SETTING UP REGISTRATION FOR A MEETING

BSA events that may require registration include roundtables and other meetings and events that are communicated to a broad audience or published on a public site. Requiring registration allows hosts and co-hosts to plan ahead and helps to limit potential security issues related to conducting secure and productive meetings. In this way, setting up registration is a measure of both convenience and participant safety.

Follow the step-by-step guidance provided to schedule a meeting; set up registration; collect the information you need to be able to plan and prepare for your meeting, including setting up breakout rooms; and generate meeting registrant reports to assist with planning and monitoring attendance.

SCHEDULE A NEW MEETING

Sign in to your account on zoom.us, then click Schedule a New Meeting.

![Schedule a Meeting Interface](image)
Enter the meeting **topic**, **date**, and **time**.

Check box to **require registration**, which helps with both planning and meeting security. It also means you will be able to generate a registration report before or after your meeting.
Rather than use the same personal meeting ID for every meeting, which can create security issues the longer that personal meeting ID is in use, select the **Generate Automatically** Meeting ID option.

**Note:** Starting **Sept. 27th, 2020**, all meetings must have either a **Waiting Room** or **Passcode** enabled. (Click [here](#) for more information.) Ensure that one or both of these options are checked.

<table>
<thead>
<tr>
<th>Meeting ID</th>
<th>Generate Automatically</th>
<th>Personal Meeting ID</th>
</tr>
</thead>
<tbody>
<tr>
<td>Security</td>
<td>Passcode</td>
<td>Waiting Room</td>
</tr>
<tr>
<td>Video</td>
<td>Host</td>
<td>on  off</td>
</tr>
<tr>
<td></td>
<td>Participant</td>
<td>on  off</td>
</tr>
<tr>
<td>Audio</td>
<td>Telephone</td>
<td>Computer Audio</td>
</tr>
<tr>
<td></td>
<td>Both</td>
<td>Dial from United States of America</td>
</tr>
<tr>
<td>Meeting Options</td>
<td>Enable join before host</td>
<td>Mute participants upon entry</td>
</tr>
<tr>
<td></td>
<td>Only authenticated users can join: Sign in to Zoom</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Breakout Room pre-assign</td>
<td></td>
</tr>
<tr>
<td>Alternative Hosts</td>
<td>Example: <a href="mailto:mary@company.com">mary@company.com</a>, <a href="mailto:peter@school.edu">peter@school.edu</a></td>
<td></td>
</tr>
</tbody>
</table>

You will now have a **Registration Link** to share with participants in an invitation. But first, you’ll want to edit your meeting’s registration options.

<table>
<thead>
<tr>
<th>Registration Link</th>
<th><a href="https://us02web.zoom.us/meeting/register/I">https://us02web.zoom.us/meeting/register/I</a>.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Copy Invitation</td>
<td><a href="#">Copy Invitation</a></td>
</tr>
</tbody>
</table>
**EDIT REGISTRATION OPTIONS**

Follow these steps to edit your meeting’s registration options.

First, click the **Registration** tab.

### Manage Attendees
- Registrants: 0

### Registration Options
- Automatically Approved
- Send an email to host
- Close registration after meeting date
- Allow attendees to join from multiple devices
- Show social share buttons on registration page

![Registration Options](image)

**Registration**

**Approval**
- **Automatically Approve**
  Registrants will automatically receive information on how to join the meeting.
- **Manually Approve**
  The organizer must approve registrants before they receive information on how to join the meeting.

**Notification**
- Send an email to host when someone registers

**Other options**
- Close registration after event date
- Allow attendees to join from multiple devices
- Show social share buttons on registration page

![Save All and Cancel buttons](image)
Select **Manually Approve** registrations before they receive information on how to join the meeting.

Once invitations are sent, you’ll be able to see how many attendees have registered under **Manage Attendees**, whom you can then approve so they receive information to join the meeting.
But first, you’ll want to set the questions you ask attendees during registration. To do that, click the **Questions** tab. Choose the options that are relevant to your meeting.

For your meeting’s purposes, you may want additional information. To gather that, click the **Custom Questions** tab, and create the questions you would like to ask. Note whether or not answering each question is required, and provide a complete list of response choices for single-answer questions. See some examples below, including one that illustrates how to use custom questions to assign attendees to breakout rooms for a roundtable. The same process could be used to assign Scouts BSA members to
patrol breakouts, Cub Scouts to den breakouts, parents or committee members to their own breakout rooms, and so on.
### Registration

#### Questions

<table>
<thead>
<tr>
<th>Order</th>
<th>Your Questions</th>
<th>Required</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Unit Type</td>
<td></td>
</tr>
</tbody>
</table>

**Type:**  
- [ ] Short Answer  
- [ ] Single answer

**Required:** [ ]

**Question:** Unit Number

Create: Cancel

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### Registration

#### Questions

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</tr>
</thead>
<tbody>
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<td>Unit Type</td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>Unit Number</td>
<td></td>
</tr>
</tbody>
</table>

**Type:**  
- [ ] Short Answer  
- [ ] Single answer

**Required:** [ ]

**Question:** Position

Add another answer

Create: Cancel

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You are prohibited from soliciting confidential personal information (such as credit card information or social security numbers) in your registration questions.
Note that you can create custom questions that will allow you to organize participants into the proper breakout room. Make sure all of your attendees have an engaging breakout option for this portion of your meeting.

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<th>Required</th>
</tr>
</thead>
<tbody>
<tr>
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<td>Unit Type</td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>Unit Number</td>
<td></td>
</tr>
<tr>
<td>3</td>
<td>Position</td>
<td></td>
</tr>
</tbody>
</table>

Create Your Own Question

You are prohibited from soliciting confidential personal information (such as credit card information or social security numbers) in your registration questions.

Type

- Short Answer
- Single answer

Required

- Check

Question

- Select Breakout Session

Answer

- Cub Scouts
- Scouts BSA

Add another answer

Create Cancel
Don’t forget to click **Save All** when you’re finished!

**Zoom Help Center Links for Further Reading**

**Setting up Registration for a Meeting**

Visit this website for more information about setting up registration and questions for a meeting: [https://support.zoom.us/hc/en-us/articles/211579443-Setting-up-registration-for-a-meeting](https://support.zoom.us/hc/en-us/articles/211579443-Setting-up-registration-for-a-meeting)

**Breakout Rooms**

If you have registration enabled and external participants register for the meeting, you can prepare to assign them to breakout rooms during the meeting.

- **Pre-assigning participants to breakout rooms**—note prerequisites and limitations: [https://support.zoom.us/hc/en-us/articles/360032752671-Pre-assigning-participants-to-breakout-rooms](https://support.zoom.us/hc/en-us/articles/360032752671-Pre-assigning-participants-to-breakout-rooms)

- **Managing breakout rooms**—[https://support.zoom.us/hc/en-us/articles/206476313](https://support.zoom.us/hc/en-us/articles/206476313)
APPROVE REGISTRATIONS

Once you send out the meeting registration link and attendees register, they will receive a message that looks like this:

Meeting Registration Pending Approval

<table>
<thead>
<tr>
<th>Topic</th>
<th>Example District Roundtable</th>
</tr>
</thead>
<tbody>
<tr>
<td>Description</td>
<td>Information, training, and networking for all adults involved in Scouting in the Example District</td>
</tr>
<tr>
<td>Time</td>
<td>Aug 12, 2020 08:00 PM in Eastern Time (US and Canada)</td>
</tr>
<tr>
<td>Meeting ID</td>
<td>838 7094 5446</td>
</tr>
</tbody>
</table>

Your registration request for this meeting has been submitted to the host for approval. You will receive an email regarding your registration status.

To Cancel This Registration

You can cancel your registration at any time.

You will want to be sure you’re monitoring meeting registrations and approve them on a regular and timely basis.

GENERATE A REGISTRATION REPORT

A registration report lists the people who have registered to attend a scheduled meeting. It is helpful to generate a registration report for the following reasons:

1. Monitor the number of people who have registered for the meeting
2. Identify specific persons who have (or have not) registered for the meeting
3. Review the registration data entered to identify where follow up may be needed to
   a. correct errors in answers; or
   b. confirm that a registrant is a valid invitee and not a potential security threat
4. Prepare a list of which breakout session each person will be attending to facilitate rapidly assigning people to breakout groups during the meeting
5. Conveniently take attendance during the meeting using the report

Currently, Zoom is capable of creating reports only for meetings that require registration.

How to Generate a Registration Report

1. Sign in to your account at https://zoom.us/.
2. Navigate to the ADMIN > Account Management > Reports screen.
3. Click Meeting on the default Usage Reports tab. Search for and select the meeting for which you want to generate a registration report. (Note: If you used polling features in your meeting, you can also generate a polling report this way.)
4. Select **Registration Report** next to the Report Type.

5. Enter a date range that includes the scheduled meeting. Below that, you may search by time range or meeting ID.

6. Click the **Search** button.

7. Check the box to select meeting.

8. Click the **Generate** link.
9. Select **All Registrants** as the Registration Type.
10. Click the **Continue** button to generate the report file.

11. Click **Download** for the Registration Report for the selected meeting.

12. Depending on the browser that you are using and your browser settings, you may have options to either
   a. Open the *meeting ID* RegistrationReport.csv (comma separated values) file in a spreadsheet program such as Microsoft Excel or Google Sheets; or
   b. Save the file.

The Registration Report contains each registrant’s approval status, when they registered, and their answers to the registration questions that were defined when the meeting was set up.

For more information about generating meeting reports for registration and polling, click this link: [https://support.zoom.us/hc/en-us/articles/216378603](https://support.zoom.us/hc/en-us/articles/216378603)

**USE REPORTS TO MONITOR MEETING ATTENDANCE**

Just before your meeting begins, you may find it helpful to print the report you generated of everyone who preregistered. This will allow you a convenient way to take attendance, either formally—through a roll call or by having participants either rename themselves to include their name and unit number (if applicable) or include this information in the chat function as they join the meeting—or by informally monitoring the participant panel during the meeting.