
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**.

The screenshot shows the Zoom web interface. At the top, there is a navigation bar with the Zoom logo and links for SOLUTIONS, PLANS & PRICING, and CONTACT SALES. Below this is a sidebar menu with options for PERSONAL, Profile, Meetings (highlighted in blue), and Webinars. The main content area is titled 'Upcoming Meetings' and features a 'Schedule a New Meeting' button. Below this, there is a breadcrumb trail: 'My Meetings > Schedule a Meeting'. The 'Schedule a Meeting' form is displayed with the following fields:

- Topic:** Example District Roundtable
- Description (Optional):** Information, training, and networking for all adults involved in Scouting in the Example District
- When:** 08/12/2020, 8:00 PM
- Duration:** 1 hr 15 min
- Time Zone:** (GMT-4:00) Eastern Time (US and Canada)
- Recurring meeting
- Registration:** Required

Enter the meeting **topic**, **date**, and **time**.

[My Meetings](#) > Schedule a Meeting

Schedule a Meeting

Topic

Description (Optional)

When

Duration hr min

Time Zone

Recurring meeting

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.

Registration

Required

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.

Meeting ID Generate Automatically Personal Meeting ID [REDACTED]

Security Passcode [REDACTED] Waiting Room

Video

Host on off

Participant on off

Audio Telephone Computer Audio Both

Dial from United States of America [Edit](#)

Meeting Options

Enable join before host

Mute participants upon entry

Only authenticated users can join: Sign in to Zoom

Breakout Room pre-assign

Alternative Hosts

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.

Registration Link [https://us02web.zoom.us/meeting/register/\[REDACTED\]](https://us02web.zoom.us/meeting/register/[REDACTED]) Copy Invitation

EDIT REGISTRATION OPTIONS

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

First, click the **Registration** tab.

Registration	Email Settings	Branding	Poll
Manage Attendees	Registrants: 0		View
Registration Options	Automatically Approved		Edit
	<input type="checkbox"/> Send an email to host		
	<input type="checkbox"/> Close registration after meeting date		
	<input checked="" type="checkbox"/> Allow attendees to join from multiple devices		
	<input checked="" type="checkbox"/> Show social share buttons on registration page		

Registration

Registration Questions Custom Questions

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

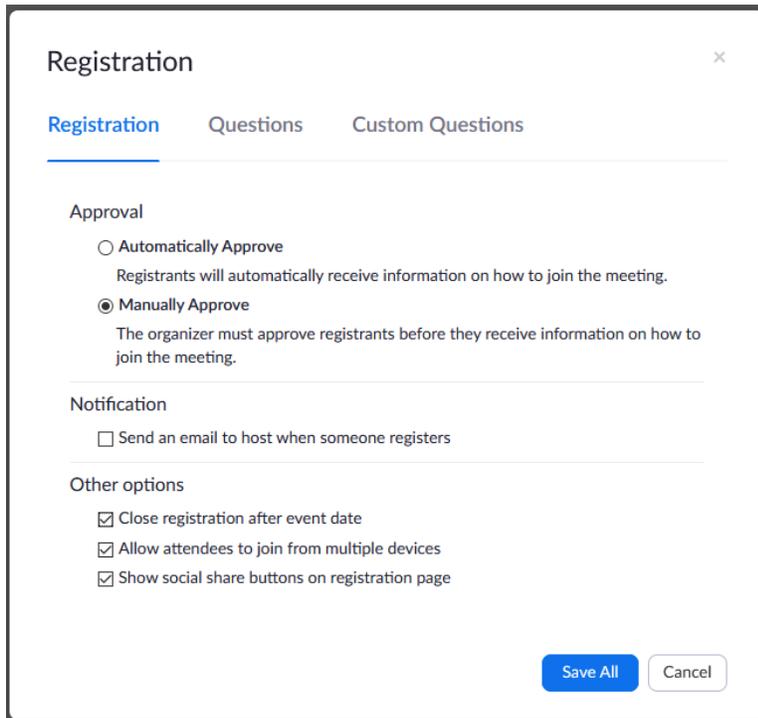
Close registration after event date

Allow attendees to join from multiple devices

Show social share buttons on registration page

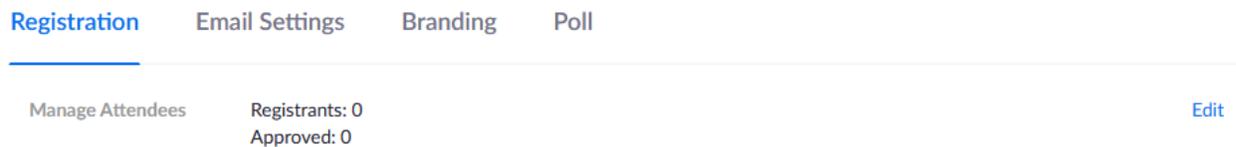
[Save All](#) [Cancel](#)

Select **Manually Approve** registrations before they receive information on how to join the meeting.



The screenshot shows a 'Registration' dialog box with a close button (X) in the top right corner. It has three tabs: 'Registration' (selected), 'Questions', and 'Custom Questions'. Under the 'Registration' tab, there are three sections: 'Approval', 'Notification', and 'Other options'. In the 'Approval' section, 'Manually Approve' is selected with a radio button, and its description is 'The organizer must approve registrants before they receive information on how to join the meeting.' In the 'Notification' section, the checkbox 'Send an email to host when someone registers' is unchecked. In the 'Other options' section, three checkboxes are checked: 'Close registration after event date', 'Allow attendees to join from multiple devices', and 'Show social share buttons on registration page'. At the bottom right, there are two buttons: 'Save All' (blue) and 'Cancel' (white).

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.



The screenshot shows a navigation bar with four tabs: 'Registration' (selected), 'Email Settings', 'Branding', and 'Poll'. Below the navigation bar, there is a section for 'Manage Attendees'. It displays 'Registrants: 0' and 'Approved: 0'. To the right of this information is a blue 'Edit' link.

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.

Registration ×

Registration **Questions** Custom Questions

Add Registration Fields

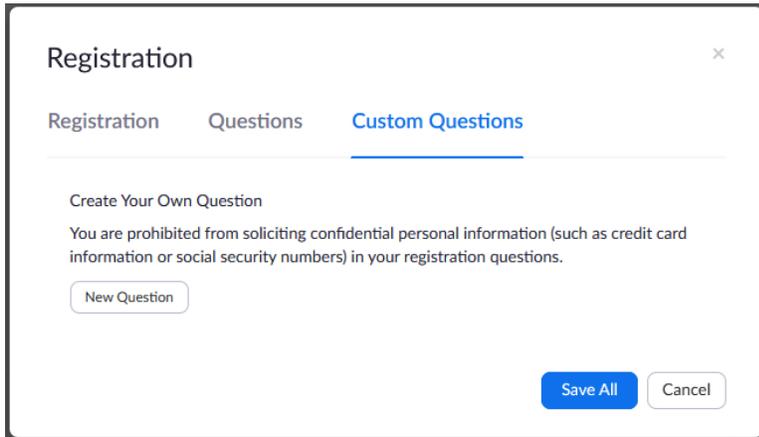
First Name and Email Address required.

<input type="checkbox"/> Field	<input type="checkbox"/> Required
<input checked="" type="checkbox"/> Last Name	<input checked="" type="checkbox"/>
<input type="checkbox"/> Address	<input type="checkbox"/>
<input type="checkbox"/> City	<input type="checkbox"/>
<input type="checkbox"/> Country/Region	<input type="checkbox"/>
<input type="checkbox"/> Zip/Postal Code	<input type="checkbox"/>
<input type="checkbox"/> State/Province	<input type="checkbox"/>
<input type="checkbox"/> Phone	<input type="checkbox"/>
<input type="checkbox"/> Industry	<input type="checkbox"/>
<input type="checkbox"/> Organization	<input type="checkbox"/>
<input type="checkbox"/> Job Title	<input type="checkbox"/>
<input type="checkbox"/> Purchasing Time Frame	<input type="checkbox"/>
<input type="checkbox"/> Role in Purchase Process	<input type="checkbox"/>
<input type="checkbox"/> Number of Employees	<input type="checkbox"/>
<input type="checkbox"/> Questions & Comments	<input type="checkbox"/>

Save All Cancel

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 ×

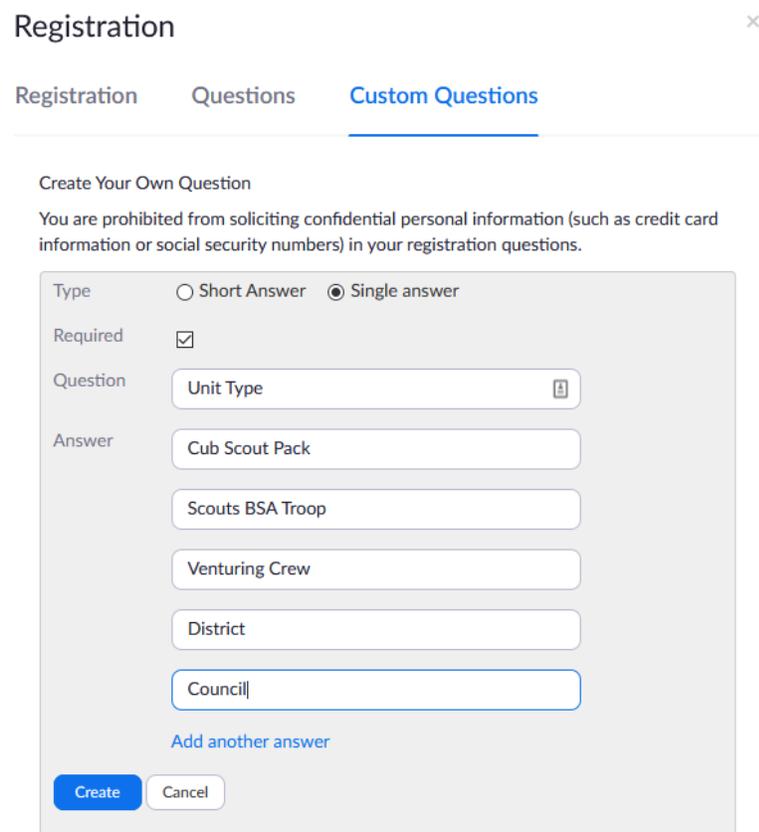
Registration Questions **Custom Questions**

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.

[New Question](#)

[Save All](#) [Cancel](#)



Registration ×

Registration Questions **Custom Questions**

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

Question

Answer

[Add another answer](#)

[Create](#) [Cancel](#)

Registration

Registration Questions **Custom Questions**

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.

Order	Your Questions	Required	
1	Unit Type	<input checked="" type="checkbox"/>	<button>Delete</button>

Type Short Answer Single answer

Required

Question

Create Cancel

Registration Questions **Custom Questions**

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.

Order	Your Questions	Required	
1	Unit Type	<input checked="" type="checkbox"/>	<button>Delete</button>
2	Unit Number	<input type="checkbox"/>	<button>Delete</button>

Type Short Answer Single answer

Required

Question

Answer

[Add another answer](#)

Create Cancel

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.

[Registration](#) [Questions](#) [Custom Questions](#)

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.

Order	Your Questions	Required	
1	Unit Type	<input checked="" type="checkbox"/>	Delete
2	Unit Number	<input type="checkbox"/>	Delete
3	Position	<input checked="" type="checkbox"/>	Delete

Type Short Answer Single answer

Required

Question

Answer

[Add another answer](#)

Don't forget to click **Save All** when you're finished!

The screenshot shows the 'Registration' window with the 'Custom Questions' tab selected. It includes a warning about soliciting confidential information, a table of questions, and 'Save All' and 'Cancel' buttons.

Order	Your Questions	Required	
1	Unit Type	<input checked="" type="checkbox"/>	Delete
2	Unit Number	<input type="checkbox"/>	Delete
3	Position	<input checked="" type="checkbox"/>	Delete
4	Select Breakout Session	<input checked="" type="checkbox"/>	Delete

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>

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>
- **Managing breakout rooms**—<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

Topic	Example District Roundtable
Description	Information, training, and networking for all adults involved in Scouting in the Example District
Time	Aug 12, 2020 08:00 PM in Eastern Time (US and Canada)
Meeting ID:	838 7034 5446

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.)

Usage Reports User Activity Reports

- Daily: Show daily number of new users, meetings, participants and me
- Active Hosts: View meetings, participants and meeting minutes within a spec
- Inactive Hosts: Show the users who are not active during a period.
- Upcoming Events: View upcoming meetings and webinars.
- Meeting**: View registration reports and poll reports for meetings.
- Cloud Recording: View detailed information about cloud storage usage by host.
- Remote Support: View in-meeting support sessions during a certain period.

If a participant requests removal of their personal information from your account, please e

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.

Reports > Usage Reports > Meeting [Document](#)

Meeting Report Report Queue

Report Type Registration Report Poll Report

Search by time range ▾ From: 08/12/2020 To: 08/12/2020 [Search](#)

Maximum report duration: 1 Month

7. Check the box to select meeting.
8. Click the **Generate** link.

Reports > Usage Reports > Meeting [Document](#)

Meeting Report Report Queue

Report Type Registration Report Poll Report

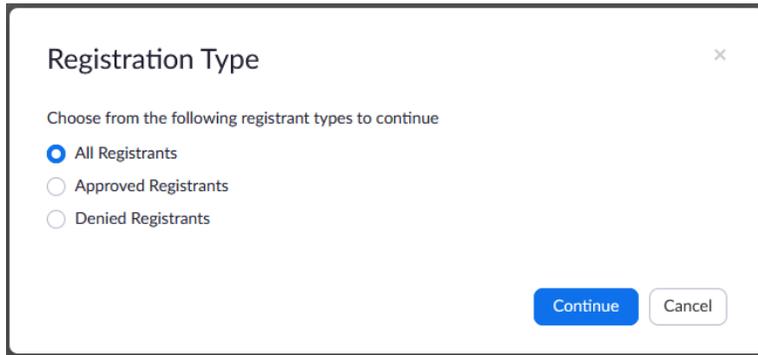
Search by time range ▾ From: 08/12/2020 To: 08/12/2020 [Search](#)

Maximum report duration: 1 Month

Selected 1 item(s). [Generate](#)

<input type="checkbox"/>	Scheduled Time	Topic	Meeting ID
<input checked="" type="checkbox"/>	08/12/2020 08:00:00 PM	Example District Roundtable	838 7034 544 Generate

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



Registration Type

Choose from the following registrant types to continue

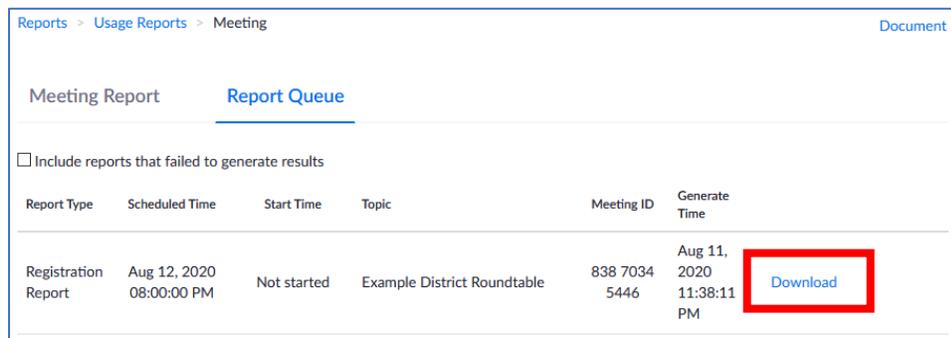
All Registrants

Approved Registrants

Denied Registrants

Continue Cancel

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



Reports > Usage Reports > Meeting Document

Meeting Report Report Queue

Include reports that failed to generate results

Report Type	Scheduled Time	Start Time	Topic	Meeting ID	Generate Time	
Registration Report	Aug 12, 2020 08:00:00 PM	Not started	Example District Roundtable	838 7034 5446	Aug 11, 2020 11:38:11 PM	Download

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.

	A	B	C	D	E	F	G	H	I	J
1	First Name	Last Name	Email	Registration Time	Approval Status	last_name	Unit Type	Unit Number	Position	Select Breakout Session
2	William	Cameron	example@gmail.com	8/12/2020 0:32	pending	Cameron	District		Commissioner	Cub Scouts

For more information about generating meeting reports for registration and polling, click this link: <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 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.