



Regional Society Leader Zoom Account Quick Start Guide

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Introduction:

SGNA National is excited to announce that regional society leaders now have access to an SGNA Regional Zoom account! With this access, regional leaders can reserve this exclusive Zoom line for meetings with up to 300 attendees and host educational webinars with up to 1,000 attendees, as a way to engage regional members virtually. All SGNA regional societies will be sharing this Zoom license, so it is important that all leaders keep the login information confidential and follow the guidelines and best practices outlined in this quick start guide. Please be sure to review the guidelines and best practices document in full, to learn everything from how to reserve the account, to tips and tricks for using Zoom features.

Login information:

Website: <https://www.zoom.us/signin>
Email: sgnahq123@gmail.com
Password: #Welcome2!

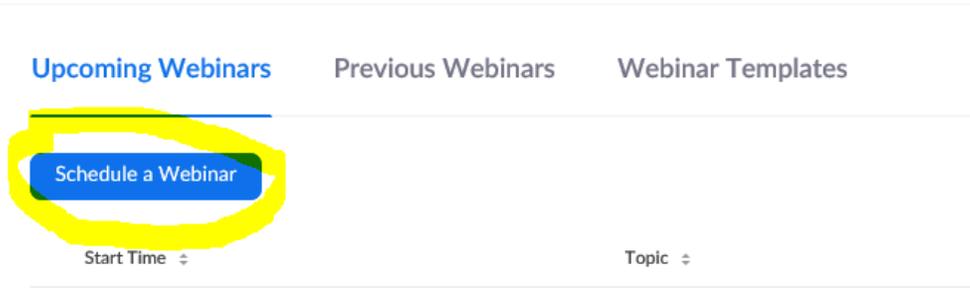
Scheduling a Webinar:

1. Once you have logged into the Regional Society Zoom account, select the “Webinars” option from the left-hand side of the page.

The screenshot shows the Zoom account settings page. On the left is a navigation menu with options: Profile (selected), Meetings, Webinars, Recordings, Settings, Account Profile, and Reports. Below the menu are links for 'Attend Live Training', 'Video Tutorials', and 'Knowledge Base'. The main content area shows the account profile for 'SGNA Regions' with a profile picture and 'Change'/'Delete' buttons. Below this is a table of account details:

Department	SGNA HQ
Account No.	133430
Personal Meeting ID	676 555 9001 Hide https://smithbucklin.zoom.us/j/*****001 Show ✔ Use this ID for instant meetings
Personal Link	Not set yet.
Sign-In Email	sgnahq123@gmail.com Hide Linked accounts:
License Type	Licensed
	Meeting 300 participants
	Webinar 1000 participants

2. Next, select “Schedule a Webinar”



3. Complete the required fields as directed.

- a. **Topic:** please include the name of your Regional Society in the Webinar title, for example “Arizona Region Educational Webinar”
- b. **Description:** This description will appear to those individuals registering for the webinar. This is a great place to provide more information about the content of or speakers for the webinar.
- c. **When:** Indicate the time of your webinar.
 - i. So as to be considerate of multiple-region use of this account, please add an additional 15 minutes to the start and stop time of your webinar.
 - ii. For example, if you webinar begins at 1:00 PM and ends at 2:00 PM, please indicate the “start” time as 12:45, and indicate the duration as 1.5 hours (ending at 2:15 PM):

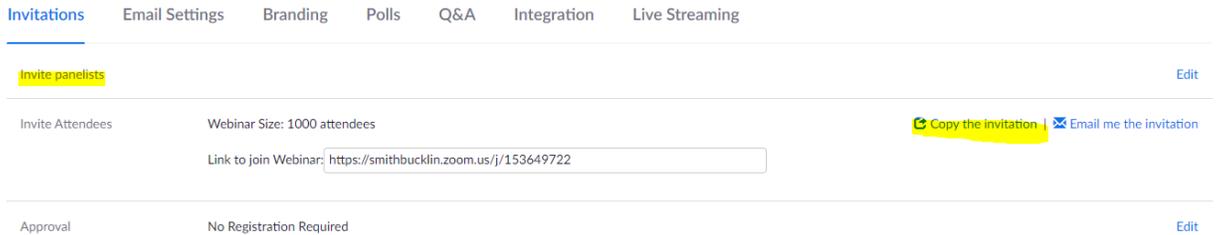
When 12/18/2019 📅 12:45 ▼ PM ▼

Duration 1 ▼ hr 30 ▼ min

- iii. Indicate your preferred time zone.
- iv. The “recurring webinar” option is to be used for recurring meetings only.
- d. **Registration:** By selecting “required”, this will require attendees to register for the webinar.
- e. **Webinar Password:** This will require attendees to enter a password to join the webinar. Utilizing this feature is not encouraged.
- f. **Video:** This setting allows you to decide if you would like the default video settings for the host and panelists to include their video. Please note, the host and panelists can turn this setting on and off on their own computer, this setting simply sets-up your preferred default setting.
- g. **Audio:** It is recommended to leave this setting as “both”.
- h. **Webinar options:**
 - i. **Q+A:** this allows the Q+A feature to be turned on during the webinar.
 - 1. You can also use the chat feature to facilitate Q+A.



- ii. **Enable Practice Session:** This allows for a pre-webinar session during which the speakers and host can join the webinar, and talk amongst themselves, without broadcasting out to the attendees.
 - 1. To begin the live webinar, you will simply select “Broadcast” at the top of the screen.
 - iii. **Only authenticated users can join: Leave this option unselected.**
 - iv. **Record the webinar automatically:** This will automatically download the webinar recording to the Zoom platform. We recommend you download the recording to the cloud.
4. Click **Schedule**.
5. Once your webinar is scheduled, you will be able to copy the invitation and distribute it to your regional society members. Scroll down to the bottom of the webinar and click “copy invitation”. Copy/paste the text to your community.
6. If you plan to invite a speaker to present at the webinar, click the “Edit” button next to invite panelists. They will get an email inviting them to the webinar with instructions on how to join.



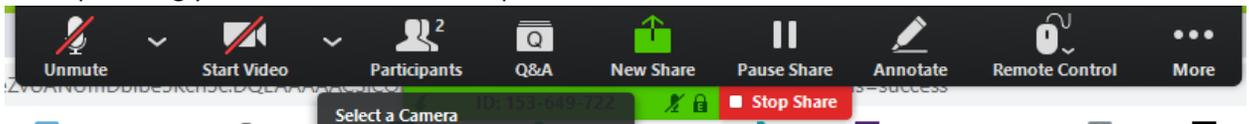
7. On the day of your webinar, click “Start”. Zoom should launch and the webinar will begin.



8. To share your screen as a presenter, please click the green “Share” button. If someone has been invited as a panelist, they will not need the host’s permission to share their screen. If they have not, a pop-up will appear and the host will have to confirm that they have permission to do so.



9. To stop sharing your screen, click the “Stop Share” button.



10. If you indicated that the webinar should be recorded, you will be able to access the recording from the Zoom platform or on the local host computer.



Scheduling a Meeting

1. Once you have logged into the Regional Society Zoom account, select the “Meetings” option from the left-hand side of the page.

The screenshot shows the Zoom account profile page for 'SGNA Regions'. On the left is a navigation menu with options: Profile (selected), Meetings, Webinars, Recordings, Settings, Account Profile, and Reports. Below the menu are links for 'Attend Live Training', 'Video Tutorials', and 'Knowledge Base'. The main content area displays account information: a profile picture with 'Change' and 'Delete' buttons, the name 'SGNA Regions', department 'SGNA HQ', and account number '133430'. It also shows the 'Personal Meeting ID' as 676 555 9001 with a 'Hide' link and a meeting link 'https://smithbucklin.zoom.us/j/*****001' with a 'Show' link. A note indicates to use this ID for instant meetings. The 'Personal Link' is 'Not set yet.'. The 'Sign-In Email' is 'sgnahq123@gmail.com' with a 'Hide' link. Below this, it shows 'Linked accounts:'. At the bottom, the 'License Type' is 'Licensed', with details for 'Meeting' (300 participants) and 'Webinar' (1000 participants).

2. Next, select “Schedule a Meeting”
3. Complete the required fields as directed.
 - a. **Topic:** please include the name of your Regional Society in the meeting title, for example “Arizona Regional Board Meeting”
 - b. **Description:** This description will appear to those individuals participating in the meeting.
 - c. **When:** Indicate the time of your meeting.
 - i. So as to be considerate of multiple-region use of this account, please add an additional 30 minutes to the start and stop time of your meeting.
 - ii. For example, if you meeting begins at 1:00 PM and ends at 2:00 PM, please indicate the “start” time as 12:30, and indicate the duration as 1.5 hours (ending at 2:30 PM):

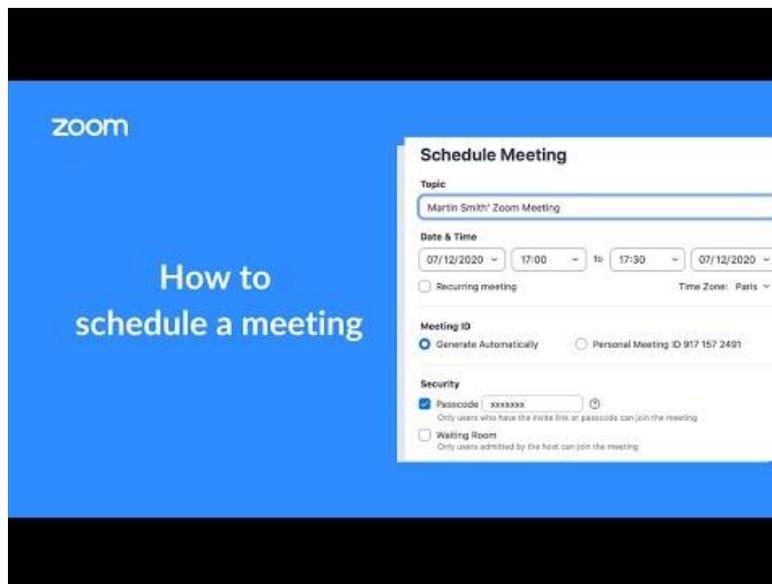
When

Duration hr min

- iii. Indicate your preferred time zone.

- iv. The “recurring meeting” option is to be used for recurring meetings only.
 - d. **Registration:** By selecting “required”, this will require attendees to register for the meeting.
 - e. **Meeting ID:** Leave Generate Automatically selected.
 - f. **Security:** Select your desired security settings. Leave the “Require authentication to join” option unselected.
 - g. **Video:** select whether or not you’d like your host and participants to have their video automatically turned on or off at the beginning of the meeting.
 - h. **Audio:** leave the Both option selected.
 - i. **Meeting Options:** Select your desired meeting options.
 - j. **Alternative Host:** leave this blank.
4. Click Save and review your meeting settings to confirm everything looks correct.
 5. Once your meeting is scheduled, you will be able to copy the invitation and distribute it to your regional society members. Scroll down to Invite Link and click “copy invitation”. Copy/paste the text to your meeting invitees.
 6. On the day of your meeting, log back into Zoom click “Start”. Zoom should launch and the meeting will begin.

Watch the instructional video below to learn how to schedule a Zoom meeting.



Zoom Meetings vs. Webinars

Use the comparison grid below to determine whether a meeting or webinar best fits your needs. Additionally, learn more about the features of each type [here](#).

Meetings versus webinars

	Meeting	Webinar
Description	Zoom meetings are ideal for hosting more interactive sessions where you'll want to have lots of audience participation or break your session into smaller groups.	Think of webinars like a virtual lecture hall or auditorium. Webinars are ideal for large audiences or events that are open to the public. Typically, webinar attendees do not interact with one another. Though Zoom provides options for you to get more social with your attendees, your average webinar has one or a few people speaking to an audience.
Best used for	Small to large groups (2+ participants) for: <ul style="list-style-type: none"> • Customer-facing meetings • Sales meetings • Training sessions 	Large events and public broadcasts (50+ attendees) such as: <ul style="list-style-type: none"> • Town halls • Quarterly updates • Educational lectures
Typically used by	<ul style="list-style-type: none"> • General employees • Training groups 	<ul style="list-style-type: none"> • Event hosts • SVPs and C-Suite
Cost	Free and Paid subscription options available.	Paid Add-on, available to Pro or higher subscriptions.

Additional Success Guides for Live Virtual Events

- [Online Event Best Practices – A Zoom Success Guide](#)
- [Zoom Meeting Training Reference Guide](#)
- [Zoom Webinar Training Reference Guide](#)
- [Information on Post-Webinar Survey and Reporting](#)