

HOSTING A VIRTUAL EVENT

*Using Zoom Webinar to host a conference, workshop or
Lecture series*

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1. Introduction

The two main software options available for virtual events hosted by the Math Department are Zoom meetings and webinars. Together, this software can cover events ranging in size from a small group meeting to a conference with 1500 attendees. The considerations for these types of events are varied.

Generally speaking, the meeting software is suitable for participant groups in the range of 1-50, where consistent audience participation and feedback are vital.

The webinar software is most appropriate for participant groups in the hundreds or thousands, where a clear line is drawn between speaker and audience. Though an audience member can be permitted to use their microphone, they are unable to use their camera or share their screen. Screen sharing and video are reserved for speakers.

As most are now familiar with the operation of a traditional Zoom meeting, this guide will cover how to schedule and host a Zoom webinar.

Fundamental features of a webinar

In a Zoom webinar, participants are broken into two major groups: panelist and attendee. Panelists are the designated speakers. They begin the meeting with the ability to share screen, unmute, and share video. This group also includes the host and cohost.

Attendees, on the other hand, cannot do any of the above. Their default screen gives them only three options: raise a virtual hand, post a question to a Q&A dialogue, or chat. An attendee can be permitted to unmute, but this permission must explicitly be granted by the host or cohost.

This separation between attendee and panelist makes Zoom webinars ideal for events that are likely to have a large audience. In this case, the host can spend less time worrying about audience behavior and can focus more of their attention on the quality of the event itself.

A traditional Zoom meeting can only support a maximum of 300 participants. A webinar can have up to 10,000 attendees.

2. Requirements

Zoom license

Harvard has an enterprise license to Zoom's software. This provides access to Zoom meetings to all members of the Harvard community. However, the Zoom webinar software is not available to all Harvard members as a default. As of May 2020, webinar licenses are in a limited supply and can only be provided to a few members of each department. In order to request access to the Zoom webinar software, [file a ticket with HUIT](#).

Once you have requested and acquired access to the software, you can schedule webinars from your Zoom account at harvard.zoom.us.

Considering your Event format

Before delving into the use of webinars, it is necessary to answer a few essential questions about your event. The first step of preparing for any successful event is establishing a loose schedule and ground rules. The main considerations are:

- How many speakers will be participating?
- How long will each talk be?
- How many talks will be given on each day of the event?
- Will there be a lunch break?
- Will talk chairs be assigned to guide the program?
- How will audience questions be handled?
- Will the talks be recorded?

Establish answers to these questions in advance and ensure smooth transitions between talks and safe and secure audience participation.

The format of a virtual event should be different from that of an in-person conference or workshop. The goal of most in-person events is networking and collaboration. However, spontaneous interaction is limited with a virtual event, so the focus falls on the talks themselves. The longer and drawn-out an event, the more attendance will dwindle.

To boost engagement, consider the following guidelines:

- Schedule fewer talks than you would for an in-person event.
- Keep the downtime between talks limited.
- Spread talks over the course of a few days or weeks, instead of a few hours.

***Tip:** Designate a cohost. Having a cohost who has no responsibilities but to back you up in case of emergency will give you peace of mind.*

3. Scheduling a webinar

Now that you have established the format of your event, you can begin scheduling. A webinar can be scheduled from the Harvard Zoom portal at harvard.zoom.us. Once logged in, navigate to **Webinars** on the left sidebar menu, and click **Schedule a Webinar**.

This process is broken up into two steps. First, schedule the date, time, and initial webinar settings. Then, after saving your event, you can customize email, registration, and more.

Establishing basic information

Topic

This is the title of your event. Include the name of the event as it would appear on a poster or website.

Description

If your event is taking place only on one day, provide basic information including a list of speakers and a description of topics covered. If your event is broken up into different days, provide a basic schedule. Including a schedule is important for multi-day events, as it will help with Zoom registration. Keep in mind that this information will be displayed in plain text, so format wisely.

Here is an example of a schedule written out for a multiday event:

March 23, 2021 | 5:00 - 6:30pm ET
Speaker A (Institution)
Title: Scheduling a virtual event

April 8, 2021 | 9:00 - 10:30am ET
Speaker B (Institution)
Title: Hosting a virtual event

Date/Time

If your event will be taking place on one day, this step is easy. Schedule the date and time of your event.

If you will be hosting a multi-day event, such as a series of lectures, schedule a recurring meeting. By scheduling a recurring meeting, you ensure that the link for each session will remain the same.

Tip: To schedule a recurring event happening at random intervals, first schedule the number of occurrences. Once you have saved your event, you can edit the date and time of each occurrence.

To schedule your event as a recurring webinar:

1. Check ***Recurring webinar***.
2. On the drop-down menu for ***Recurrence***, select ***Daily***.
3. Leave repeat every as ***1 day***.
4. Select ***after*** [blank] ***occurrences*** and select the number of days of your event will occur on.
5. Once your event is saved, edit the date and time of each occurrence to match your schedule.

Duration

If your event will be taking place as a one-day event, you should schedule one webinar with an approximate duration for the length of the event. Don't worry about this being entirely accurate, meetings and webinars will not be cut short because of the established duration.

Presetting main webinar options

Registration

You have the option of using Zoom's registration and automated email system or distributing the link via email on your own. An alternative to using Zoom's system is to create a Google form registration and populating a custom mailing list with the responses. Though this option allows for more flexibility, it leaves more room for costly errors.

In most cases, using Zoom's registration system will be the cleanest option. You can choose whether attendees only have to register once to attend all the events, or if they must register for each occurrence individually. Choose the former option for something like a multiday workshop, the latter for a lecture series.

Webinar Passcode

For Harvard Zoom Meetings HUIT requires that hosts use either a waiting room or a passcode to protect their event. This rule does not apply to webinars. If you are using registration, you do not need to select a passcode, as you can comb through the list of registrants before the event begins.

Video

This option sets the default video permissions for your webinar. Selecting *on* means the user will immediately be given the option to start their video when they join the meeting. The best option here is usually *on*. Seeing panelists when they are speaking provides attendees with a more engaging experience.

Audio

This section designates which type of audio attendees will be permitted to use to hear the webinar. Select *Both*.

Webinar options

Unlike meetings, webinars are given an additional chat interface specifically designed for attendee questions. I will go over the use of Q&A in more detail in **In-Meeting controls**.

Enable Practice Session

The practice session feature allows panelists to join the webinar before it is opened up to attendees. This feature is vital as it allows speakers and the host to prepare their slides and make any preparations without attendees watching. If an attendee tries to join a webinar that is in practice session, they will be held in a waiting room until the webinar is begun by the host.

Require Authentication to join

This option only allows Harvard members with a Harvardkey enabled Zoom account to attend. As one of the benefits of using a webinar is its ability to host a varied and broad audience, authentication should be avoided.

Automatically record Webinar

If you have received permission from speakers to record their talks, the webinar can be recorded beginning immediately when the practice session ends, and the webinar

begins. Regardless of this setting, you will have the option to start, stop, or pause recording with the in-meeting controls.

A recorded webinar can be downloaded to your local computer or be made available on the cloud. The preferred option is recording to the cloud as it provides a backup should anything happen to your computer.

Approve or block entry for specific users from specific countries or regions

This option should be avoided.

You have now finished with the initial scheduling of your webinar. Once you have saved your event, you can begin customizing your selections for registration, automated emails, and branding.

Customizing your scheduled webinar

Now that you have saved your event, you can customize it on the webinar page. Any of the selections you have made so far can be altered by navigating halfway down this page and selecting *Edit*.

If you have scheduled a recurring event, you should first make sure the dates and times of your event are correct. In the time section, click *Show all occurrences*. You can edit each occurrence or add more here.

At the bottom of your Webinar page, you have the option to customize Invitations, Email Settings, Branding, Polls, Q&A, and more.

Sending Invitations

Invite panelists

Speakers must be invited on this panel in advance. Once invited, they will receive an automated email and a reminder at a scheduled time. The link to join that is sent to panelists is unique to them, so it is important they use their automated email reminders to join.

***Tip:** If you have a panelist who is struggling to find their automated email and join, you can copy and paste their link from this panel into an email of your own.*

Invite attendees

This link will lead users to the registration page. Share it widely. Registration on this page is just for attendees. Panelists do not have to register. The registration page will contain the title and description of your event, along with the option to select each occurrence of the event.

Manage attendees

This panel allows you to view all registrants in advance and remove them if necessary. You can send reminder emails to specific registrants as well.

Reminders and appearance

Email Settings

This panel allows you to customize the timing and text of the automated emails that are sent to registrants (attendees) and panelists. You have the option to send a reminder one week in advance, one day in advance, and /or one hour in advance. All automated

emails contain the link to attend. This link is unique to the individual, either registrant or panelist, and should not be reproduced or shared.

Tip: Schedule a reminder email for an hour before the webinar begins. This will likely serve as a last-second reminder for registrants and will help boost attendance. You also have the option to automate a follow-up email.

When scheduling a reminder email, remember to include talk information. A reminder email is sent for each occurrence of the event. If your event has a different schedule each day, you can edit the email contents after each occurrence to ensure the reminder email reflects the upcoming day's information.

Branding

This panel allows you to customize the visual appearance of your automated emails and registration page. Change the theme color to Harvard crimson, **hex code: #A51C30**. The logo can either be the Harvard Shield or a specifically designed graphic for your event.

Polls and questions

Polls/Survey

This panel allows you to create a custom survey to be given during the webinar.

Q&A

This panel allows you to specify your settings for the Q&A chat box during the webinar. Attendees can be permitted to ask questions anonymously or be required to show their names. Additionally, attendees can be permitted to see questions before they have been answered, and even upvote certain questions.

Once you have finished customizing your settings, check your registration link to ensure everything is correct. If you scheduled a recurring event requiring attendees to register for each occurrence separately, you will see that the registration is presented as a series of dates with checkboxes. It is essential your event description includes a schedule. This will ensure attendees will have the information they need to register for an individual occurrence of your event.

4. Preparing participants

To guarantee a smooth event with few technical glitches, give your speakers an opportunity to practice using the software in advance of the event. At least a week before the event begins, contact each speaker directly and explain the process going forward. They will likely already be familiar with using Zoom. Don't forget to include the following things:

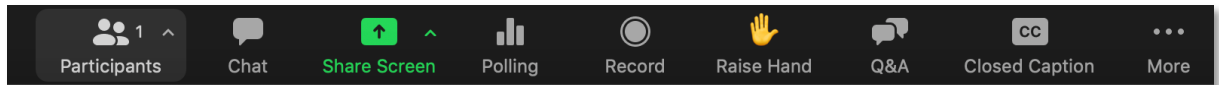
- Explain the differences between webinars and meetings.
- Layout the process for questions you have established with the event organizer.
- Explain the concept of the practice session.
- let them know to join early to get prepared for their talk.

If a participant chooses to meet with you in advance of their talk, schedule a test webinar and invite them as a panelist. During your meeting, ensure they understand how to share their screen. Additionally, make sure they understand how to use their camera, microphone, etc.

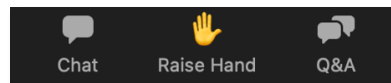
5. In-meeting controls

Now that we have established how to schedule and fine-tune a webinar, we can consider in-meeting controls. This section will cover the controls that differ from traditional Zoom Meetings. As a general rule, all of the options you've selected that apply to panelist/attendee permissions can be altered once your webinar has begun.

Important note: attendees will only have three options on their panel. Raise hand, Q&A, and Chat. They will only have the option to unmute if you select them from the participants panel and click "unmute."



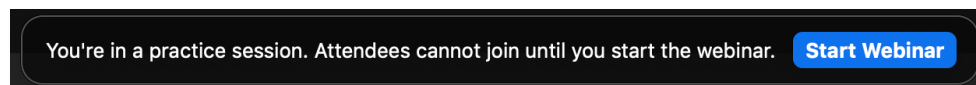
Default host options.



Default attendee options.

Practice Session

If you have decided to use the practice session feature, your webinar will begin in this mode. Once you are ready to allow attendees to enter, click **Start webinar** on the banner at the top of the screen. If you have set the webinar to automatically record, the recording will now begin.



Practice mode banner

Participants

Clicking the **participants** button will lead you to a panel that is split between panelists and attendees. You can alter a given participants permissions by clicking the indicator next to their name.

For example, attendees can be promoted to panelists, and panelists can be promoted to host or cohost.

The list of attendees is ordered alphabetically by default. However, if an attendee raises their hand, they will move to the top of this list.

On the participants panel, at the bottom of the screen, there are three indicators: **Invite**, **Mute All**, and **More**. Click **More** to access miscellaneous permissions and meeting settings. If you are having trouble finding the location of a setting, check here.

A dark-themed settings menu with several sections. The first section is titled 'Ask All to Unmute' with the option 'Lower All Hands'. The second section is titled 'Mute Panelists Upon Entry' and includes '✓ Play Join and Leave Sound' and 'Lock Webinar'. The third section is titled 'Allow Panelists to:' and includes '✓ Unmute Themselves', '✓ Rename', and 'Start Video'. The fourth section is titled 'Allow Attendees to:' and includes '✓ Raise Hand' and 'View Participant Count'. The fifth section is titled 'Attendee Video Layout:' and includes 'Follow Host's View', '✓ Active speaker view', and 'Gallery view'.

- Ask All to Unmute
 - Lower All Hands
- Mute Panelists Upon Entry
 - ✓ Play Join and Leave Sound
 - Lock Webinar
- Allow Panelists to:
 - ✓ Unmute Themselves
 - ✓ Rename
 - Start Video
- Allow Attendees to:
 - ✓ Raise Hand
 - View Participant Count
- Attendee Video Layout:
 - Follow Host's View
 - ✓ Active speaker view
 - Gallery view

Additional settings stored under *More*

Q&A

When an attendee asks a question, you have the option to answer or dismiss. Answers can be given verbally or written out. Either way, an answered question will move out of the queue. Dismissed questions will not be visible to attendees.

All of the Q&A settings you predetermined while scheduling the meeting can be found by clicking the gear in the top right corner of the Q&A tab.

A dark-themed settings menu for Q&A. It starts with a checked checkbox 'Allow anonymous questions'. Below this is a section titled 'Allow attendees to view' with two radio button options: 'answered questions only' (selected) and 'all questions'. At the bottom are two unchecked checkboxes: 'Attendees can upvote' and 'Attendees can comment'.

- ☒ Allow anonymous questions
- Allow attendees to view
 - ☒ answered questions only
 - ☐ all questions
- ☐ Attendees can upvote
- ☐ Attendees can comment

Settings on Q&A tab

End meeting

There are two options when ending a webinar:

1. **End meeting for all.** This will kick everyone, including the panelists out of the webinar and end it permanently.
2. **Leave meeting.** Only you will leave the meeting and host permissions will be transferred to the designated cohost.

Example situations to prepare for

- If a designated speaker has accidentally joined the meeting as an attendee, begin your webinar and promote them to a panelist from the attendee list.
- If an attendee raises their hand and would like to speak, they can be unmuted from the participant panel. Additionally, to share screen or use their camera, they can be promoted to a panelist.
- You can individually mute any panelist. Use this tool sparingly.
- If a panelist is unable to share their screen, it means you have only allowed hosts to share. You can change this setting by clicking the carrot in the top right of the share screen icon.
- If a panelist is making noise during another panelist's talk, you can mute them by hovering over their name and clicking **Mute**.

6. Reports and video

From your Zoom web portal at harvard.zoom.us. You may download a report of your webinar that includes the contact info and names of everyone who attended and registered for your event. It is a good idea to keep this information handy.

If you selected to have your Webinar recorded, a recording will be made available in the web portal. You can locate this on the left sidebar menu. Zoom automatically transcribes all videos. However, the transcription is provided by AI and is highly inaccurate and has no real value. If a video must be captioned, use one of the Harvard-approved vendors listed on the accessibility page.

Information about accessibility requirements and preferred vendors can be found on the [Harvard Accessibility website](#).

As of this moment the Math department captions all videos intended for a broad and general audience. If your event took place in a Webinar format, it is likely your video needs to be captioned.

7. Further reading

[Getting started with webinars](#)

[Information on scheduling a webinar provided by Zoom](#)

[Accessing a cloud recording](#)