

Training Set Up:

1. Send presenters and coordinators a scheduling request form through Smartsheet, Calendly or other preferred system to reserve a time for each presenter training. Include fields for the speaker name and email as well as slots for any additional speakers (for presentations who have more than 1 speaker) or coordinators (for any speakers who utilize another person for scheduling). [see below for email example]

XYZ Presenters and Coordinators,

I am working with all presenters to set up a training time to review and test the virtual platform that the XYZ Conference will now be on. Please connect with your other presenters (if applicable) and select a time for this training via my schedule here: (Insert Link)

NOTE: This calendar is being shared with all presenters to write in their preferred training time. It is first come, first serve. Feel free to email me if none of these times work for you and I will accommodate as I can.

Please let me know if you have any questions or concerns.

2. Once presenters fill in their time request, share meeting information [see below for email example]

Hello Bill,

Thank you for signing up for our presenter training session on Tuesday, March 17th, 10:30 – 11:00 AM. Please make sure to join the session at your start time via a computer.

Below is the zoom meeting information:

*Join Zoom Meeting
(Zoom Link)*

*Meeting ID: (INSERT ID)
Password: (INSERT PASSWORD)*

Please let me know if you have any questions or concerns.

Platform Training: Based on Zoom Meetings with the breakout room functionality. If you are using Zoom Webinar or another platform, then the below training procedure will differ based on the selected platform.

1. When training begins, go through the following questions with the presenter to determine the flow of this training:
 - Is this the computer/audio you plan to present with?
 1. If no, you may need to do a follow up training to test quality of mic and controls.
 2. If yes, confirm quality. If video is lagging or audio is glitching, it most likely is because of their internet connection. If they decide to use audio via phone, have them switch to phone audio.
 - To switch to phone audio, at the bottom of the screen there is an arrow next to the mic icon. They click that and follow the prompts to disconnect from computer and dial in for phone, or if they disconnect completely and reconnect via the computer first, the audio pop up will give them the dial in via phone options. In both cases, they need to enter the participant id that is given when they login to connect their audio and video participant profiles. Entering their participant id is the recommended way to connect so it is seamless when they are given controls and unmuted.
 - Do you intend to turn on your camera for the presentation or keep audio only? (this question applies if there is not a requirement for video)
 - Does your presentation have external links and or videos that will be sourced in an external browser?
 1. If no, follow the *share controls training*
 2. If yes, follow the *share screen training*
2. Once all audio troubleshooting is connected, you may move on to the screen share training:
 - *Share Controls Training* (the presentation is housed by the host computer and controls are given to the presenter):
 1. To share the host screen, click the “share screen” icon at the bottom of the meeting page. Select the opened PowerPoint you wish to share. Once sharing, click the presentation icon at the bottom of the PowerPoint to enter the full screen mode. To give controls to a presenter, click the “give controls” icon at the top and search to select speaker name.
 2. Explain the intro process to presenter (i.e. “the moderator will introduce you by sharing your bio that you provided with your speaker packet. When she is done, she will say ‘George, you have controls.’”)
 3. Give controls to the speaker and have them click through their slides to confirm function. When they initially click with their mouse, it may exit out of full screen mode. Just train them to resume their presentation in PowerPoint if this happens.
 4. Once slides are confirmed, discuss the process for questions with them (i.e. when you get to your final slide and are ready for questions, the moderator will come back on and direct the audience to type in the chat box or use the raise hand feature to voice their questions. The moderator then will verbally ask the question to you for your verbal response.)
 5. If the speaker wants to visually follow along with the questions, at the top of their screen there is a box that says “Show Meeting Controls,” then click “chat”. They do not have to have this open, but it is an option.

- *Screen Share Training* (the presentation is housed by the presenter):
 1. Similar structure to the “Share Controls” option but instead the presenter shares their screen with you. This should only be done if the presenter is comfortable and familiar with the platform.

- 3. If using breakout rooms:
 - Easiest method is to assign participants randomly to breakout rooms and then manually move specific moderators or room facilitators to the correct room.
 - The tech host should remain in the main session and not facilitate a breakout room. This will help others who are having tech issues get placed into a room.
 - Set the correct time duration in the breakout room settings for how long the rooms should be active. Once time is up, the meeting will automatically kick everyone out of their breakout rooms into the main session.
 - Participants can choose to leave a breakout room early and if they do, they will be sent to the main session. If this is done accidentally, they can re-enter their room by clicking the breakout room icon at the bottom of the control screen and click to rejoin the room. If they are to go into a different room, the tech host will have to assign them to it first.

Zoom Troubleshooting Tips (also include this information in the Know Before You Join communications to attendees):

- If you remove yourself from your breakout room accidentally, you may rejoin by clicking the room under “breakout rooms” icon in your controls (only include if using breakout rooms)
- Make sure you are always muted and video should also remain off for participants.
- The best way to join this meeting will be by computer. There will be PowerPoint presentations paired with live-speaker presentations and a chat box for questions. All are best engaged with via a computer.
- If you join by computer but would prefer audio connection via phone, join by computer first, then enter the participant ID that Zoom will provide in the “connect audio by phone” prompt.
- Questions for all presentations will be facilitated via the moderator through the chat box or with the “raise hand” feature for those who want to voice their questions. These features can be enabled at the bottom of your Zoom screen by clicking the “chat” icon.
- A few presenters will have their video enabled. Each participant has their own controls to view these video streams or to minimize them. Please configure your settings to your preference.
- If you are having trouble initially downloading Zoom, check your pop-up blockers. Those must be off for Zoom to bring you into the meeting.