



# Use Zoom Registration for Meetings

Zoom Registration can be useful if you are not using the CCE Registration system. If you are, it can add an additional level of security, allow you to find out more about your audience, and track who attends your meetings more accurately. It is especially useful for large groups.

## Enabling Registration for a Meeting

1. Navigate to <https://csus.zoom.us/> and **Sign In**.
2. From the **Meetings** section, click **Schedule a Meeting** or click **Edit** an existing meeting.
3. Check the **Required** box to the right of the **Registration** field. If your meeting is a recurring meeting, you will get these additional options. Select one.

**Registration**  **Required**

**A**  Attendees register once and can attend any of the occurrences

**B**  Attendees need to register for each occurrence to attend

**C**  Attendees register once and can choose one or more occurrences to attend

- A. Registrants can attend all of the occurrences. All dates and times of the meeting will be listed and the registrant will be registered for all occurrences.
- B. Registrants need to register separately for each occurrence to attend. They can only choose one date and time on the registrant page.
- C. Registrants register once and can choose one or more occurrences to attend. They will need to select which dates and times they would like to attend and they will only be registered for those occurrences. They can choose multiple options.

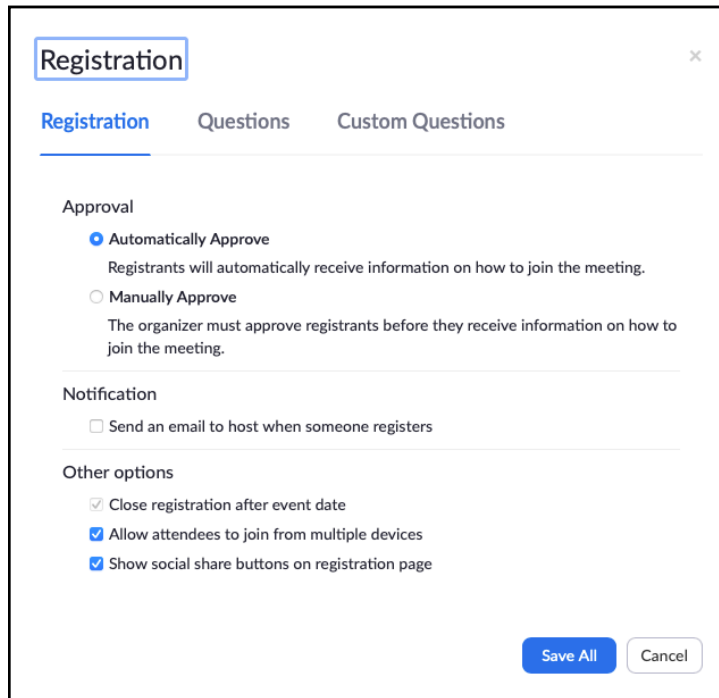
4. Then click **Save**.
5. Scroll up to see the generated Registration link).

**Registration Link** [https://csus.zoom.us/meeting/register/tZYqcO-prTMpGdck8\\_qzlsQzL8Ow9ntQMVs-](https://csus.zoom.us/meeting/register/tZYqcO-prTMpGdck8_qzlsQzL8Ow9ntQMVs-)

6. Copy this link (right-click the link and select **Copy Link**). You can then send it to whomever needs the registration link.  
**Note:** If you previously scheduled your meeting without registration, you will now need to send this new link to your participants and/or change it in the CCE.
7. Once you have saved your meeting, the Registration, Email Settings and Branding tabs will appear at the bottom of the page.

## Customizing Registration Options

1. From the **Registration** tab, click **Edit** to the right of **Registration Options**. Then make your selections from each section, and click **Save All**.

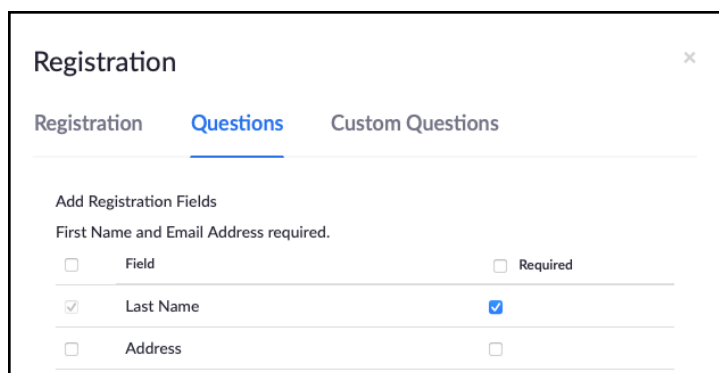


The screenshot shows the 'Registration' tab of a dialog box. It has three tabs: 'Registration', 'Questions', and 'Custom Questions'. The 'Registration' tab is active. Under 'Approval', there are two radio buttons: 'Automatically Approve' (selected) and 'Manually Approve'. Under 'Notification', there is a checkbox 'Send an email to host when someone registers' which is unchecked. Under 'Other options', there are three checkboxes: 'Close registration after event date' (checked), 'Allow attendees to join from multiple devices' (checked), and 'Show social share buttons on registration page' (checked). At the bottom right are 'Save All' and 'Cancel' buttons.

Under **Registration**, decide if *Approval* should be automatic or manual. Realize if you select Manual you will need to monitor your registrants.

*Notification* leave unchecked. The host email is [ren-xx@csus.edu](mailto:ren-xx@csus.edu). Most people do not have access to this mail account.

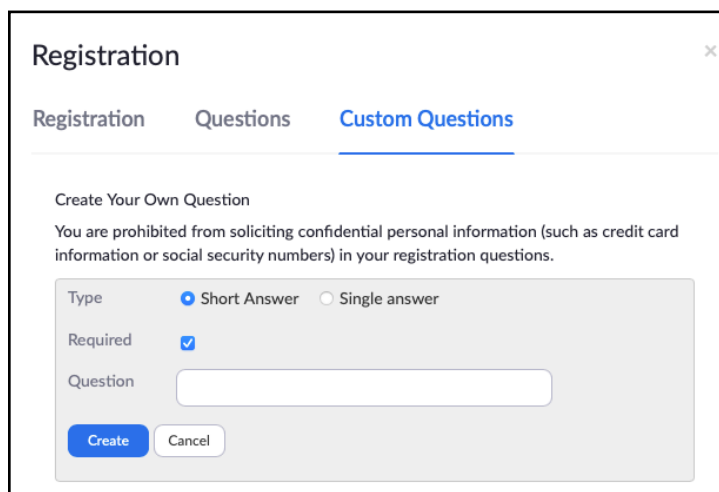
*Other options*: Recommend check Allow attendees to join from multiple devices but uncheck Show social share buttons on registration page.



The screenshot shows the 'Questions' tab of the dialog box. It has three tabs: 'Registration', 'Questions', and 'Custom Questions'. The 'Questions' tab is active. Under 'Add Registration Fields', there is a note 'First Name and Email Address required.' Below this is a table of fields:

Field	Required
<input type="checkbox"/> First Name	<input type="checkbox"/>
<input checked="" type="checkbox"/> Last Name	<input checked="" type="checkbox"/>
<input type="checkbox"/> Address	<input type="checkbox"/>

Under **Questions**, you can *add additional standard fields* to your registration form by checking the box before the field (scroll down the page to see all the choices). In addition, check the *Required* box if registrations must provide the information.

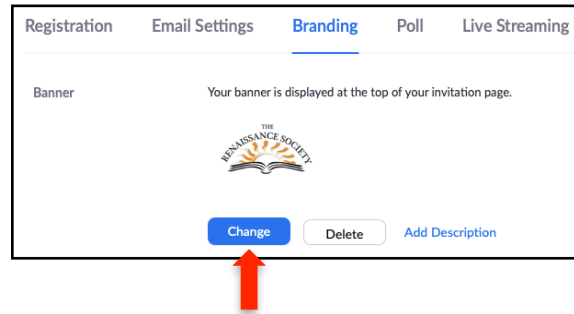


The screenshot shows the 'Custom Questions' tab of the dialog box. It has three tabs: 'Registration', 'Questions', and 'Custom Questions'. The 'Custom Questions' tab is active. Under 'Create Your Own Question', there is a warning: 'You are prohibited from soliciting confidential personal information (such as credit card information or social security numbers) in your registration questions.' Below this is a form with 'Type' (radio buttons for 'Short Answer' and 'Single answer', with 'Short Answer' selected), 'Required' (checkbox checked), and a 'Question' text input field. At the bottom are 'Create' and 'Cancel' buttons.

Under **Custom Questions**, you can create your own questions. They can be Short Answer or Single Answer. Enter your Question and click *Create*. You can click *New Question* for additional ones. For Single answer questions, you will be prompted to enter the answer choices.

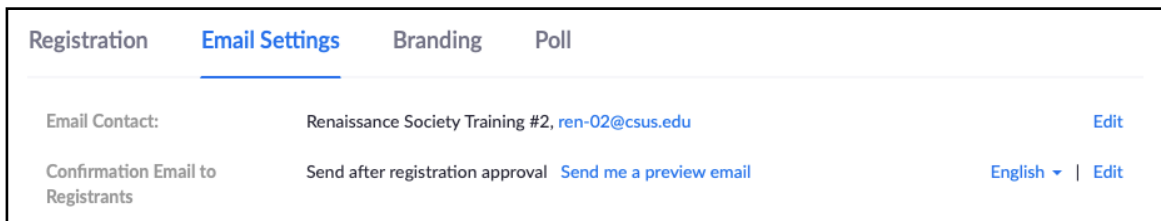
## Customizing Branding

1. Click the **Branding** tab, to upload a banner or logo image. A banner will appear at the top of your registration invite page; a logo will appear on the right side of your Meeting topic.
2. Click **Upload** under Banner or Logo. Image requirements are displayed.
3. Locate the file then click **Choose for Upload**. A thumbnail of your image appears. Click **Change** if you need to update.

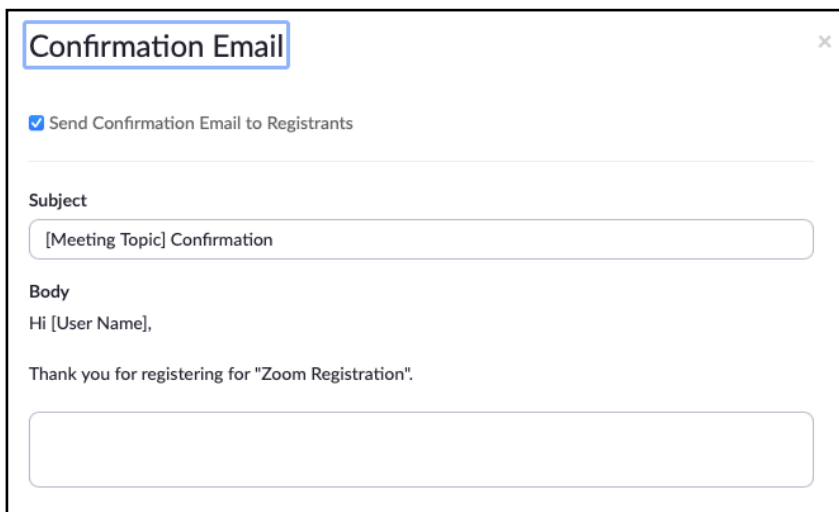


## Modifying Email Settings

1. Click the **Email Settings** tab, to edit the Email Contact or Confirmation Email.
2. For **Email Contact**, click **Edit** to change the email address and contact name that appears in the confirmation email. This is a good idea since most of us are not able to access our [ren-xx@csus.edu](mailto:ren-xx@csus.edu) mail account. If participants have questions before the meeting, they will be able to contact you through this email.



3. Only two areas can be modified in the **Confirmation Email**. Click **Edit** to make changes. Be sure to **Save** when you are finished. Then click **Send me a preview email** to ensure it is what you want.



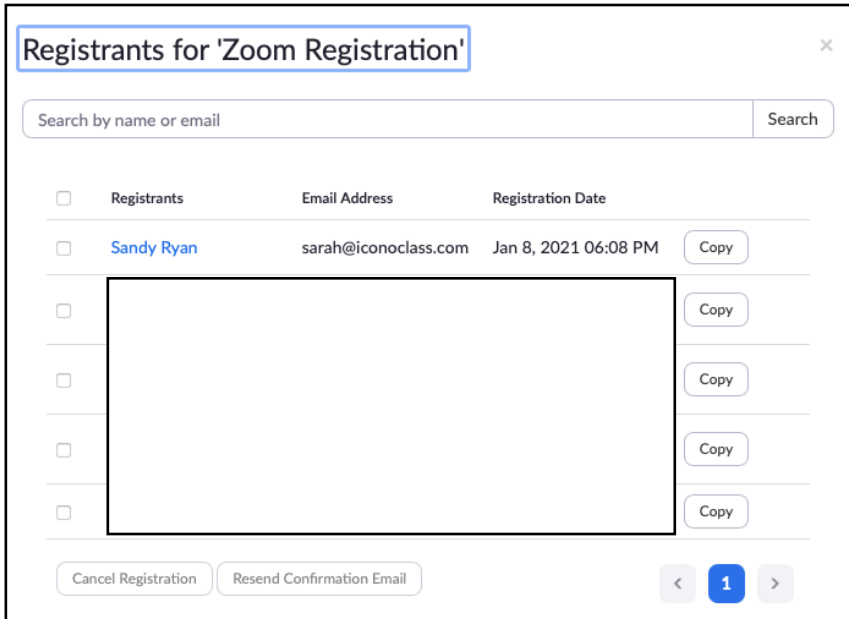
Anything in [ ] is a field and should not be changed.

**Subject:** Usually no need to change. Can change “Confirmation” to “Reminder” before resend.

**Body:** You can add additional information, including links. You cannot add attachments.

## Managing Registration

1. Click the **Registration** tab. The number of registrants appears next to **Manage Registrants**
2. For detailed information or to manage your enrollment, click **View** to the right.



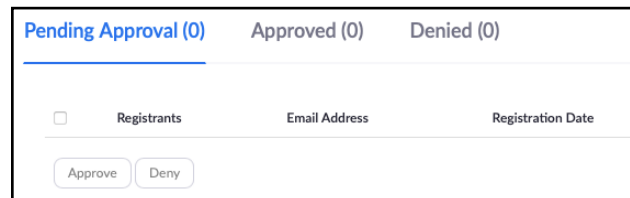
You can **Search** for a registrant. This is helpful if there are multiple pages.

To **select** someone check the box to the left of their name. To select everyone on a page, check the box to the left of Registrants.

Then click **Cancel Registration** or **Resend Confirmation Email**.

3. Click the “X” in the upper right corner to close the dialog box.

**Note:** If you had selected Manually Approve, you would see this intermediate dialog box. You would need to Approve or Deny each registrant.



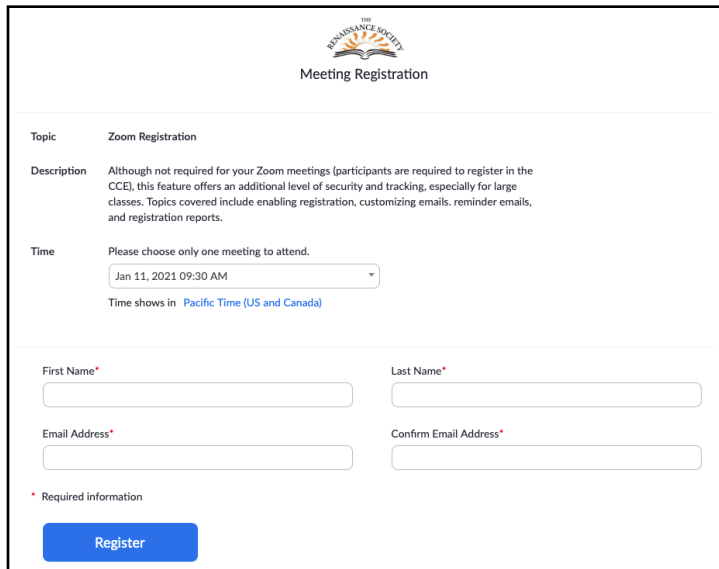
## Communicating with Your Audience

Your participants will get the following communication from Zoom once they click on your registration link. Most common are the items bolded below

- **Registration Form**
- Registration Pending (only if you use Manually Approved)
- Registration Approved or Denied (only if you use Manually Approved)
- **Confirmation**
- Reminder (only if you manually send out)

## Registration Form

After filing out the form and clicking Register, the participant will get immediate feedback of Meeting Registration Approved or Meeting Registration Pending Approval (if you chose Manually Approve).



The screenshot shows the Renaissance Society Meeting Registration form. At the top is the Renaissance Society logo and the title "Meeting Registration". The form includes the following fields and sections:

- Topic:** Zoom Registration
- Description:** Although not required for your Zoom meetings (participants are required to register in the CCE), this feature offers an additional level of security and tracking, especially for large classes. Topics covered include enabling registration, customizing emails, reminder emails, and registration reports.
- Time:** Please choose only one meeting to attend. A dropdown menu shows "Jan 11, 2021 09:30 AM". Below it, it says "Time shows in Pacific Time (US and Canada)".
- First Name\*** and **Last Name\*** input fields.
- Email Address\*** and **Confirm Email Address\*** input fields.
- A small asterisk icon with the text "Required information" below the input fields.
- A blue **Register** button at the bottom.

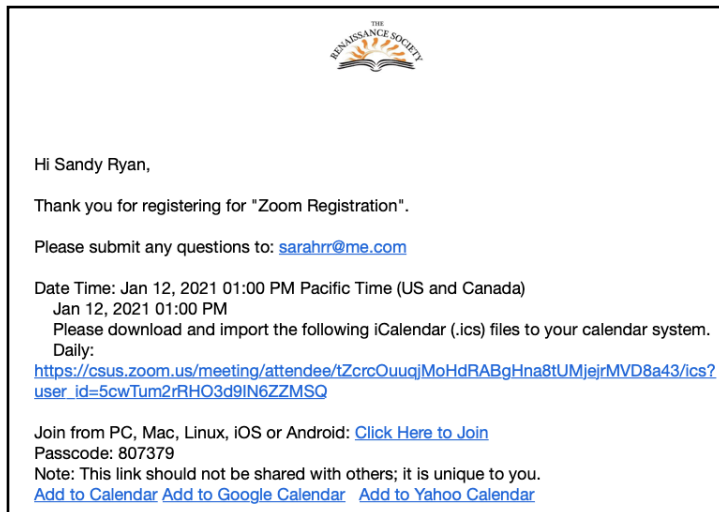
**Description:** Only appears if you entered a Description when you scheduled your meeting.

**Time:** Reflects your Registration choices.

**Entry fields:** Based on Questions and Custom Questions you selected.

## Confirmation Email

This is automatically sent after the registration form is completed. The screenshot below reflects the top half of the email. The bottom part lists additional options for joining the meeting.



The screenshot shows the top half of a confirmation email from Renaissance Society. It includes the following text:

- Renaissance Society logo at the top.
- Greeting: "Hi Sandy Ryan,"
- Thank you message: "Thank you for registering for 'Zoom Registration'."
- Contact information: "Please submit any questions to: [sarahr@me.com](mailto:sarahr@me.com)"
- Date and Time: "Date Time: Jan 12, 2021 01:00 PM Pacific Time (US and Canada) Jan 12, 2021 01:00 PM"
- Calendar instructions: "Please download and import the following iCalendar (.ics) files to your calendar system. Daily: [https://csus.zoom.us/meeting/attendee/tZcrcOuuqjMoHdRABgHna8tUMjejrMVD8a43/ics?user\\_id=5cwTum2rRHO3d9lN6ZZMSQ](https://csus.zoom.us/meeting/attendee/tZcrcOuuqjMoHdRABgHna8tUMjejrMVD8a43/ics?user_id=5cwTum2rRHO3d9lN6ZZMSQ)"
- Joining instructions: "Join from PC, Mac, Linux, iOS or Android: [Click Here to Join](#)"
- Passcode: "Passcode: 807379"
- Note: "Note: This link should not be shared with others; it is unique to you." followed by links: [Add to Calendar](#) [Add to Google Calendar](#) [Add to Yahoo Calendar](#)

**Click here to join:** Link to click the day of the meeting.

**Add to calendar:** Encourage your audience to use one of the calendar options. If this link (or Google/Yahoo) do not work, they can click the download link above it.

**Note:** This link should not be shared. Each join link is unique to the person who registered.

There are no automatic reminder emails in Zoom Meeting. You can resend this one as a reminder. **Note:** You will need to send All Registrants page by page.

## Registration Reports

Registration reports list all the fields from your registration form plus information on registration time and status.

1. If you are not logged in, navigate to <https://csus.zoom.us/> and **Sign In**.
2. Select **Reports** from the navigation pane on the left.
3. Under Usage Reports, click **Meeting**.
4. Next to **Report Type**, click **Registration Report**. A list of previous and upcoming meetings will appear.

Scheduled Time	Topic	Meeting ID
01/07/2021 10:00:00 AM	Leader's Workshop	848 7282 2731
01/06/2021 01:00:00 PM	Scheduling & Reporting in a Zoom Meeting	897 6727 4425

5. If your meeting does not appear, adjust the time range you want and click **Search**. You can only select a one month period at a time.
6. Click **Generate** to the right of the report you want. The Report Queues tab will be displayed with your report listed.

Report Type	Scheduled Time	Start Time	Topic	Meeting ID	Generate Time
Registration Report	Jan 6, 2021 01:00:00 PM	Jan 7, 2021 10:11:07 AM	Scheduling & Reporting in a Zoom Meeting	897 6727 4425	Jan 9, 2021 12:02:48 PM

7. Click **Download** and a CSV file will be downloaded to your computer. You can open it in a spreadsheet program to view the results and/or manipulate the data. **Note:** It is a handy way to get a list of all your registrants emails if you want to send them something outside of the Zoom registration system.

**Send questions or comments** about this guide to [rensocit@gmail.com](mailto:rensocit@gmail.com) with RS Zoom Training in the subject line.