

Volunteers' Documentation on Zoom

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Create Zoom Meeting Manually

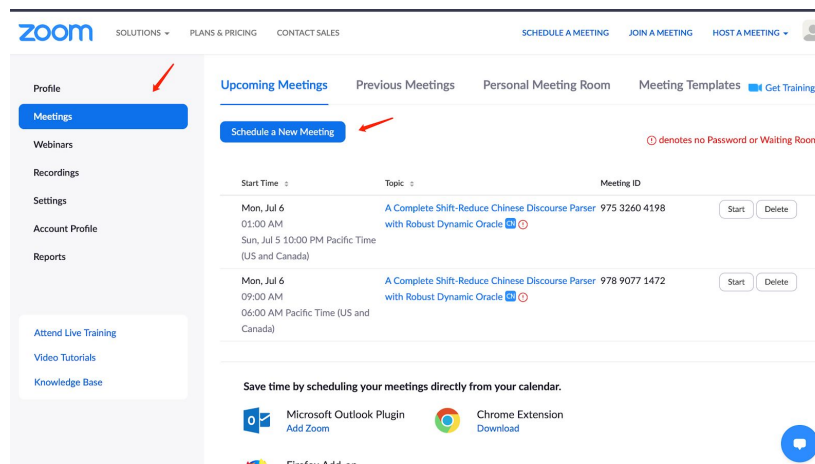
In case you need to create one or few meetings if something happens, manually creating them would be the easiest way instead of using scripts. Here are some situations, which serve as a navigation for you to know what to do:

Situations:

1. Create a new meeting for an existing user: log in the user's account/ACL2020 Master account
2. Create a new meeting for a new user: create new user first using ACL2020 Master account, and create a new meeting
3. If the current link for an existing meeting is broken: create a new meeting for this existing user

Create Meeting:

1. Log in the right Zoom account
 - a. If you need to create a meeting for a new paper presentation, please log in to ACL2020 Master Zoom account (Check [Section Below](#)), and follow steps to create a new user first ([Check how](#)).
 - b. If you need to create a meeting for sponsors, please log in using sponsor's credentials (Same step as in c)
 - c. If you need to create a meeting for an existing presentation (in case of emergency, such as the link fails), log in to the corresponding Zoom account.
 - Account name could be found here ([link](#)), through Title/id/uniqueid. Use the account in column "host_zoom_user_email".
 - Account password could found [here](#)
2. Select "Schedule a new meeting"




3. In the meeting schedule window, specify Topic and Time (could be found [link](#) for existing meetings). Be extra careful about Time Zone

Schedule a Meeting

Topic

Description (Optional)

When



Duration

hr
 min

Time Zone

☐ Recurring meeting

- In the “[Alternative Hosts](#)” section, add volunteer accounts in (copy the following string in to the box):

acl2020zoom@gmail.com,acl2020zoom+Volunteer1@gmail.com,acl2020zoom+Volunteer2@gmail.com,acl2020zoom+Volunteer3@gmail.com,acl2020zoom+Volunteer4@gmail.com,acl2020zoom+Volunteer5@gmail.com

Alternative Hosts

NOTE: if you are using ACL2020 Master Zoom account, use the following string **PLUS** author’s email (separated by comma):

acl2020zoom+Volunteer1@gmail.com,acl2020zoom+Volunteer2@gmail.com,acl2020zoom+Volunteer3@gmail.com,acl2020zoom+Volunteer4@gmail.com,acl2020zoom+Volunteer5@gmail.com, **<HOST-EMAIL-HERE>**

- Make sure password is disabled

Meeting Password

☐ Require meeting password

- You can also customize this meeting’s setting here, if needed

7. Click “Save” at the bottom to generate meeting information. You can find links for participants here.

Invite Link

<https://zoom.us/j/92264755633>

 Copy Invitation

8. Now, the host could login through his/her Zoom account to start the newly created meeting. Also remember to distribute the above link for participants.

NOTE: it turns out that you could login ACL2020 Master Zoom account, and select a specific user from “User Management” -> “Users”, and then create a meeting for that user (the user will be the host).

Modify Existing Meeting Manually

If something changes for an existing meeting, you should modify them, preferably by hand instead of using scripts. By doing this, the existing Zoom link will remain the same.

1. Log in to the meeting host’s Zoom account
 - Account name could be found here ([link](#)), through Title/id/uniqueid. Use the account in column “host_zoom_user_email”.
 - Account password could found [here](#)
2. In the “Meeting” tab, select the corresponding meeting to modify
3. Change the meeting information there
4. NOTE: please document the updated schedule/meeting information [here](#)
 - If session is updated (for example, from 9A to 14B), please change “meeting description” in Zoom web portal
 - To record updated session, use “Updated Session” column in spreadsheet
 - To record updated start/end time, use “starttime_Update”, and “endtime_Update” columns

When Participants Want to Join Zoom Meeting through Web Browser

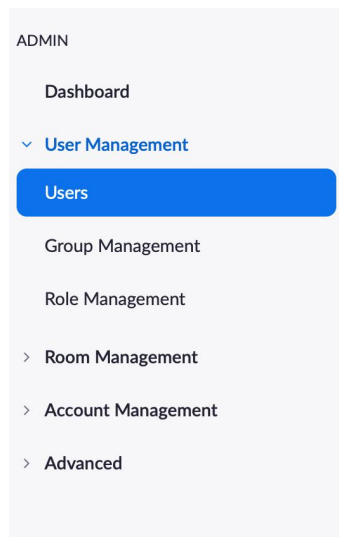
Note: this could only be done through HOST's Zoom account **BEFORE** meeting. And it is currently a known bug. Also, joining a meeting through a web browser may result in limited functionalities ([details here](#)).

Please follow the steps in [this solution](#) to disable function of registration to allow participants to join through a web browser.

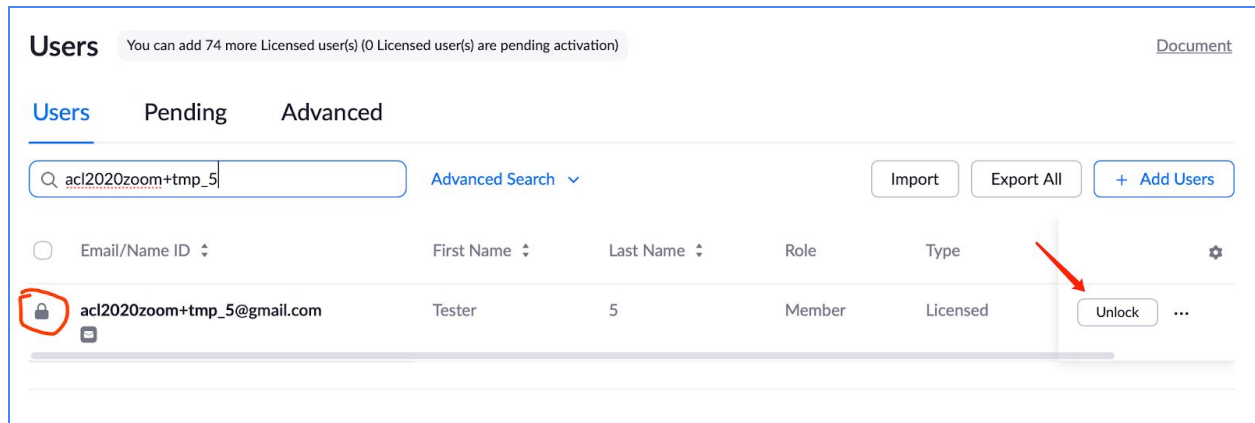
When Users Are Blocked

If the password is provided wrong for a few consecutive times, the account would be blocked by Zoom for 30 minutes. When this happens, use the following steps to unlock the account.

1. Log in ACL2020 Master Zoom Account ([here](#))
2. Go to “[User Management](#)” -> “[Users](#)” tab from left navigation bar



3. Look for that specific user (you can search it, but usually only FULL name will get you the result). You can see the locked sign to the left of the user. Click the “[Unlock](#)” button to unlock the account.



Check more information here:

https://support.zoom.us/hc/en-us/articles/206344385-Change-a-User-s-Password#h_6a6b8aba-8a3a-4b9e-8cb1-abff9c82c2b4

Create New Users

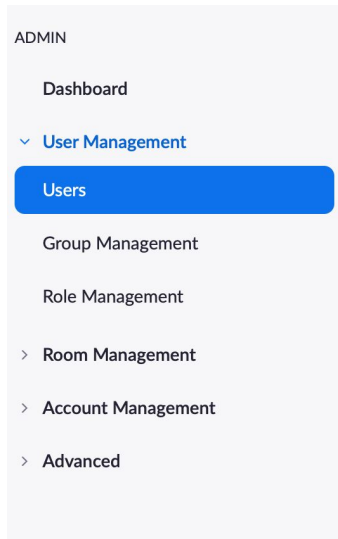
This section is used to create new Zoom users under ACL2020 Master Zoom Account. It is for cases when new user accounts are requested.

There are two ways of creating users, manually or semi-automatically.

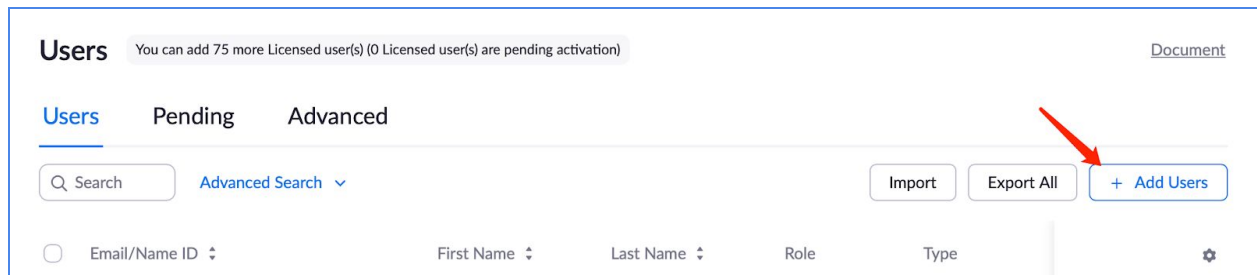
1. Manually Create New Users

This way is easy for creating only a few users.

- (1) Log in ACL2020 Master Zoom Account ([here](#))
- (2) Go to "User Management" -> "Users" tab from left navigation bar



(3) Choose “+ Add Users” to add user(s)



(4) In the pop up windows, put in new account(s), separated by comma. Leave other fields blank.

NOTE: the prefix of the account are IMPORTANT, so please use the following format for new accounts. You should change **<NUMBER>** to a number that is not being used:

ac12020zoom+tmp_**<NUMBER>**@gmail.com

Add Users

Add users with their email addresses

You can add users of all types to your account. If you enter the email address of account owners or admins, all users on their accounts will be added to this account.

User Type ⓘ

☐ Basic
 ☒ Licensed
 ☐ On-Prem ⓘ

Feature

☐ Large Meeting
 ☐ Webinar

Department

Job Title

Location

User Group

IM Group

Add

Cancel

- (5) Once it's done, the newly created users will show up in "Pending" tab
- (6) Then you need to activate those accounts. Check [here](#)
- (7) Once activated, those accounts are ready to be distributed to hosts
- (8) Remember to document those newly created accounts here (in tmp spreadsheet):
https://docs.google.com/spreadsheets/d/15v_4x_shKqs8A8P_JxgCBclJpFaKNzyvljEiYYzbwaE/edit#gid=548914854

2. Semi-automatically Create New Users

This way is easy for creating many users.

- (1) Before to start, you need to prepare a csv file, with the header "Email" (other fields are not necessary). In the "Email" column, fill in accounts for each row. **Remember to follow format in Step (4) in the previous section!**
- (2) Do Step (1) - (2) from previous section
- (3) Click "Import"

Users You can add 75 more Licensed user(s) (0 Licensed user(s) are pending activation) [Document](#)

Users Pending Advanced

Q Search [Advanced Search](#) v

Import Export All + Add Users

☐ Email/Name ID ⌵ First Name ⌵ Last Name ⌵ Role Type ⌵

(4) Choose your newly created csv file, and click “Upload”

Import from CSV file

Add Users Update Users

CSV file requirements

- CSV format: Email, First Name, Last Name, Department, User Group, IM Group, Job Title, Location. Department, user group and IM group are optional fields used for tracking in reports.
- User is listed in Pending tab prior to activation or acceptance.
- Max records must be less than 9999.

If you import the information of account owners or admins, all users on their accounts will be added to this account.

User Type ☐ Basic ☒ Licensed ☐ On-Prem

Feature ☐ Large Meeting ☐ Webinar

Upload CSV File Close

(5) Follow Step (5) - (8) in the previous section

Provide Tech Help using Volunteers Account

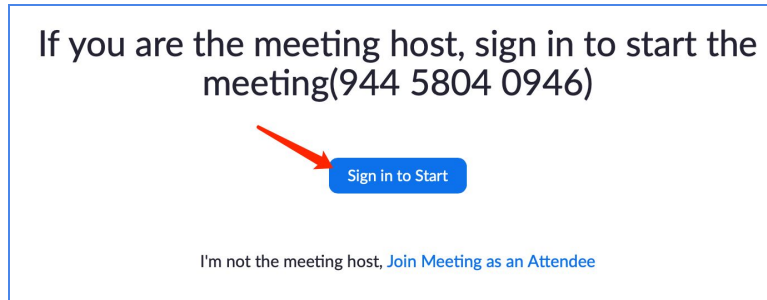
For every meeting, there are 5 volunteer accounts listed as co-hosts. These are the accounts you should use to provide any technical help during the meeting, given you would have co-host's privileges.

Follow the steps to log in as Volunteers

1. Identify the meeting you are needed, copy its **START LINK**
 - a. Quick trick: if you cannot find START LINK, you could generate the link using following format:

zoom.us/s/<MEETING ID>

2. Copy & paste the Start Link into the browser, Click “Sign in to Start”. (Ignore the message even if you are not “host”. DO not use the link below “Join Meeting as an Attendee”).



3. Credentials are:

accounts:

acl2020zoom+Volunteer1@gmail.com

acl2020zoom+Volunteer2@gmail.com

acl2020zoom+Volunteer3@gmail.com

acl2020zoom+Volunteer4@gmail.com

acl2020zoom+Volunteer5@gmail.com

Passwords:

Volunteeracl2020

4. Once you login and start the meeting as co-host, you have host's privilege to provide technical support here
NOTE: as a co-host, you CANNOT make other participants as co-host

Reset Passwords

If meeting hosts report errors of invalid email/password when logging in to Zoom, you should reset passwords for them.

1. Make sure you have the right email address (Zoom account) to reset password
2. Go to Zoom website: <https://zoom.us>
3. Click “SIGN IN” at the top right corner.
4. Click “Forgot password”, and request reset-password email

Sign In

Email Address

acl2020zoom+main-2@gmail.com

Password

Forgot password?

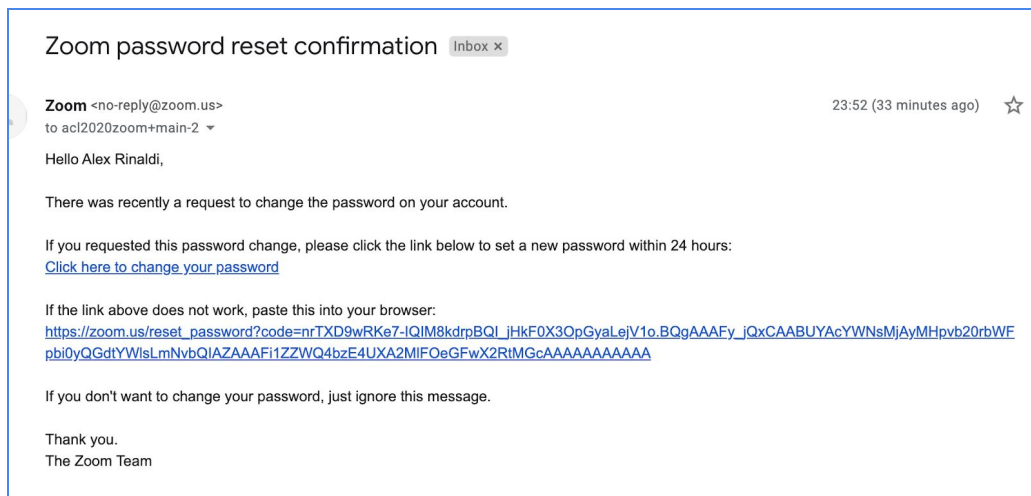
Zoom is protected by reCAPTCHA and the [Privacy Policy](#) and [Terms of Service](#) apply.

Sign In

☒ Stay signed in

New to Zoom? [Sign Up Free](#)

5. Log in Gmail of ACL2020 Master Account. Use credentials [here](#)
6. In the inbox of ACL2020 master account, search for the Zoom account you just requested to reset password. Find the most recent email
7. Follow instructions in that email to reset password



8. **(IMPORTANT!!!)** Record this new password into the document: https://docs.google.com/spreadsheets/d/15v_4x_shKqs8A8P_JxgCBclJpFaKNzyvljEiYYzbwaE/edit#gid=0

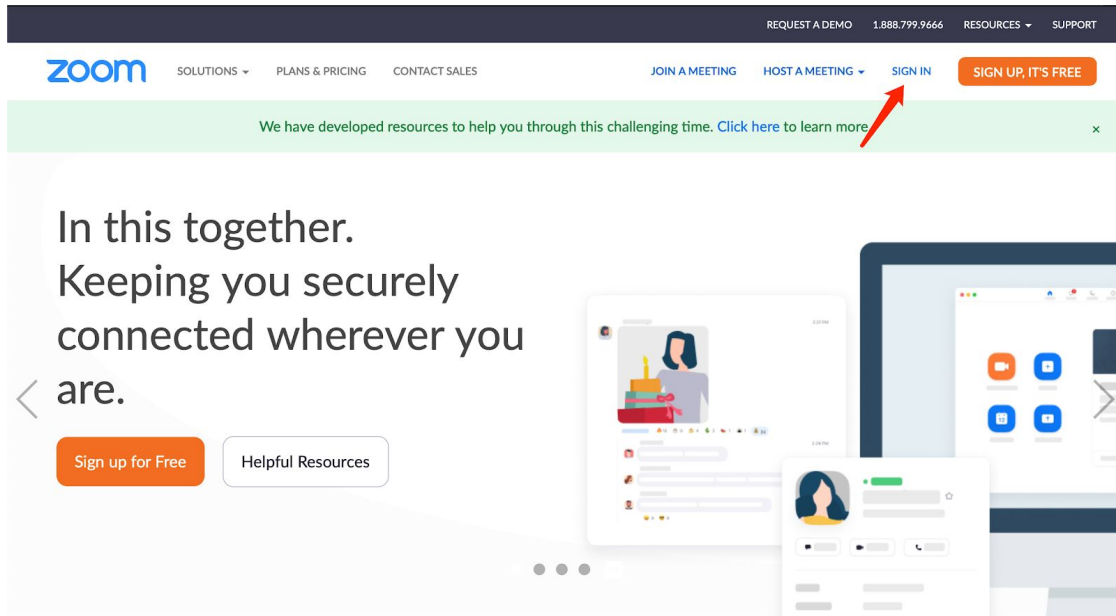
Please follow this FORMAT to update:

- Record your new password in column "Password-update-1" and update datetime in column "update-1-date"
- If this update 1 is already there, use update 2, or 3, or 4... Please create two columns ("Password-update-<X>" and "update-<X>-date") accordingly, if necessary

Verifying Zoom Accounts

This section is used for verifying existing Zoom Accounts.

1. Go to Zoom website: <https://zoom.us>
2. Click “SIGN IN” at the top right corner.



3. Use credentials in this Google spreadsheet (“username” and “passwords”) to sign in: https://docs.google.com/spreadsheets/d/15v_4x_shKqs8A8P_JxgCBclJpFaKNzyvljEiYYzbwaE/edit#gid=603234286
4. If you can successfully sign in, then the credentials for this account is verified to work
5. If you got an error, saying “Incorrect email or password”, then **report it<or do what?>**

Activating Zoom Accounts

This section is used for activating Zoom accounts.

1. Log in to the Gmail account:

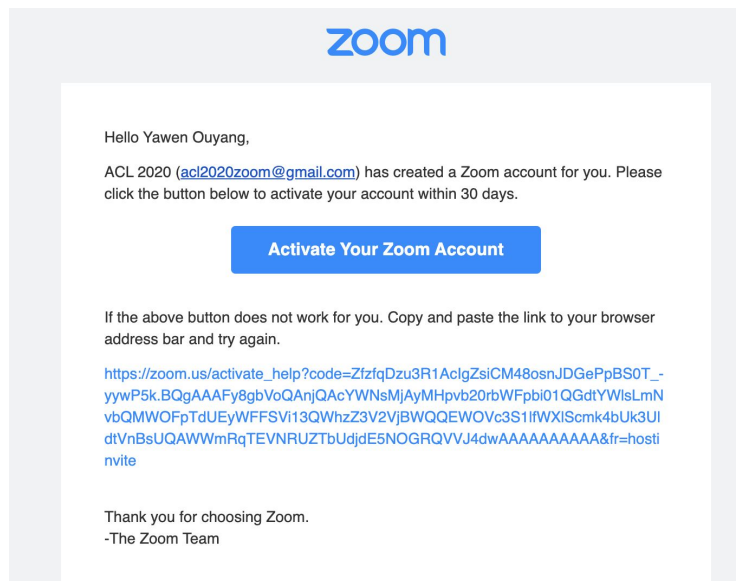
Username: acl2020zoom@gmail.com

Password: wGn\$&39J7cPk

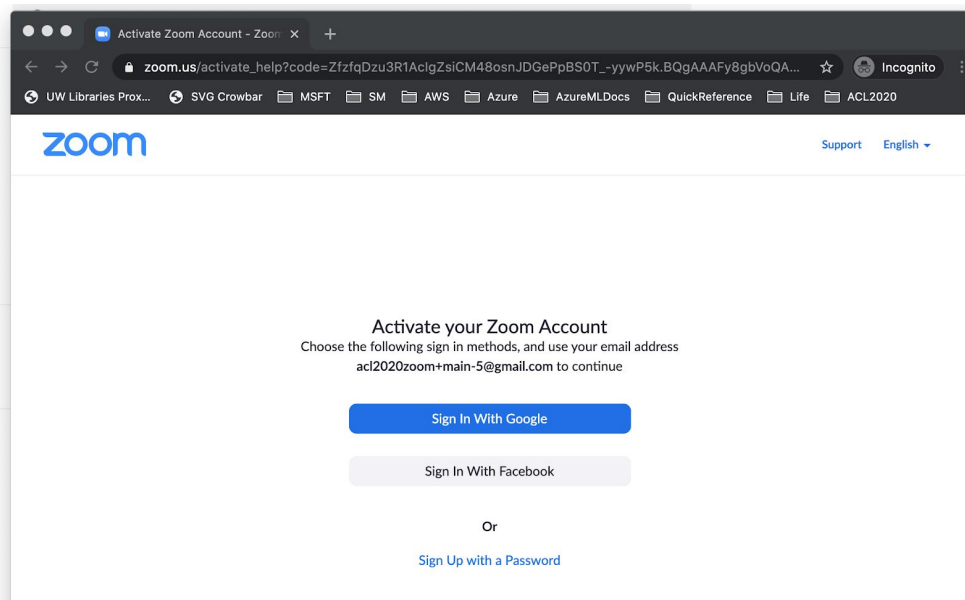
2. Search one at a time for your username/paper in the inbox
> to:acl2020zoom+main-{number}@gmail.com



3. Open mail & activate the account

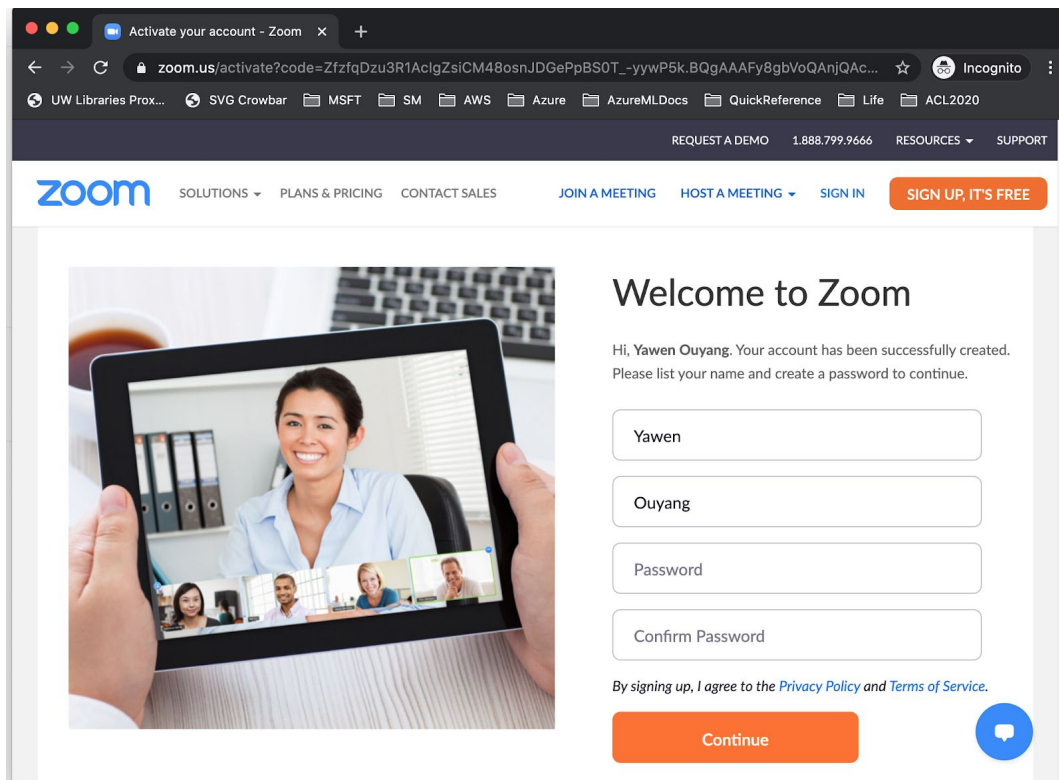


4. **DO NOT sign in with Google or Facebook // instead, click on “Sign Up with a Password”**



5. Then you should find the password in the shared Google spreadsheet (link below), and copy it to the "Password" and "Confirm Password" fields. (Use password provided)

[https://docs.google.com/spreadsheets/d/15v_4x_shwGn\\$&39J7cPkKqs8A8P_JxgCBclJpFaKNzyvljEiYYzbwaE/edit#gid=603234286](https://docs.google.com/spreadsheets/d/15v_4x_shwGn$&39J7cPkKqs8A8P_JxgCBclJpFaKNzyvljEiYYzbwaE/edit#gid=603234286)



Activate your account - Zoom

zoom.us/activate?code=ZfzfQDzu3R1AclgZsiCM48osnJDGePpBS0T_-yywP5k.BQgAAAFy8gbVoQAnjQAc...

REQUEST A DEMO 1.888.799.9666 RESOURCES SUPPORT

zoom SOLUTIONS PLANS & PRICING CONTACT SALES JOIN A MEETING HOST A MEETING SIGN IN SIGN UP, IT'S FREE

Welcome to Zoom

Hi, Yawen Ouyang. Your account has been successfully created. Please list your name and create a password to continue.

Yawen

Ouyang

Password

Confirm Password

By signing up, I agree to the [Privacy Policy](#) and [Terms of Service](#).

Continue

6. Go back to Step 2 for the next username.

Responding to disruptive participants

Volunteers may be called upon by authors during their Q&A sessions to help deal with disruptive participants. We ask volunteers to take on this role in case authors do not feel able to (for example, a relatively senior person might be being disruptive in the Q&A session of a junior author; an author might feel unable to both answer questions and handle a disruption at the same time).

Please monitor four channels < #helpdesk, #presenter-helpdesk, #incidents, #oncall-volunteers private channel > in RocketChat. This is where authors will leave a message with the link to their Zoom room if they need assistance. Please go to the room and find out if the problem is a tech support problem or a disruptive participant problem.

When you enter the Zoom room with your ACL volunteer account credentials, you will automatically be a co-host of the room, meaning that you will have access to the following actions. We encourage you to take the minimal action that manages the disruption.

- a. **Mute the participant.** This can be done via the Participants pane. At this point, it is also a good idea to uncheck the option that allows participants to unmute themselves.
- b. **Move the participant to the waiting room.** If a participant continues to be disruptive despite being muted (e.g. via the chat), you can move them to the waiting room. This can be done even if the waiting room isn't 'enabled', but it may be valuable to enable it at this point, in case the person tries to leave and immediately re-enter. Anyone with host or co-host privileges can send messages to the waiting room, but it is not possible to communicate with people in the waiting room via individual chat.
- c. **Remove the participant.** This prevents the participant from easily coming back into the room.

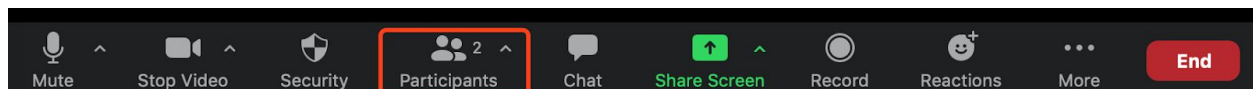
Please keep in mind the following:

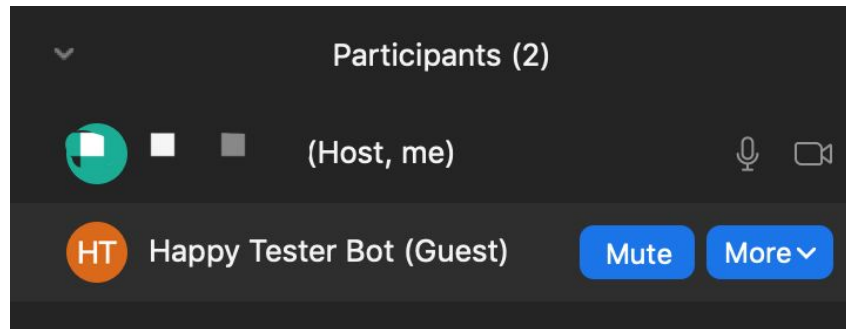
- a. These actions are only for cases of disruptive behavior, and not, for example, to be used in case of simple scientific disagreement.
- b. Any author or volunteer who finds it necessary to deploy one of these 'silencing' options should report that fact to the PCC co-chairs, immediately upon the conclusion of the session, via [this brief form](#).

Below are illustrations about how to make use of these Zoom features:

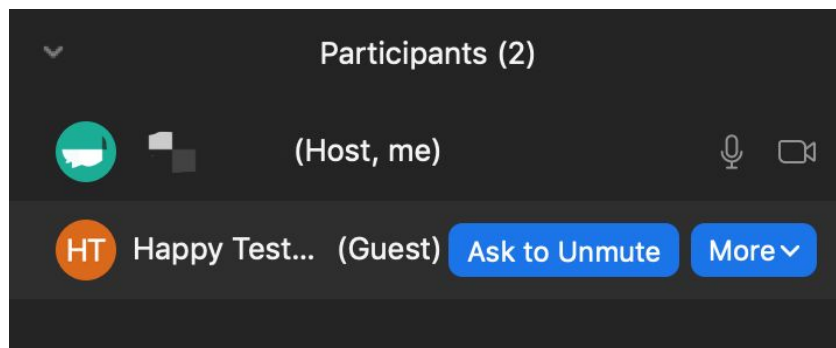
1. Mute/Unmute a participant

If you find some participant is unmuted, you can mute them by moving the cursor over them in the Participants Tab, and select "mute".

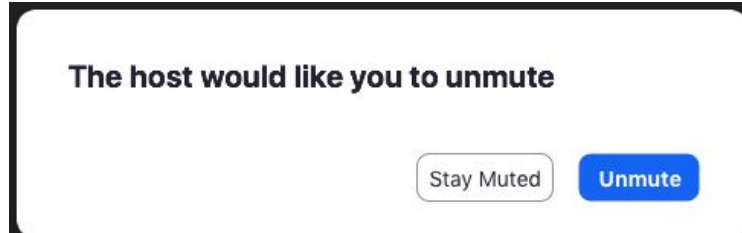




In the same way, if you want to unmute a specific muted participant, you will find the “Ask to Unmute” option next to him/her.



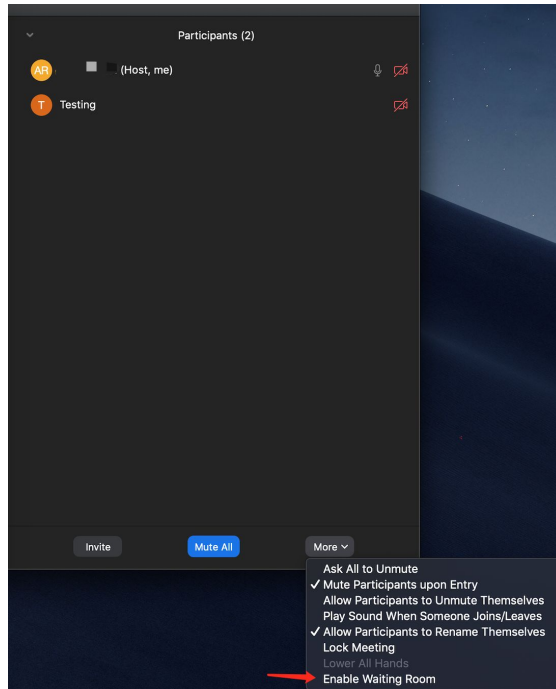
If you click this button, a notice on the participant’s side will pop up, saying “The host would like you to unmute”. He/She can then choose whether to do it or not.



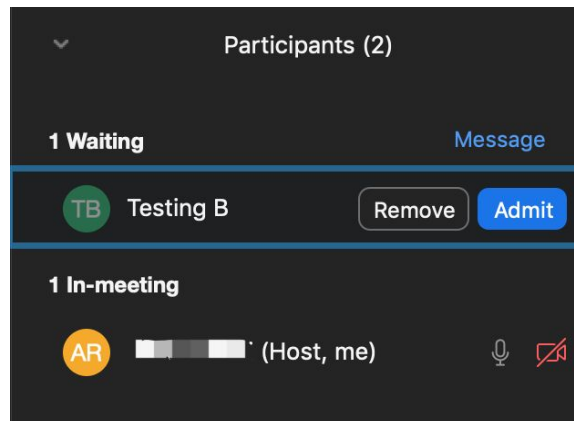
2. Enable waiting room

The waiting room function could enable the host to select who to join the meeting.

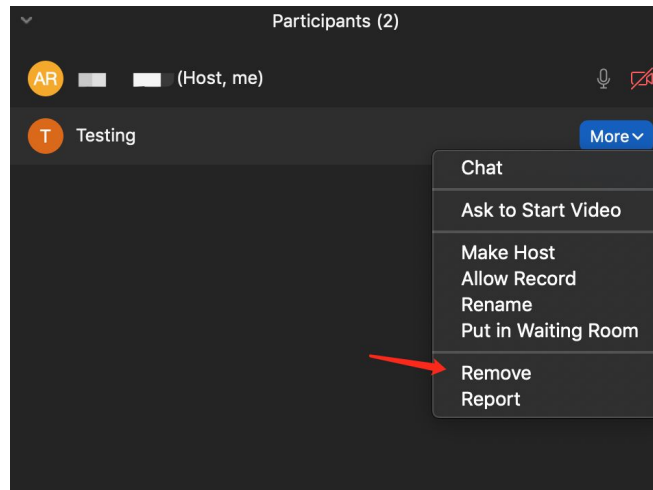
- a. In Participants Tab, click “More” at the bottom, and select “Enable Waiting Room”



- b. Once the Waiting Room is enabled, all new participants will show up in Participants Tab, under the “[Waiting](#)” Section. You can either let them in or remove them.



3. Remove a participant or put a joined participant back into the waiting room. In the Participants tab, move the cursor over the participant to be removed, and click “[More](#)”; then select “[Remove](#)” to remove that participant from the meeting, or “[Put in Waiting Room](#)” (if Waiting Room is enabled).



NOTE: A removed participant cannot rejoin the meeting.

ACL2020 Master Zoom Account

This is the ACL2020 Master Zoom account. If not necessary, do not change any settings here.
REMEMBER TO LOG OUT when you are finished here.

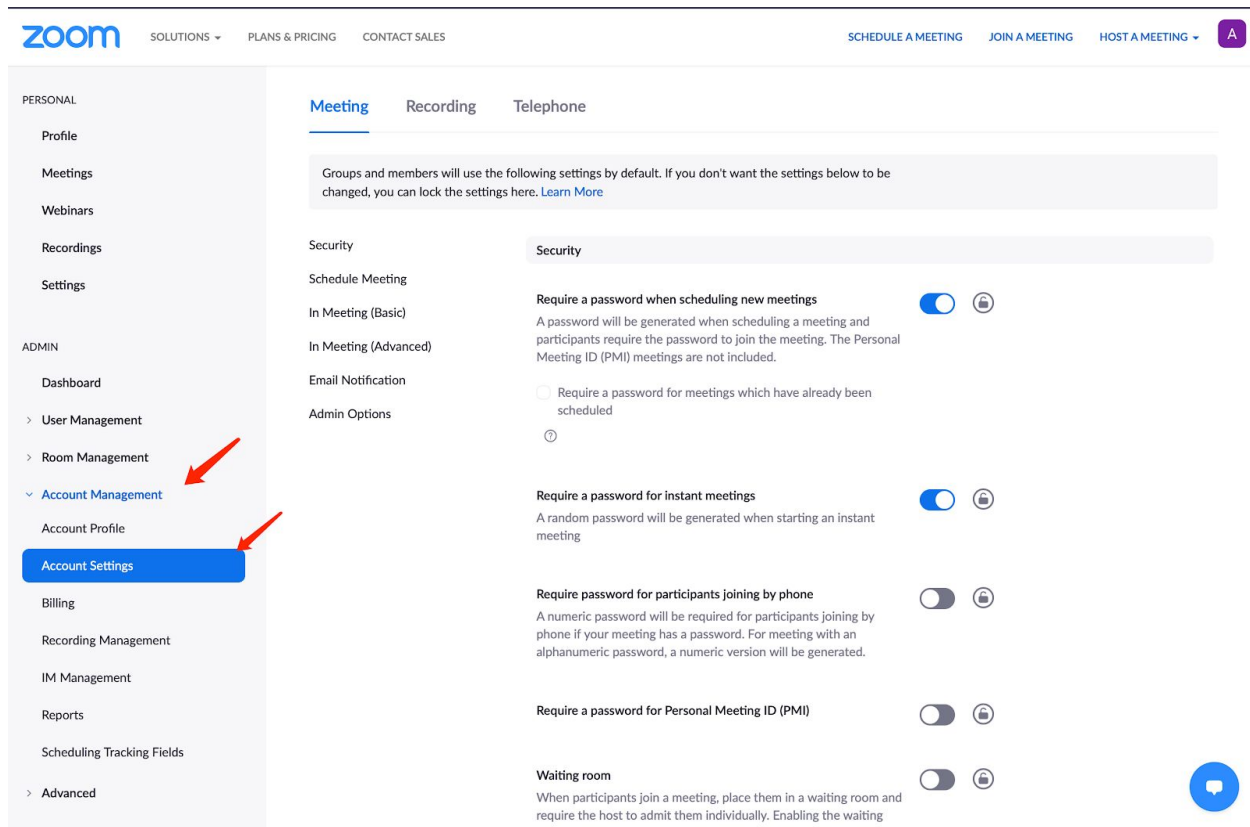
If you need help with Master Zoom Account, contact Zoom Team POC FIRST.

Change Zoom Meeting Settings Globally (For **ALL** Existing and New Meetings)

This is the operation to change default configurations for all Zoom meetings, by using ACL2020 Zoom Master account. It is **NOT** recommended to play here in order to only change settings for one meeting.

1. Log in ACL2020 Zoom Master Account
2. From the left navigation bar, select "Account Management" -> "Account Settings". All basic settings for Meeting, Recording, and Telephone are here.

WARNING: It is not recommended to change these settings in order to only set up a new meeting. Be careful with those settings, since it will affect all existing and upcoming meetings!



The screenshot displays the Zoom web interface. The top navigation bar includes the Zoom logo, links for SOLUTIONS, PLANS & PRICING, and CONTACT SALES, and buttons for SCHEDULE A MEETING, JOIN A MEETING, and HOST A MEETING. The left sidebar is divided into PERSONAL and ADMIN sections. Under ADMIN, 'Account Management' is expanded, and 'Account Settings' is highlighted. Two red arrows point to 'Account Management' and 'Account Settings'. The main content area shows the 'Meeting' tab with a warning message and a list of settings under the 'Security' section. The settings include 'Require a password when scheduling new meetings' (enabled), 'Require a password for instant meetings' (enabled), 'Require password for participants joining by phone' (disabled), and 'Require a password for Personal Meeting ID (PMI)' (disabled). There is also a 'Waiting room' section.

Meeting Recording Telephone

Groups and members will use the following settings by default. If you don't want the settings below to be changed, you can lock the settings here. [Learn More](#)

Security

Schedule Meeting

In Meeting (Basic)

In Meeting (Advanced)

Email Notification

Admin Options

Require a password when scheduling new meetings ☒

A password will be generated when scheduling a meeting and participants require the password to join the meeting. The Personal Meeting ID (PMI) meetings are not included.

☐ Require a password for meetings which have already been scheduled

Require a password for instant meetings ☒

A random password will be generated when starting an instant meeting

Require password for participants joining by phone ☐

A numeric password will be required for participants joining by phone if your meeting has a password. For meeting with an alphanumeric password, a numeric version will be generated.

Require a password for Personal Meeting ID (PMI) ☐

Waiting room ☐

When participants join a meeting, place them in a waiting room and require the host to admit them individually. Enabling the waiting room automatically disables the setting for allowing participants to

Create Zoom Meeting Using Scripts

Updated on July 1st, 2020

NOTE: running this script will update:

(1) your local Excel/csv files

(2) Zoom meeting settings (if anything changed), stored on Zoom's backend (cloud)

Thus, please do not run this code without control... For testing, please follow DEMO embedded in each step. Please **only create a few entries** to make it controllable (we have a limit of 100 registers per day... so be careful).

What you need to start:

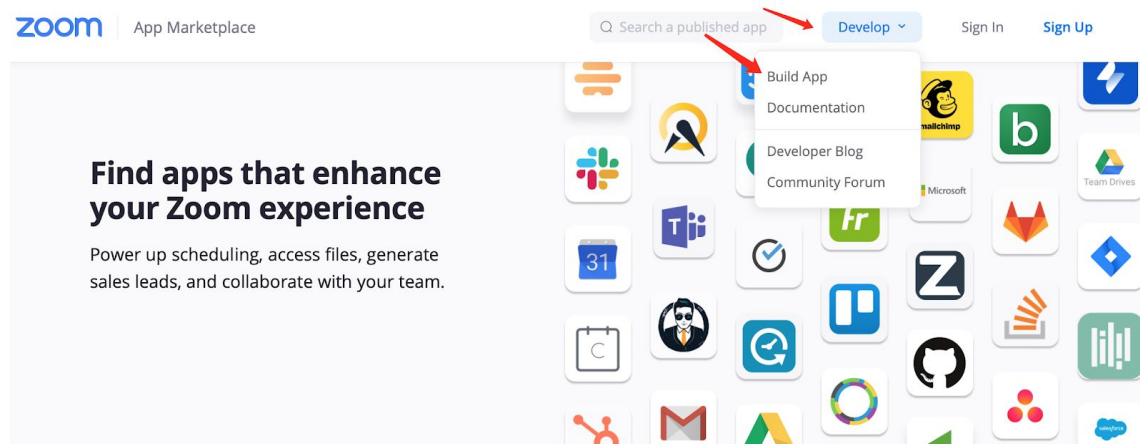
- (1) Github repo: <https://github.com/acl-org/acl-2020-virtual-conference-zoom/tree/master>
Currently, please use "test" branch

Structure

- (1) `go.py`: the main python script you will need to generate meetings
- (2) `Input` folder: input files to arrange meetings for different sections
- (3) `Output` folder: output files with generated/updated Zoom ID's and Zoom links

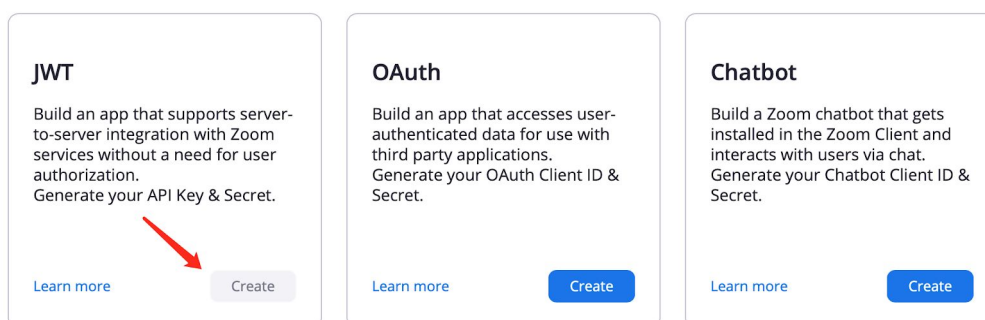
JWT Setup Step (optional)

1. Using `acl2020` master account, create JWT credentials in Zoom App Marketplace
 - (1) Log in through <https://marketplace.zoom.us>, using Master Zoom Account's credentials
 - (2) From "Develop" in top bar, select "Build App"

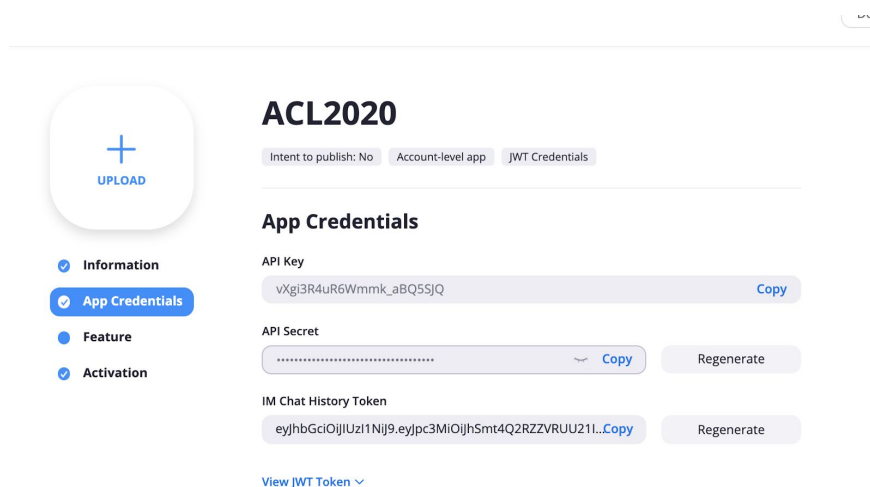


(3) Under JWT tab, select “Create”

Choose your app type



(4) Now you will be able to see (or create or regenerate, if needed) the API Key and API Secret.



Before regenerating new API Secret, click “View JWT Token” to expand it, and select a longer expiration date (1 week or custom: 00:00 07/26/2020).

- (5) NOTE: if the token is expired, you need to use the “Regenerate” button to regenerate new API Secret.
2. Update the API Key and API Secret in github project (hopefully you downloaded this into your computer already to proceed)
 - (1) In the github project (acl-2020-virtual-conference-zoom) directory, open “zsecret.py” file. In the very beginning, you will find the following line (very likely we uploaded Key and Secret into Github, so you actually don’t need to worry about this):

```
client = ZoomClient("XXX", "YYY") #(API_KEY, API_SECRET)
```
 - (2) Copy and paste the API Key and Secret from Zoom Marketplace into the above line, to update client credentials

NOTE: it is likely that API credentials will expire after a certain amount of time. If this happens, use the above step to regenerate them.

Steps to create new Zoom Links (ID + links for participants + links for authors)

1. Install required packages
Part of the required python packages are stored in “requirements.txt”. To install them:

```
>> pip3 install -r requirements.txt
```

NOTE: not all required packages are listed here. If you encounter errors for uninstalled packages during following steps, please install them manually!

Full requirements:

- openpyxl
- nameparser
- psutil
- PyJWT
- pytz
- python-dateutil
- requests

2. Identify which section you want to create new meetings for. For example, for main paper section, you should identify “Input/main_paper_schedule.xlsx”; for sponsors, it’s “Input/schedule_sponsors.xlsx”, etc.

In demo, use “Input/Volunteer_test.xlsx”. For this demo file, you can definitely add more entries, but please follow the format, and use acl2020zoom+volunteer_alternative_test@gmail.com as host_user_email for testing purposes.

3. Prepare the right file to CREATE NEW Zoom ID's and links
 - (1) In this Excel file you identified in previous step, make sure your to-be-arranged meetings are in "Sheet1"
 - (2) Make sure `zoomid`, `join_link`, and `start_link` are all empty (IMPORTANT!)

Tips (you don't need to take actions here):

- `uniqueid` and `title` should be identical
- `starttime` and `endtime` are predefined
- `host_zoom_user_email` is the account for authors (host)
- `alternative_host` is the ACL main account acl2020zoom@gmail.com (co-host)
- If any step below fails, remember to recheck Step 3 to make sure the Excel file is clean.
- This excel file MUST be closed when executing the following script(s).

4. Change Meeting Settings (optional)

The meeting settings are stored in `zsecret.py` file, in python dictionary called `meeting_defaults`. If you want to change some default meeting settings for new ones, you should modify this accordingly.

- `duration`: meeting duration in minutes
- `recurrence`: recurrence meeting settings

For more information, refer to Zoom API Documentation ([click here](#)).

5. Execute script

```
>> python3 go.py --file Input/<YOUR_FILE.xlsx>
```

In demo, use

```
>> python3 go.py --file Input/Volunteer_test.xlsx
```

6. (debugger should be removed after testing) debug is on currently, so use "c" to move to next steps in pdb debugger
7. If successful, the script will update the original Excel file (in `Input` folder), and also create a new csv file in `Output` folder, with filled columns of `zoomid`, `join_link`, and `start_link`.
 - `zoomid`: an 8/9-digit number. It could used to join the meeting directly
 - `join_link`(for Attendees) : the link for participants
 - `start_link`(for Hosts) : the link for authors

The output file could be found as

"Output/schedule_main_paper_author_email.csv" for main paper session, or
"Output/schedule_sponsors.xlsx" for sponsors session, etc.

DEMO Check Results:

After successfully executing `go.py` with `Volunteer_test.xlsx`, you could log in Zoom using the following credentials:

Email: `acl2020zoom+volunteer_alternative_test@gmail.com`

Password: `Volunteeracl2020`

And in the "Meetings" Tab, you could find your newly created meetings.

NOTE:

1. If `go.py` fails, the `zoomid`, `join_link`, and `start_link` in `"schedule_main_paper.xlsx"` will show NULL/null in the first row. Please remember to clean them before running next time
2. If `go.py` fails, please have a check on JWT credentials through Zoom App Marketplace. The API access logs will help debug here:
 - (1) If the logs show error of "expired credentials", use JWT Setup Step section to regenerate API Secret (remember to use a longer expiration time, other than 90 minutes by default)
 - (2) If the logs show error of something like "hitting daily API request of 100", **<back-up plans here? Such as use another Zoom account?>**