

## Legacy Step by Step Guide

### How to set up a webinar

1. Schedule a meeting in ZOOM (account details are with Lateefah)

#### **Meetings > Schedule a meeting**

The default settings are generally fine, just tick the box that says 'registration required' and 'automatically record meeting' if preferred.

#### **Save meeting**

*Note: the Legacy ZOOM account does not include webinars and the features that come with it. This means that there can be no more than 100 participants, you cannot pre-publish a live stream link and reminders for meetings are not automatically sent.*

2. Now check the settings for the meeting you just scheduled

#### **My meetings > Manage my meetings**

Scroll to the bottom to where it says 'polls' and 'live stream'. Here you can enter a poll (a pop up survey that every participants gets and can respond to when the host puts it up during the meeting). Check here is live streaming via Youtube and Facebook is enabled.

#### **Here you also find the invite link**

3. Now go to Personal settings

#### **Personal settings > Meetings**

Go with the default as set up now, just make sure that co-hosts are enabled and check the screen sharing settings (sometimes you'll want to enable that for all participants, sometimes just for the host).

#### **Personal settings > Recording**

The default here is fine, just make sure that chats are saved and cloud recording is on.

4. If some setting are disabled in Personal, that might have to do with the Admin settings.  
*Note: most settings for individual meetings are overruled by the general account settings. This is important to remember since every change in the Admin settings will also affect other meetings.*

**Admin > Account Management > Account Settings**

Again: when in doubt, go for the default. Important is to **enable co-hosts**, so the main presenter(s) can concentrate on the content while others do logistics. Also important to enable is **screen sharing**, at least for the host. This is also where you can change the **livestream settings**. It's a long list of settings, just scroll down and you'll find what is important to you.

5. Monitoring registrations.

You can view the registrations on the bottom page of each individual meetings page, under the tab 'Registration' when you click 'View'. When you want to export a full list of the registrations thus far, you go the Admin settings.

**Admin > Account Management > Reports > Meeting**

Search a meeting by name or time range and check the box in front of the title.

**Then click 'Generate' > Select 'All registrants' > Continue**

In the Report queue you'll find a list of reports, your recent one should be on top. Click on 'Download' on the right side of that line. A CSV-file will be downloaded to your computer with names, emails and time of entry of all registrants. You can open this in Excel.

6. Send out reminders to the registrants.

As stated before, our ZOOM account does not automatically send out reminder to registrants. You can do this either manually from the Legacy mail by using the emails from the CSV file in step 5 and sending a bulk bcc-message, but you can also do this manually within ZOOM. The advantage of the latter is that it automatically encloses the login links and other details. Also, you can manually add a message to the reminder that ZOOM will send out.

Send out a reminder email manually (don't forget to check the boxes of the persons you want to send it to) via ZOOM My Meetings once you have selected your meeting and scroll to the bottom:

**Registration > View registrants > Resend confirmation email**

Edit the reminder email:

**Email settings > Edit**

7. Starting the meeting.

**Personal > Meetings**

Select your meeting and click the button 'Start meeting'. Then remember as a host – if you haven't selected automatic recording – to start recording once you see fit. And if you want to live stream, the host has a 'More' button on the bottom of the page where they can select that option too.

8. Ask the speakers to log in early to make sure that they have access to the meeting. If you suspect the number of participants might reach 100, it is important to have a co host manage entries to a level just below that in case an essential speaker has not logged in yet. Also ask the speakers and hosts to use a headset to avoid feedback.

9. For big webinars restrict comments and questions of participants to the chat.

10. The Legacy Youtube channel is set up for livestreaming via ZOOM already. You access the Youtube account through Legacy's Google account. You need the password as the ZOOM host in order to enable the livestreaming (it's worth practicing this once because at the moment of the webinar there will be a lot of other things demanding your attention). Don't forget to switch of livestreaming at the end of the meeting. The same Youtube link will now become the link to the registration, which you can still edit in Youtube Studio (also accessible via Google).

**Videos > Live > (select livestream you want to edit) > Editor > Trim > Preview > Save**

Note that your changes take a while to get published. In the mean time viewers will see the old version of your live stream.

11. Youtube also has several ways to fish out statistics about unique viewers and the time they watched, both during the livestream and afterwards. What I haven't found though is a way to save the chats next to the livestream. They seem to disappear, so it is a good idea for someone to take a screenshot of them.

That's it for now, what I have learnt in organising the Webinar The Brazilian Connection. Feel free to add and change if the circumstances require.

Femke van Zeijl

Lagos, March 29, 2021

