Zoom User Guide (for the Purpose of Running a Festival)

This document will walk through how a festival might be run using Zoom and how to accomplish all of the required steps using Zoom from a computer. There will also be tips about using Zoom on a tablet or mobile phone (as the screen and some settings appear differently depending on platform). Any instructions related to the use of Zoom on tablet or mobile phone will be italicized for easy reference.

Overview:
Zoom is a great option for connecting adjudicators and competitors in a virtual festival setting. Zoom is a reasonably priced platform ($20.00 per month for the meeting host) where only the meeting host has to pay for an account. Anyone else attending a Zoom session (adjudicators and competitors) can access the Zoom meeting for free. Zoom has a number of built-in tools that can be utilized to make it a really smooth experience for your adjudicators and competitors. There are many other conferencing tools besides Zoom (such as Google Meets) that you may want to consider and explore (and may already have access to). However, AMFA will only be creating a user guide for Zoom at this time as it has become a widely known platform in recent months, is reasonably priced for the meeting host, and has a huge variety of built-in tools to make your Zoom event unique and well-run.

Zoom can be utilized on its own as a tool for running a virtual festival or Zoom can be used in coordination with a video playback tool like YouTube (AMFA has also created a user guide for YouTube which can be accessed on the AMFA website at albertamusicfestival.org/agm).

Creating a Free Zoom Account (for Competitors and Adjudicators) and Joining/Participating in a Zoom Meeting using a Computer: There is a fairly substantial difference between a free Zoom account (that competitors and adjudicators will likely use) and a paid Zoom account (which you will need to set up your session). We will start by addressing free accounts.

1. **Set Up a Free Account:** Anyone joining a Zoom meeting will need to set up a free Zoom account before they can join. You can do this a few different ways:
    A. Option 1: Wait until you receive a Zoom meeting link (the festival will send one out if using Zoom). You can then click on that link and set up a free account. From a computer, you will want to install the Zoom software.
    B. Option 2: Go to https://zoom.us/and click the "Sign Up, It's Free" button to create a new account, then enter your personal details and then download the software when it asks.
2. **Join a Meeting:** There are a couple of ways to join a Zoom meeting:
    A. Click the Link: Click on the Zoom link sent to them. When you click, a pop up will come up asking if you want to "Open Zoom Meetings" (the software you downloaded above). Click yes to open the meeting.
    B. Enter the Meeting Details: Go to Zoom.us and sign in to your account. Once signed in, there will be a tab towards the top right that says "Join a Meeting." Click there and enter the Meeting ID number and click "Join." Enter the password (if there is one) and enter the meeting. When you click, a pop up will come up asking if you want to "Open Zoom Meetings" (the software you downloaded above). Click yes to open the meeting.
3. **Waiting Room:** You may or may not be placed in a Waiting Room once you join the meeting. If you are in a Waiting Room, you will just need to wait until the meeting host lets you into the meeting. Alternately, you might go straight into the meeting without having to wait. It depends on the settings the meeting organizer uses.
4. **Audio Options:** When the meeting comes up, it will ask if you want to use Computer Audio or Join Audio Using Telephone. If you have a microphone and speakers (which you likely do if using a laptop), select Computer Audio. If you do not have a microphone or speakers, you may join just with video and then call in on your telephone for audio. If you select the wrong audio option, you can always click the small up arrow next to "Mute" (once in the Zoom meeting) and select join (or leave) computer audio there. **IMPORTANT NOTE:** If you

do NOT join with computer audio, you will not be heard and will not be able to hear unless you call from your phone. Also, if you are performing in a Zoom session, you will need to set up "Original Sound" in your advanced settings. Please see number 9 below for more about that.

5. **Mute:** The meeting host may choose to Mute everyone but the presenter. If called on to speak, you can press the Mute button of the bottom left to unmute or press and hold your space bar.

6. **Video Options:** At the bottom left of the meeting screen (next to the Mute button), you can "Share Video" which will start your camera so that others can see you.

7. **Different Viewing Options:** At the top right, you can choose Speaker View or Gallery View (the one you are on currently is NOT the one you see the name for). Speaker view only shows whoever is speaking at the time. Gallery view shows up to 25 people all at once. If you want to see a single screen even if they are not currently speaking, you can right-click on that screen and click "Pin Video" and that video will become prominent. You can always unpin it by right-clicking on a pinned video and selecting unpin.

8. **Other Options:** There are a few other things you can do now that you are in the meeting:
   A. Chat: You can use the chat function to say hello to others or ask questions. You can also send private chats to specific other individuals in the meeting (if the host has selected this is okay).
   B. Reactions: You can add reaction emojis to your video (applause, thumbs up, etc.)

9. **Advanced Settings:** You can make adjustments to all sorts of settings by clicking the green checkmark in the top left side of the screen. If you are singing/playing in a Zoom meeting, you will DEFINITELY want to change your audio input setting to "Turn on Original Sound." You can find this by clicking the green checkmark, select "Audio,", select "Advanced" at the bottom right, and then make sure the box is checked for "Show in-meeting option to Enable Original Sound from microphone." Once you close the settings box, you should now have a "Turn on/off Original Sound" at the top left. Without this setting, Zoom will try to edit out sound that it thinks is unusual (like high and low frequencies you might have in a performance).

Creating a Free Zoom Account and Joining/Participating in a Meeting using a Tablet or Mobile Phone:

I. *Set Up a Free Account: Anyone joining a Zoom meeting will need to set up a free Zoom account before they can join. You can do this a few different ways:*
   a. *Option 1: Wait until they receive a Zoom meeting link (when you send it out). They can then click on that link and set up a free account. From their device, they will want to install the Zoom app.*
   b. Option 2: *Go to https://zoom.us/ and click on the three horizontal lines to the right of "Host." Click "Sign In" at the bottom of the list of options. Underneath the blue "Sign In" button on this page, there is a small bit of text that says "New to Zoom? Sign Up Free." Click on "Sign Up Free" and click the "Sign Up, It's Free" button to create a new account, then enter your personal details. If, at any point, it asks you to download the Zoom app, do so.*

II. *Join a Meeting: There are a couple of ways to join a Zoom meeting:*
   a. *Click the Link: Click on the Zoom link sent to them. When it asks you if you want to open the Zoom app (which you downloaded above), click yes to open the meeting.*
   b. *Enter the Meeting Details: Open the Zoom app and click "Join." Enter the Meeting ID number and click "Join." Enter the password (if there is one) and enter the meeting.*

III. *Waiting Room, Audio, and Video: These options are located in the same place as on a computer. Please see 3, 4, 5, and 6 in the "using a computer" section above to learn more about these options. You may or may not be placed in a Waiting Room once you join the meeting. If you are in a Waiting Room, you will just need to wait until the meeting host lets you into the meeting. Alternately, you might go straight into the meeting without having to wait. It depends on the settings the meeting host uses.*

IV. *Different Viewing Options: To access the other viewing options for a tablet or phone, you will have to swipe left or right on your screen with your finger. The left-most video option is the speaker view which displays whoever is speaking at the time. As you scroll right, you will get different gallery views. On a tablet, you will get up to twelve on one screen. On a mobile phone, you will get up to four (so, if you want to see everyone, you'll have to do lots of swiping). If you want to see a single screen, you can pin it by double-tapping on that video(which will now show up on your speaker view even if they are not currently speaking). You can always unpin it by double-tapping on that video again.*

V. *Other Options: There are a few other things you can do now that you are in the meeting (same as discussed above in number 8). All of these functions can be found under the "More" option on the bottom right.*

VI. *Advanced Settings: You cannot make nearly the number of audio adjustments as you can by using a computer. If you are performing as part of a Zoom meeting, you should try to use a computer if possible so that you can set up the Audio options to work well for music. If not, you should not join using audio and try to call from a phone for your audio option as a phone essentially uses "original sound" anyway.*

Setting Up a Zoom Meeting: Now that you have a free account and all of your adjudicators and competitors know how to set up their free accounts, you need to decide how long your sessions will be and set up your Zoom meetings.

1. **Length of Zoom Session:** You can continue to use Zoom for free provided your meeting is under 40 minutes. This is probably not really conceivable as you would have to change meetings at least that often (as would your adjudicators). There are four different Zoom accounts options:
   a. Basic: This is your free account which allows up to 100 people to sign on at one time and caps your time at 40 minutes.
   b. **Pro (Recommended**): This account costs $20.00 per month (or $200.00 annually to save a few bucks) as allows up to 100 people to sign in and does not cap your meeting time and includes all of the tool options addressed below.
   c. Business: Allows up to 300 people to sign in but does not really add additional tools that would serve your festival all that well.
   d. Enterprise: Allows up to 500 people to sign in and adds a few tools for huge groups (again, not really all that helpful for festival purposes).

   To upgrade your account, sign in and click on the "Plans and Pricing" tab in the top left side. Find the plan you want and click "Upgrade to (name of plan)." It will open a screen with upgrade options where you can add your credit card and upgrade.

2. **Create a Meeting using a Computer:**
   a. **Sign In:** Sign into your zoom account by going to https://zoom.us/ and click "Sign In" (and then sign in). If you do not see "Sign In" and see "My Account" instead, click "My Account" (you are already signed in but you need to still click there to get to the next screen).
   b. **Schedule a Meeting:** Click "Schedule a Meeting." This will open the meeting scheduler where you have your first set of options to decide on.
   c. **Meeting Details and Options:**
      i. **Topic** is the title of your meeting. We recommend you come up with some sort of naming convention so that you can quickly identify each session by name without having to open it to look at the date and time, etc.
      ii. **Description** is optional. You can definitely leave it blank.
      iii. **When, Duration, Time Zone: "**When" is the start time. If you have a Pro account (or higher), you can guess on duration as Zoom will not end your meeting if it goes long. Your meeting likely is not recurring but if you want to use the same link for multiple sessions over multiple days, you might decide to check that box and set it up. **IMPORTANT NOTE:** The same Zoom account cannot have two meetings running concurrently so make sure you are done plenty of time before you have scheduled your next meeting (if you need to run concurrent sessions, see some ideas about that below under "Breakout Rooms" in the final section of this document).
   d. **Registration:** Only check this if you want participants to register to come on (they will have already registered by sending an entry form so keep that in mind). We would recommend you keep this box unchecked.
   e. **Meeting ID**: This option is up to you. You might decide to use the same Meeting ID for all of your sessions but then anyone can sign on to any of your sessions – even if you did not intend them too. We would recommend you let it Generate Automatically.
   f. **Security**: There are two options here:
      i. Password: This is up to you. In theory, only the people you send the link to will sign on so you may not need password protecting (as even if you do, the people with the link will also have the password).
      ii. Waiting Room: We talked a bit about the Waiting Room above. If you check this box, anyone coming into your meeting with be held in a Waiting Room first until the moderator lets them in (you will receive a notice in the centre top of your screen saying there are people that are

waiting to be let in). If you are concerned that people might have the link you don't want in your meeting, this is a great option as you don't have to let everyone in. But, if your only concern is that people don't come on earlier than you do (as the meeting host), there is another setting on this same page ("Enable Join Before Host") that accomplishes that without the monitoring the Waiting Room requires.

g. **Video:** These options just dictate whether your video and the participants video is on or off when they first enter the meeting so do not matter too much. If you choose off, you/they can still turn their video on. If you choose on, all meeting participants can turn their own video off.

h. **Audio:** You should select both to give your competitors every option as possible to hear (and be heard). Right underneath this option, you can click edit to add in Canada call in numbers (and remove the US numbers if you want).

i. **Meeting Options:**
   i. Enable Join Before Host: With this checked, meeting participants can come into your meeting before the host signs in and talk to each other. If you don't check this box, all of your meeting participants (if they have logged in already) will come into your meeting at once when you start it.
   ii. Mute Participants Upon Entry: Probably not a bad idea to check this. They can always unmute later if performing.
   iii. Only Authenticated Users Can Join: We recommend you keep this unchecked. It just adds another potential barrier to joining the meeting.
   iv. Automatically Record Meeting: This is up to you. Even if you do not select this, you can still record the meeting inside the meeting itself (but you probably don't need to record regardless).
   v. Other: You might have a few other options here depending on you're the internal settings you have enabled. Use your best judgment and if unsure, leave it unchecked.

j. **Alternative Hosts:** If you have other licensed users on the same Zoom account, you can add them here to give them host control as well. However, this is a bit of a pain to set up in the back end so it will save you a lot of hassle to just not worry about it (and leave it blank).

k. **Click Save.**

l. **Summary Page and Link for Meeting:** Once you save you meeting, it will open a summary page with the meeting details. If you need to make any edits, click the "Edit this Meeting" button at the bottom. On the line "Invite Link" is your link to this specific meeting. If you click "Copy Invitation" it will open another screen with the full meeting sign-in details (everything a participant will need to know to sign in on any device or phone). Click the "Copy Meeting Invitation" button at the bottom and paste this over to wherever you need it (a document or email, etc.). This invitation is what you will need to send every competitor and adjudicator in that particular session. **USEFUL TIP:** CTRL+V is the paste shortcode on your keyboard if you want to paste it over a bit more quickly than right-clicking.

m. **Editing Meetings Later:** If you realize you need to make a change in your meeting later on, go to https://zoom.us/ and Sign In or click My Account. On the left side, click on "Meetings." Find the meeting you want to edit and click the "Edit" button that will appear when you hover your mouse over that meeting.

Create a Meeting using the Zoom App on a Tablet or Mobile Phone:

I. *Open the Zoom app and make sure you are signed in. On the main screen, click "Schedule" to set up your meeting. All of the options you need will be below. Please read above ("Create a Meeting using a Computer") to learn more about what these options do. A couple of the last options in the above list are available by clicking "Advanced Options" at the bottom. Click Save when you are done.*

II. *It will likely open a calendar event for your device calendar. The link for the meeting can be found in the description of your calendar event and copied and pasted from there.*

Running Your Zoom Meeting: You have now created all of your meeting sessions and have the links sent out to your competitors and adjudicators! Now it is time to host your meeting/s.

1. **Start Meeting using a Computer:** To start your meeting, go to https://zoom.us/ and Sign In or click My Account. On the left side, click on "Meetings." Find the meeting you want and click the "Start" button that will appear when you hover your mouse over that meeting. Once you click, a box will ask you if you want to "Open Zoom

Meetings." Click yes and you are in your meeting.

Start Meeting using the Mobile App: Open the app and make sure you are signed in. At the bottom of the main screen, click "Meetings" and then click "Start" on the meeting you want to start. It is MUCH easier to host from a computer so that is what is recommended (and this is where tips for the mobile app will end in this guide). If you decide to host from a tablet or mobile phone, the Zoom website has vast information on how to use all of the hosting tools in the mobile app.

2. **Hosting the Meeting:** Now you are hosting!! You can use any of the tools you see. As host, you can right-click any participant's video to open options specific to that person (mute them, ask them to unmute, ask them to turn on video, rename them, etc.). Your meeting will run much more smoothly if everyone is muted except the person talking at the time. So, make sure your people know to stay muted. When your meeting is over, click the "End" button and "End Meeting for All." Other useful host tools:

    a. **Manage Participants (including Mute Everyone):** Click on Participants at the bottom. This will open add a Participants window to the side of your video. At the bottom of that, there is a button that allows you to "Mute All" which will mute everyone but you. When you click that, it will ask if you want participants to be able to unmute themselves. That is up to you and how much you want to moderate the unmuting of everyone (including your adjudicator).

    b. **Pop-Out Screen:** If you minimize your Zoom screen or toggle to another item open on your computer, Zoom may automatically create a small box with just your video. To go back to the larger Zoom screen, hover over that video box and click the green arrow pointing up and right.

    c. **Chat:** Zoom has a built-in chat function that you can disable if you desire (or disable participant's private chatting). Make sure to monitor the Chat just in case anyone asks a question there.

    d. **Record:** You can record each session if you desire.

    e. **Share Screen:** If competitors are not performing individually (maybe they have already submitted their videos and this session is just to hear them together), you will want to use Share Screen to playback the videos. When you click "Share Screen," you now have lots of share options:

        i. Default Share Screen: Zoom will likely pick "Screen" on the Basic tab by default (that will be surrounded by blue colour) when you click Share Screen. If using this option, MAKE SURE to click "Share Computer Sound" AND "Optimize Screen Sharing for Video Clip" at the bottom of this screen and then click the blue "Share" button.

        ii. Share Portion of Screen: Under the Advanced Tab, you can select "Share a Portion of Screen." If using this option, MAKE SURE to click "Share Computer Sound" AND "Optimize Screen Sharing for Video Clip" at the bottom of this screen and then click the blue "Share" button. Now, you have a moveable box that you can move to the part of your screen you want visible (if you don't want your full screen shared).

        iii. Music or Computer Sound Only: Under the Advanced Tab, you can select "Music or Computer Sound Only." This will not share video at all but is a great option if you have an audio only file you want to present (probably not too useful for your festival but maybe for something else).

    f. **Other Meeting Settings and Options:** Zoom has tonnes of other tools that can be utilized but many of these tools are not automatically turned on when you create your account as many users will not need or want them. Below is an overview of a few different tools you can enable in your Zoom account (but you certainly don't need to). If there is a feature below you want to add, just google "how to add (name of feature) on Zoom" and you will get step by step instructions.

        i. Breakout Rooms: If you need to run two or more sessions concurrently and do not have a second Zoom account and host to run that, you could utilize Breakout Rooms from one account. Breakout Rooms allow you to move participants into other rooms within your larger session and separates them from other rooms. So, if you have two sessions running concurrently (and less than 100 participants in both of them combined), you can send one discipline to one Breakout Room and the other to another Breakout Room. They will not be able to see or hear anything from the other Breakout Room and you, as host, can pop back and forth between the different rooms as you desire. Once you enable Breakout Rooms in your Zoom settings (on the Zoom website), you will be able to set up Breakout Rooms either from the website for a particular meeting or from your Zoom meeting (will likely be found under the "More" option inside your actual meeting depending on how wide your screen is). You can set Breakout Rooms for a

particular period of time and at the end of that time, people drop back into the main room (or you don't need to set an end time). You also have the power of moving a participant from one room to another (for example, if you have a competitor performing in two different disciplines that are scheduled concurrently, you can make sure they have performed in one room and then move them to the other). This is a tool that can be super useful if you do not have a second host but if you need to run sessions concurrently and have the personnel to have a second host on a second account, that is a much better way to go (and much less headache for the single host dealing with multiple breakout rooms).

ii. Polls: If you need to do any type of voting for your Zoom Meeting, you will want to turn on the Polls function. Your poll questions will have to be written in advance of your meeting on the website (or during your meeting on the website but this cannot be done from the Zoom software itself). Once your questions are added, you can click on "Polls" inside your meeting and send questions out to all of your participants. You can set them to be anonymous or not and then you can display final results to all participants right away. For festivals, you could definitely use this function for Board meetings, or, if you have more than one adjudicator in a discipline, this tool could be utilized to capture their voting.

iii. Many Others: Zoom has lots of other tools too! If there is something you wonder about, just google if Zoom can do it. It likely can, you'll just need to enable the specific tool to do it.

Delivering Your Festival with Zoom AND YouTube: If you have asked competitors to submit their entries through YouTube but want everyone to still view them together and get a live adjudication, Zoom has tools (these tools are discussed above under "Share Screen" options) for playing that video and audio from a host computer so this is definitely do-able and can create a bit of the live atmosphere and comradery that is lost with just using YouTube. For more ideas about how to combine these, check out the Virtual Festival Format ideas found at www.albertamusicfestival.org/agm (under the heading "Virtual Festival Meeting"). A couple of these formats provide some suggestions for using both tools together. As mentioned above, there is also an AMFA's produced YouTube User Guide available for download (found at the same link) if you want to learn more about the tools you can use to run a Festival through YouTube.

Congratulations!! You have done everything you can to make your virtual festival a success using Zoom!!