the event, and providing support for event participants. Zoom assigns its *Host* role to the individual who schedules the webinar, and there is only one *Host* per event. In CBE, webinar hosting is enabled on the Zoom accounts of Erika Harris, Joshua Polansky, and the shared NetIDs cbezoom1 and cbezoom2. The **host** also must assign at least one **co-host**, who will probably be the **discussant**, the **Q&A monitor**, or someone else from the CBE entity hosting the webinar. The **host** may optionally designate an ***Alternative Host*** who has permission to start and end the event. (If someone is designated as an Alternative Host, they can not be changed to an attendee. Otherwise, the Host has the ability to change people's roles as a panelist, co-host, host, or attendee.)
  - **Discussant** (Listed as co-host or panelist in Zoom settings)
    - The **discussant** is the public-facing manager of the webinar who welcomes attendees, introduces the event and the panelists, lays out ground rules for participation, keeps time, and closes the event. The **discussant** may also serve as **Q&A monitor** for smaller webinars and contribute as a **panelist**. The **discussant** should establish a system of off-broadcast communication with those playing supporting or background roles in the webinar production; the **discussant** will follow both the on-screen conversation among panelists and respond off-screen to messages from production staff.
  - **Panelists** (Listed as panelist in Zoom settings)
    - **Panelists** are those webinar participants who contribute the main substance of the event, often in the format of timed presentations and/or structured discussions managed by the **discussant**. **Panelists** generally do not concern themselves with technical aspects of the production, and focus solely on the conversation that progresses on-screen for the benefit of the webinar attendees. Production staff

will generally refrain from communicating with **panelists** during a webinar unless the panelist is the only individual who can perform a required task, such as adjusting a poor camera angle. The panelist should NOT register as an attendee. They should use the panelist email they get from the Host.

- ○ **Q&A Monitor** (Listed as co-host or panelist in Zoom settings)
  - ■ For events with time dedicated to question and answer periods, the **Q&A monitor** is responsible for reviewing questions submitted by **attendees** through the webinar's Q&A function. The **Q&A monitor** may be tasked with selecting the questions that the **discussant** will read to **panelists**. Once the question has been answered either the Q&A monitor or the discussant should mark the question as answered to remove it from the list. The Q&A monitor should NOT register as an attendee. They should use the panelist/co-host email they get from the Host. (This is not an official role in Zoom webinars, but important for the conversation roles. This person could be listed as a panelist or a co-host in Zoom settings.)
- ● **Attendees**
  - ○ **Attendees** observe the webinar and may ask questions of participants during the question and answer period. They are not empowered to activate video or microphone options, but they may participate in Chat, Poll, and Q&A elements if the *Host* or *co-host* has activated any of these features. The *Host* or *co-host* may elevate an **attendee** to the role of **panelist** to allow greater interaction. Once upgraded to **panelist**, an individual who entered the webinar as **attendee** may participate with video and microphone functions. During the transition from attendee to panelist, the attendee loses the video feed briefly. If you want to have an attendee speak briefly and not have them lose connection, the Host can manually turn an attendee's microphone on for them to have the ability to talk. The Host is responsible for turning the attendee's microphones on and off. The attendee's video cannot be enabled unless they are promoted to a panelist. The *Host* and *co-host* may demote the **panelist** to **attendee** status at their discretion. They may also remove an **attendee** from the webinar at their discretion. Attendees cannot see who else is an attendee until they post something in Q&A or Chat (if those features are enabled) that allows everyone to see their name.

Webinar instructions

Day before webinar

- ● **Host** confirms that all panelists have been added
  - ○ **Host** makes sure to have email addresses for the discussant, panelists, and Q&A monitor so they can be added as needed during the webinar

15 minutes before webinar start time

- **Host** opens the webinar (You are in practice session mode and only Panelists/Co-Hosts/Hosts can enter the Zoom room. Do NOT click broadcast yet.)
- **Discussant**, **panelists**, and **Q&A monitor** join
- **Host** confirms Q&A settings
    - Open Q&A and click settings icon in upper right corner
    - Recommended settings:
        - Uncheck *allow anonymous questions*
        - Check *all questions*
        - Check *attendees can upvote*
        - Check *attendees can comment*
- **Host** confirms chat settings
    - Open chat and click the three dots
    - Recommended settings:
        - Check *all panelists*
- **Host** confirms participant settings
    - Open participants window, click three dots at right bottom of panel
    - Recommended settings:
        - Check *mute panelists on entry*
        - Check *allow panelists to mute themselves*
        - Uncheck *play enter/exit chime*
        - Uncheck *lock webinar*
        - Check *allow panelists to start video*
        - Uncheck *raise hand*
        - Check *view the participant count*
        - Check *follow host view*
- **Host** confirms video setting
    - Next to video arrow, select video settings
    - Recommended settings:
        - Check *hide non-video participants (This means that any panelist/co-host/host with their video turned off will not be visible to attendees.)*
- If desired, **host** changes name to appropriate department/lab/center or hashtag
- **All participants** may change their display names at this point
- **Discussant** reminds all participants of their roles
- **Host** confirms who has their video and microphones on/off
    - Panelists and discussant should have their video and microphones on, and everyone else should have their video off and microphones muted
- **Host** tests speakers, microphones, and screen sharing for any participants planning to use that function
- **Discussant** reminds all participants of time limits for presentations and Q&A

Five minutes before webinar start time

- **Host** mutes all panelists, turns off video for host and Q&A monitor
- **Host asks all production staff to turn off their video. Then, from the three-dot menu, the Host hides non-video participants.**
- **Host** shares screen with message welcoming attendees to the event
- **Host** broadcasts the webinar (Now attendees will start entering the room. Anything that is said or shown through video is visible to attendees.)
- **Host** ensures that the recording starts or, if recording does not start, manually records the session

One minute before webinar start time

- **Discussant** welcomes attendees and informs them that the webinar will begin shortly

Webinar begins

- **Discussant** welcomes attendees to the webinar:
  - "Welcome to [event name]. Before we get started with our panel introductions and discussion, I want to invite our audience to submit questions to our panelists through the Q&A function. If you have technical issues, please send a message to our Zoom support person, [name of host], through the chat function. We also encourage you to share this event with others. You can tweet about the event using the hashtag [hashtag]. This event is being recorded and can be viewed after we wrap up at [website or YouTube channel]."
- **Host** sends the following message to all panelists and attendees through the chat function:
  - "Please direct all technical questions (connection, audio, video) to me in this chat box. For questions and comments directed to panelists, please use the Q&A function. We will try to address as many questions as possible."
  - Reminder that the chat function is similar to Zoom meetings in that if you log on later, the messages that were previously sent are not visible. Therefore you may need to repost messages or have reminders for late comers.
- **Q&A monitor** reviews questions and communicates with the **discussant** through the chat function to decide on which questions to ask the panelists
- **Host** responds to technical questions in the chat box, removes attendees if necessary, and provides other technical support as needed

After panelists' presentations

- **Discussant** transitions to the question and answer period and asks questions selected from the Q&A function

Five minutes before end of webinar

- **Host** sends a message to panelists only in the chat box reminding them that the event will wrap up in five minutes
- **Discussant** announces the final question or questions

End of the webinar

Discussant closes the webinar and announces where the recording will be posted. The recording is found in the zoom settings of the account that set up webinar. Therefore, the Zoom accounts of Erika Harris, Joshua Polansky, and the shared NetIDs cbezoom1 and cbezoom2 will be the only way to get the recording. Please contact them to get the recording for your use.

Multi-day webinars
If you are planning to have a multi-day webinar, you will need to have the Host set up a recurring webinar. If the webinar is at the same time each week, please set that time in the webinar for people to access. If the webinar is at varied times, consider using non-scheduled webinars. (Note - nonscheduled webinars will not send out reminders to attendees before the webinar.)
You will need to send the Host a list of the panelists' emails for each webinar to allow that person to remove prior panelists and add new panelists. Once someone isn't listed as a panelist, they are able to register as an attendee to attend future/prior sessions.