

ZOOM ACCOUNT ADMINISTRATION

It is important for hosts, administrators, and meeting participants to understand the distinction between the Zoom web portal¹ and the Zoom app. Use of the *Zoom web portal* should be limited primarily to maintenance and administration of the group's Zoom account by the group's Zoom Account Administrator. The web portal is also used to download the *Zoom app* — an effective tool which Zoom continues to enhance in an effort to increase the availability and flexibility of options and protocols for those of us who lack the cybersecurity infrastructure of a major corporation or large organization. We recommend that only the *Zoom app* be used to start or join a scheduled AI-Anon meeting.

ZOOM APP vs. ZOOM WEB PORTAL

In the classic 1939 film *The Wizard of Oz*, the end of the hall where the wizard receives visitors features a magnified image of the wizard's head complete with smoke, flames, and sound effects. This is equivalent to the virtual meeting room created through the use of the Zoom app (replete with its many potential features and presentation tools).

Off to the side is a curtained area; and the man behind the curtain — eventually revealed by Dorothy's little dog, Toto, who pulls the curtain aside — is pushing buttons, pulling levers, and shouting into a microphone. The Zoom web portal is the area behind the curtain; and in the corporate world of information technology, use of the web portal would be restricted to the company's on-site systems administrator. Some AI-Anon Family Groups (AFGs) have created a similar service position of "Zoom Account Administrator."

SERVICE POSITION DESCRIPTION

The Zoom Account Administrator is responsible for:

- Maintaining the group's Zoom account settings in keeping with safety committee recommendations and/or group conscience and updating these settings as necessary.
- Maintaining the current status of the recurring meeting(s) for the group.
- Checking for updates to the Zoom app, applying those updates to the group's Zoom account, and notifying group members of the availability of each new update.
- Scheduling a rotation of hosts and co-hosts on a timely basis to serve at each meeting, if deemed appropriate by the group's safety committee and/or group conscience.
- Securing and/or providing training to hosts and co-hosts.
- Serving as a backup/substitute host or co-host for the meeting as necessary.
- Serving as a member of the safety committee and as the communications hub for the safety committee, hosts and co-hosts, and group members regarding virtual meetings or Zoom-related matters.
- Responding to Zoom's email request for more information following a Disruption (when/if one occurs).

1. Please see page 16 for more information about accessing the Zoom web portal.

SETTING UP A NEW GROUP ACCOUNT

To create a new Zoom Pro account through the Zoom web portal (<https://zoom.us/>), you will need a group email address, a password (which differs from the passcode used to join your group's Zoom meeting), and a payment method. The latter will be used to process the annual or monthly payment to Zoom for this account.

Ideally, the payment method for the Zoom account is a credit or debit card attached to the group's bank account. If this is not possible, the Treasurer or the Group Rep may wish to use a personal credit card to cover this payment on behalf of the group and then be reimbursed in keeping with Tradition Seven.

You can set up the new group account through Zoom's web portal by simply following the directions, and many fields can be left blank. The name on the account should be the group name or the meeting name divided between the first and last name entry boxes. Examples:

First Name: <i>Monday</i>	Last Name: <i>Steps Study</i>
First Name: <i>Thursday</i>	Last Name: <i>Morning Sausalito</i>
First Name: <i>Friday</i>	Last Name: <i>12:30pm</i>

The full name you choose (e.g., "Thursday Morning Sausalito") is what will appear on a dropdown meetings list for a previous participant who is joining your meeting again.

Login credentials for starting the meeting will include the Zoom account email address and the Zoom account password (which, again, is different than the *passcode* used to join the meeting). Requirements for this password are imposed by Zoom to strengthen their security, and this password should be complex enough that it cannot be easily guessed yet straightforward enough that it can be used to open a 12-Step meeting without duress. Please avoid the following characters in your Zoom account password: the numeral 1, the lower-case letter l, the upper-case letter I, the numeral 0, the upper or lower-case letter O, sequential letters or numbers (e.g., "abc" or "123"), or use of the word "zoom."

As a recommended security practice, this password should be changed by the Zoom Account Administrator each time a member of the hosting team rotates out and the new password given to the Host(s) and one other trusted servant (usually the Treasurer or the Group Rep). To avoid double-headed management by balancing service responsibility with service authority (see Concept Ten), this other trusted servant will only use these login credentials in a dire emergency.

Once you have created a new Zoom account for your group, please download the Zoom app (aka the "Zoom Client for Meetings" or "Meetings Client") on each device you will be using to start or join an AI-Anon meeting or to administer the Zoom account for your group.

You can update, modify, or verify the accuracy and compatibility of details in your group's Zoom account by signing in through Zoom's web portal (<https://zoom.us/>). Always remember to Sign Out of the account before leaving the Zoom web portal.

RECOMMENDED ACCOUNT SETTINGS

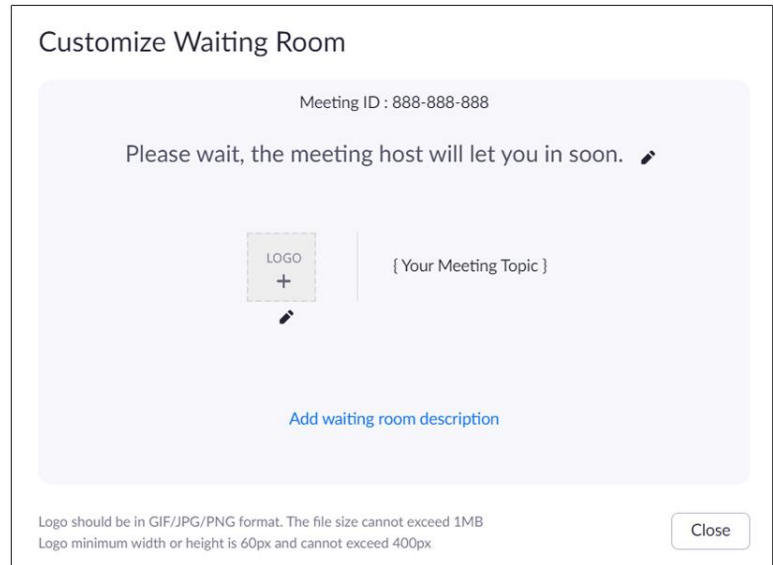
Establishing and maintaining the Zoom account settings for your group is a priority, and a detailed list of recommended settings is available. As always, any group can choose to relax or tighten these settings as part of an informed decision-making process.

CUSTOMIZING WAITING ROOM MESSAGE

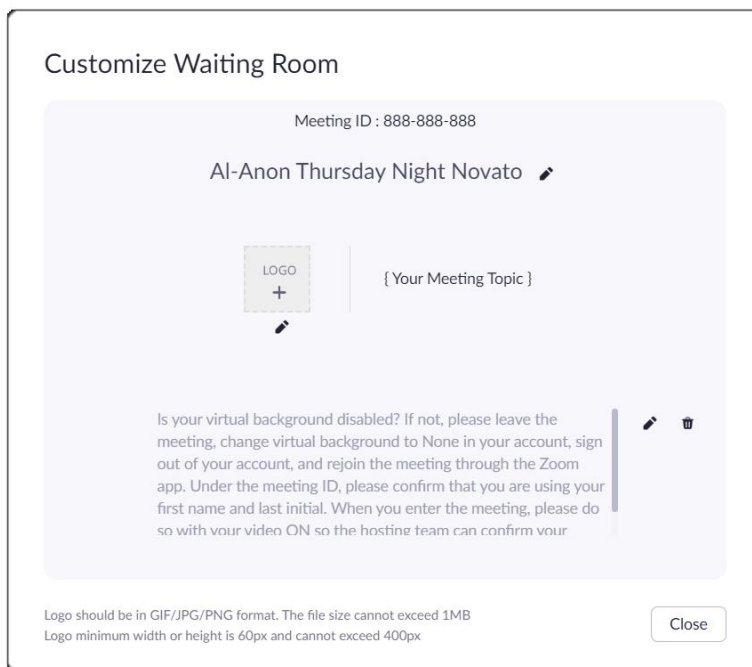
You can customize the message on the “wall” of the waiting room to provide guidance to Waiting Room Participants. Sign In through the Zoom web portal and begin in Admin: Account Management: Account Settings. Scroll down to “Waiting Room Options” and click on “Customize Waiting Room.”

The example to the right depicts Zoom’s default waiting room wall.

Do not add a logo² or concern yourself with the Meeting Topic. The Meeting ID is populated by Zoom.



You can change the standard phrase “Please wait, the meeting host will let you in soon” to a more descriptive name for your meeting (see customized example below).



You can also add a waiting room description that serves as guiding instructions for your participants. This description is limited by Zoom to 400 characters, including spaces and punctuation. Sample text (not completely visible due to the scroll bar feature) just fits within this limitation:

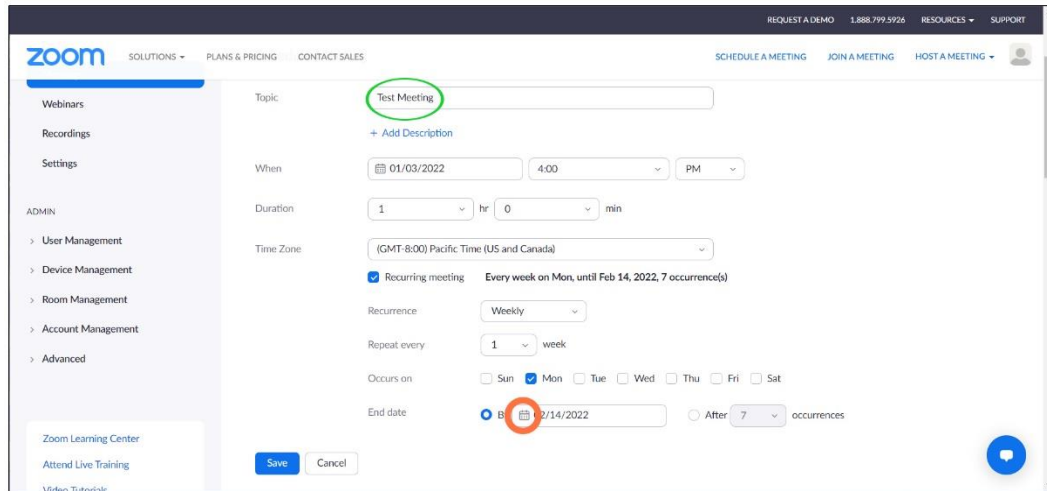
Is your virtual background disabled? If not, please leave the meeting, change virtual background to None in your account, sign out of your account, and rejoin the meeting through the Zoom app. Under the Meeting ID, please confirm that you are using your first name and last initial. When you enter the meeting, please do so with your video ON so the hosting team can confirm your identity. Thank you!

When you have completed your customization, click the checkmark, Close the window, and repeat this process under Personal: Settings. It is very important that both windows match.

2. The logo or identifying symbols of Al-Anon and Alateen are trademarked, copyrighted, and safeguarded. As members, it is important for us to honor the legal protections provided to our 12-Step programs.

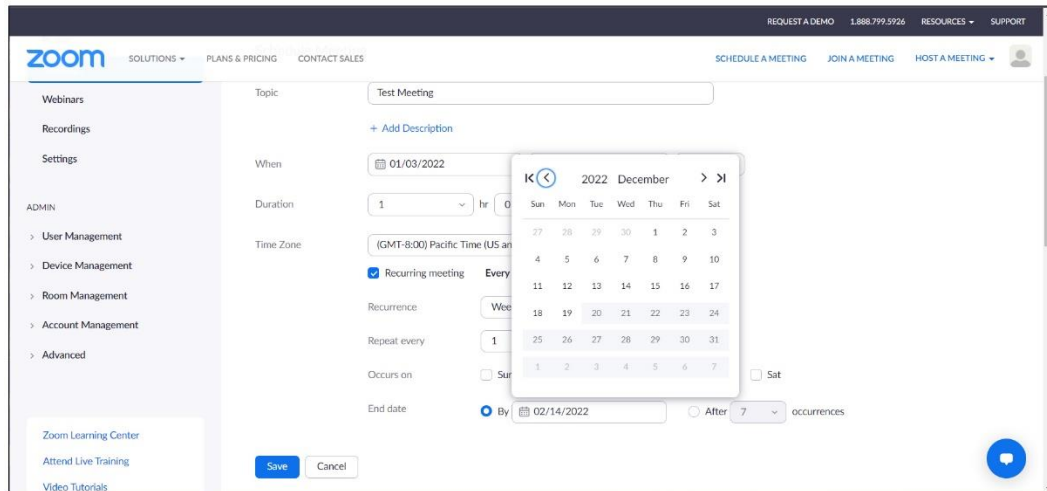
SCHEDULING A RECURRING AL-ANON MEETING

Sign In to the Zoom web portal and select “Meetings” under Personal in the left sidebar, then click on “Schedule a Meeting.” When the Schedule Meeting popup window appears, enter the name of your meeting under Topic (the area is circled in green on the sample window below and will be highlighted in blue when you are doing this live).



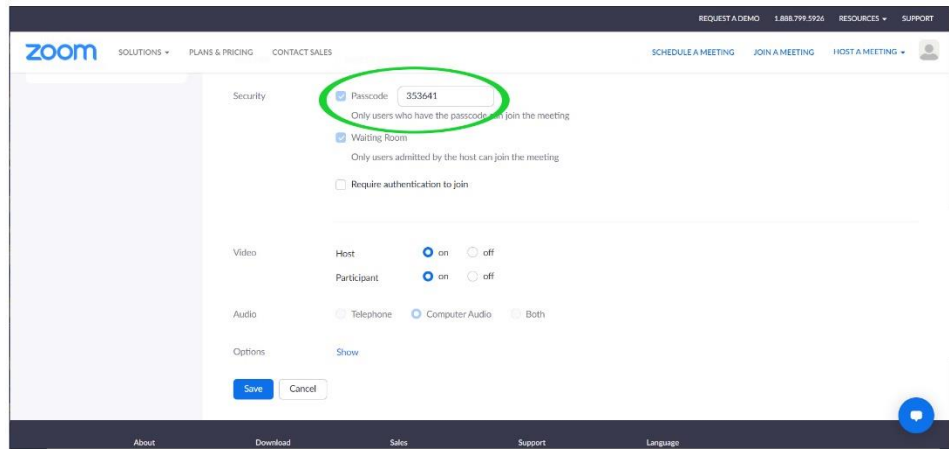
Set the start date and time. For the duration, remember to schedule the start at least 30 minutes before and end at least 30 minutes after the meeting. Once scheduled within this window, the host can start and end the meeting as desired. We recommend having the hosting team convene at least ten minutes before the scheduled pre-meeting fellowship start time to prepare for and address any last-minute issues.

Verify the time zone, check the box for “Recurring meeting,” confirm that the Recurrence is Weekly and is to Repeat every “1” week. Check the day of the week for the meeting, then click on the “End date” calendar (circled in orange on the above window). This triggers the calendar popup (see below).



Move through the calendar to the last meeting date you can schedule.

Allow the Meeting ID to be generated automatically. You can change the meeting Passcode to something that includes letters, numbers, and characters; or you can accept the Zoom-generated Passcode (circled in green on the sample window below).



Accept all defaults for the Waiting Room, authentication, Video, and Audio; and click on the blue Save button. If a browser tab opens to record this meeting to your calendar, simply close it. Remember to *always* SIGN OUT after using the Zoom web portal.

VERIFYING THE END DATE OF A SCHEDULED AL-ANON MEETING

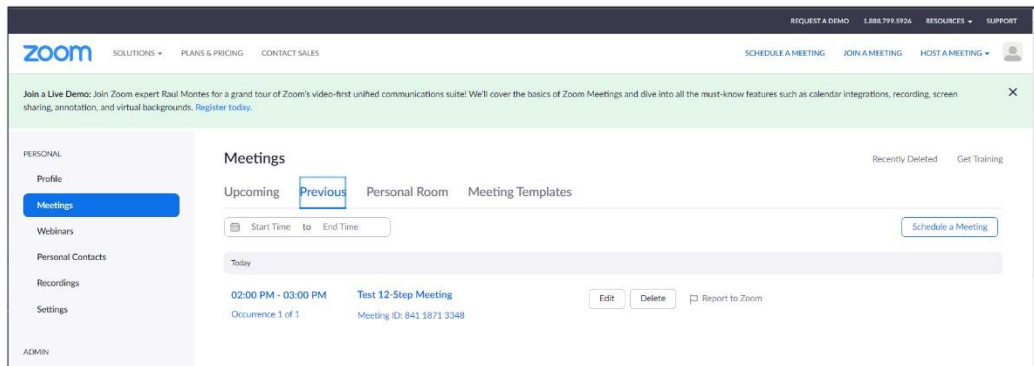
It is advisable to occasionally confirm that your meeting is still on the list of recurring meetings in the Zoom app. Meetings expire and can also disappear from the list if you have made changes to the group’s Zoom account settings.

If a meeting disappears, Sign Out of your Zoom app and close it (all the way). Wait ten seconds, then open your Zoom app again and Sign In. Chances are, your recurring meeting is back again.

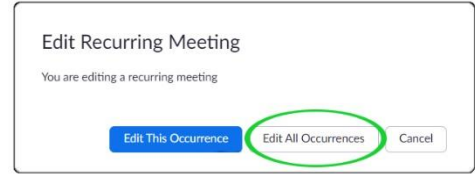
If the meeting does not reappear, follow the instructions below for “Restoring A Previously Scheduled Al-Anon Meeting.”

RESTORING A PREVIOUSLY SCHEDULED AL-ANON MEETING

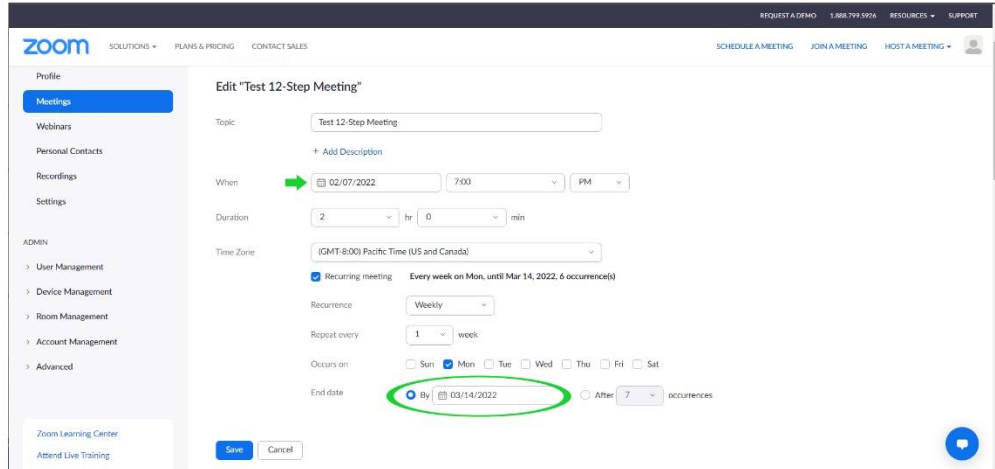
Sign In through the Zoom web portal and select “Meetings” under Personal in the left sidebar. Click on “Previous” and mouse over the most recent occurrence of the meeting you want to restore to cause the Edit button to appear. Click the Edit button (*not the Delete button*).



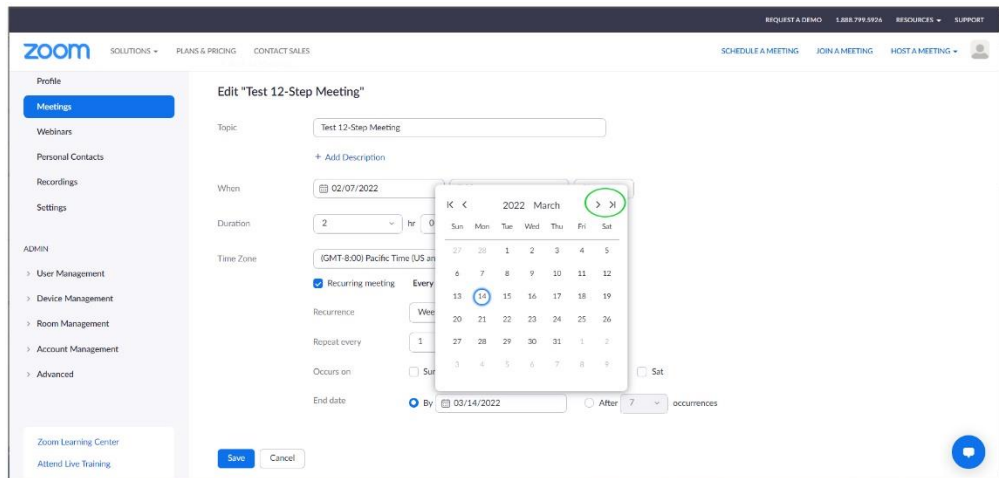
Click on the “Edit All Occurrences” button (circled in green on the screenshot to the right) on the “Edit Recurring Meeting” popup.



To the right of “When” (see green arrow on sample window below), verify or change the date to the next scheduled occurrence of this meeting. Verify the meeting details (start time, duration, time zone, recurrence, etc.), then click on the “End date” calendar (circled in green below).



This triggers the calendar popup (see below). Using the calendar’s right arrows (circled in green on the sample window below), move through the calendar to find the last end date that Zoom will permit you to schedule.



Click on the blue “Save” button at the bottom of the screen.

SIGN OUT of the Zoom web portal and Sign In to your Zoom app to verify that your meeting is once again a recurring meeting, then SIGN OUT of your Zoom app.

CHECKING FOR UPDATES

Zoom Account Administrators are encouraged to check for updates to the Zoom app on a daily basis. Please see page 2 of Participant Guidelines (available at www.marinal-anon.org) for detailed instructions on how to check for updates and, when available, to update the Zoom app.

SCHEDULING HOSTS / CO-HOSTS

In smaller meetings, one person may accept the service position of weekly host and enlist a trained co-host from the group to help with the waiting room for the early part of the meeting. Co-host duties can later be withdrawn so this individual can participate and share in the remainder of the meeting. In larger meetings, however, it may be beneficial to rotate host and co-host duties and to support each host with one or more scheduled co-hosts. For newer hosting team members, an experienced individual can be made a co-host to provide coaching and guidance using Chat.

The Zoom Account Administrator is responsible for scheduling hosts and co-hosts on a timely basis and for ensuring that they are effectively trained and adequately supported during the meeting. This administrator would also serve as a backup host or co-host as necessary.

ZOOM-RELATED COMMUNICATIONS

As a member of the safety committee, the administrator is responsible for Zoom-related communications among committee members, on behalf of the committee, to hosts and co-hosts, and to the group as a whole.

When a Disruption to the meeting requires the hosting team to Suspend Participant Activities (see pages 16 and 17), a followup email may be sent by Zoom's Trust and Safety Team³ to the Zoom account's email address requesting additional information about this Disruption. With the support of the hosting team and the safety committee, responding to this email is the responsibility of the administrator.

ZOOM POLLS

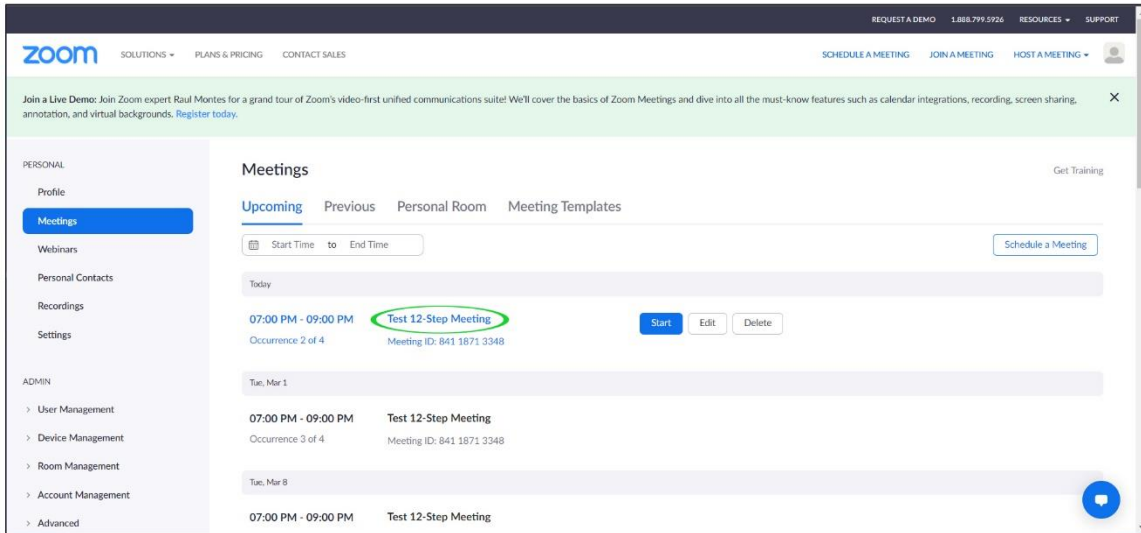
An anonymous Zoom Poll is an effective tool for gauging group conscience. It only takes a few minutes during the portion of an Al-Anon meeting designated for announcements to complete a Zoom poll and download the results. Later, the Zoom Account Administrator can compile these results into charts for review by meeting participants.

3. Zoom's Trust and Safety Team encompasses attorneys, engineers, and technical experts in such fields as data science, privacy, and cybersecurity. A live response from members of this team is activated when participant activities are suspended during a meeting and the "Report to Zoom" box is checked. These responding team members aid the hosting team by removing disruptors from the meeting while collecting pertinent data about these disruptors. It is important to remember that disrupting or hacking into a virtual meeting, class, or video conference is a federal offense; and all charges — including (but not limited to) disrupting a public meeting, computer intrusion, using a computer to commit a crime, fraud, spreading hate crimes, or transmitting threatening communications — are punishable at both the state and federal levels by fines and imprisonment. For this reason, reporting a participant to Zoom is a very serious action and should never be taken lightly. It is recommended that the Zoom Account Administrator limit this Report to Zoom capability to members of the hosting team.

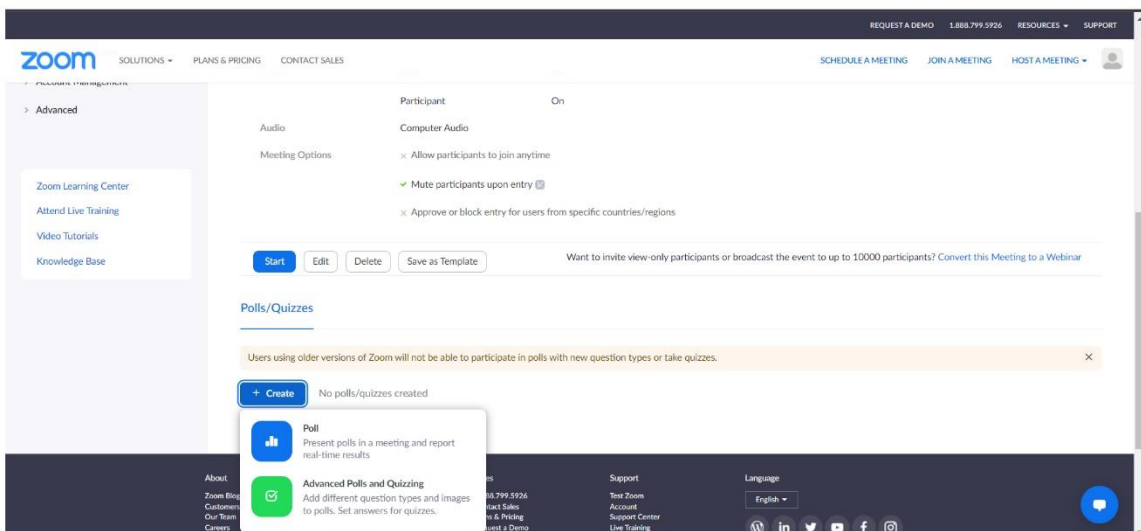
Enabling Polls (Zoom Account Administrator)

Using the Zoom web portal, change both the Account Management: Account Settings and the Personal: Settings by toggling Meeting Polls/Quizzes ON.

Scroll up to Personal: Meetings on the left sidebar and, under Upcoming Meetings, click on the name of the meeting itself (circled in green on the sample window below) — NOT on Start, Edit, or Delete.



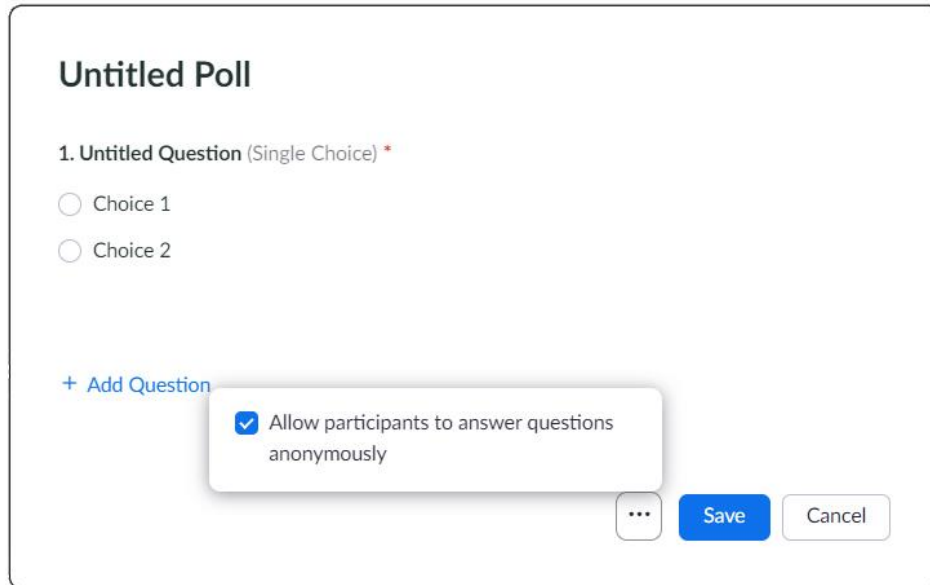
Polls/Quizzes are located at the bottom of this meeting page. Click on the Create button and select “Poll” from the popup window.⁴ If you already have one or more polls/quizzes listed, there should be an Add button. You can also Delete old polls and/or quizzes.



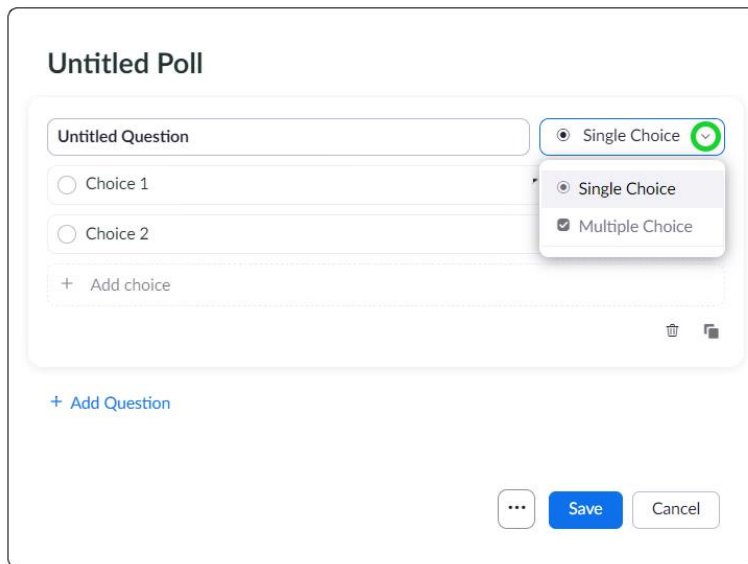
4. Advanced Polls and Quizzing are worth exploring; however, a regular Poll will be the most commonly used format for an AI-Anon meeting.

Poll Questions (Zoom Account Administrator)

When you click on Polls, the following popup window appears. As a first step, it is best to click on the ellipsis (three dots) to the left of the Save button and check the box to the left of the statement: “Allow participants to answer questions anonymously.” This is in keeping with Tradition Twelve.



When you click on Untitled Question, an option appears for you to change Single Choice (by clicking on the down arrow or caret to the right of Single Choice, which is circled in green on the sample window below), to Multiple Choice.



Click on “Untitled Poll” to give it a more meaningful title — always an excellent idea.

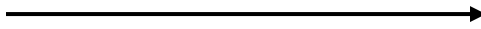
Replace “Untitled Question” with your first question, including the correct punctuation (e.g., question mark).

In most cases, for an informed group conscience, these will be Single Choice questions with Yes and No answers. A third choice allows for uncertainty (e.g., “Not sure”).

Click on “Add Question” to continue.

A sample poll appears on the following page. You can include up to ten questions; however, a maximum of nine is recommended to avoid glitches.

This is a simple sample of a Poll:



Meeting Formats

1. Are you ready to return to in-person meetings? (Single Choice) *

Yes

No

Not sure

2. Would you prefer to remain on Zoom for now? (Single Choice) *

Yes

No

Perhaps

3. Would you like to try a hybrid meeting? (Single Choice) *

Yes

No

Maybe

[+ Add Question](#)

... Save Cancel

When you have completed your poll, click the Save button. The poll (framed in red below) is now attached to this meeting, and you can Edit, Duplicate, or Delete this poll at any time.

The screenshot shows the Zoom meeting management interface. On the left is a navigation sidebar with 'Advanced' selected. The main area shows meeting settings for 'Participant' (On), 'Audio' (Computer Audio), and 'Meeting Options' (Allow participants to join anytime, Mute participants upon entry, Approve or block entry for users from specific countries/regions). Below these are buttons for 'Start', 'Edit', 'Delete', and 'Save as Template'. A 'Polls/Quizzes' section is visible, containing a table with one poll entry highlighted in red:

Name	Type	Status	Modified	
1 Meeting Formats	Poll	Activated	2022-02-22 02:31 AM	...

Remember to SIGN OUT of your Zoom account.

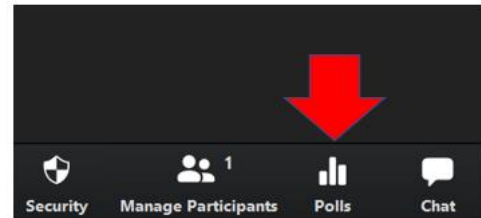
Preparing To Launch A Poll During A Meeting (Host or Administrator)

NOTE: The hosting team will not be able to participate in the poll. Those who have not updated their Zoom apps may also not be able to participate. Only the Host can launch the poll, and only the person who started the meeting can download the results.

TIPS FOR THE HOST: Allow your Zoom Account Administrator to start the meeting and make you the Host. Withdraw permissions from your Co-Host(s) so they can participate in the poll and make your Zoom Account Administrator the temporary Host so you can participate. After the administrator downloads the Results Report, s/he can make you Host again; and you can restore permissions to your Co-Host(s).

Launching A Poll (Host or Administrator)

Click on the Polls icon in the Zoom menu bar (pictured right), which triggers the Launch popup window (pictured below).



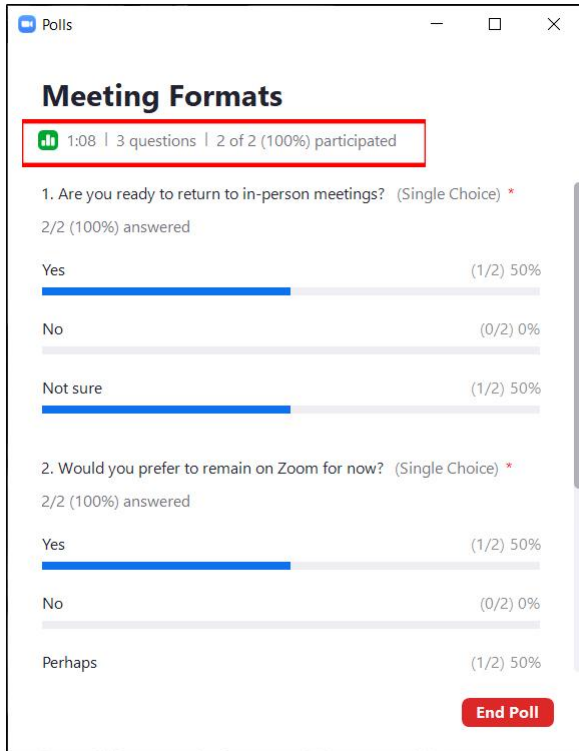
If you have more than one poll stored with this meeting, it will default to the first poll created. You can select a different poll by clicking on the down arrow or caret (circled in green on the sample window below) and making a choice from the dropdown menu. When the correct poll is selected, click the blue Launch button.

 A screenshot of the Zoom 'Polls' launch window. The window title is 'Polls'. At the top, there is a dropdown menu labeled 'Meeting Formats' with a green checkmark icon to its right. Below the dropdown, two poll options are listed: 'Meeting Formats' (3 questions) and 'Food For Thought' (3 questions). The 'Meeting Formats' option is selected. Below the list, there are three poll questions:

1. Are you ready to return to in-person meetings? (Single Choice) *
 - Yes
 - No
 - Not sure
2. Would you prefer to remain on Zoom for now? (Single Choice) *
 - Yes
 - No
 - Perhaps
3. Would you like to try a hybrid meeting? (Single Choice) *
 - Yes

 At the bottom left, there is a '+ Create' link. At the bottom right, there is a blue 'Launch' button.

The participants in the meeting will now be prompted to answer the polling questions and, as Host, you will be able to see the results live.



The information under the poll title (framed in red on the screenshot to the left) will let you know how much time has passed since the poll was launched and how many participants (by count and percentage) have submitted their answers.

Remember that no member of the hosting team will be able to take the poll, which figures into the total count, and some individuals may choose not to participate in the Zoom poll.

When everyone who wishes to do so has submitted their answers, press the red “End Poll” button.

This brings up the Poll Options window (pictured below). By clicking on the blue Share Results button, meeting participants will be able to view the results of the poll. When you return to this window after sharing the results, you can click on the ellipsis (three dots) to Download Results.

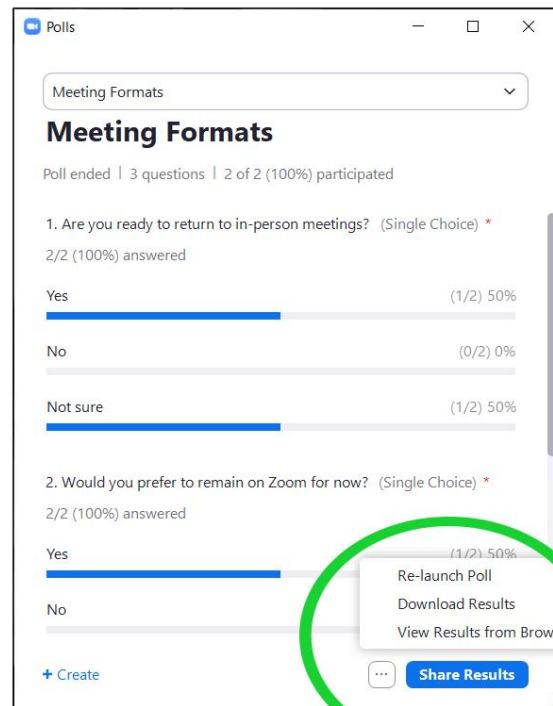
If you choose to Relaunch the Poll, you will lose all of the data you just collected. That’s fine — just remember that this is a “do over.”

When you Download Results, your browser will open. Simply close it, which will return you to the meeting.

[NOTE: Only the person who started the meeting can Download the report.]

Do not view results from the browser, as this is not necessary. The results of the poll will be compiled after the meeting (usually the next day) to generate charts to be shared with the group at the next meeting.

When you Share Results by clicking on the blue button to the right of the ellipsis, the window on the following page will appear.

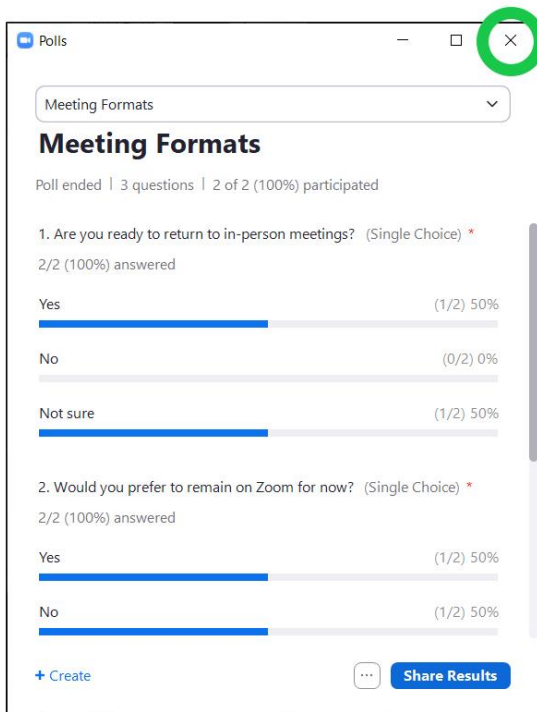
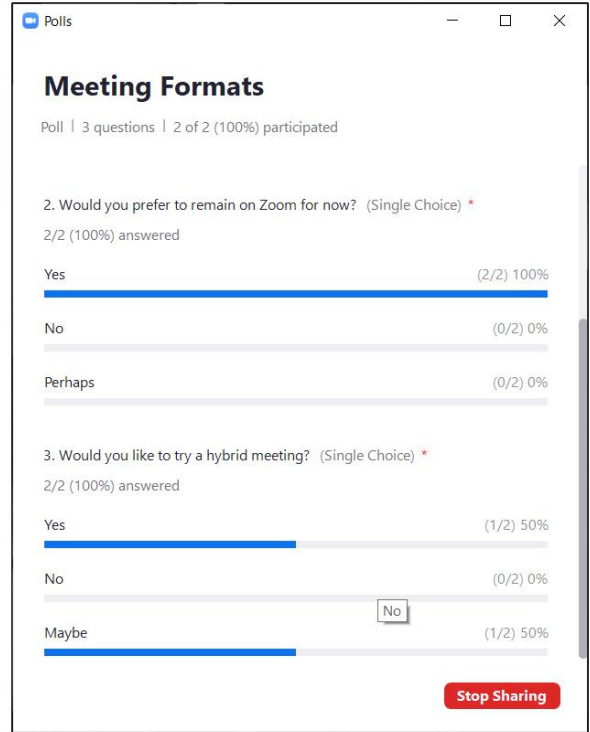


This is your Share Results window.

Meeting participants will be able to see the poll results until you click the Stop Sharing button.

Scrolling is required for a poll with multiple questions (both answering and viewing the results).

When you stop sharing these poll results, you will return to the Poll Options window (see below).



If you have already downloaded the poll results, you can exit the poll by clicking on the **X** in the upper-right corner of the Poll Options window. (To download poll results, see the instructions on the previous page.)

Downloaded Poll Results (Zoom Account Administrator)

Using the Zoom web portal, go to Personal: Meetings, click on Previous and, under the date that the poll was launched, click on the name of the meeting (NOT Edit, Delete, or Report to Zoom).

On the Meeting page, click on Account Management: Reports.

Under Usage Reports, click on Meeting.

In reference to Meeting Report: Report Type, click on Poll Report. Set the calendars so that the time range (From/To) begins and ends on the date the poll was launched and click Search.

To the right of the listed poll report, click Generate; then click Download.

Click on the downloaded CSV (comma separated variable) file. An Excel spreadsheet will open.⁵

In Excel, click File, Save As, change the document type to Excel Workbook (*.xlsx), give the report a meaningful name (e.g., Thursday Novato Poll May 2021), make a note of the file location on your computer, and click Save.

Return to the Zoom web portal and SIGN OUT of your group's account.

Sharing Poll Results With Your Group

You can play with the Excel spreadsheet to widen the columns so you can read each question and all responses. The questions will not be in the same order. Don't panic — you do not have to rearrange them. Save the workbook.

Add a sheet to the workbook and rename it DATA. If you had five questions in your poll, create five headings (in bold) that are shortened versions of your question topics in the order that these questions were asked (e.g., Return In-Person, Continue Virtual, Try Hybrid, Both Separate, Increased Service).

Copy the column of answers to each question (matching them correctly) from the first sheet to your data sheet. Select all data (including headings), click on Format as Table, select the style of table you would like that is easy to read, check the box indicating that "My table has headers," and click OK. Save the workbook.

To create a chart for each question:

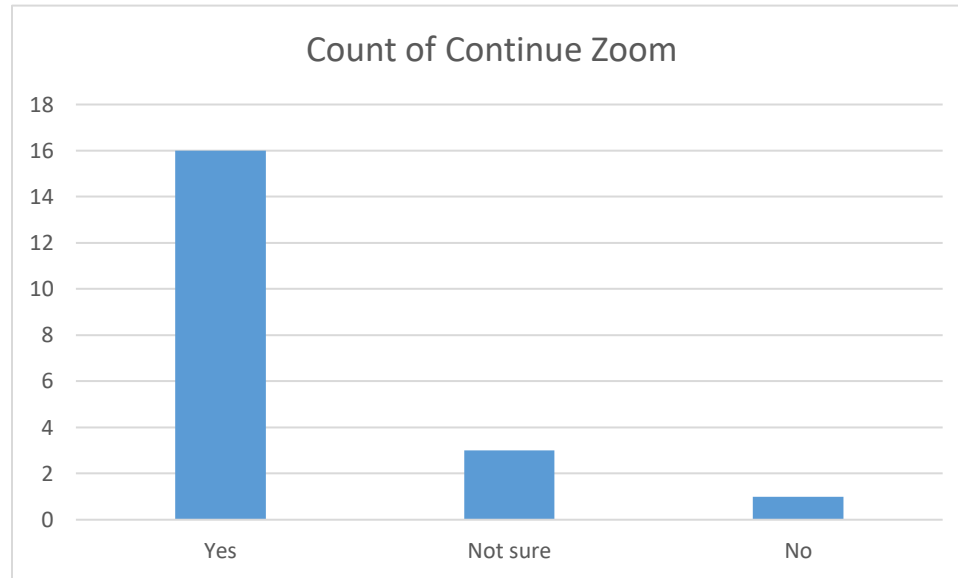
1. Click on the column letter, which will highlight all of the data in that column. Click the Insert tab, click on Recommended Charts, then click OK. Rename the newly created sheet to match the heading of your column (e.g., Return In-Person).
2. Column A on this new sheet has a down arrow to the right. Click on this down arrow, then click on More Sort Options. Select "Descending (Z to A) by:" and then select "Count of [column title]." This will arrange your chart bars in descending order.

Repeat Steps 1 and 2 until you have a chart reflecting the answers to each question.

You can copy and paste these charts into a Word document, resize them to fit perfectly on a page, and email that page to the members of your group.

5. On a Mac, this process will be slightly different. The goal is to save or export the results as a CSV file and then to save that as an Excel Workbook with a meaningful name so that charts can be generated from the results.

Below is a sample of one chart indicating responses to one polling question from one meeting in May of 2021.



CLOSED CAPTIONS / LIVE TRANSCRIPTION

Accessibility for all of those in need of comfort and encouragement, including individuals with disabilities, is an essential quality of Al-Anon meetings. For this reason, we recommend the activation of Closed Captioning for those who are deaf or hard of hearing. To accomplish this:

1. Sign In to the group account through the Zoom web portal (<https://zoom.us/>) and select Admin: Account Management: Account Settings on the left sidebar.
2. Scroll down to In Meeting (Advanced) and toggle “Manual captions” OFF, “Automated captions” ON, “Full transcript” OFF, and “Save captions” OFF.

Verify or repeat Step 2 (above) under Personal: Settings.

SIGN OUT of the group’s Zoom account.

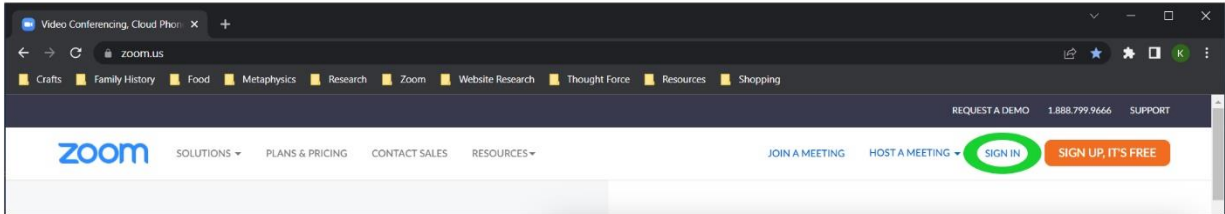
With Live Transcription activated by the Zoom Account Administrator and enabled by the Host, the meeting will be transcribed automatically (with 95 percent accuracy⁶) by a feature embedded in Zoom’s software. Instructions for effectively utilizing this feature are included in “Participant Guidelines” and “Hosting Team Guidelines” at www.marinal-anon.org. The latter document is accessed through the “Host a Zoom Meeting” link in the Virtual Meetings Guide sidebar menu.

6. There is currently no ability to add key words to the Live Transcription feature, so certain 12-Step program names or acronyms may not appear as we would spell them out.

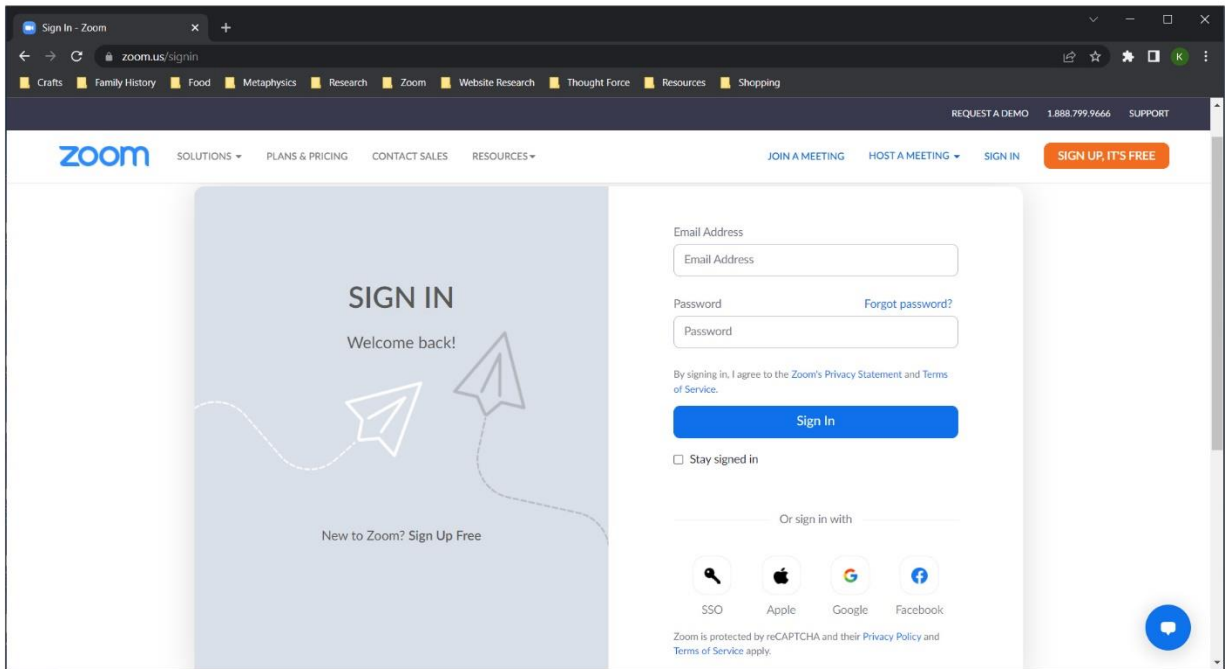
SIGN OUT ALL DEVICES

If there is concern that a member of the hosting team has failed to sign out of the group’s account after ending a meeting, the administrator can resolve this through the Zoom web portal. This technique can also be used by any meeting participant or member of the hosting team who wishes to ensure that his/her personal or business Zoom account is closed before starting or joining an AI-Anon meeting.

Use your web browser to access the Zoom web portal (<https://zoom.us/>) and select Sign In (circled in green in the sample window below).

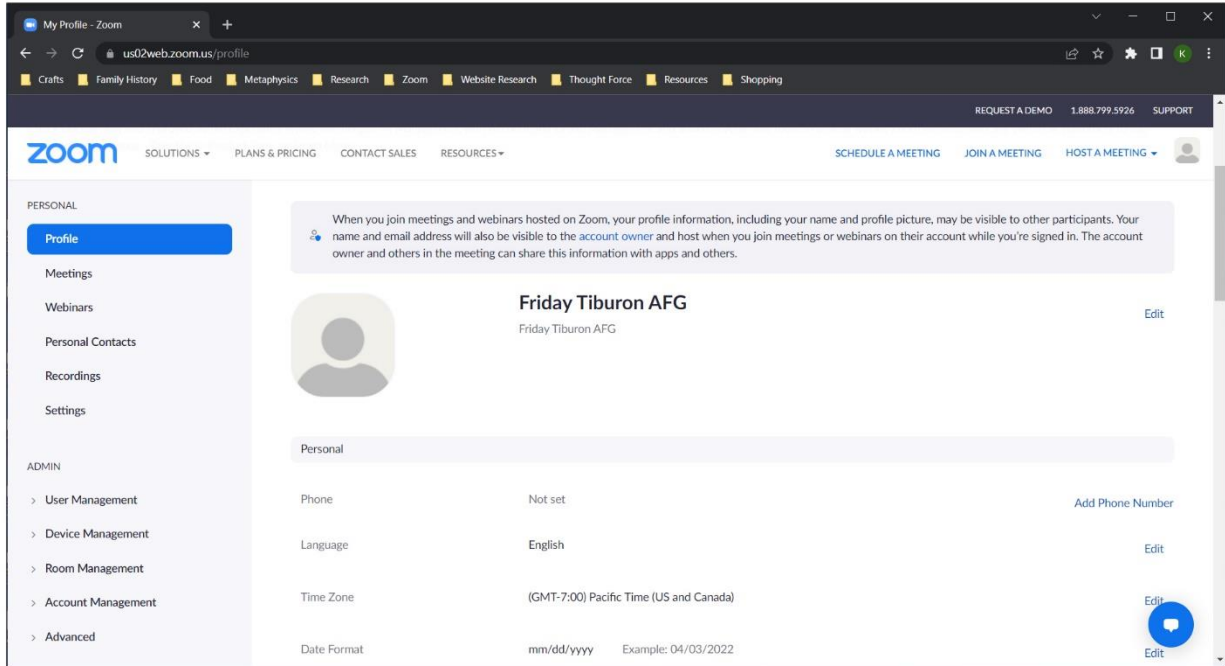


Enter the group’s email and Zoom account password on the Sign In window (example below), UNCHECK the “Stay signed in” box, then click on the blue Sign In button.



This action brings you to the Profile page of your group’s Zoom account (see next page).

One example of a Zoom account Profile page is pictured below:



At the top of each Zoom account’s Profile page, you will note the following message:⁷

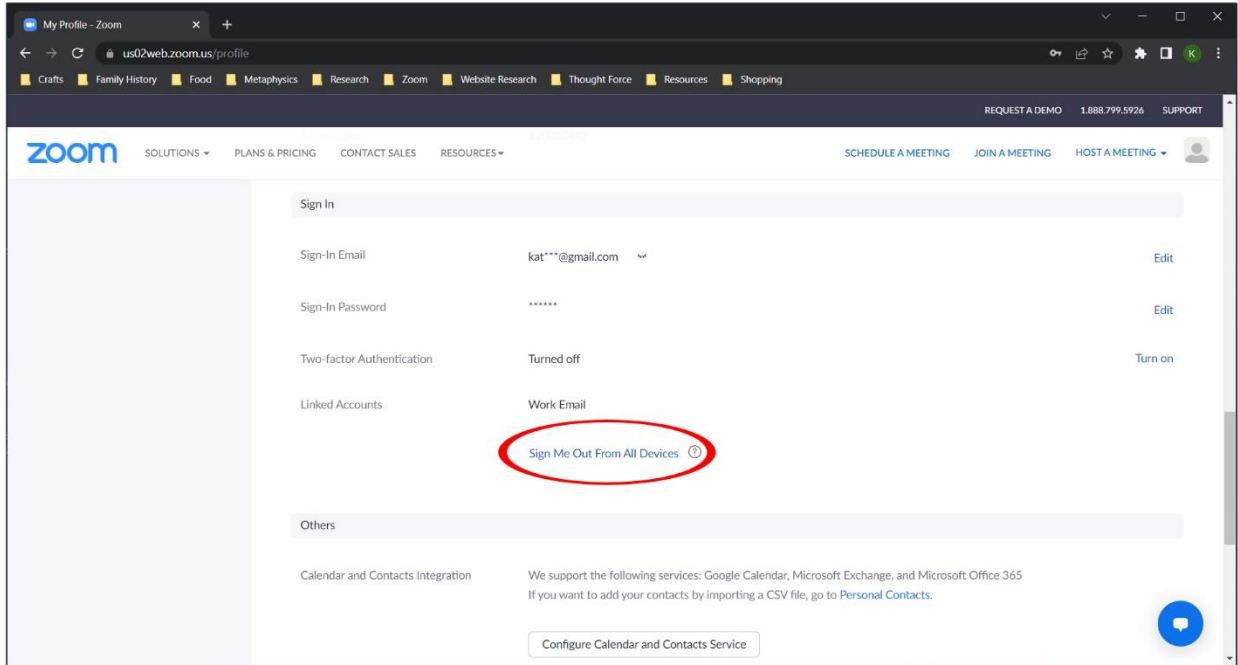
When you join meetings and webinars hosted on Zoom, your profile information, including your name and profile picture, may be visible to other participants. Your name and email address will also be visible to the account owner and host when you join meetings or webinars on their account while you’re signed in. The [account owner](#) and others in the meeting can share this information with apps and others.

DO NOT BE ALARMED. This applies to those who join meetings or webinars using their own Zoom account (or while they are inadvertently signed in to their own account), which is strongly discouraged for Al-Anon meeting participants. By signing out of your Zoom account before joining a meeting through the Zoom app, you ensure that what is visible in the Participants List about you specifically is all of the information available to the hosting team and is only visible to the administrator and/or account owner if they are in the meeting. As an added precaution (per recommended settings), no part of the meeting is saved, recorded, or archived. Access to outside apps (except for the Zoom app itself) is also strongly discouraged during Al-Anon meetings.

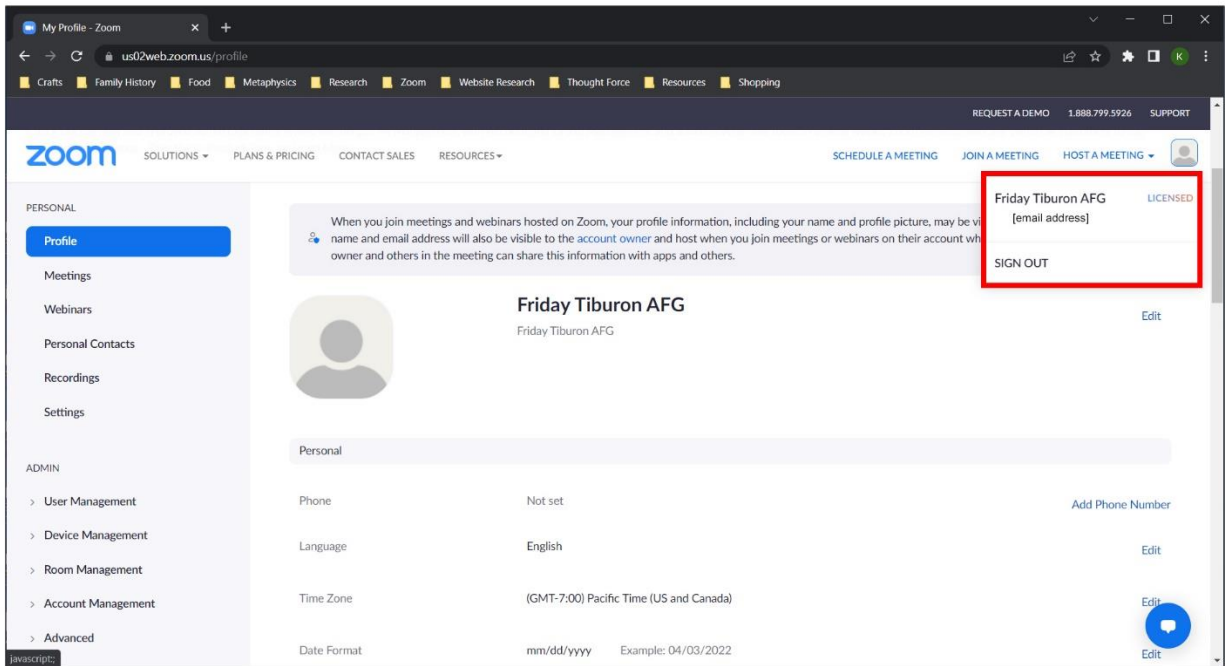
To sign out all devices, scroll down toward the bottom of the Profile page.

7. The term “account owner” appears in blue in this message because it is hyperlinked on the Zoom account Profile page; however, this hyperlink is not active in the message box provided as part of these guidelines.

Under the Sign In section heading toward the bottom of the Profile page, click on the blue statement: “Sign Me Out From All Devices” (circled in red on the sample window below).



You will still need to Sign Out of the account by clicking on the gray head and shoulders in the upper-right corner (under the word “Support”). This will open the dropdown menu (framed in red on the sample window below).



Click on SIGN OUT on this dropdown menu, then close your browser.