Appendix B: Zoom Virtual RTP Meeting Step by Step

Additional Zoom resources are available online:

- Zoom Help Center
- APSU Distance Education Zoom website

Creating an APSU Zoom Account

In general, an APSU Zoom account is not required to *attend* meetings. An APSU Zoom account is only required for the meeting host. Though APSU Zoom uses your single sign-on credentials you must claim your APSU Zoom license first before you can use APSU Zoom to attend or host a meeting. To claim your license, simply go to https://apsu.zoom.us and log in with your single sign-on credentials.

Special Notes:

- A Zoom account created directly with Zoom using your APSU email is not the same as an APSU Zoom account created at https://apsu.zoom.us. That account will have limitations (length of meeting, length of recordings, etc.). You can still create an APSU Zoom account at https://apsu.zoom.us, but you may receive a notice that Zoom needs a few days to transfer your account so do this well in advance.
- The only time an APSU Zoom account is required to attend a meeting is if the meeting host is requiring user authentication. More about that setting below under Schedule a Meeting.
- The meeting host (specifically the person hosting the meeting when the poll is launched) must not only be logged into their activated APSU Zoom account, they must host the meeting on a desktop computer using the Zoom desktop app. This requirement is due to polling.

Accessing Zoom

The **host must** be logged into their APSU Zoom account **and** use the Zoom desktop app to see the Poll button and launch the polls. Attendees that join from their browser can now participate in polling; however, it is recommended that they still join with the Zoom desktop or mobile app and use their APSU Zoom account for the best overall experience. When accessing Zoom through the desktop or mobile apps, you must select to "Sign in with SSO" and then enter your single sign-on credentials.

Downloading the Zoom App on a Desktop Computer
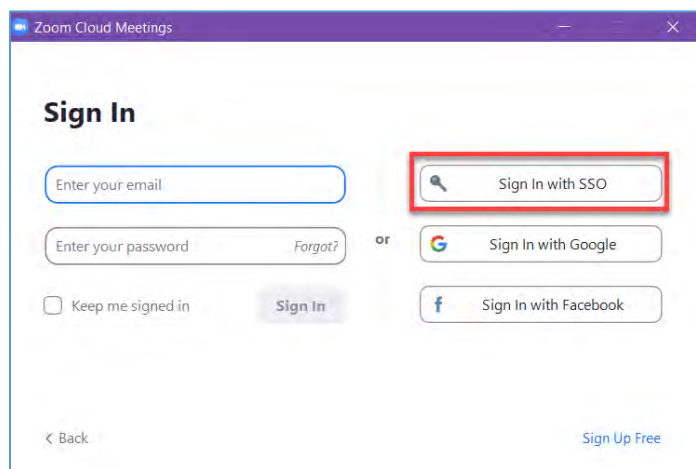
Schedule a Meeting

1. Log into APSU Zoom at https://apsu.zoom.us
2. Select "Meetings" and then "Schedule a Meeting."
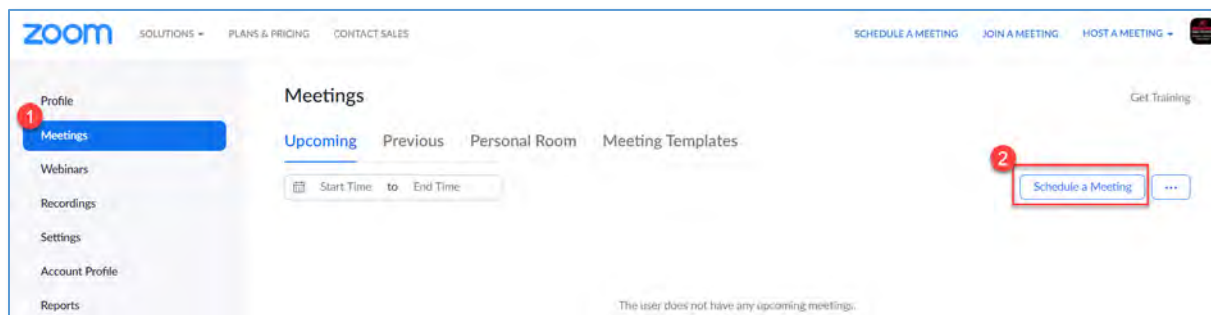
3. Complete the form as follows:
   a. Topic – use the format RTP [DEPT NAME] [Promotion or Retention], example = RTP Biology Promotion
   b. Optional description – consider entering the names of those candidates that will be discussed or ensure you have a list somewhere of which candidates were discussed when so that you can tie it back to a particular meeting for attendance and poll reports.
   c. Set date, time, duration, and time zone. Please note, it is not recommended to use "Recurring Meeting" as there is a 25 poll limit on meetings.
   d. Do not require registration
   e. Set Meeting ID to "Generate Automatically"
   f. Check "Passcode"
   g. Check "Waiting Room"
   h. Notes on "Require authentication to join"
      i. This requires attendees to 1. Have already created an APSU Zoom account and 2. Use that account to attend the meeting.
      ii. Attendees do not know if a meeting requires this in advance. Host must inform them in advance.
      iii. We have received reports of users having issues joining meetings with this feature.
   i. Recommend Video Off for Host and Participants
   j. Set Audio to Both
   k. Do NOT "Allow participants to join anytime"
   l. Check "Mute participants upon entry"
   m. No breakout rooms
   n. No recording
   o. Alternative Hosts – enter the email address of the chair/dean for the meeting. They must already have created their APSU Zoom account. Anyone you list as an Alternative Host will come into the meeting as a co-host if they log into their APSU Zoom account to attend.
4. Save

Topic	RTP + Dept Name + Promotion or Retention
Description (Optional)	Optional candidates' names listed here

When	01/06/2021 11:00 AM
Duration	1 hr 0 min
Time Zone	(GMT-6:00) Central Time (U ∨
	☐ Recurring meeting

Registration	☐ Required

Meeting ID	⦿ Generated ID 822 6572 0765 ◯ Personal Meeting ID 931 221 7259

Security	☑ Passcode 126739
	Only users who have the invite link or passcode can join the meeting
	☑ Waiting Room
	Only users admitted by the host can join the meeting
	☐ Require authentication to join

Video	Host ◯ on ⦿ off
	Participant ◯ on ⦿ off

Audio	◯ Telephone ◯ Computer Audio ⦿ Both
	Dial from United States of America Edit

Meeting Options	☐ Allow participants to join anytime
	☑ Mute participants upon entry ⊗
	☐ Breakout Room pre-assign
	☐ Automatically record meeting
	☐ Approve or block entry to users from specific regions/countries

Alternative Hosts	deanchair_email_here@apsu.edu

Save   Cancel

Share the meeting information.

After saving, you will see the confirmed meeting information. From this page, you can:

    a.   Use the "Add to Outlook Calendar" option to open an Outlook meeting appointment.

    b.   Use "Copy Invitation" to copy the complete meeting information and paste it into an Outlook meeting invitation.

Set Up Polls

    a.   Scroll to the bottom of the page and select "Add"

    b.   Enter the candidate's name as the poll title so that you know which poll to launch during the meeting

    c.   Check "Anonymous"

    d.   Enter the question to be consistent with guidelines from Dr. Crosby. You must enter the candidate's name here as well for accurate poll reporting.

        Do you recommend retention of NAME?

        Do you recommend tenure for NAME?

        Do you recommend promotion of NAME?

    e.   Check "Single Choice"

    f.   Enter "Yes" and "No" only as answer choices; be consistent with the order.

    g.   Save

Add a Poll   ×

Candidate's Name   **B**

C ☑ Anonymous? ⓘ

1.

D Do you recommend retention of NAME?

E ● Single Choice   ○ Multiple Choice

F

Yes

No

Answer 3 (Optional)

Answer 4 (Optional)

Answer 5 (Optional)

Answer 6 (Optional)

Answer 7 (Optional)

Answer 8 (Optional)
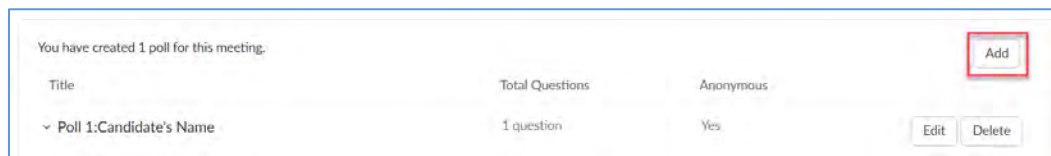
Answer 9 (Optional)

Answer 10 (Optional)

Delete

✚ **Add a Question**

G

Save   Cancel

h. You can select "Add" again to add additional polls to an individual meeting. There is a limit of 25 polls per meeting. This applies to recurring meetings as well, 25 polls across all recurrences.

Host/Co-Host In-Meeting Controls

A complete resource for host and co-host in-meeting controls is available on the Zoom website. Below are special considerations for RTP meetings.

Special Notes:

- Since "Waiting Room" was enabled during meeting set up. Meeting participants will be filtered into the waiting room for your admittance. Use this time as a "staging area" to prepare the meeting before you allow in attendees. Anyone you listed as an Alternative Host will come into the meeting as a co-host as long as they are logged into their APSU Zoom account when joining the meeting.
- If you are new to waiting rooms, review this resource on Using Waiting Rooms.
- As soon as the meeting starts follow the steps below for "4. Chat" so that the attendees can only chat with the host/co-hosts.
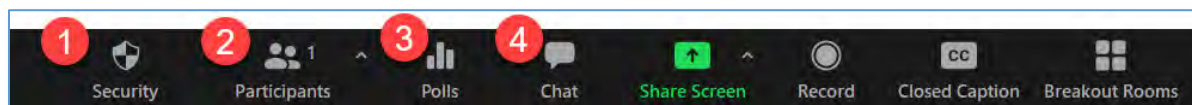
1. Security

a. Use the updated "Security" button to help manage your meeting security and participants' permissions. Please note, the meeting can be locked to keep people from joining. Please note, this will impact people that are supposed to be in the meeting as well including those that were in the meeting and were kicked out due to tech issues.

b. Check "Share Screen" any time during the meeting if participants besides the host and co-hosts will need to share their screen
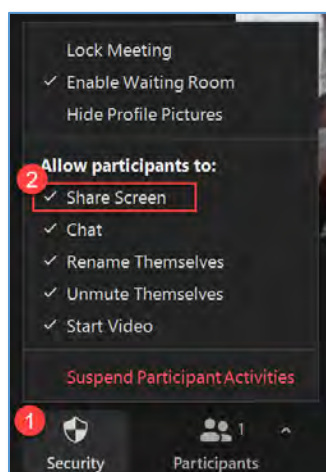
2. Participants

From the Participants list, you can see who is currently the host and who is a co-host. Hover over a participant's name and select "More" to open additional settings. This is where you can make the dean/chair the host with "Make Host" so that you can switch and un-switch for voting. The host or co-host can start a poll but only the attendees can respond to polls. Anyone that needs to vote cannot be listed as host or co-host. Make sure you check this before polling.

"Ask to Start Video" and "Rename" can both help make sure you know who is in your meeting

"Put in Waiting Room" can be used in cases where the committee wants to discuss without chair/dean in the room.
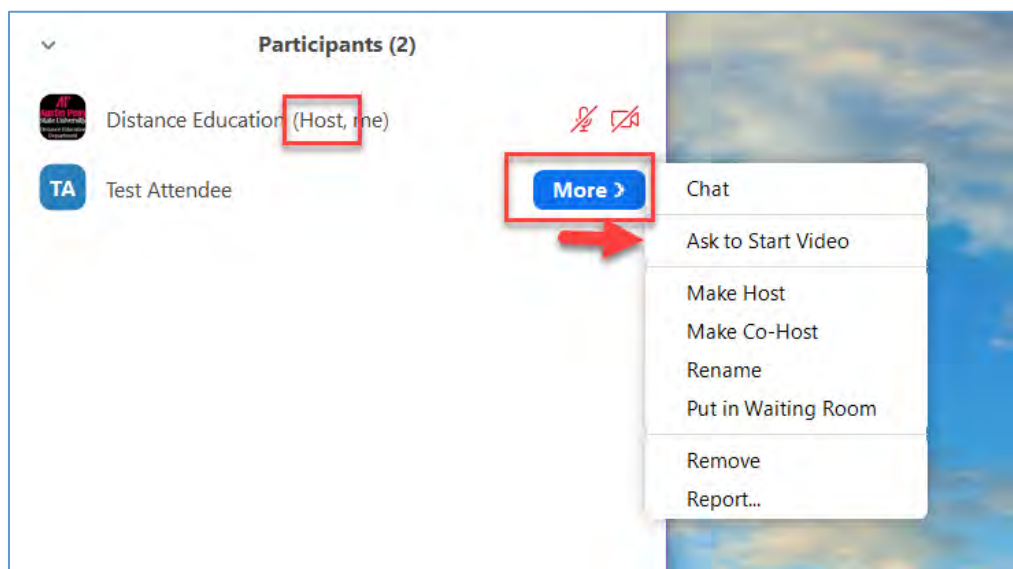
3. Polls

The host and co-hosts can launch polls but only attendees can vote so a non-voter like the dean or chair needs to be made the host during voting. The ***host must*** be logged into their APSU Zoom account ***and*** use the Zoom desktop app to see the Poll button and launch the polls. Attendees that join from their browser can now participate in polling; however, it is recommended that they still join with the Zoom desktop or mobile app and use their APSU Zoom account for the best overall experience.

In case of the attendance of a non-voting department representative on the college committee, the presiding officer of the college committee should place the non-voting department representative in a waiting room (so they cannot vote) prior to making the dean the meeting host.

To launch a poll:

    a. Select the Polls button on the Zoom menu bar
    b. Use the down arrow button to open a list of available polls and select one. Select "Launch Polling"
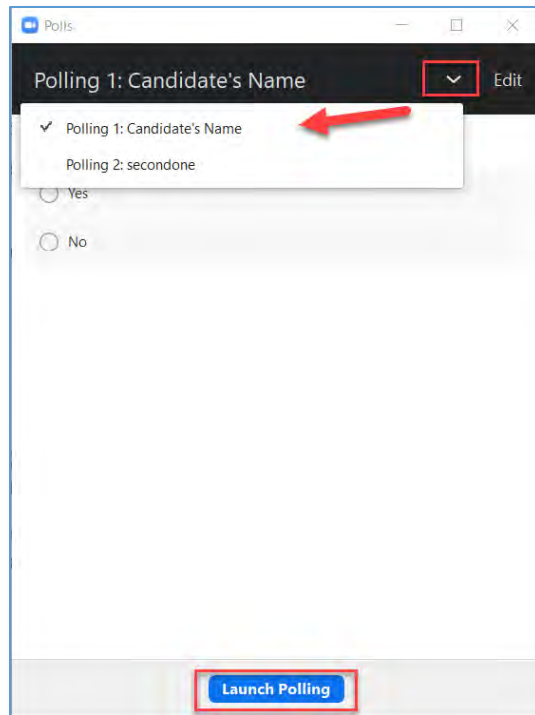
c. The poll will be sent out to the meeting attendees and the green bar and text denotes this as well as how long the poll has been open and how many people have voted. As votes come in, the votes will tally. This information is only viewable to the host/co-hosts at this time. Select "End Polling" once everyone has voted.
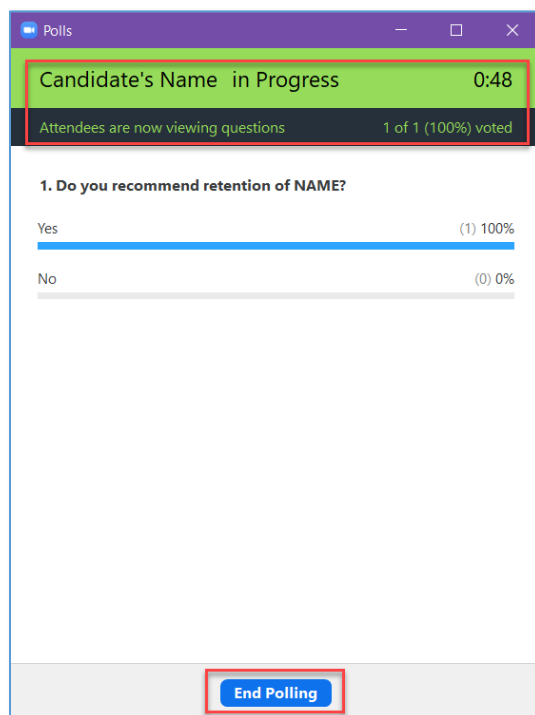
d. If there was an issue, the host can "Re-launch Polling." This will re-launch the poll and automatically and permanently delete the previous poll results.
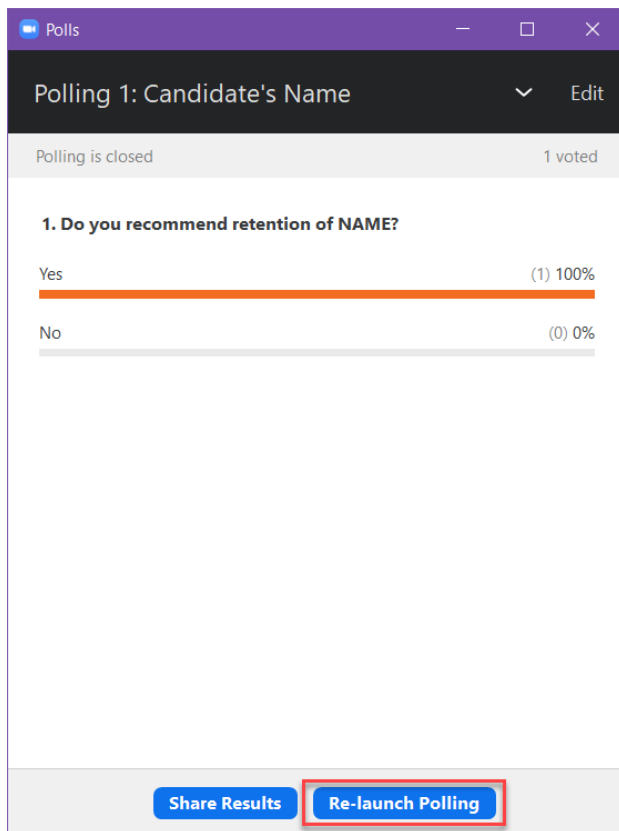

e. After the poll is over, the current host (the non-voting dean/chair) will NOT share the poll results. Instead, the current host will use the Participants list to make the presiding officer the host again. Select the Participants button, locate the presiding officer's name in the participants list, hover over the name and select "More," and then select "Make Host." See "2. Participants" above for images.

At the college committee, the presiding officer should admit the non-voting department representative from the waiting room.

f. Once the presiding officer is the host again, select the Polls button to access the results.
g. After reviewing the results, they can X-out of the poll, "Share Results" to the attendees, or "Re-Launch Polling."
    a. Refer to guidance from Dr. Crosby on when it would not be appropriate to share the Zoom poll results i.e. if there were proxy votes.
    b. The presiding officer should not re-launch the poll since as the host they will not be able to vote.

You may consider taking a screen shot of the results. There is a poll report, see Reports below; but, it may be beneficial to have a back up. Ensure there are no faces/names/etc. in any images.
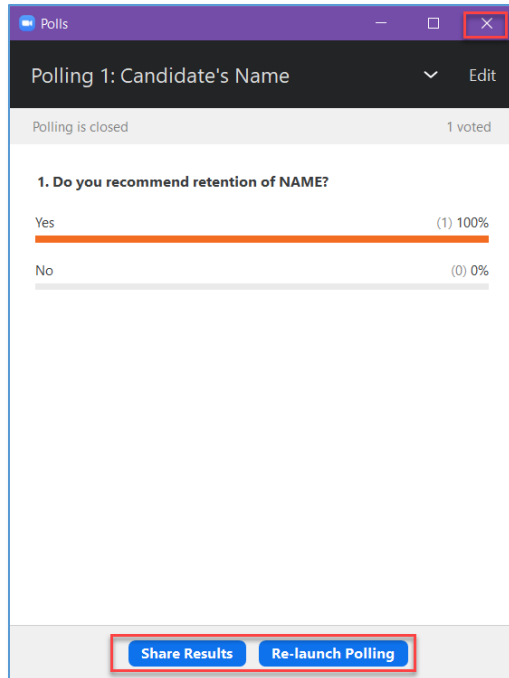
h. If you Share Results, the green bar and text denotes that you are sharing. Select "Stop Share Results" when done.
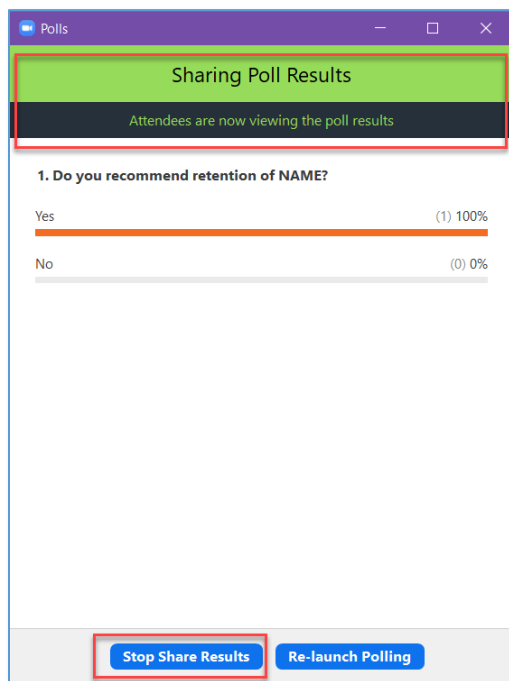
4. *Chat*

You will need to disable chat so that the attendees can not have discussions outside the main verbal meeting discussion.

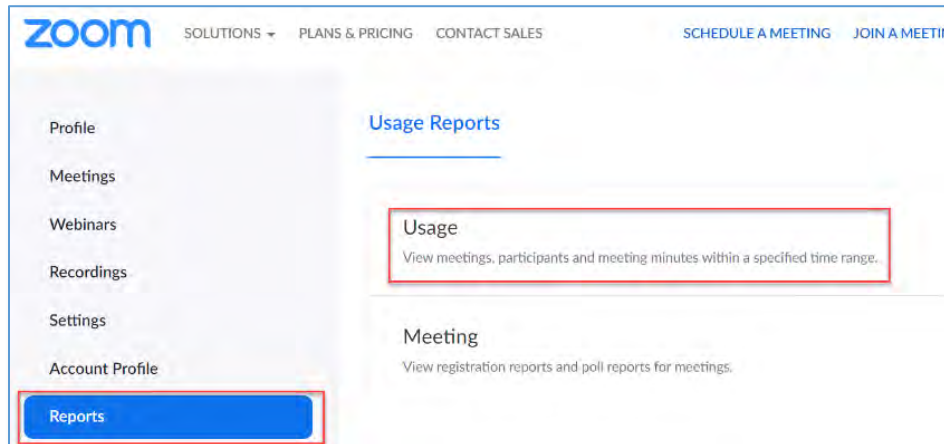a. Open Chat and then select the ellipses button (…).
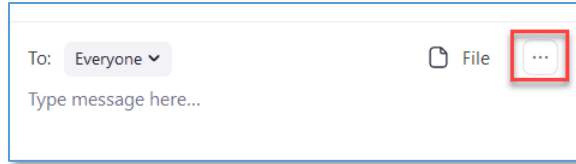
b. Then select, "Host Only."
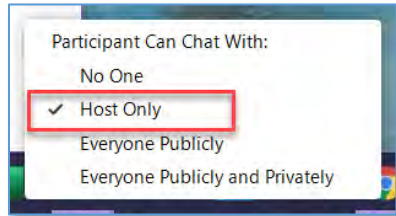
Reports

After the meeting, the host that scheduled the meeting can access reports on the meeting.

Attendance Report

1. Log into APSU Zoom at https://apsu.zoom.us
2. Select "Reports" and then "Usage"

3. Use the search feature if necessary to find the meeting, then select the number in the Participants column for the meeting in question.

4. Here you can review the report or "Export" it.

5. Then you can open the report in Excel.

Poll Report

1. Log into APSU Zoom at https://apsu.zoom.us
2. Select "Reports"
3. Select "Meeting"

4. Check the bubble next to "Poll Report."
5. Adjust the date range as needed. You must select "Search" after selecting "Poll Report" even if you do not adjust the date range.
6. Select "Generate" next to the appropriate meeting

7. After the report processes, select "Download"

8. Then you can open the report in Excel

#	User Name	User Email	Submitted Date/Time		
1	Anonymous	Anonymous	8/31/2020 13:04	Do you recommend tenure for NAME?	Yes
2	Anonymous	Anonymous	8/31/2020 13:04	Do you recommend tenure for NAME?	No

End of Training Guide

Back to RTP Website