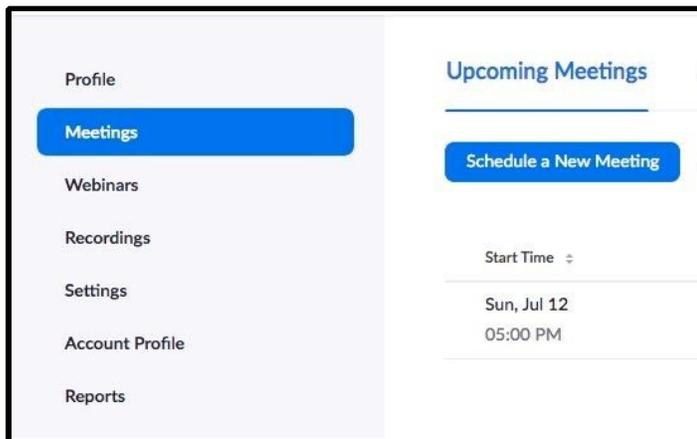


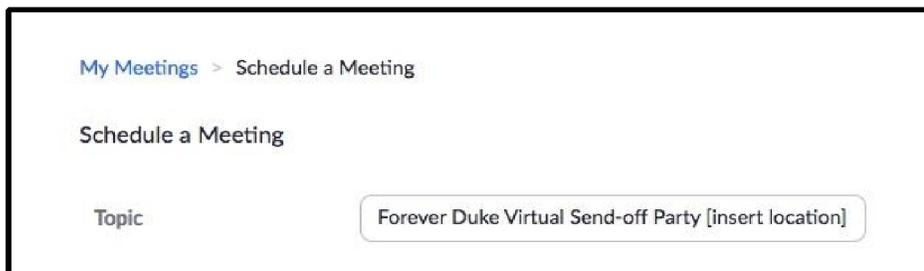
SOP Zoom Set-up Guide

The Basics

1. Use Net ID to log-in to <https://duke.zoom.us/>
2. Under the **Meetings** tab, find and click the blue **Schedule a New Meeting** button



3. Beside **Topic**, enter **Forever Duke Virtual Send-off Party [insert location]** as the title of your event



** Example: Forever Duke Virtual Send-off Party Canada, Forever Duke Virtual Send-off Party Wilmington

** Topics do not have character count limits so titles should be uniform if possible

4. Beside **Description**, enter the following event description:

“Please join Duke Alumni Affairs for a celebratory evening dedicated to welcoming incoming undergraduates and their parents from [insert region] to the Duke family. Featuring live, virtual experiences, this unique event is the perfect opportunity for members of the Class of 2024 and their parents to meet and mingle with the local Duke community, including other Duke students, Duke parents and even Duke alumni.”

Description (Optional)	Please join Duke Alumni Affairs for a celebratory evening dedicated to welcoming incoming undergraduates and their parents from [insert region] to the Duke family. Featuring live, virtual experiences, this unique event is the perfect opportunity for members of the Class of 2024 and their parents to meet and mingle with the local Duke community, including other Duke students, Duke parents and even Duke alumni.
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5. Select the appropriate **date, time, duration, and time zone**

When	07/12/2020		5:00	PM
Duration	1	hr	0	min
Time Zone	(GMT-4:00) Eastern Time (US and Canada)			
<input type="checkbox"/> Recurring meeting				

6. Ensure that **Registration** for the event is not **Required**

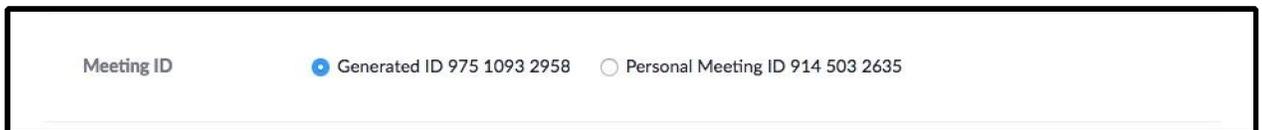


Registration Required

** Registration for send-off parties will be managed using Cvent not Zoom

** If for some reason there is a check mark located next to Required, click inside the box to remove it.

7. Ensure that the **Meeting ID** is randomly generated



Meeting ID Generated ID 975 1093 2958 Personal Meeting ID 914 503 2635

** For security reasons, your Personal ID should not be used for SOP events.

8. Check the box to **Require a meeting password**



Meeting Password Require meeting password

** A password prevents unwanted guests, also known as “zoom bombers,” from stumbling upon these events. The good news is, passwords are encrypted into Zoom links so checking this box does not add an extra step for attendees joining the event by clicking the link. Attendees who do not use the zoom link to join will be required to manually enter the password. However, this should not be an issue since we are turning off the phone option for these events (*note: for more information about audio preferences, see step #10*).

9. Ensure that **video** is turned **on** for both the host and participants

A screenshot of the Zoom settings interface. It shows three rows of settings: 'Video', 'Host', and 'Participant'. Each row has a label on the left and a radio button control on the right. The 'Video' row has a radio button labeled 'on' which is selected (filled with blue) and a radio button labeled 'off' which is unselected. The 'Host' row has a radio button labeled 'on' which is selected and a radio button labeled 'off' which is unselected. The 'Participant' row has a radio button labeled 'on' which is selected and a radio button labeled 'off' which is unselected.

** This is the default setting and thus, should not require a change for most RDs

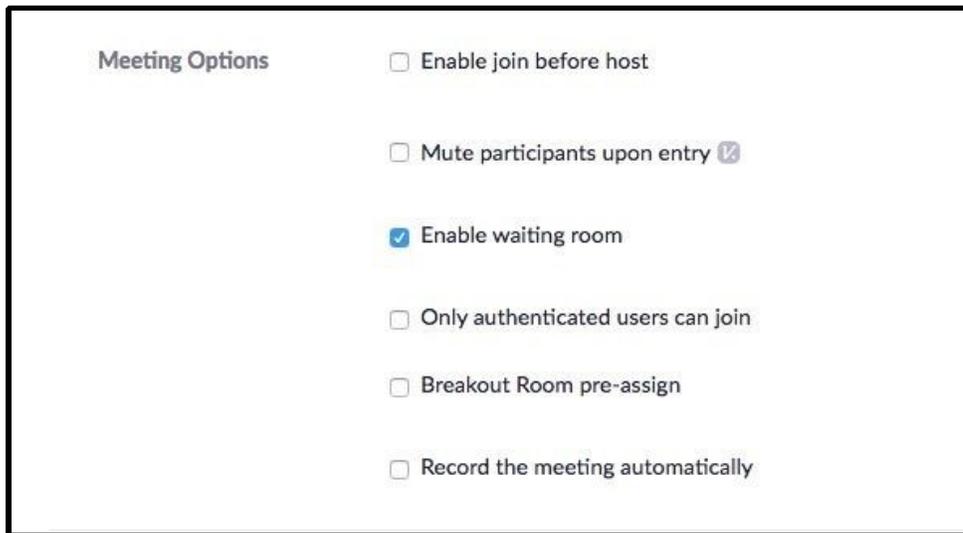
10. Change **Audio** preferences from both Telephone and Computer Audio to **Computer Audio only**

A screenshot of the Zoom Audio settings interface. It shows a label 'Audio' on the left and four radio button options on the right: 'Telephone', 'Computer Audio', 'Telephone and Computer Audio', and '3rd Party Audio'. The 'Computer Audio' option is selected, indicated by a blue dot inside the radio button.

** Attendees will still be able to attend using the Zoom application on their phone, but will not be able to dial-in via telephone. The purpose of this is to ensure that staff can quickly and easily identify which attendees are students and place them in the breakout room.

** Note: **Telephone and Computer Audio** is the default option so be sure to make the change to **Computer Audio only** when setting up Send-off parties

11. Under **Meeting Options**, check the box to **Enable waiting room**; leave all other boxes blank

A screenshot of the Zoom Meeting Options panel. The title "Meeting Options" is on the left. To its right are six settings, each with a checkbox:

- Enable join before host
- Mute participants upon entry 
- Enable waiting room
- Only authenticated users can join
- Breakout Room pre-assign
- Record the meeting automatically

12. Add secondary staff member as the **alternative host** by entering their NetID email

A screenshot of the Zoom Alternative Hosts panel. The title "Alternative Hosts" is on the left. To its right is a text input field containing the email address "weist001@duke.edu".

** It is important to enter the staff member's netID@duke.edu email **NOT** their firstname.lastname@duke.edu alias email.

** Note: this does **NOT** make the staff member a co-host (that must be done once the Zoom has begun). As long as the host is on the Zoom, this person has no power (unless they are also made a co-host). The purpose of an alternative host is to take over and become the default host in the event that the host is unable to start or control the meeting for some unforeseen reason or circumstance. Think of this as an insurance policy against bad WiFi connections, unexpected computer trouble, or other elements beyond your control, such as the power going out

13. Click **Save** to schedule the meeting and confirm all changes to preferences



Next Steps

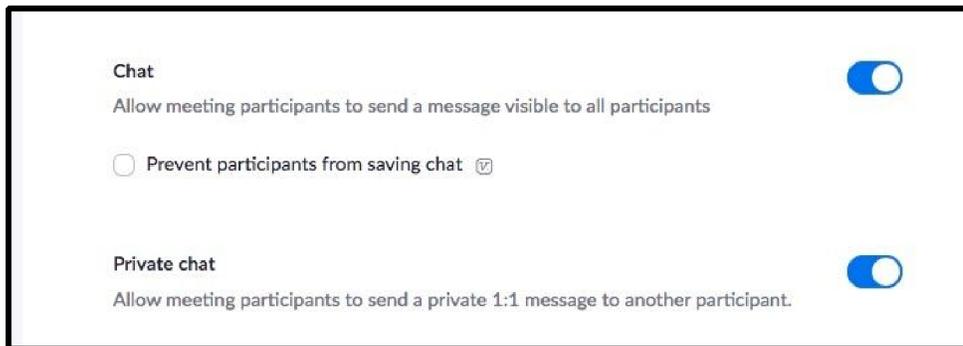
In order for all send-off parties to run smoothly and efficiently, it is essential to “turn on” or enable a handful of other in-meeting settings such as chat (1), co-host (2), screen sharing (3), participant renaming (4), breakout room (5), and waiting room (6) on your duke.zoom.edu profile.

Before moving on, it’s important to point out that unlike the settings discussed above, all of the settings covered in the second part of this manual are **not** event-specific. This means that once they are enabled, these settings will be applied to **all** meetings/events scheduled by the account user.

First, let’s start with the *Basic In-Meeting Settings*:

1. Chat

Under the **Settings** tab and **Meetings** header, ensure that both the **Chat** and **Private Chat** functions are enabled.

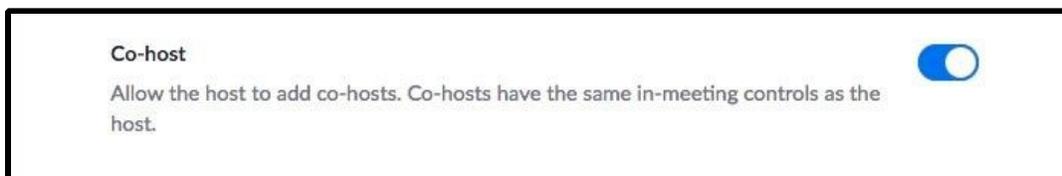


Send-off parties are all about making connections, so we want attendees to be able to connect in every possible way during these events!

** If for some reason the chat function is disabled, this can be changed by clicking on the grey button located on the right-hand side of the screen.

2. Co-host

Under the **Settings** tab and **Meetings** header, ensure that the **Co-host** function is enabled.

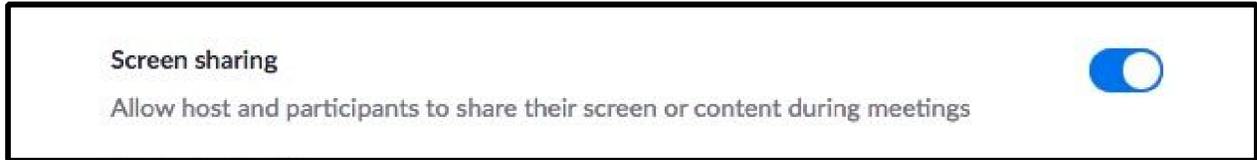


Co-hosts cannot be assigned during the zoom scheduling/set-up process. In order for other Send-off Party staff members (e.g. DAA staff, regional volunteers, faculty/staff speakers) to have host capabilities, the Regional Director must promote them from participant to co-host once the meeting has started. *Note: Meetings can, and should, be started early (i.e. between 15-20 minutes before the listed start time) in order to allow time for the host to promote the rest of their SOP team from participants to co-hosts.*

** If for some reason the co-host function is disabled, this can be changed by clicking on the grey button located on the right-hand side of the screen.

3. Screen Sharing

Under the **Settings** tab and **Meetings** header, first, ensure that the **Screen sharing** function is enabled.



Next, ensure that the **Host** is the only person with screen sharing abilities.

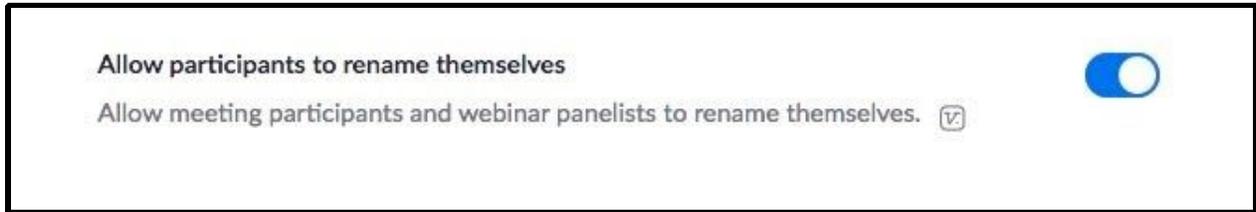


Screen sharing must be enabled in order to show the video during the program, but we definitely do not want all participants to have the ability to share their screen.

** If for some reason the screen sharing function is disabled, this can be changed by clicking on the grey button located on the right-hand side of the screen. Change who can share their screen by clicking the circle next to Host Only.

4. Allow Participants to Rename Themselves

Under the **Settings** tab and **Meetings** header, ensure that the **Allow participants to rename themselves** function is enabled.



Allow participants to rename themselves must be enabled in order for student attendees to be able to add the prefix (“S” & class year) to their name in Zoom. The “S” prefix is the only way that SOP staff will be able to identify which attendees are students and which attendees should be removed from the breakout room.

** If for some reason the allow participants to rename themselves function is disabled, this can be changed by clicking on the grey button located on the right-hand side of the screen.

Now, onto Advanced In-Meeting Settings:

5. Breakout Room

Under the **Settings** tab and **Meetings** header, ensure that the **Breakout room** function is enabled.



Breakout rooms must be enabled in order to separate student attendees from parents/guardians, alumni and other non-student attendees during the breakout portion of the event.

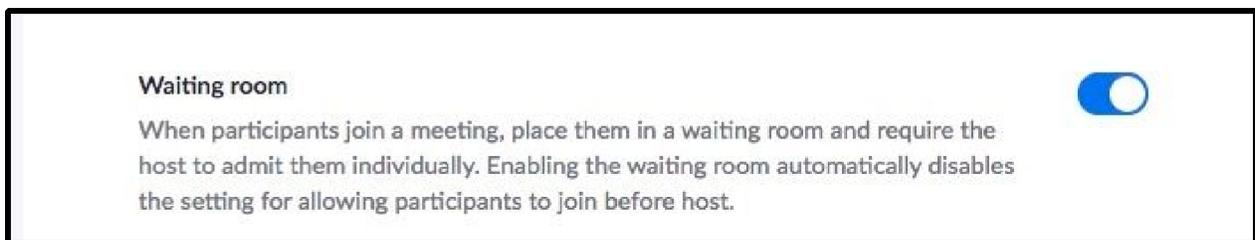
** If for some reason the breakout room function is disabled, this can be changed by clicking on the grey button located on the right-hand side of the screen.

** Note: since we are no longer pre-assigning students to the breakout room, there is no need to enable the other breakout room setting.

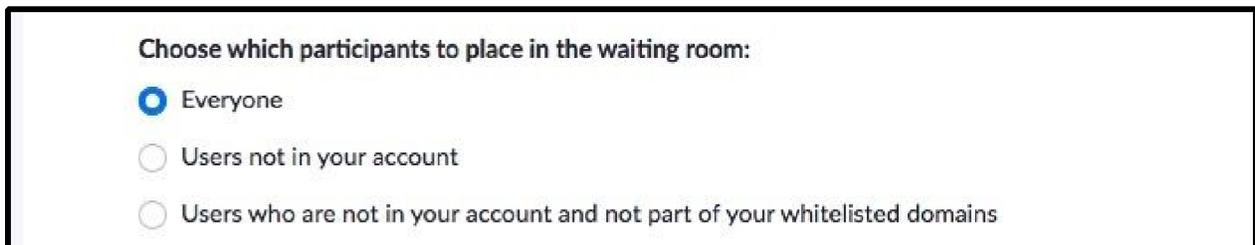
6. Waiting Room

Before turning on your waiting room, remember that once enabled, it will be applied to all meetings/events scheduled by the account user. Thus, enabling the waiting room setting and/or altering the waiting room title, description, logo should take place as close as possible to the event.

Under the **Settings** tab and **Meetings** header, ensure that the **Waiting room** function is enabled.



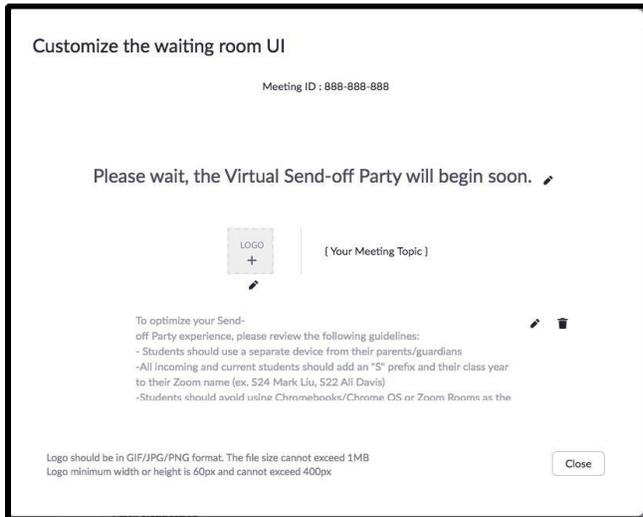
Next, ensure that all participants are placed in the waiting room by choosing **Everyone** under the options listed.



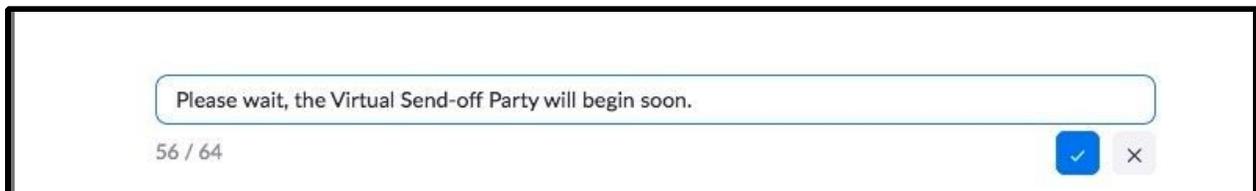
Lastly, customize the waiting room title, logo and description in a few simple steps by clicking on the pencil icon.



Once a pop-up window like the one shown below appears, change the title, logo and description by clicking on the pencil icons located beside each component.



First, update the waiting room **title**.

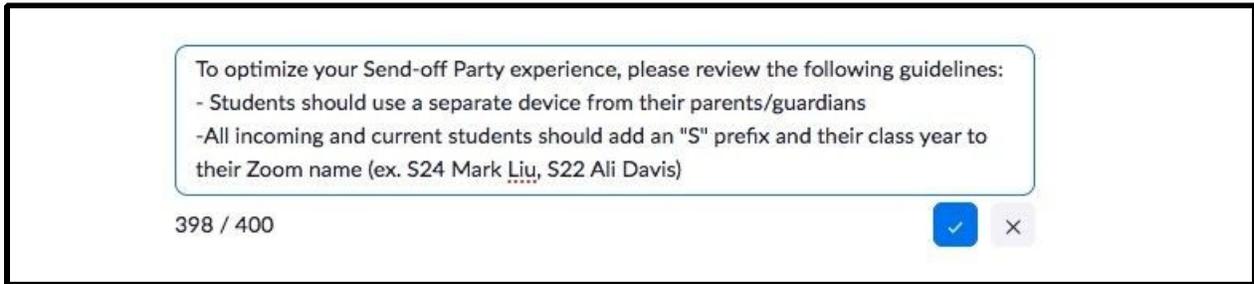


Use the following text as the waiting room **title**

“Please wait, the Virtual Send-off Party will begin soon.”

** Be sure to click the blue check mark in order to save changes to the event title.

Second, update the waiting room **description**.



Use the following text as the waiting room **description** :

- “To optimize your Send-off Party experience, please review the following guidelines:
- Students should use a separate device from their parents/guardians
 - All incoming and current students should add an "S" prefix and their class year to their Zoom name (ex. S24 Mark Liu, S22 Ali Davis)
 - Students should avoid using Chromebooks/Chrome OS or Zoom Rooms as they are not compatible with breakout rooms”

** Be sure to click the blue check mark in order to save changes to the event title.

Finally, update the waiting room **logo**.



** Note: Currently, no existing SOP image meets the file specifications required - a request has been placed to the MarComm team (Natalie) to create one in time.

** It is extremely important to remember to change the waiting room title, description and logo, particularly if the waiting room was used for other recent events. An out-dated waiting room slide will confuse SOP attendees and think they are attending the wrong event.