Zoom: Registration

This is a more concise list of instructions on how to Zoom Registration in your Zoom meeting. More information can be found either [Zoom Registration Part 1](#) or [Zoom Registration Part 2](#).

Table of Contents

- Setting up Registration in a Zoom Meeting
- Managing Zoom Registrants
- Registration Options
- Registration Email Settings
- Export a List of Zoom Registrants

Setting up Registration in a Zoom Meeting

You can set up a quick registration form for any Zoom meeting. This allows you to get the Zoom Registration settings for that meeting, which will be outlined below.

When Scheduling a meeting, scroll down until you see “Registration”. The right of this will be a checkbox labeled “Required”. Click on the checkbox and then click on the blue Save button at the bottom of the page.

Managing Zoom Registrants

In Zoom, you can easily approve registration, deny registration, or unregister people form attending your Zoom meeting. Note: “user” and “registrant” will be used interchangeably.
e, make sure you are in the meeting section of Zoom and click on the name of the meeting that you want to manage registrants for.
| Manage Registrants | Registrants: 4  
| Approved: 3 |
| Registration Options | Manually Approve  
|  
|  
| ✗ Send an email to host  
| ✔ Close registration after meeting date  
| ✗ Allow registrants to join from multiple devices  
| ✗ Show social share buttons on registration page |
Registrants for 'My Meeting'

<table>
<thead>
<tr>
<th>Pending Approval (1)</th>
<th>Approved (3)</th>
<th>Denied (0)</th>
</tr>
</thead>
</table>

- **Garrus Valkarian**
  - Email: garrus@archangel.net
  - Registration Date: Sep 15, 2021 09:12 AM

- **Approve**
- **Deny**
provincial (if you are mentally preparing for resistance).

Click the checkbox (es) to the left of the name(s) of the people you want to
manage. You can also select the checkbox to the left of where it says "Registrants" to select all Registrants in the list. Then either
a p p r o v e o r d e n y t h e s e l e c t e d r e g i s t r a n t ( s ).

If you a p p r o v e a r e g i s t r a n t , t h e y w i l l b e c o m e a p a r t o f t h e A p p r o v e d l i s t .
the registrant, they will become a part of the denied list and will not be able to join the Zoom meeting using that email address, in either
case, the user will get an email. Approved users will get an email with a link unique for them and denied users will get an email.
saying they were denied. If you would like to add extra information why, then you can do that too. If you want to see more
For this user, I will choose Deny.

For approved users, you still have the option to cancel their

Registrants for 'My Meeting'

Search by name or email

Pending Approval (0)  Approved (3)  Denied (1)

☐ Registrants

☐ Urdnot Wrex  urdnot@wrex.com  Sep 15, 2021 09:09 AM

☐ Steve McQueen  lightning@mcqueen.com  Sep 15, 2021 09:08 AM

☐ Barla Von  itsbarla78@me1.com  Sep 15, 2021 09:07 AM

Cancel Registration  Resend Confirmation Email
If you are using the user list.
You can also send the confirmation email if you choose to.
We'll focus on can...
ft of the user's name that you want to cancel the registration of. Then click on Cancel Registration.
Registration Options

When you use Registration in Zoom, you also have options in how you want to handle people who register.
ou are in the meeting section of Zoom and click on the name of the meeting that you want to manage registrants for.

2 Scroll down to the b
In the section titled "Registration Options," you will see a few options below, including "Registration Options." This option has an
Overview of your choices for various settings. Click on the "Edit" link on the far-right to see a pop-up of these options and more.
Registration

<table>
<thead>
<tr>
<th>Registration</th>
<th>Questions</th>
<th>Custom Questions</th>
</tr>
</thead>
</table>

**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
Add Registration Fields

First Name and Email Address required.

<table>
<thead>
<tr>
<th>Field</th>
<th>Required</th>
</tr>
</thead>
<tbody>
<tr>
<td>Last Name</td>
<td>✔️</td>
</tr>
<tr>
<td>Address</td>
<td></td>
</tr>
<tr>
<td>City</td>
<td></td>
</tr>
<tr>
<td>Country/Region</td>
<td></td>
</tr>
<tr>
<td>Zip/Postal Code</td>
<td></td>
</tr>
<tr>
<td>State/Province</td>
<td></td>
</tr>
<tr>
<td>Phone</td>
<td></td>
</tr>
<tr>
<td>Industry</td>
<td></td>
</tr>
<tr>
<td>Organization</td>
<td></td>
</tr>
<tr>
<td>Job Title</td>
<td></td>
</tr>
<tr>
<td>Purchasing Time Frame</td>
<td></td>
</tr>
<tr>
<td>Role in Purchase Process</td>
<td></td>
</tr>
<tr>
<td>Number of Employees</td>
<td></td>
</tr>
<tr>
<td>Questions &amp; Comments</td>
<td></td>
</tr>
</tbody>
</table>

Save All  Cancel
You can also add your own Custom Questions to the Registration Form by going to the Custom Questions tab.

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.

<table>
<thead>
<tr>
<th>Order</th>
<th>Your Questions</th>
<th>Required</th>
</tr>
</thead>
</table>

New Question

Save All  Cancel
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
--- | --- | ---

<table>
<thead>
<tr>
<th>Type</th>
<th>Short Answer</th>
<th>Single answer</th>
</tr>
</thead>
<tbody>
<tr>
<td>Required</td>
<td>✔</td>
<td></td>
</tr>
<tr>
<td>Question</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Create Question

Save All | Cancel
a Single Answer (i.e., multiple-choice) and whether or not it will be something that the Registrant is required to fill out. When done, click
on the blue Create button in the lower left. You can create other questions by following the previous two steps (i.e., 5 through 5B).
When you are done creating questions, click on the blue 'Save All' button in the lower right.

If you want to see what your registratio

<table>
<thead>
<tr>
<th>Topic</th>
<th>My Meeting</th>
</tr>
</thead>
<tbody>
<tr>
<td>Time</td>
<td>Sep 14, 2021 10:00 AM Eastern Time (US and Canada)</td>
</tr>
<tr>
<td>URL</td>
<td>[Click here to join the meeting][1]</td>
</tr>
</tbody>
</table>

[1] Copy Link
from
will
look
like
(a
and
if
you
want
to
provide
the
link
to
other
s"

When
you
click on the link, the Registration form will open up in a new tab in your browser that you can view and/or test. You can alsoOdick o
Registration Email Settings

Zoom provides generic emails for registrants. However, you can edit these generic emails as well as other settings.
1. Go to canisius.zoom.us and sign-in. From there, make sure you are in the meeting section of Zoom and click on the name of the meeting that you want to manage registrants for.

2. Scroll down to the bottom of the page until you see “Registration”. To the right of it will be a tab titled “Email Settings”. Click on that to see an overview of options for the Email Settings.

3. [Instructions continue on the next page]
We will go right into the Email Contact since the first option, Select Email Language, is self-explanatory.

Edit Contact Email Address

You may change the contact information that attendees can use if they have questions about the meeting.

Name
Tyler Kron-Platek (he/him/his)

Email Address

[Input field]

Save  Cancel
Zoom defaults the Email Contact to the account that is creating the meeting. In some cases, however, the contact should really be someone else or at least a different email address. Click on Edit to the far-right of Email Contact and you will get a pop-up that is populated with the account's name (that can be seen by other users in a meeting) and their email address.
These are text boxes you can edit.

When you are done changing the Contact Email Address, click on the blue Save button in the lower-right corner.

You can also modify the Confirmation Email. Click on the Edit button to the far right to get a pop-up of the Confirmation Email.

While you cannot edit everything in the Confirmation Email, you can edit a few options, including:

- Send...
Confirmation Email

Send Confirmation Email to Registrants

1. Subject

[Meeting Topic] Confirmation

Body

Hello [User Name],

Thank you for registering for My Meeting. You can find information about this meeting below.

My Meeting

Date & Time: Sep 16, 2021 10:00 AM Eastern Time (US and Canada)

Meeting ID: 

Please submit any questions to: [Email Address]

You can cancel your registration at any time.

WAYS TO JOIN ZOOM

1. Join from PC, Mac, iPad, or Android

   Join Meeting

   If the button above does not work, paste this into your browser
   [Join Link]
Subject of the Email (1)

2. Join via audio

One tap mobile: US:

Or dial: For higher quality, dial a number based on your current location.

Meeting ID:

International numbers

Thank you!

Copyright ©2021 Zoom Video Communications, Inc. All rights reserved.

Save  Cancel
• Add more information/personalization to two text boxes (2 and 3).
Export a List of Zoom Registrants

This is a supplemental step-by-step for the Zoom Registration Videos. Please view Part 1 and Part 2 before proceeding, which will go through setting up a Zoom Meeting with Registration.

The purpose of this supplemental material is in case you would like to share the list of registrants with someone or if you want to save it for some other reason. Check out the steps for this below:
First, go to canius.us and login by clicking on the Single Sign-On button and using your Canius Credentials.

On the left-hand side, you can see the Zoom video conferencing interface.
nd side, find the option for Reports. You may or may not have a dropdown menu titled Account Management, which the Rep
or option will be under.

Next, you will be taken to a page that looks similar to this one. Choose the second option, Meeting.
You will then be sent to a list of your previous meetings within a certain range, which you can edit to find other meetings. The important
ect, click on Gene, to the far-right of the Meeting you want to Gene a Registration Report for.
You want to generate reports for, you can select the checkbox to the left of each and click on the Generate button that appears.
If you do generate a report this way, you will still need to continue to step 5 and 6.
When you click on Generate, a pop-up will appear and ask you to choose a registration type.

Registration Type

Choose from the following registrant types to continue:

- All Registrants
- Approved Registrants
- Denied Registrants

Continue  Cancel
Approved Registrants will only generate a report of those registrants that were accepted in the meeting.
On the figure, you have to notice the type you want to generate, hit on the blue control but not in the lower-right corner.
In the Report Queue, the Report that was generated might take a minute to actually generate. It should also be at the top of the list.

<table>
<thead>
<tr>
<th>Report Type</th>
<th>Scheduled Time</th>
<th>Start Time</th>
<th>Topic</th>
<th>Meeting ID</th>
<th>Generate Time</th>
</tr>
</thead>
<tbody>
<tr>
<td>Registration Report</td>
<td>Feb 16, 2021 01:00:00 PM</td>
<td>Not started</td>
<td>My Meeting</td>
<td></td>
<td>Feb 11, 2021 01:04:19 PM</td>
</tr>
<tr>
<td>Registration Report</td>
<td>Feb 7, 2021 01:00:00 PM</td>
<td></td>
<td></td>
<td></td>
<td>Feb 7, 2021 11:17:59 PM</td>
</tr>
<tr>
<td>Registration Report</td>
<td>Dec 7, 2020 04:00:00 PM</td>
<td></td>
<td></td>
<td></td>
<td>Sep 7, 2020 04:29:29 PM</td>
</tr>
<tr>
<td>Registration Report</td>
<td>Oct 15, 2020 02:00:00 PM</td>
<td></td>
<td></td>
<td></td>
<td>Oct 15, 2020 02:06:53 PM</td>
</tr>
<tr>
<td>Registration Report</td>
<td>Oct 13, 2020 02:00:00 PM</td>
<td></td>
<td></td>
<td></td>
<td>Oct 13, 2020 02:06:30 PM</td>
</tr>
</tbody>
</table>
Once you have your report generated, click on the blue download link to the far right.
day your port and done it, you will getting similar to the image to the right. The portable will include cloud computing for any data at
a you wanted to collect (for example, if you also wanted to collect the registrant’s address, job title, a custom question, etc, each will...
receive their own columns with the respective registrant’s answers).