Using Zoom for
IEC virtual meetings

Version	Date	Description	Name
0	2018-07-18	Draft	MDA
1	2018-07-26	Version	MDA-SCO
2	2020-04-24	Version	JGO-PSE
3	2021-03-01	Version	GRU-JGO-PSE

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1. The Zoom application

1.1. Use of Zoom by IEC

Zoom (www.zoom.us) is the tool for virtual meetings chosen by IEC to allow web conferencing meetings.

With increasing demand for virtual meetings, Zoom suits the IEC community needs the most.

The main goal is to offer to the IEC community the facility to create and manage virtual meetings. All IEC licensed users will no longer require Central Office administrative support for the creation and management of virtual meetings, as they will be able to handle these activities directly.

1.2. User licence allocation

IEC will provide an IEC user account for the people with the following roles in the EMS:

- Active Secretaries and Assistant Secretaries of committees (TC, SC, SyC and AC).
- Active Convenors for all Groups (WG, MT and AG)
- Active Project Leaders for all Project Teams (PT)
- Active Technical Area Managers, Technical Area Secretaries and Assistant Secretaries for TAs.

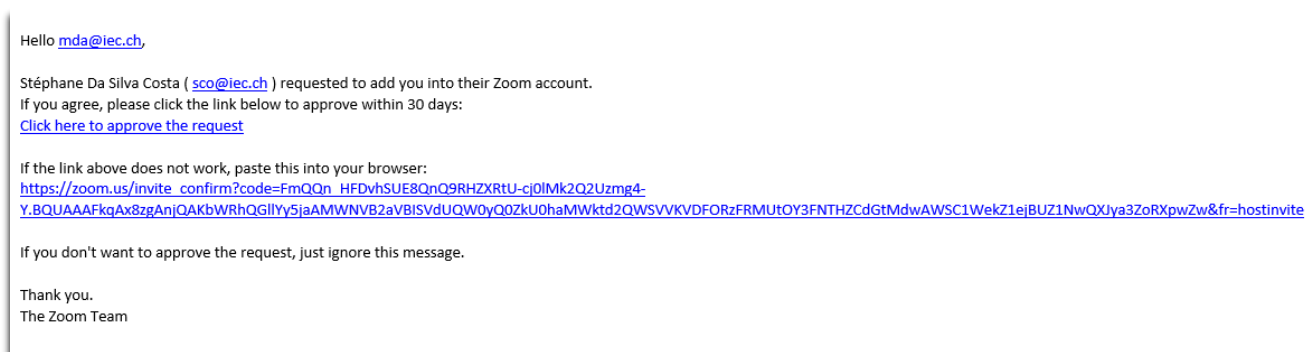The licence usage will be only for IEC purposes and not for any personal use.

The LOGIN is personal and should not be shared with a third party.

Note that new eligible people will be assigned a licence when their position is registered in the IEC Expert Management System. Further help can obtain from the IEC Helpdesk (helpdesk@iec.ch).

1.3. Account creation

The eligible people defined in 1.2 will receive a mail to register their account. The email is sent via the IEC Expert Management System.

Example:

Hello mda@iec.ch,

Stéphane Da Silva Costa (sco@iec.ch) requested to add you into their Zoom account.
If you agree, please click the link below to approve within 30 days:
Click here to approve the request

If the link above does not work, paste this into your browser:
https://zoom.us/invite_confirm?code=FmQQn_HFDvhSUE8QnQ9RHZXRtU-cj0lMk2Q2Uzmg4-
Y.BQUAAAFkqAx8zgAnjQAKbWRhQGllYy5jaAMWNVB2aVBISVdUQW0yQ0ZkU0haMWktd2QWSVVKVDFORzFRMUtOY3FNTHZCdGtMdwAWSC1WekZ1ejBUZ1NwQXJya3ZoRXpwZw&fr=hostinvite

If you don't want to approve the request, just ignore this message.

Thank you.
The Zoom Team

Click on the link to approve the account creation and fill in your personal details on the Welcome screen.
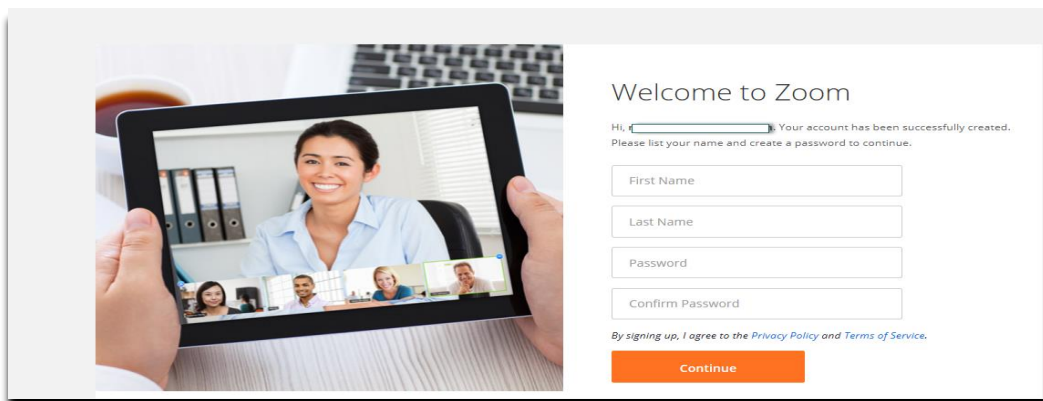
Once the account has been created you will have the possibility to start a test meeting.
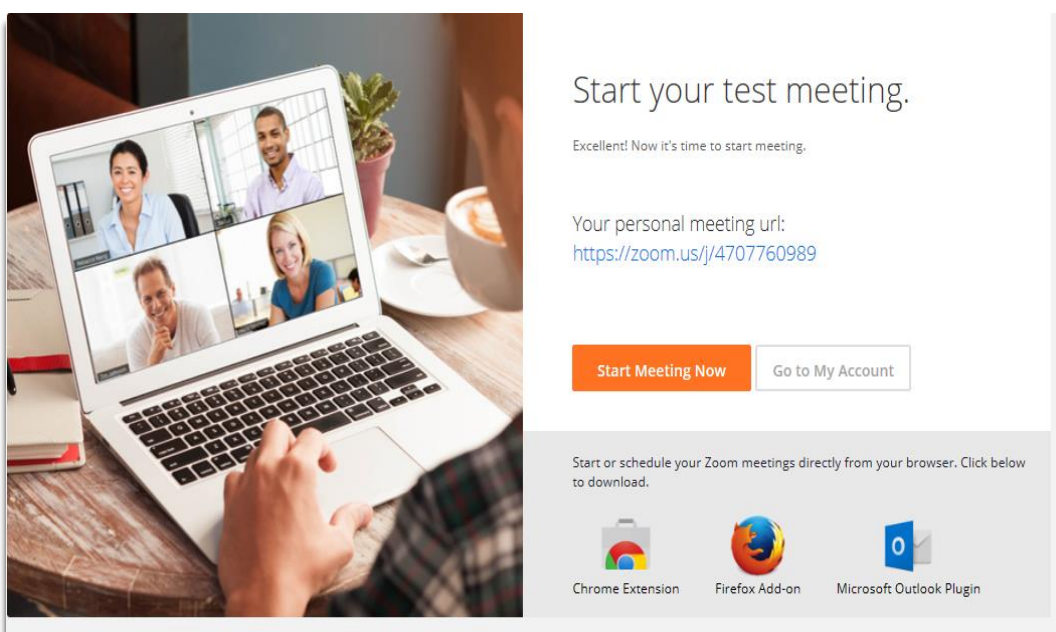
Some settings are predefined by the IEC. Other settings can be customized.

1.4. Support and help about Zoom

- FAQ available on: https://resources.iec.ch/zoom
- Feel free to contact your Standards Project Administrator in charge of your committee.
- IEC Helpdesk (helpdesk@iec.ch)

2. Scheduling and starting a virtual meeting

2.1. Scheduling a virtual meeting with Zoom

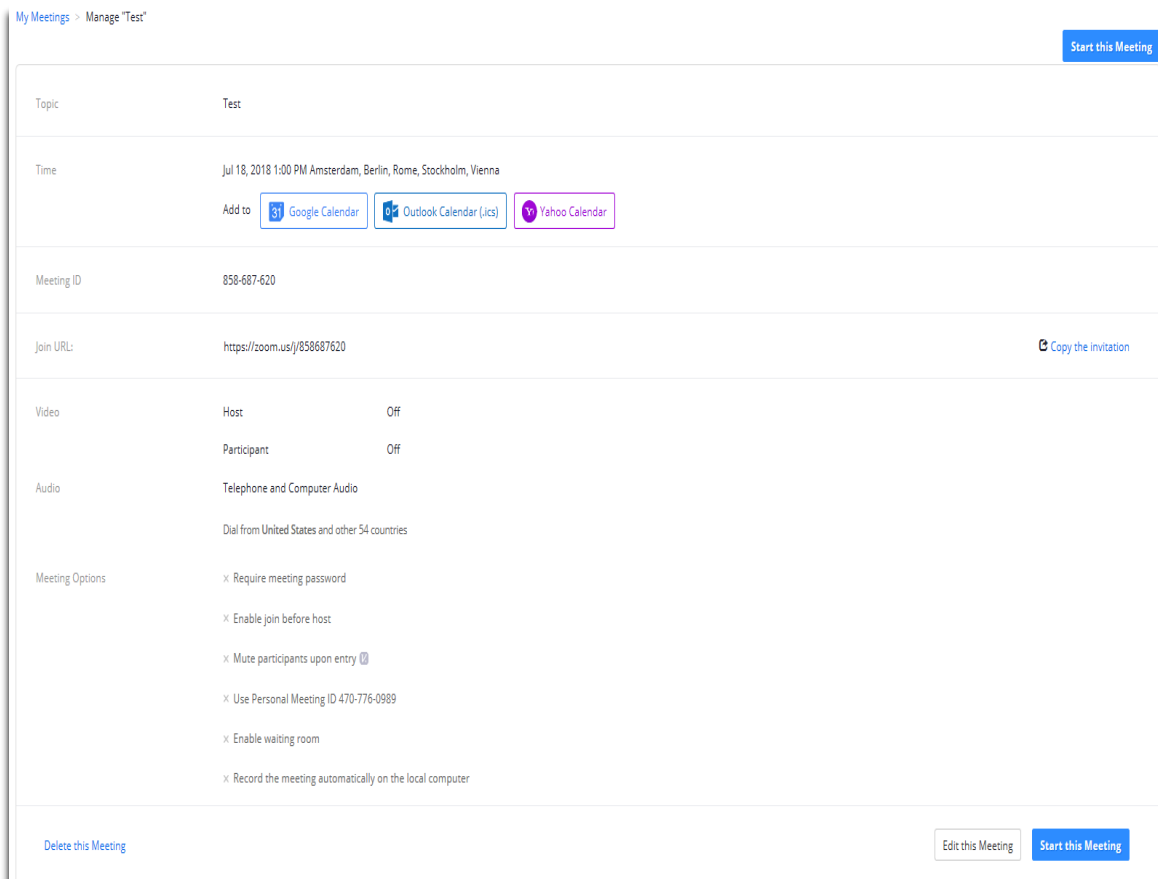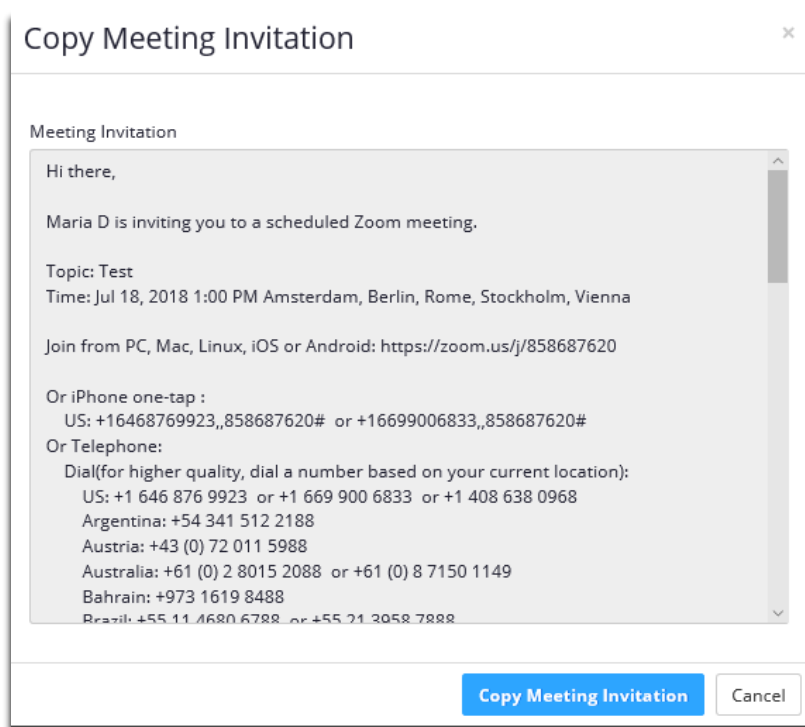Then the different fields may be edited to schedule the meeting.

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Once the meeting is Saved it can still be modified and added to the mail calendar.

The option Copy the invitation

Then *Copy Meeting Invitation* can be pasted in a mail.

Alternative method to send invitations

Additionally, the host can also generate the associated ICS file, which contains all the meeting information. This file can be saved and then sent as an attachment to an email to which the recipient can then load the ICS file on their own calendar automatically modified to the time zone of the recipient. This avoids the host having to send a meeting invitation in particular for large meeting attendance to avoid calendar responses and disclosure of sensitive information. It is further advised that the email to all meeting recipients is sent in BCC mode to avoid disclosing private information of attendees (i.e. email addresses).

Under *Meetings* the meeting will be visible.
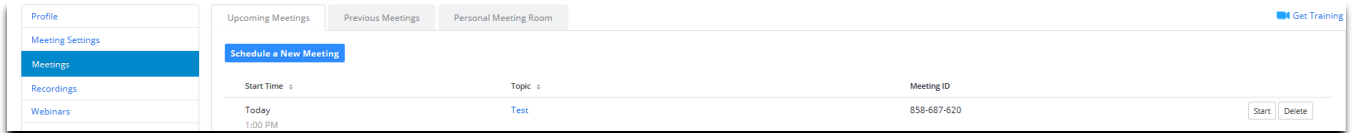
2.2.   Starting a virtual meeting Zoom

Click on *Start*
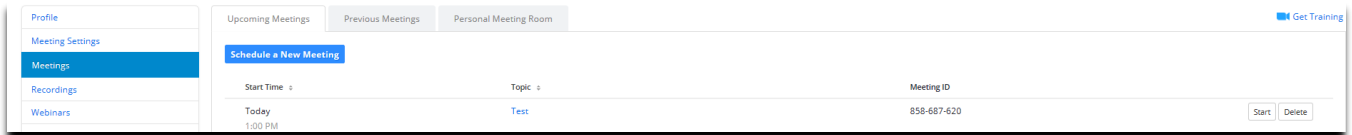
And select the needed features.

Scrolling down with the mouse will show features like, Invite, Manage Participants...End Meeting

3. Running a virtual meeting - best practices for IEC

3.1. Opening a virtual meeting

Consider allowing time at the beginning of the agenda for meeting logistics

Consider whether you need to allow for an agenda item to provide guidance and instructions to participants. For example, consider the following questions:

- Do the meeting participants have experience in participation in virtual meetings and the use of Zoom (raise hand function, use of chat, use of the non-verbal feedback buttons)?
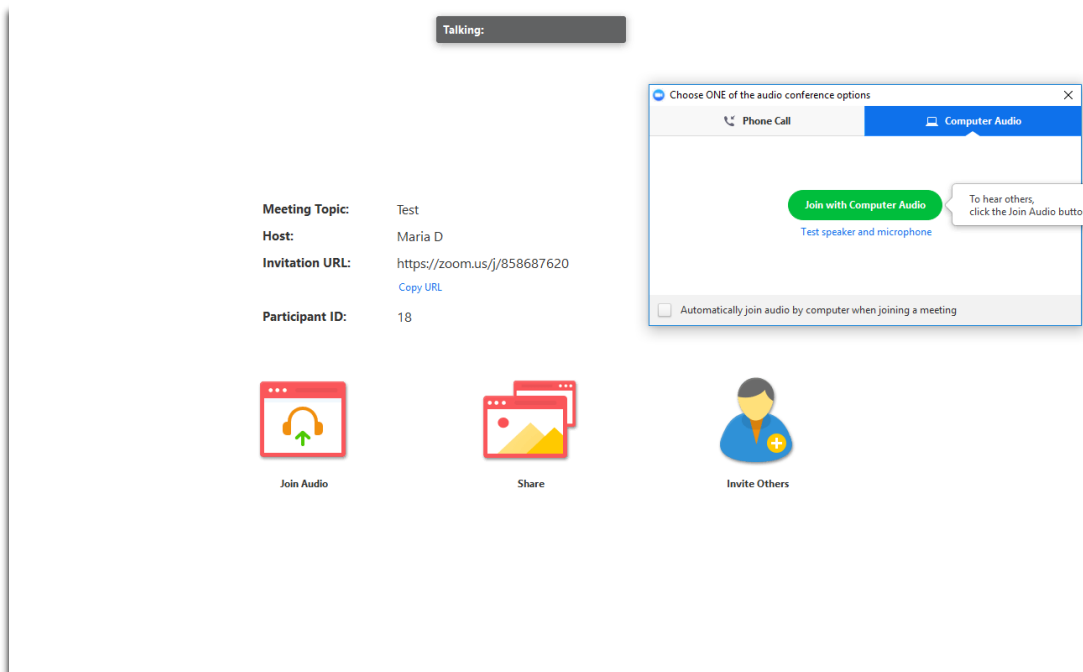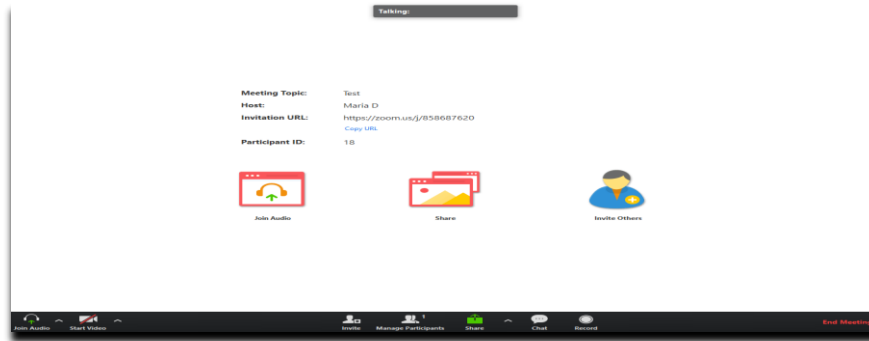 further information in section 3.4 Taking committee decisions
- Is it necessary to ask the participants to make their identity clear from their name?
  further information in section 3.3 Naming scheme for participants
- Do you need to share different participants screens?
- Do you need to take decisions?
  further information in section 3.4 Taking committee decisions

3.2. Code of Conduct during the meeting

The Chair/Convener is responsible for running the meeting and it is therefore important to let him carry out this task.

At the start of the meeting, consider inviting the participants to respect the following code of conduct:

- participants' microphones should be kept muted unless the participant is invited to speak;
- participants desiring to speak, should use the "Raise Hand" function to attract attention and should wait to be invited to speak by the Chair or the Convenor before they unmute themselves (see "non-verbal feedback" at https://support.zoom.us/hc/en-us/articles/115001286183-Nonverbal-Feedback-During-Meetings);
- once the participant has spoken, the participant should mute him/herself again;
- participants should use the chat function (in mode "private" or "Everyone") to make a comment.
- participants should use an agreed naming scheme for identifying themselves

3.3. Naming scheme for participants to committee plenary meetings

Information on participation is part of the meeting's documentation and is available on the IEC meeting registration system. Virtual meeting tools like Zoom offer the possibility to display a list of participants. The names displayed in this list makes reference to information registered in the Zoom user profile and the name displayed is not always adapted to the specific of a committee plenary meeting where Delegates represent their countries.

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In such situations, participants can be requested to follow an agreed naming scheme:

- to make explicit who is around the virtual table
- to handle formal decisions (and thus to differentiate between Heads of Delegation and Liaisons, etc.).

If this is the case, use the Roll call to identify participants that need to be renamed (e.g. phone number only, non-Latin characters), and to note the participants in a group of people sitting in the same room and connected to the meeting from the same computer. Prior to the meeting, share the naming scheme with the participants invited to the meeting and present it again on video during the Roll call. Once the Roll call is done, it is recommended that the participants swich off their webcam in order to save data transmission bandwidth.

Participants can rename themselves. The host and any co-host can also rename the participants. The naming should include the name of the participant and any other relevant information required for that meeting. e.g. for a plenary meeting this would require National Committee and role, whereas for a working group meeting only the identifying the expert's name could be sufficient.

The following provides suggestions for providing meaningful information while reducing the number of characters needed. The participants list window in zoom can display a limited number of characters.

For NC references it is recommended to use the Alpha 2 country code (GB, CH, ES, FR etc.).

For the roles the following table is provided

Role in the meeting	Role abbreviation	Registered role in MRS (for information)
Assistant Secretary	A-Sec	Assistant Secretary
Technical Officer	TO	Technical Officer
Chair	Chair	Chair
Convenor	Conv	Other participation
Delegate	Deleg	Delegate
Guest/Observer	Guest*	Other participation
Head of delegation	HoD	Head of delegation
Liaison	Liaison	Liaison
Secretary	Sec	Secretary
Vice-Chair	V-Chair	Vice-Chair

*Note some instances Zoom automatically adds the suffix "Guest" when the person is not registered in the zoom database

Participants can have more than 1 role in a meeting, e.g. Member and Liaison.in this case the roles are separate by ",". Optional: # = 1 or 2 for a participant who appears twice because has dialled in for sound and connected for vision

The structure of the naming will be officer dependent examples include

For zoom to collect experts/delegates from the same country.

| ALPHA-2 COUNTRY CODE | Role abbreviation | SURNAME | INITIALS # |

Examples :
BR Conv MAGILHAENS DE BOLIVEIRA
DE HoD, Lsn-CIGRE/SCD# HÖLSTEIN-AVANASONA
ES Mem GONZALEZ DE LAS HORUS CARTONELL E 1
 IEC TO SEBELLIN P

Or name first (following IECs preference to have surnames in Captials)

First Name   Surname   Country   Role

Stephen DUTNALL, CH, IEC
John SMITH, GB, HoD

3.4. Taking committee decisions

The method to take a decision depends on several factors including the type of decision, the number of participants and the meeting logistics. The following provide examples for consideration.

Voting rights: Remote participants can vote and comment on any agenda item, where it is emphasized that voting can be made only by the Head of Delegation, attending physically or remotely. The Head of Delegation should coordinate comments and contribution from the delegation including remote participation.

1) Carry out an oral vote or a visual vote (if all participants are using video) if there is a limited number of participants. Note the votes in a decision.

2) Use the non-verbal feedback buttons. ^{yes} button and ^{no} button or "hands function or "thumbs up function" (see (https://support.zoom.us/hc/en-us/articles/115001286183-Nonverbal-Feedback-During-Meetings) and:

- ensure that all participants know how to use these functions
- ensure that each participant identifies him/herself and their role(s)
  further information in section 3.3 Naming scheme for participants
- allow sufficient voting time to ensure that all participants having the right to vote (using "yes" and "no" buttons or abstaining) have cast their vote, and
- The "Abstain" vote is given to the P-Members having not voted either "Yes" or "No"
- note the votes in a decision and use the "clear all" function to clear the results.

Note that multiple eligible voting participants sharing a single phone cannot use non-verbal feedback - it is necessary to ask them to announce their vote and record it.

Pros and cons regarding the use of non-verbal feedback

Pros&Cons about the non-verbal feedback buttons "yes" and "no":
- they are associated with a counter which is visible to the host and any co-hosts,
- their status is visible and adjacent to the name of the participant,
- their status cannot be changed for single participants,
- a "clear all" function can be used to clear simultaneously all the votes, and
- the host and co-hosts can also cast a vote which is visible to everybody.

Click the "Reactions" icon on the Zoom menu to access the non-verbal feedback buttons:
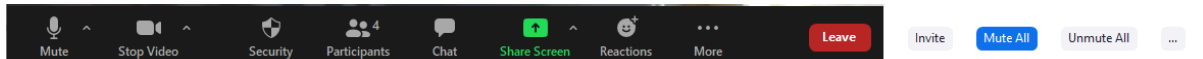
Pros&Cons about the "raise hand" function for voting:
- the host and any co-hosts can change/overwrite the status for each participant,
- the raise hand function changes the order in the list of participants, and
- the host and any co-hosts cannot use the raise hand function as such if used hosts and co-hosts should only be the meeting officers who cannot vote in meetings.

Pros&Cons about the non-verbal feedback buttons "Clap", "Thumbs up", "Thumbs down" for voting:
- they appear only on the images (videos) tab and not on the participants window,
- the associated icon appears for a few seconds only, and
- their meaning is culture dependent.

It is advised if using nonverbal sings then the approach is to first explain the approach to be used to the audience and then ask for decisions in the way commonly done in face-to-face plenary meetings starting with "against" then "abstain" with the rest being the approve. For example:

This resolution is for the approval of the agenda. Please raise your hand if you are against this (count the hands on the screen) then lower all the raised hands and ask Please raise your hands if you abstain (count your hands on the screen). The rest is assumed approve

Given that zoom automatically raise hands higher up in the participant list this is easily done.

3) Set up a poll (https://support.zoom.us/hc/en-us/articles/213756303-Polling-for-Meetings)

Poll results can be shared during the meeting and downloaded as a report, however similar pros and cons can be observed as for the above "nonverbal" aspects (name changing, non-eligible delegates voting etc). Also note polling only provides yes and no response, as such abstain indication is not possible in polling.

Note that the Zoom meeting participants who have the co-host status cannot participate in a poll. The co-hosts have the right to carry out poll actions, e.g., End Polling.

Relaunching a new poll will clear the existing polling results.
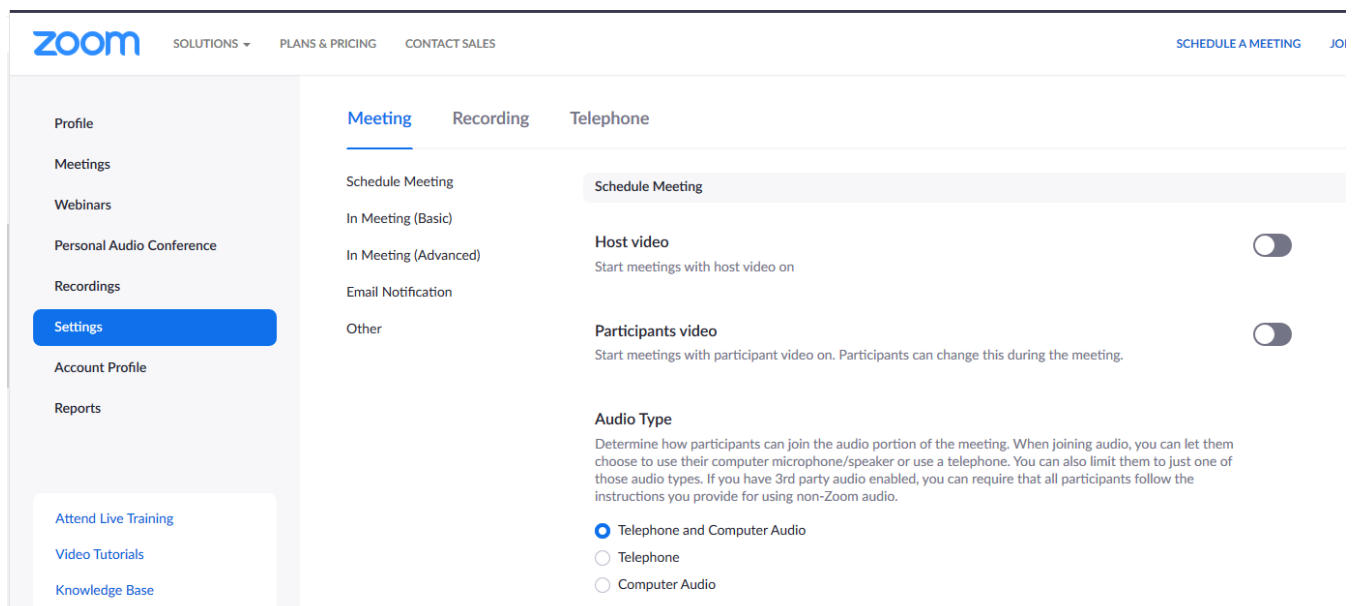
Note that participants sharing a single connection (a group of people connected together using a single PC or phone) cannot individually use the poll function. It is necessary to ask them to announce their vote and add it.

4. Zoom configuration

This section helps to properly configure the individual user Zoom parameters for optimal participation at IEC Zoom meetings.

4.1. Access to Zoom settings

Link to Zoom settings: https://iec.zoom.us/profile/setting

4.2. Predefined and proposed settings

Zoom offers a wide set of parameters to customise the virtual meeting invitation and operation. These parameters are grouped by sections. Here under is a review of theses parameters and recommended settings for an optimal experience in the context of IEC meetings. Zoom may change this set of parameters without notice.

Format interpretation for the list of settings:
OBLIGATORY SETTING: set by the IEC, no setting change is possible
Recommended setting (might be different from the default Zoom settings, to be changed by the user)
No setting change recommended
Personal preference: may be changed from the default Zoom setting upon personal preference

Security section

- *Waiting Room: No recommendation*
- *Require a passcode when scheduling new meetings: ON (an encrypted password is automatically embedded in the meeting link, so clicking the link takes participants directly to the meeting. There is no need to manually enter the password)*
- *Require a passcode for instant meetings: ON*
- *Require a passcode for Personal Meeting ID (PMI): ON*
- *Require passcode for participants joining by phone: ON*
- *Embed passcode in meeting link: ON*
- *Mute participants upon entry: ON (participants are muted by default when they join the meeting, and can then unmute themselves to speak)*
- *Only authenticated users can join meeting: OFF*

Schedule Meeting section

- *Host video: OFF*
- *Participants video: OFF*
- *Audio type:*
  - ***Telephone and Computer Audio: ON***
- *Allow participants to join before host: OFF (participants can join a meeting only after the host has joined; we recommend that meeting hosts connect at least 10 minutes prior to the start of a meeting)*
- *Use Personal Meeting ID (PMI) when scheduling a meeting: OFF*
- *Use Personal Meeting ID (PMI) when starting an instant meeting: OFF*
- *Up-coming meeting reminder: OFF*

In Meeting (Basic) section

- *Require encryption for 3rd party endpoints (SIP/H.323): OFF*
- ***Chat: ALLOW***
  - *Prevent participants from saving chat: OFF*
- ***Private chat: ON***
- *Auto-saving chats: OFF*
- ***Sound notification when someone joins or leaves: ON***
  - ***Everyone: ON***
  - *Host and co-hosts only*
  - *When someone joins by phone: Ask to record their voice to use as the notification*
- *File Transfer: OFF*
- *Feedback to Zoom: OFF*
- *Display end-of-meeting experience feedback survey: OFF*
- ***Co-host: ON if needed** (Co-hosts do not have the full host abilities.)*

- ***Meeting Polls: ON***
- ***Always show meeting control toolbar: ON***
- *Show Zoom windows during screen share: OFF*
- *Screen Sharing: ON*
  - *Who can share: All participants following authorization by the host*
  - *Who can start sharing: Host only*
  - *On starting a meeting, screen sharing is enabled only for the host: to allow other participants to share their screens the host can now use the Security button and click 'Allow participants to Share Screen' (see image below)*
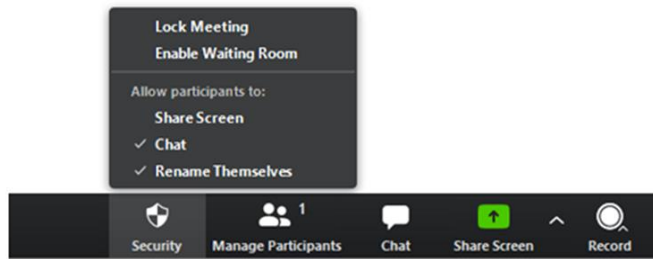
- *Disable desktop/screen share for users: OFF*
- *Annotation: OFF (hosts can reactivate this in settings)*
- ***Whiteboard: ON***
  - ***Auto-save whiteboard content when sharing is stopped: ON***
- ***Remote Control: ON***
- ***Nonverbal feedback: ON***
- *Join different meetings simultaneously on desktop: Personal preference*
- *Allow removed participants to re-join: OFF (hosts can reactivate this in settings)*

In Meeting (Advanced) section

- ***Breakout room: ON***
  - ***Allow host to assign breakout rooms when scheduling: ON***
- *Remote support: OFF*
- *Closed Captioning: OFF*
- *Save Captions: OFF*
- *Language interpretation: as needed*
- *Far end camera control: OFF (only works if you have an adjustable cam)*
- ***Group HD video: Standard*** *(No recommendation - Use caution as this setting will use more bandwidth)*
- *Virtual background: No recommendation*
- *Identify guest participants in the meeting/webinar: OFF*
- *Auto-answer group in chat: OFF*
- *Only show default email when sending email invites: OFF*
- *Use HTML format email for Outlook plugin: OFF*
- *Allow users to select stereo audio in their client settings: OFF*
- *Allow users to select original sound in their client settings: OFF*
- *Show a Join from your browser link: ON*
- *Allow live streaming: OFF unless needed*

Email Notification section

- *When a cloud recording is available: OFF*
- ***When attendees join meeting before host: ON***
- ***When a meeting is cancelled: ON***
- ***When an alternative host is set or removed from a meeting: ON***
- *When someone scheduled a meeting for a host: OFF*

- *When the cloud recording is going to be permanently deleted from trash*

Other section

- *Blur snapshot on iOS task switcher: OFF*
- *Invitation Email: Select English*
  - o *Send me a preview mail: OFF*
- **Schedule privilege:**
  - o **Assign scheduling privilege to:** *Empty (If you would like to have assistance or back-up with scheduling course meetings, then you may add people to your account as a scheduler)*
  - o *I can schedule for: Empty*

Recording Settings (the second tab)

IT IS ESSENTIAL TO GAIN THE PERMISSION OF THE PARTICIPANTS T RECORD; SOME COUNTRIES DO NOT ALLOW THIS

- *Local Recording: ON (we strongly recommend that you record locally and then upload videos)*
- *Cloud Recording: OFF (only hosts can now make local recordings of meetings after participants' approval as described above)*
- *Automatic Recording: Personal preference. NOTE: whether this is on or off, you have the option, when scheduling a new meeting, of turning it on or off then as well as long as both the Local and Cloud Recording settings above are both set to the ON position as recommended.*
  - o *Select Record on the Local Computer*
  - o *Be sure the following is enabled: Host can pause/stop the auto-recording in the cloud*
- *IP Access Control: Personal preference*
- *Require users to authenticate before viewing cloud recordings: Personal preference (sharing with students is not automatic even if this is on)*
- *Require passcode to access shared cloud recordings: Personal preference*
- *Auto-delete cloud recordings after days: Personal preference*
- *The host can delete cloud recordings: Personal preference*
- *Recording disclaimer: Personal preference*
- *Multiple audio notifications of recorded meeting: Personal preference*