Volunteers' Documentation on Zoom

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# Create Zoom Meeting Manually

In case you need to create one or few meetings if something happens, manually creating them would be the easiest way instead of using scripts. Here are some situations, which serve as a navigation for you to know what to do:

Situations:
1. Create a new meeting for an existing user: log in the user's account/ACL2020 Master account
2. Create a new meeting for a new user: create new user first using ACL2020 Master account, and create a new meeting
3. If the current link for an existing meeting is broken: create a new meeting for this existing user

Create Meeting:
1. Log in the right Zoom account
   a. If you need to create a meeting for a new paper presentation, please log in to ACL2020 Master Zoom account (Check Section Below), and follow steps to create a new user first (Check how).
   b. If you need to create a meeting for sponsors, please log in using sponsor's credentials (Same step as in c)
   c. If you need to create a meeting for an existing presentation (in case of emergency, such as the link fails), log in to the corresponding Zoom account.
      - Account name could be found here (link), through Title/id/uniqueid. Use the account in column "`host_zoom_user_email`".
      - Account password could found here
2. Select "Schedule a new meeting"
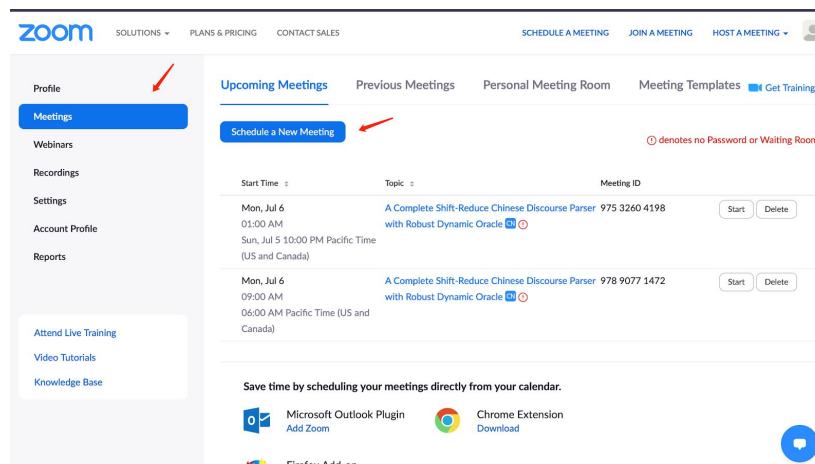
3. In the meeting schedule window, specify Topic and Time (could be found link for existing meetings). Be extra careful about Time Zone

Schedule a Meeting

Topic	My Meeting
Description (Optional)	Enter your meeting description

When	06/29/2020 🗓 3:00 ∨ PM ∨
Duration	1 ∨ hr 0 ∨ min
Time Zone	(GMT-4:00) Eastern Time (US and Canada) ∨
	☐ Recurring meeting

4. In the "Alternative Hosts" section, add volunteer accounts in (copy the following string in to the box):

`acl2020zoom@gmail.com,acl2020zoom+Volunteer1@gmail.com,acl2020zoom+Volunteer2@gmail.com,acl2020zoom+Volunteer3@gmail.com,acl2020zoom+Volunteer4@gmail.com,acl2020zoom+Volunteer5@gmail.com`

Alternative Hosts   acl2020zoom@gmail.com,acl2020zoom+Volunteer1

NOTE: if you are using ACL2020 Master Zoom account, use the following string **PLUS** author's email (separated by comma):

`acl2020zoom+Volunteer1@gmail.com,acl2020zoom+Volunteer2@gmail.com,acl2020zoom+Volunteer3@gmail.com,acl2020zoom+Volunteer4@gmail.com,acl2020zoom+Volunteer5@gmail.com,` `<HOST-EMAIL-HERE>`

5. Make sure password is disabled

Meeting Password   ☐ Require meeting password

6. You can also customize this meeting's setting here, if needed

7. Click "Save" at the bottom to generate meeting information. You can find links for participants here.

Invite Link	https://zoom.us/j/92264755633	⏏ Copy Invitation

8. Now, the host could login through his/her Zoom account to start the newly created meeting. Also remember to distribute the above link for participants.

NOTE: it turns out that you could login ACL2020 Master Zoom account, and select a specific user from "User Management" -> "Users", and then create a meeting for that user (the user will be the host).

Modify Existing Meeting Manually

If something changes for an existing meeting, you should modify them, preferably by hand instead of using scripts. By doing this, the existing Zoom link will remain the same.

1. Log in to the meeting host's Zoom account
   - Account name could be found here (link), through Title/id/uniqueid. Use the account in column "`host_zoom_user_email`".
   - Account password could found here
2. In the "Meeting" tab, select the corresponding meeting to modify
3. Change the meeting information there
4. <mark>NOTE: please document the updated schedule/meeting information here</mark>
   - If session is updated (for example, from 9A to 14B), please change "meeting description" in Zoom web portal
   - To record updated session, use "`Updated Session`" column in spreadsheet
   - To record updated start/end time, use "`starttime_Update`", and "`endtime_Update`" columns

# When Participants Want to Join Zoom Meeting through Web Browser

Note: this could only be done through HOST's Zoom account **BEFORE** meeting. And it is currently a known bug. Also, joining a meeting through a web browser may result in limited functionalities (details here).

Please follow the steps in this solution to disable function of registration to allow participants to join through a web browser.

When Users Are Blocked

If the password is provided wrong for a few consecutive times, the account would be blocked by Zoom for 30 minutes. When this happens, use the following steps to unlock the account.

1. Log in ACL2020 Master Zoom Account (here)
2. Go to "User Management" -> "Users" tab from left navigation bar
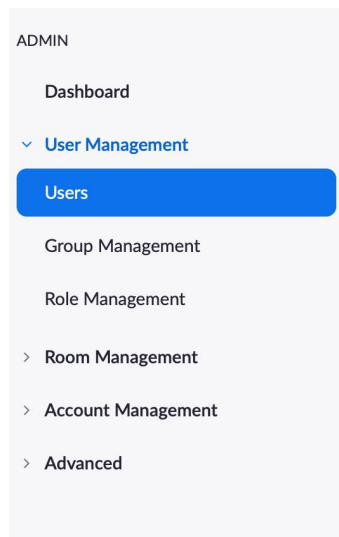
3. Look for that specific user (you can search it, but usually only FULLl name will get you the result). You can see the locked sign to the left of the user. Click the "Unlock" button to unlock the account.
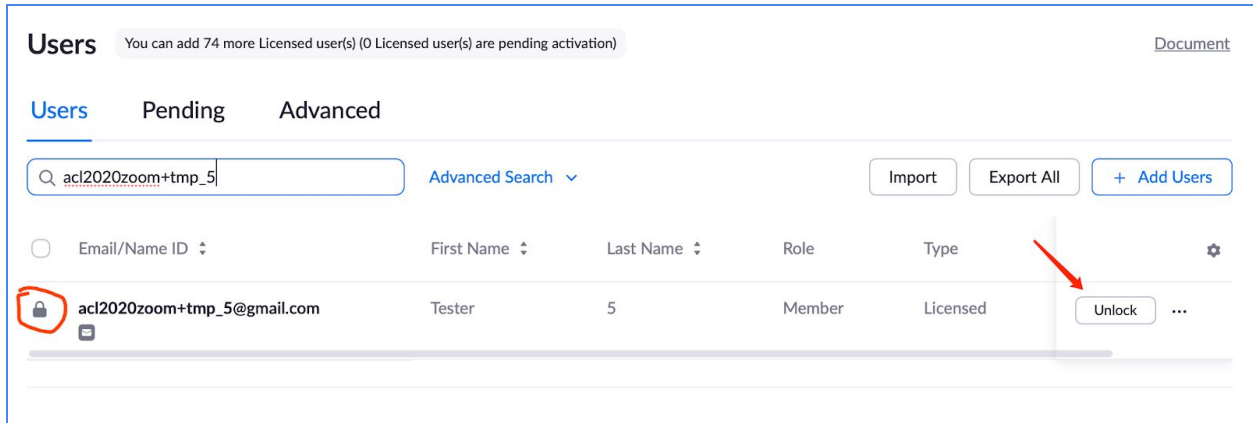
Check more information here:
https://support.zoom.us/hc/en-us/articles/206344385-Change-a-User-s-Password#h_6a6b8aba-8a3a-4b9e-8cb1-abff9c82c2b4
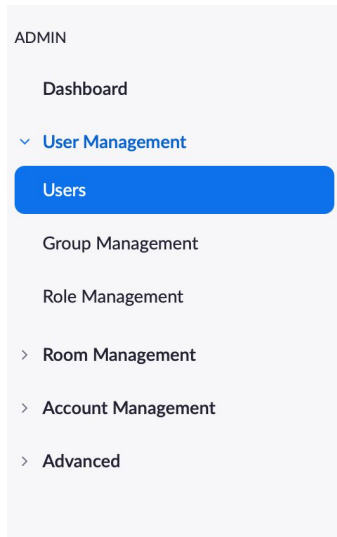
Create New Users

This section is used to create new Zoom users under ACL2020 Master Zoom Account. It is for cases when new user accounts are requested.

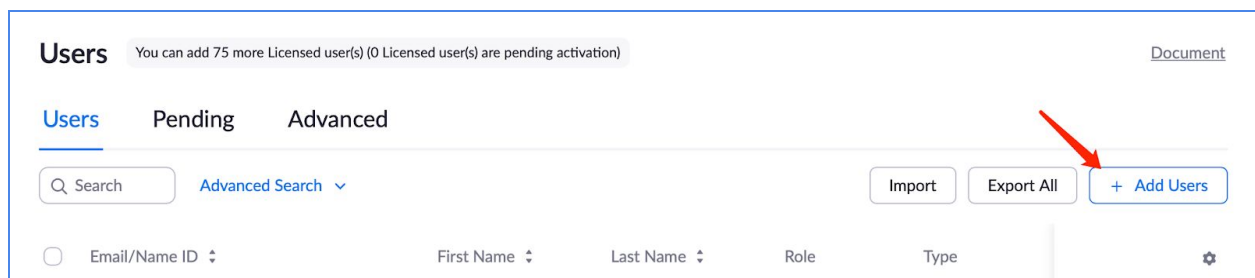There are two ways of creating users, manually or semi-automatically.

1. Manually Create New Users

This way is easy for creating only a few users.

(1) Log in ACL2020 Master Zoom Account (here)
(2) Go to "User Management" -> "Users" tab from left navigation bar

ADMIN

Dashboard

∨ User Management

Users

Group Management

Role Management

› Room Management

› Account Management

› Advanced

(3) Choose "+ Add Users" to add user(s)

Users   You can add 75 more Licensed user(s) (0 Licensed user(s) are pending activation)   Document

Users   Pending   Advanced

🔍 Search   Advanced Search ∨   Import   Export All   + Add Users

⬭ Email/Name ID ⇕   First Name ⇕   Last Name ⇕   Role   Type   ⚙

(4) In the pop up windows, put in new account(s), separated by comma. Leave other fields blank.
NOTE: the prefix of the account are IMPORTANT, so please use the following format for new accounts. You should change <NUMBER> to a number that is not being used:
`acl2020zoom+tmp_<NUMBER>@gmail.com`

Add Users

Add users with their email addresses

You can add users of all types to your account. If you enter the email address of account owners or admins, all users on their accounts will be added to this account.

acl2020zoom+tmp_1@gmail.com, acl2020zoom+tmp_2@gmail.com

User Type ⑦   ○ Basic   ● Licensed   ○ On-Prem ⑦

Feature   □ Large Meeting

□ Webinar

Department   e.g. Product

Job Title   e.g. Product Manager

Location   e.g. San Jose

User Group   No Group

IM Group   No IM Group

Add   Cancel

(5) Once it's done, the newly created users will show up in "Pending" tab
(6) Then you need to activate those accounts. Check here
(7) Once activated, those accounts are ready to be distributed to hosts
(8) Remember to document those newly created accounts here (in `tmp` spreadsheet): https://docs.google.com/spreadsheets/d/15v_4x_shKqs8A8P_JxgCBcIJpFaKNzyvIjEiYYzbwaE/edit#gid=548914854

2. Semi-automatically Create New Users

This way is easy for creating many users.

(1) Before to start, you need to prepare a csv file, with the header "Email" (other fields are not necessary). In the "Email" column, fill in accounts for each row. Remember to follow format in Step (4) in the previous section!
(2) Do Step (1) - (2) from previous section
(3) Click "Import"

(4) Choose your newly created csv file, and click "Upload"

(5) Follow Step (5) - (8) in the previous section
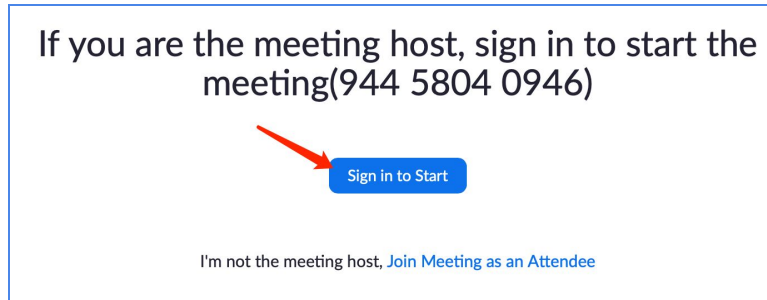
Provide Tech Help using Volunteers Account

For every meeting, there are 5 volunteer accounts listed as co-hosts. These are the accounts you should use to provide any technical help during the meeting, given you would have co-host's privileges.

Follow the steps to log in as Volunteers
1. Identify the meeting you are needed, copy its **START LINK**
   a. Quick trick: if you cannot find START LINK, you could generate the link using following format:

zoom.us/s/<MEETING ID>

2. Copy & paste the Start Link into the browser, Click "Sign in to Start". (Ignore the message even if you are not "host". DO not use the link below "Join Meeting as an Attendee").

If you are the meeting host, sign in to start the meeting(944 5804 0946)

Sign in to Start

I'm not the meeting host, Join Meeting as an Attendee

3. Credentials are:
   accounts:
   acl2020zoom+Volunteer1@gmail.com
   acl2020zoom+Volunteer2@gmail.com
   acl2020zoom+Volunteer3@gmail.com
   acl2020zoom+Volunteer4@gmail.com
   acl2020zoom+Volunteer5@gmail.com
   Passwords:
   Volunteeracl2020
4. Once you login and start the meeting as co-host, you have host's privilege to provide technical support here
   NOTE: as a co-host, you CANNOT make other participants as co-host

Reset Passwords

If meeting hosts report errors of invalid email/password when logging in to Zoom, you should reset passwords for them.

1. Make sure you have the right email address (Zoom account) to reset password
2. Go to Zoom website: https://zoom.us
3. Click "SIGN IN" at the top right corner.
4. Click "Forgot password", and request reset-password email

Sign In

Email Address

acl2020zoom+main-2@gmail.com

Password · Forgot password?
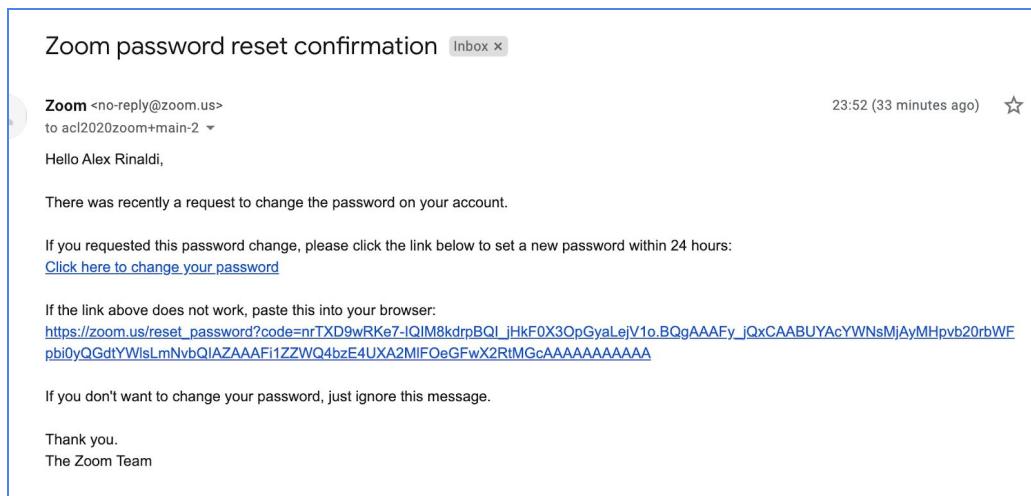
Zoom is protected by reCAPTCHA and the Privacy Policy and Terms of Service apply.

Sign In

☑ Stay signed in   New to Zoom? Sign Up Free

5. Log in Gmail of ACL2020 Master Account. Use credentials here
6. In the inbox of ACL2020 master account, search for the Zoom account you just requested to reset password. Find the most recent email
7. Follow instructions in that email to reset password

Zoom password reset confirmation Inbox ×

Zoom <no-reply@zoom.us>   23:52 (33 minutes ago) ☆
to acl2020zoom+main-2 ▾

Hello Alex Rinaldi,

There was recently a request to change the password on your account.

If you requested this password change, please click the link below to set a new password within 24 hours:
Click here to change your password

If the link above does not work, paste this into your browser:
https://zoom.us/reset_password?code=nrTXD9wRKe7-IQIM8kdrpBQI_jHkF0X3OpGyaLejV1o.BQgAAAFy_jQxCAABUYAcYWNsMjAyMHpvb20rbWF
pbi0yQGdtYWlsLmNvbQIAZAAAAFi1ZZWQ4bzE4UXA2MlFOeGFwX2RtMGcAAAAAAAAAA

If you don't want to change your password, just ignore this message.

Thank you.
The Zoom Team

8. **(IMPORTANT!!!)** Record this new password into the document:
https://docs.google.com/spreadsheets/d/15v_4x_shKqs8A8P_JxgCBcIJpFaKNzyvljEiYY
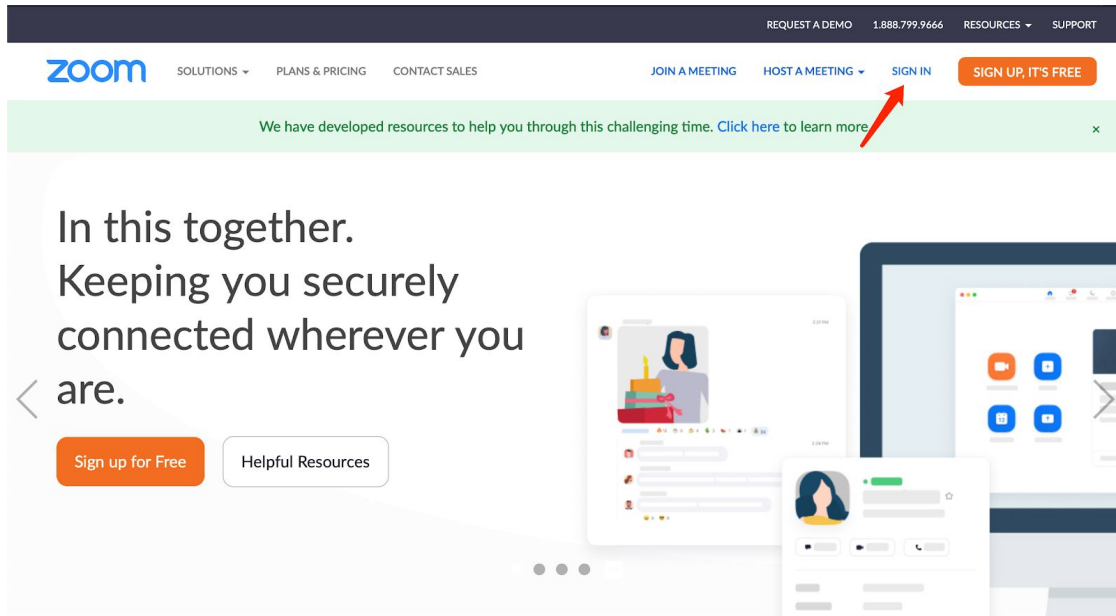zbwaE/edit#gid=0
Please follow this FORMAT to update:
- Record your new password in column "Password-update-1" and update datetime in column "update-1-date"
- If this update 1 is already there, use update 2, or 3, or 4… Please create two columns ("Password-update-<X>" and "update-<X>-date") accordingly, if necessary

Verifying Zoom Accounts

This section is used for verifying existing Zoom Accounts.
1. Go to Zoom website: https://zoom.us
2. Click "SIGN IN" at the top right corner.

3. Use credentials in this Google spreadsheet ("`username`" and "`passwords`") to sign in:
   https://docs.google.com/spreadsheets/d/15v_4x_shKqs8A8P_JxgCBcIJpFaKNzyvIjEiYY
   zbwaE/edit#gid=603234286

4. If you can successfully sign in, then the credentials for this account is verified to work
5. If you got an error, saying "Incorrect email or password", then report it<or do what?>

Activating Zoom Accounts

This section is used for activating Zoom accounts.

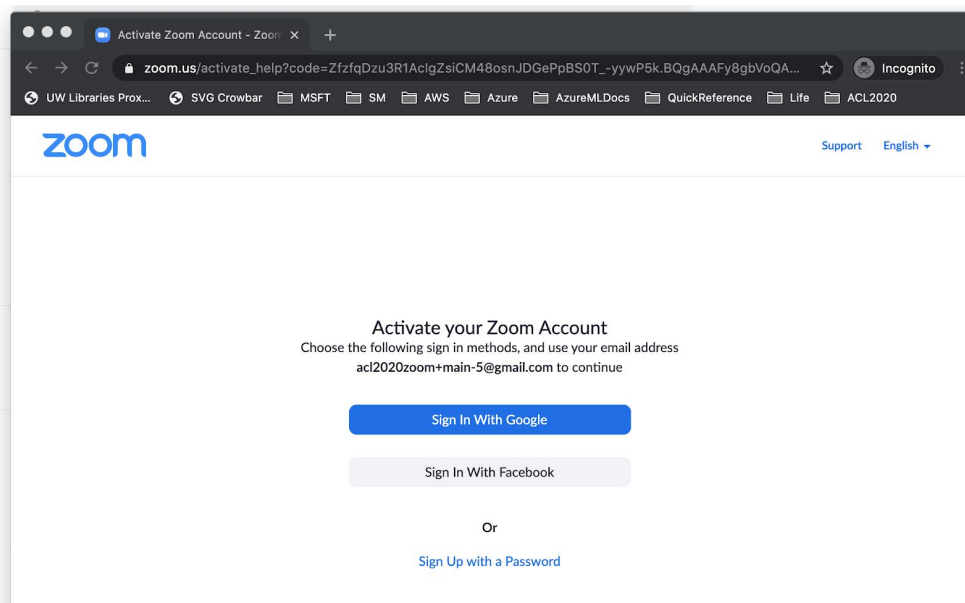1. Log in to the Gmail account:

Check Section Below

2. Search one at a time for your username/paper in the inbox
> to:acl2020zoom+main-{number}@gmail.com
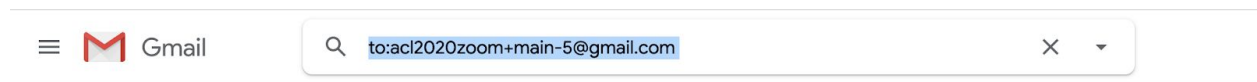
3. Open mail & activate the account
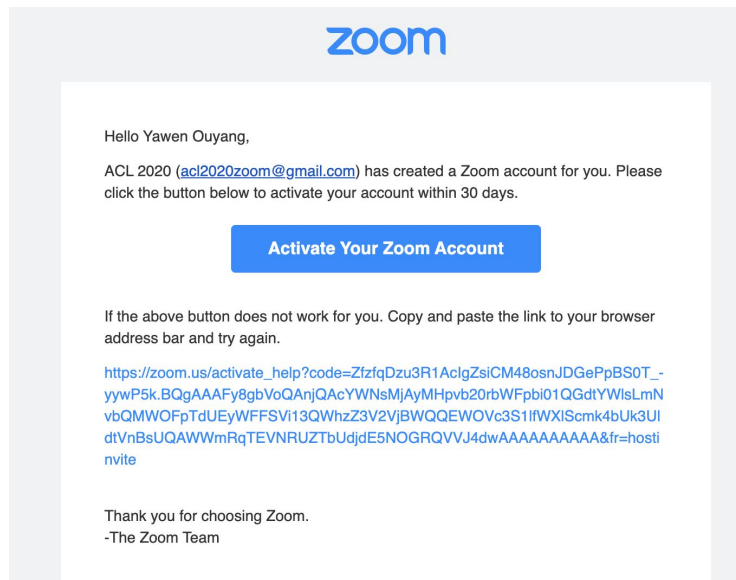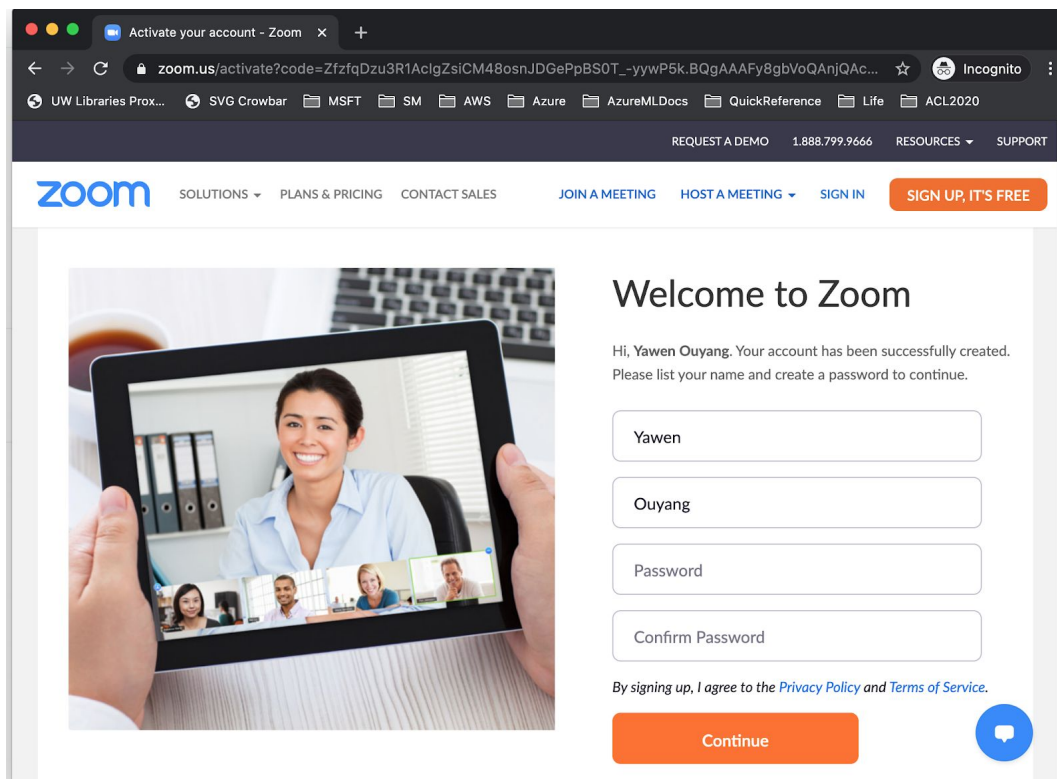

4. **DO NOT sign in with Google or Facebook** // instead, click on "`Sign Up with a Password`"

5. Then you should find the password in the shared Google spreadsheet (link below), and copy it to the "Password" and "Confirm Password" fields. (Use password provided)

https://docs.google.com/spreadsheets/d/15v_4x_shwGn$&39J7cPkKqs8A8P_JxgCBcIJpFaKNzyvljEiYYzbwaE/edit#gid=603234286

6. Go back to Step 2 for the next username.

Responding to disruptive participants

Volunteers may be called upon by authors during their Q&A sessions to help deal with disruptive participants. We ask volunteers to take on this role in case authors do not feel able to (for example, a relatively senior person might be being disruptive in the Q&A session of a junior author; an author might feel unable to both answer questions and handle a disruption at the same time).

Please monitor four channels < #helpdesk, #presenter-helpdesk, #incidents, #oncall-volunteers private channel > in RocketChat. This is where authors will leave a message with the link to their Zoom room if they need assistance. Please go to the room and find out if the problem is a tech support problem or a disruptive participant problem.

When you enter the Zoom room with your ACL volunteer account credentials, you will automatically be a co-host of the room, meaning that you will have access to the following actions. We encourage you to take the minimal action that manages the disruption.

    a. **Mute the participant**. This can be done via the Participants pane. At this point, it is also a good idea to uncheck the option that allows participants to unmute themselves.

    b. **Move the participant to the waiting room.** If a participant continues to be disruptive despite being muted (e.g. via the chat), you can move them to the waiting room. This can be done even if the waiting room isn't 'enabled', but it may be valuable to enable it at this point, in case the person tries to leave and immediately re-enter. Anyone with host or co-host privileges can send messages to the waiting room, but it is not possible to communicate with people in the waiting room via individual chat.

   c. **Remove the participant.** This prevents the participant from easily coming back into the room.

Please keep in mind the following:

    a. These actions are only for cases of disruptive behavior, and not, for example, to be used in case of simple scientific disagreement.

    b. Any author or volunteer who finds it necessary to deploy one of these 'silencing' options should report that fact to the PCC co-chairs, immediately upon the conclusion of the session, via [this brief form](#).

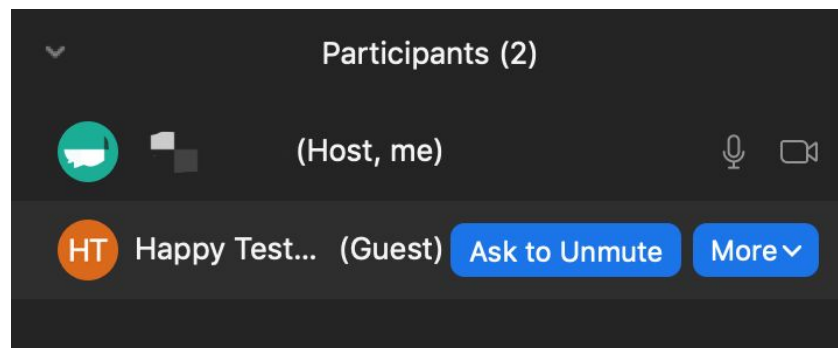Below are illustrations about how to make use of these Zoom features:

1. Mute/Unmute a participant
   If you find some participant is unmuted, you can mute them by moving the cursor over them in the Participants Tab, and select "mute".
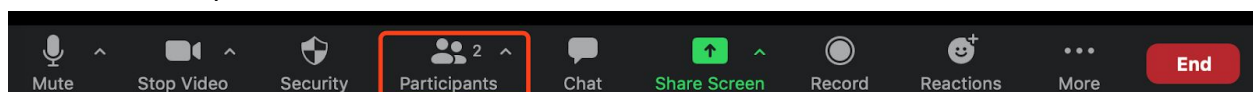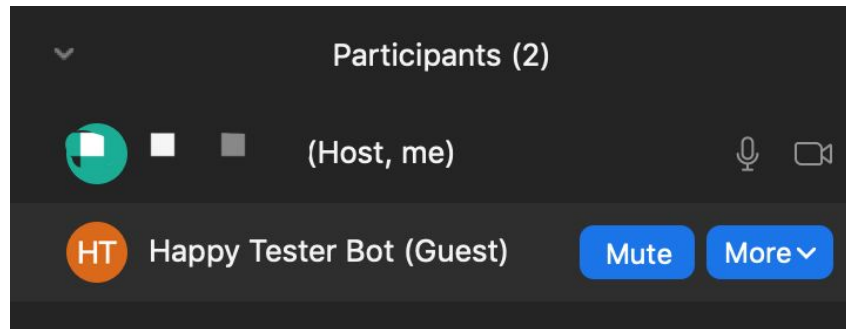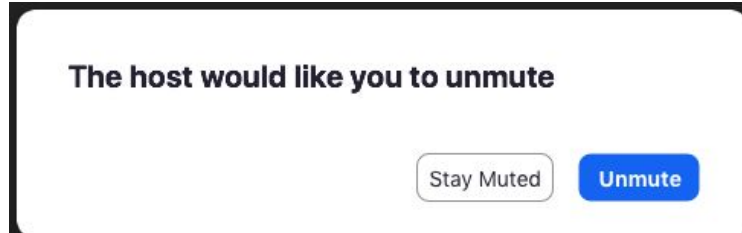
In the same way, if you want to unmute a specific muted participant, you will find the "Ask to Unmute" option next to him/her.
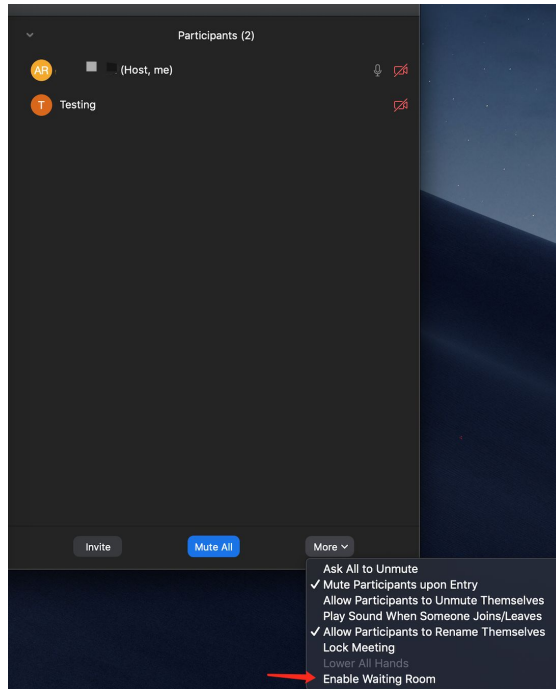

If you click this button, a notice on the participant's side will pop up, saying "The host would like you to unmute". He/She can then choose whether to do it or not.
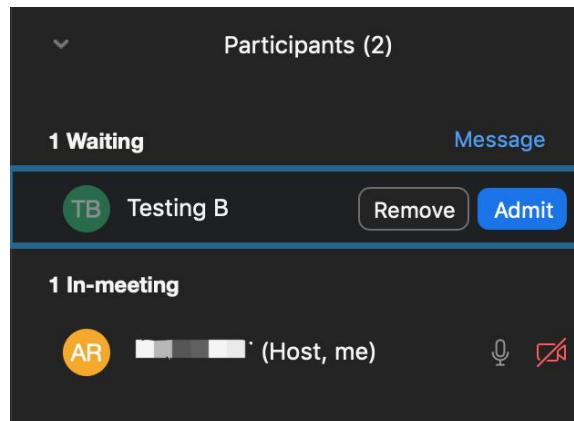

2. Enable waiting room
    The waiting room function could enable the host to select who to join the meeting.
   a. In Participants Tab, click "More" at the bottom, and select "Enable Waiting Room"

b. Once the Waiting Room is enabled, all new participants will show up in Participants Tab, under the "Waiting" Section. You can either let them in or remove them.

3. Remove a participant or put a joined participant back into the waiting room. In the Participants tab, move the cursor over the participant to be removed, and click "More"; then select "Remove" to remove that participant from the meeting, or "Put in Waiting Room" (if Waiting Room is enabled).
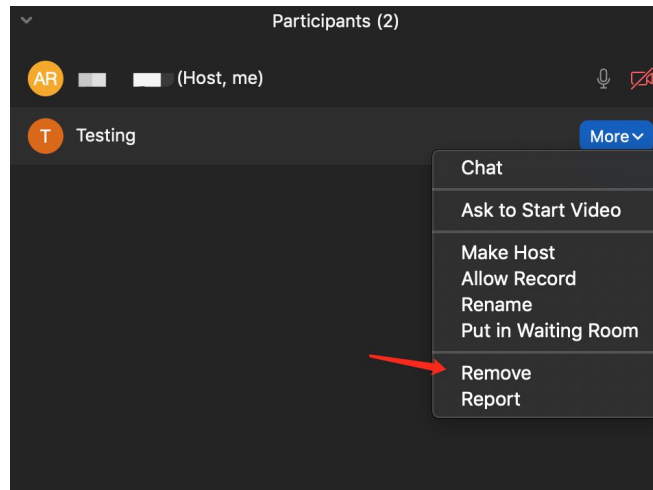
NOTE: A removed participant cannot rejoin the meeting.

ACL2020 Master Zoom Account

This is the ACL2020 Master Zoom account. If not necessary, do not change any settings here. REMEMBER TO LOG OUT when you are finished here.

If you need help with Master Zoom Account, contact Zoom Team POC FIRST.

Start Many Parallel Zoom Meeting Sessions

This section is mainly for infrastructure developers and authors who want to host many Zoom meetings at the same time. The key point here is to avoid using one single host for multiple meetings (even you want to transfer host to others and start another meeting). Please assign different hosts to different meetings. If you are on some "pro" plan of Zoom, you can actually create many dummy accounts (passwords), and share the credentials with real meeting hosts. Using this Master Zoom Account, you can then create Zoom meetings for them.

For a better explanation, please refer to this post (which was based on lessons learned in WiNLP 2020 session):
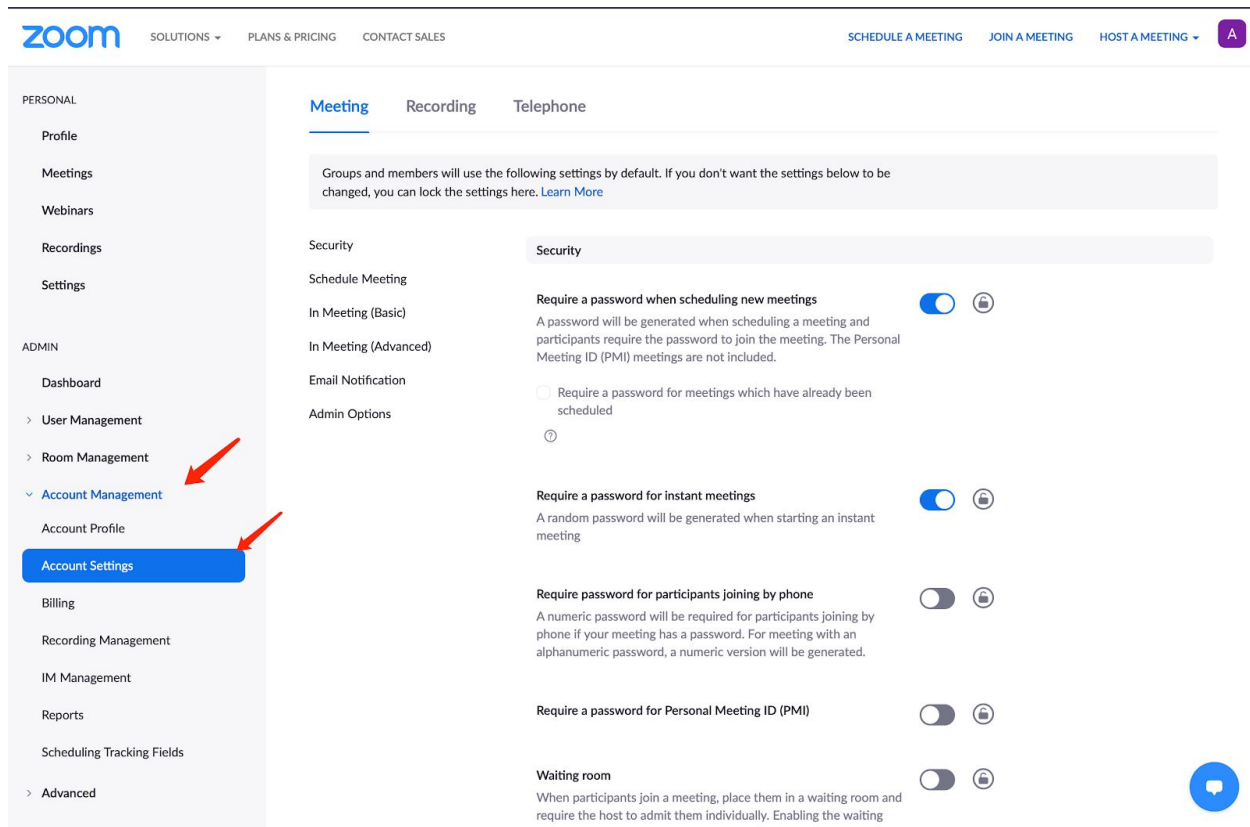https://docs.google.com/document/d/1lUwrRDLsH7ecP28FizSMzAZcVCjdVIIHi5TiQg7ddME/edit?usp=sharing

Change Zoom Meeting Settings Globally (For ALL Existing and New Meetings)

This is the operation to change default configurations for all Zoom meetings, by using ACL2020 Zoom Master account. It is **NOT** recommended to play here in order to only change settings for one meeting.

1. Log in ACL2020 Zoom Master Account
2. From the left navigation bar, select "Account Management" -> "Account Settings". All basic settings for Meeting, Recording, and Telephone are here.

   WARNING: It is not recommended to change these settings in order to only set up a new meeting. Be careful with those settings, since it will affect all existing and upcoming meetings!

Create Zoom Meeting Using Scripts

NOTE: running this script will update:
(1) your local Excel/csv files
(2) Zoom meeting settings (if anything changed), stored on Zoom's backend (cloud)
Thus, please do not run this code without control… For testing, please follow DEMO embedded in each step. Please only create a few entries to make it controllable (we have a limit of 100 registers per day… so be careful).

What you need to start:

(1) Github repo: https://github.com/acl-org/acl-2020-virtual-conference-zoom/tree/master
   Currently, please use "test" branch

Structure

(1) `go.py`: the main python script you will need to generate meetings
(2) `Input` folder: input files to arrange meetings for different sections
(3) `Output` folder: output files with generated/updated Zoom ID's and Zoom links

JWT Setup Step (optional)

1. Using acl2020 master account, create JWT credentials in Zoom App Marketplace
   (1) Log in through https://marketplace.zoom.us, using using Master Zoom Account's credentials
   (2) From "Develop" in top bar, select "Build App"
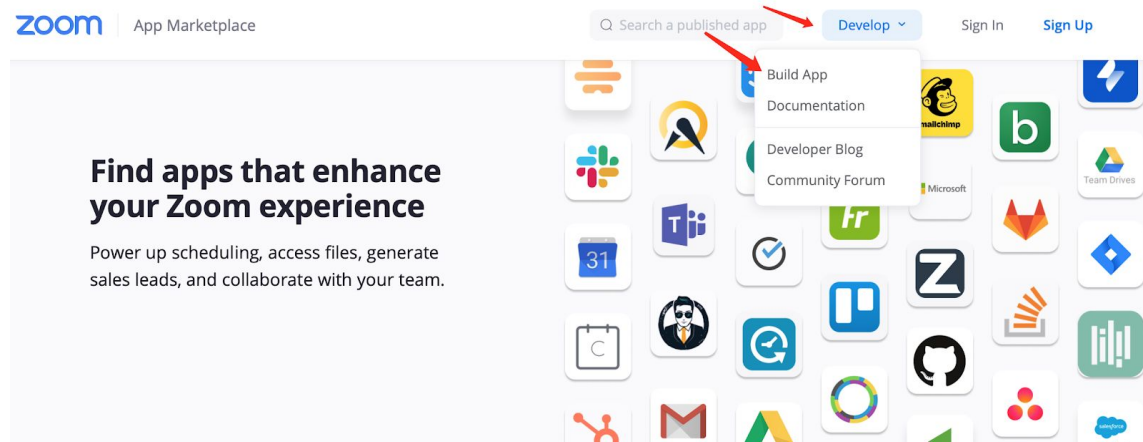
(3) Under JWT tab, select "Create"

Choose your app type

JWT	OAuth	Chatbot
Build an app that supports server-to-server integration with Zoom services without a need for user authorization. Generate your API Key & Secret.	Build an app that accesses user-authenticated data for use with third party applications. Generate your OAuth Client ID & Secret.	Build a Zoom chatbot that gets installed in the Zoom Client and interacts with users via chat. Generate your Chatbot Client ID & Secret.
Learn more Create	Learn more Create	Learn more Create

(4) Now you will be able to see (or create or regenerate, if needed) the API Key and API Secret.
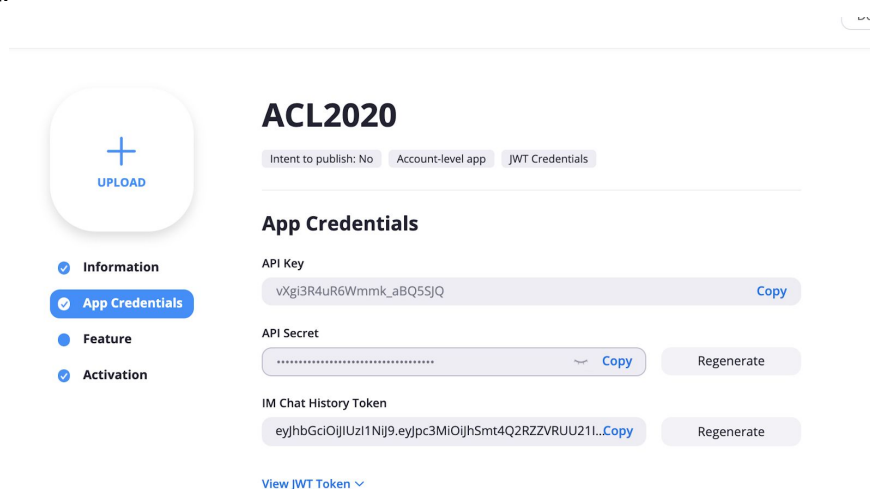
Before regenerating new API Secret, click "View JWT Token" to expand it, and select a longer expiration date (1 week or custom: 00:00 07/26/2020).

(5) NOTE: if the token is expired, you need to use the "Regenerate" button to regenerate new API Secret.
2. Update the API Key and API Secret in github project (hopefully you downloaded this into your computer already to proceed)
    (1) In the github project (acl-2020-virtual-conference-zoom) directory, open "`zsecret.py`" file. In the very beginning, you will find the following line (very likely we uploaded Key and Secret into Github, so you actually don't need to worry about this):
    ```
    client = ZoomClient("XXX", "YYY") #(API_KEY, API_SECRET)
    ```
    (2) Copy and paste the API Key and Secret from Zoom Marketplace into the above line, to update client credentials

NOTE: it is likely that API credentials will expire after a certain amount of time. If this happens, use the above step to regenerate them.

Steps to create new Zoom Links (ID + links for participants + links for authors)

1. Install required packages
    Part of the required python packages are stored in "requirement.txt". To install them:
    ```
    >> pip3 install -r requirements.txt
    ```

    NOTE: not all required packages are listed here. If you encounter errors for uninstalled packages during following steps, please install them manually!
    Full requirements:
    - openpyxl
    - nameparser
    - psutil
    - PyJWT
    - pytz
    - python-dateutil
    - requests

2. Identify which section you want to create new meetings for. For example, for main paper section, you should identify "`Input/main_paper_schedule.xlsx`"; for sponsors, it's "`Input/schedule_sponsors.xlsx`", etc.
    In demo, use "`Input/Voluteer_test.xlsx`". For this demo file, you can definitely add more entries, but please follow the format, and use acl2020zoom+voluteer_alternative_test@gmail.com as `host_user_email` for testing purposes.

3. Prepare the right file to CREATE NEW Zoom ID's and links
   (1) In this Excel file you identified in previous step, make sure your to-be-arranged meetings are in "Sheet1"
   (2) Make sure `zoomid`, `join_link`, and `start_link` are all empty (IMPORTANT!)

   Tips (you don't need to take actions here):
   - `uniqueid` and `title` should be identical
   - `starttime` and `endtime` are predefined
   - `host_zoom_user_email` is the account for authors (host)
   - `alternative_host` is the ACL main account acl2020zoom@gmail.com (co-host)
   - If any step below fails, remember to recheck Step 3 to make sure the Excel file is clean.
   - This excel file MUST be closed when executing the following script(s).

4. Change Meeting Settings (optional)
   The meeting settings are stored in zsecret.py file, in python dictionary called `meeting_defaults`. If you want to change some default meeting settings for new ones, you should modify this accordingly.
   - `duration`: meeting duration in minutes
   - `recurrence`: recurrence meeting settings
For more information, refer to Zoom API Documentation (click here).
5. Execute script
   ```
   >> python3 go.py --file Input/<YOUR_FILE.xlsx>
   ```
   In demo, use
   ```
   >> python3 go.py --file Input/Voluteer_test.xlsx
   ```

6. (debugger should be removed after testing) debug is on currently, so use "c" to move to next steps in pdb debugger
7. If successful, the script will update the original Excel file (in `Input` folder), and also create a new csv file in `Output` folder, with filled columns of `zoomid`, `join_link`, and `start_link`.
   - `zoomid`: an 8/9-digit number. It could used to join the meeting directly
   - `join_link(for Attendees)`: the link for participants
   - `start_link(for Hosts)`: the link for authors
   The output file could be found as
   "`Output/schedule_main_paper_author_email.csv`" for main paper session, or
   "`Output/schedule_sponsors.xlsx`" for sponsors session, etc.

DEMO Check Results:
After successfully executing go.py with Volunteer_test.xlsx, you could log in Zoom using the following credentials:
Email: acl2020zoom+voluteer_alternative_test@gmail.com
Password: Volunteeracl2020
And in the "Meetings" Tab, you could find your newly created meetings.

NOTE:
1. If `go.py` fails, the `zoomid`, `join_link`, and `start_link` in
    "`schedule_main_paper.xlsx`" will show NULL/null in the first row. Please remember to
    clean them before running next time
2. If `go.py` fails, please have a check on JWT credentials through Zoom App Marketplace.
    The API access logs will help debug here:
    (1) If the logs show error of "expired credentials", use JWT Setup Step section to regenerate
        API Secret (remember to use a longer expiration time, other than 90 minutes by default)
    (2) If the logs show error of something like "hitting daily API request of 100", <back-up plans
        here? Such as use another Zoom account?>