

## INSTRUCTIONS TO RECORD YOUR PRESENTATION USING ZOOM MEETING SOFTWARE

### Set up your technology.

- **If all team members are together in one room:** You will need two computers – one to share the slides and one with video and audio to record the presentation. The computer that will be presenting the slides should have a slide advancer to advance your PowerPoint slides.
- **If team members are spread out in different locations:** Each team member will present using their own computer. One team member will share the PowerPoint slides. A different team member will record the presentation.

### Sign up with Zoom

1. The Team Captain will visit <https://zoom.us/signup>.
  - Confirm your date of birth.
  - Provide an email address and click “Sign Up”
  - Zoom will email you a link to activate your account. Click “Activate Account.”
  - Add your account details (first name, last name, and password).
  - Zoom gives you the option to invite colleagues. You may add your team members’ email addresses, but this is not required.
  - Zoom allows you to test a meeting. Skip this step and click “Go to My Account”

### Settings for recording

1. In your account settings:
  - on the left sidebar under “**Personal**,” select “**Settings**”.
  - then select the “**Recording**” tab at the top of the page.
  - Make sure “**Local Recording**” is turned on.

### Create a meeting with Zoom

1. While signed into Zoom, select “**Host a Meeting**” (link in the top right of the webpage)
  - select “**With Video On**”
2. Launch the meeting. Zoom will automatically download necessary software.
3. Zoom will ask you to “**Join with Computer Audio.**” Accept this option.

### Invite other team members or presentation computer to the meeting

1. In the Zoom meeting, in the center of the bottom options ribbon, click the up arrow next to participants, then click “**Invite**”
  - **All team members together in one room:** Send an invitation or copy the URL to have the computer with your PowerPoint slides join the meeting.  
NOTE: When adding the computer with the PowerPoint slides, that computer **should not connect with video or audio.**
  - **Team members spread out in different locations:** Send an invitation to each presenting team member  
NOTE: Zoom allows for you to send an email with the meeting link to people you wish to invite, or you can copy the meeting URL and share via messenger.
2. As your team members join the meeting, you may need to admit them to the meeting

**Set up for Recording with Zoom**

1. On the computer presenting the PowerPoint slides,
  - launch the PowerPoint and put it into presentation mode.
  - Then return to the Zoom meeting. In the center of the bottom options ribbon, click “**Share Screen**”
  - Select the appropriate option to share your PowerPoint presentation.
  - We suggest that you use a slide advancer to progress the slides.
2. On the computer recording the presentation (NOTE: different from the PowerPoint computer), in the Zoom meeting bottom options ribbon, click “**Record**”
3. When your presentation is done, in the Zoom meeting bottom options ribbon, click “**Stop Recording**”.
4. When you end the meeting, your recording will process and you can save it to your computer.
5. Zoom will record the full meeting with shared slides and presenter video/audio feeds as an .mp4, as well as individual audio feeds for each person/computer in the meeting.
6. The .mp4 is the file that you will need to provide to CFA Institute.