



# The COPA Guide to Online Meetings



---

## Table of Contents

<b>Introduction.....</b>	<b>3</b>
<b>Comparison of the Platforms.....</b>	<b>3</b>
<b>Skype.....</b>	<b>4</b>
<b>Zoom .....</b>	<b>8</b>
<b>Pros and Cons of the Platforms.....</b>	<b>12</b>
<b>Tips and Tricks for Conducting Online Meetings .....</b>	<b>13</b>
<b>Contact and Support Resources .....</b>	<b>14</b>
<b>Appendix A – Creating a Microsoft Account for Skype.....</b>	<b>15</b>
<b>Appendix B – Creating a Zoom Account .....</b>	<b>16</b>

### **NOTE**

*This guide contains information of a general nature only. Use of this guide does not make COPA responsible for legal action taken against you. For information that applies to your individual circumstances consult an aviation lawyer.*

## Introduction

The current COVID-19 pandemic has brought many changes to daily life and COPA meetings are no exception. To address this issue, many Flights have been turning to online video conferences to hold their meetings and safety seminars.



The intent of this COPA Guide to Online Meetings is to introduce and compare the platforms available for online meetings.

As technology is constantly evolving, this guide will be as well. Please let us know your feedback and experiences with the platforms by emailing [Lnagel@copanational.org](mailto:Lnagel@copanational.org).

## Platform Comparison

There are two platforms that will meet the needs of most COPA Flights that are either free or inexpensive. These are Skype and Zoom. They are compared in table 1, with more complete descriptions of each in later pages.

**Table 1 Platform Comparison**

	Cost	Account required?	How many people in a meeting?	Meetings can be recorded?	Meeting password protection?
<b>Skype</b> 	Free, no time-limit	Only the host (Microsoft account)	50	Yes	No
<b>Zoom</b> 	Free or \$20/month	Only the host	100+	Yes	Yes

# Skype

## Overview

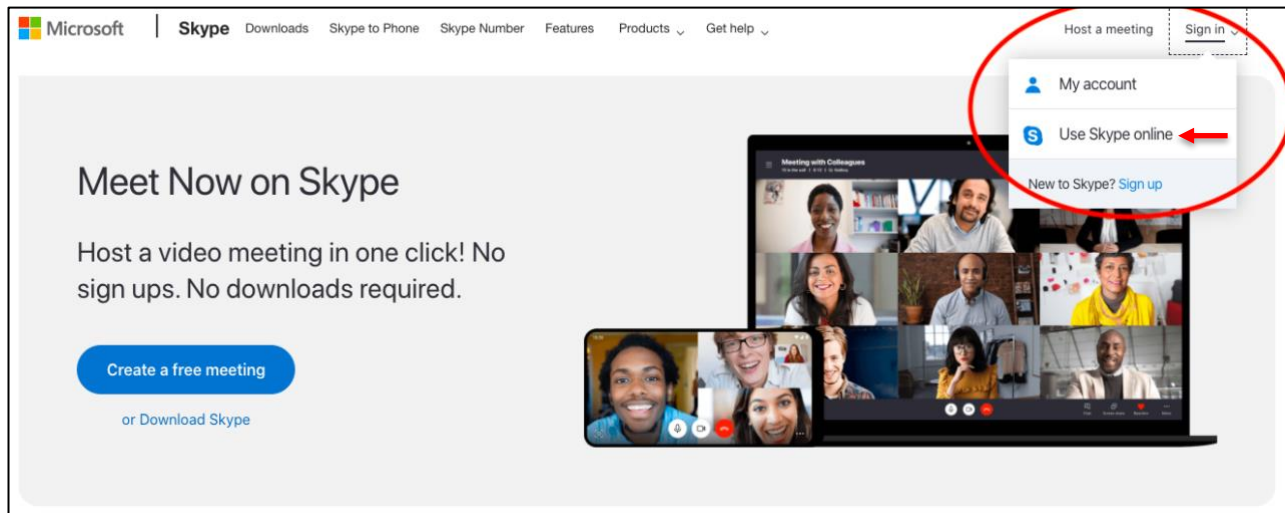
- Skype is free
- Up to 50 participants
- Allows screen sharing
- Allows call recording
- No time limit

Skype is a great option for groups of 50 participants or less, as it is a free service with no time limit for meetings with up to 50 people. To host a Skype meeting, the host needs to have a Microsoft account but the participants do not need an account.

## Organize a Meeting with Skype

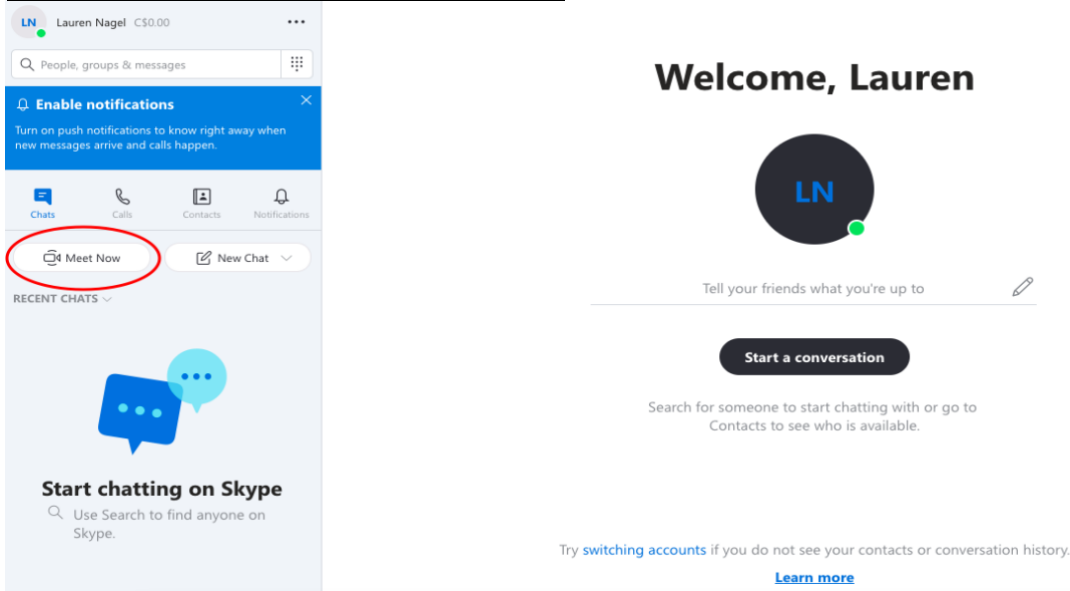
1. In order to begin the process, you must have a Microsoft account. For how to create an account, see Appendix A on page 15. Once you have an account, continue to step 2.
2. Go to <https://www.skype.com/en/> and click “Sign in” in the top right corner (Image 1) then click “Use Skype Online”.

### Image 1: Sign in to Skype Online



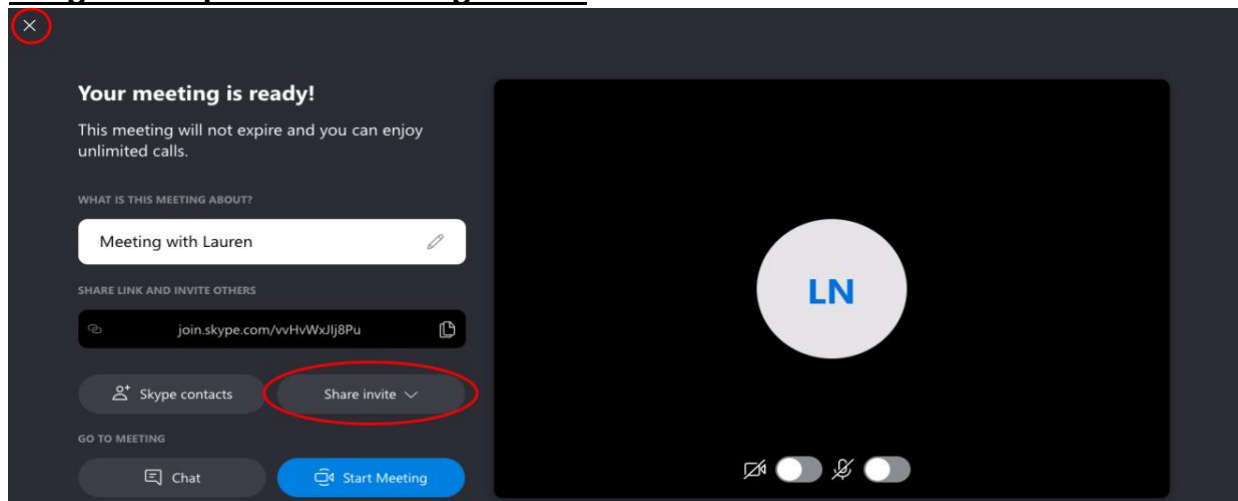
3. Log-in to your Microsoft account. You will then arrive at the Skype landing page (Image 2). Click on “Meet Now”.

### Image 2: Skype Online Landing Page



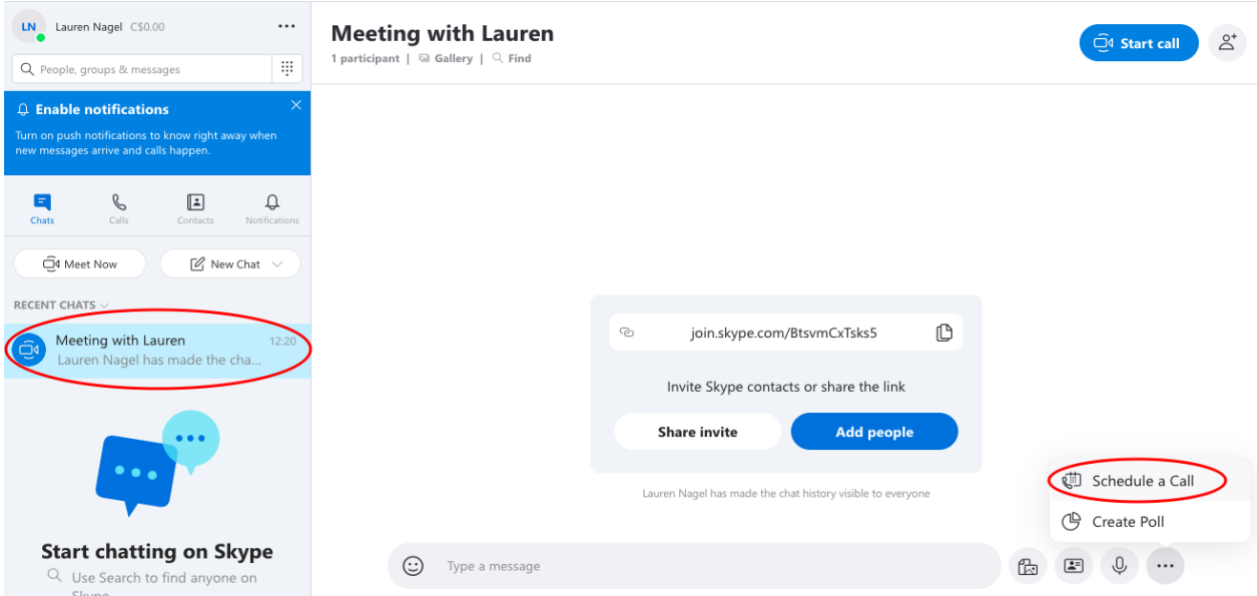
4. A new window will appear (Image 3) where you prepare your basic meeting details. Here you can name your meeting and share the link with participants, either by copy-pasting the link and sending it to them or by using one of the options offered by clicking “Share invite”, such as sending in through your computer’s email app or through Facebook.
5. You can either start your meeting right away by clicking “Start Meeting” or save the details and start it at a later time by clicking the “X” in the top left corner (Image 3). For the purposes of this guide, we will assume you clicked “X” and continue to step 6.

### Image 3: Prepare the Meeting Details



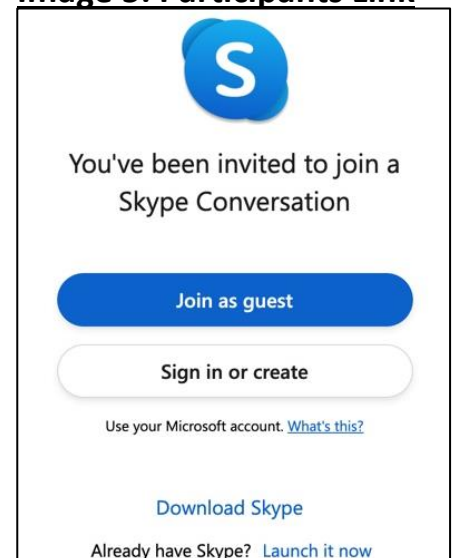
6. After clicking the “X” you will return to the home screen, but now your meeting will appear on the left side under “Recent Chats” (Image 4). When you click on the meeting, the link for the meeting will appear in the centre with the option to “Share invite”, and a chat bar will appear underneath.
7. To the right of the chat bar there are several icons with a “...” icon furthest to the right. Click the “...” and then click “Schedule a Call” (Image 4). Fill in the details including the title, date and time then click “Send”. A message will be sent on Skype to everyone you have invited to the meeting. **Note: Participants will only receive the invitation when they have Skype open, so make sure to remind members of the meeting and share the link via email as well.**

**Image 4: Plan a Skype Call**



8. To start your call, click on the Meeting in the left panel and then click “Start call” in the top right corner of the window. A preview window will appear where you can turn on your camera and microphone. When you are ready to begin, click “Start call” again in the preview window.
9. Image 5 shows what participants will see when they click on the meeting link that you send them. They have the option to join the call as a guest or to sign in to a Microsoft account / create an account.

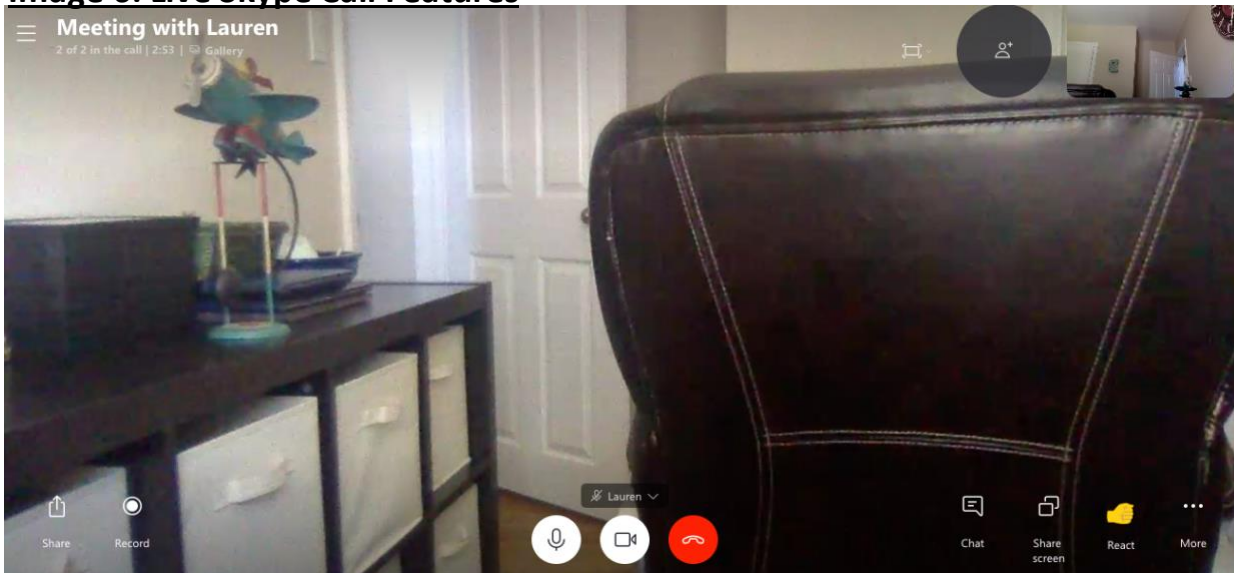
**Image 5: Participants Link**



10. When the call begins you will see the participants' videos with several controls at the bottom (See Image 6):

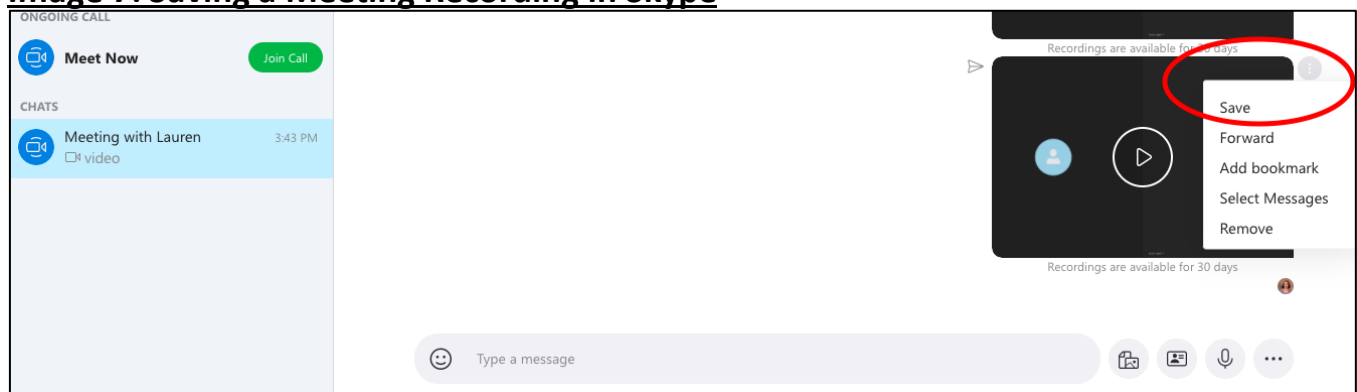
- Share: Provides the link to the meeting that you can share with participants
- Record: Click this to begin recording the meeting
- Microphone and Video icon: Use these buttons to turn your camera and microphone on and off
- Red phone: Click this to end the call
- Chat: This will open a side panel where messages can be sent to participants
- Share screen: Click this to share your computer screen or a specific window with participants
- React: Send reactions like a "thumbs up" to respond to other participants' remarks
- More: Provides the option to adjust your audio and video settings

**Image 6: Live Skype Call Features**



11. When you stop the recording, the file will appear automatically in the chat window. Once the meeting has ended, the recording will remain in the chat for 30 days. You can download the recording by clicking "..." to the top right of the recording preview and clicking "Save" (Image 7).

**Image 7: Saving a Meeting Recording in Skype**



12. To end the call, click the red telephone button.

### Troubleshooting Skype

- Someone cannot be heard in the meeting but they are not on mute
  - Have them go to their Skype settings and test their audio. Make sure that they have allowed their browser access to their microphone, this is found in browser settings.
  - If this does not work, have the person exit the call and re-join
  - The same goes for problems with the camera, it is possible that the browser has not been granted permission to use the camera, which needs to be done for it to work if using Skype online.

## Zoom

### Overview

- The Free Plan allows unlimited 1-on-1 meetings
- 40-minute time limit on group meetings for up to 100 people
- The Pro Plan costs \$20/month with a 24-hour time limit on meetings up to 100 people
- Allows screen sharing
- Allows call recording

Zoom has recently gained popularity because it is simple to use and participants do not need to have an account to join a meeting. It is highly recommended that all participants download the program on a device rather than using the browser version or the telephone call-in method to join, for the following reasons: with the browser version, they cannot see video, they can only hear audio; with telephone call-in, there is also a toll for users and they can only hear audio.

The two most popular ZOOM plans are:

1. Free Plan – allows up to 100 participants but there is a 40-minute time limit on meetings.
2. Pro Plan – up to 100 members and meetings up to 24 hours for \$20/month. With the Pro Plan, you can pay for one month at a time. If you want to pay for a full year at once, the total is \$200 for the year or \$16.67/month.

Information on all the plans can be found online: <https://zoom.us/pricing> - note that amounts are in CAD.

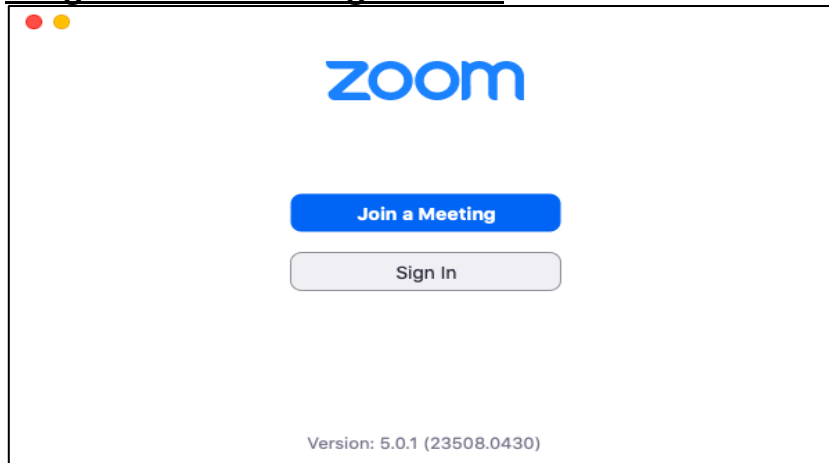
### **Organize a Meeting with Zoom (Free and Pro Plan)**

1. The host must have a Zoom account in order to create a meeting – for how to create a Zoom account, see Appendix B on page 16, then continue to the step 2.



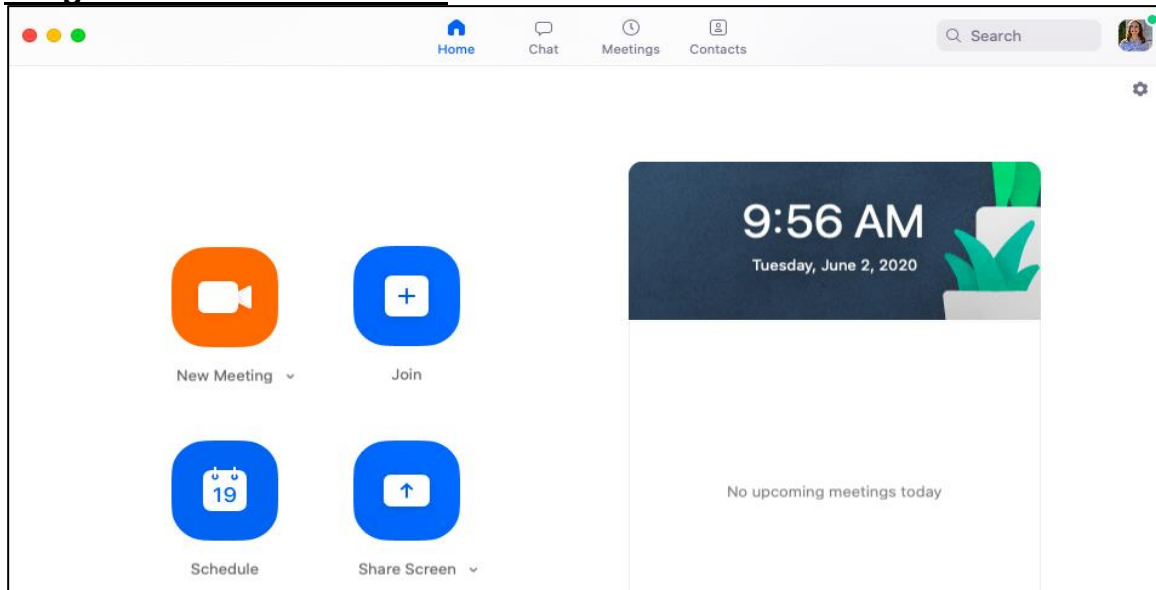
2. Once you have a Zoom account, download the Zoom app by visiting this link: <https://zoom.us/download?zcid=1231> or by searching “Zoom download” in Google. **Note: the downloaded app version of Zoom works much better than the online version, so encourage participants to use the app.** When you click on the Download button, a file “Zoom.pkg” will download on your computer, click to open it and then continue through the installation.
3. This window will open automatically after installation (Image 8). If it does not open, search for the Zoom app on your computer and open it. Click “Sign in” and enter your email and password.

**Image 8: Zoom Landing Window**



4. This is the Zoom home screen (Image 9). Note the options across the top:
  - “Home”: In Image 9 the Home screen is selected. It has many features you will regularly use including “Schedule” and “Join” for meetings.
  - “Chat”: Stores your contact requests and allows you to send messages to your contacts.
  - “Meetings”: Provides a list of upcoming meetings and recorded meetings, and allows you to schedule, join, or start a meeting.
  - “Contacts”: Provides a list of your contacts, though it is not necessary to have contacts to host or join meetings.
  - To schedule a meeting, go to the Home page (Image 9) and click “Schedule”.

**Image 9: Zoom Home Screen**

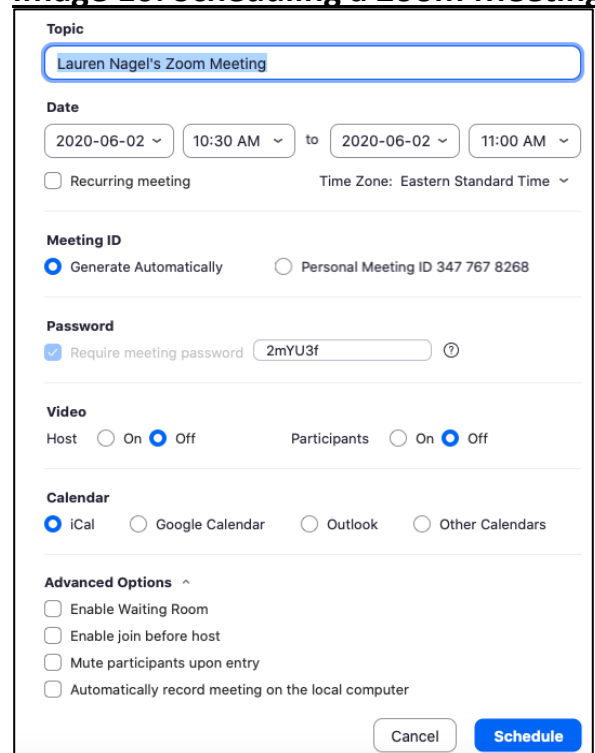


5. This window (Image 10) will appear and allow you to specify the meeting topic, date, time, and time zone. The next field is Meeting ID, for which either option works fine. Next is the Password for the meeting, one is automatically generated or you can create one. The Video option determines whether the camera of the host and participants will be on or off when they join the meeting. The Calendar feature creates an event that will automatically be input into your computer’s calendar, choose an option based on which calendar your computer uses.

6. Advanced Options

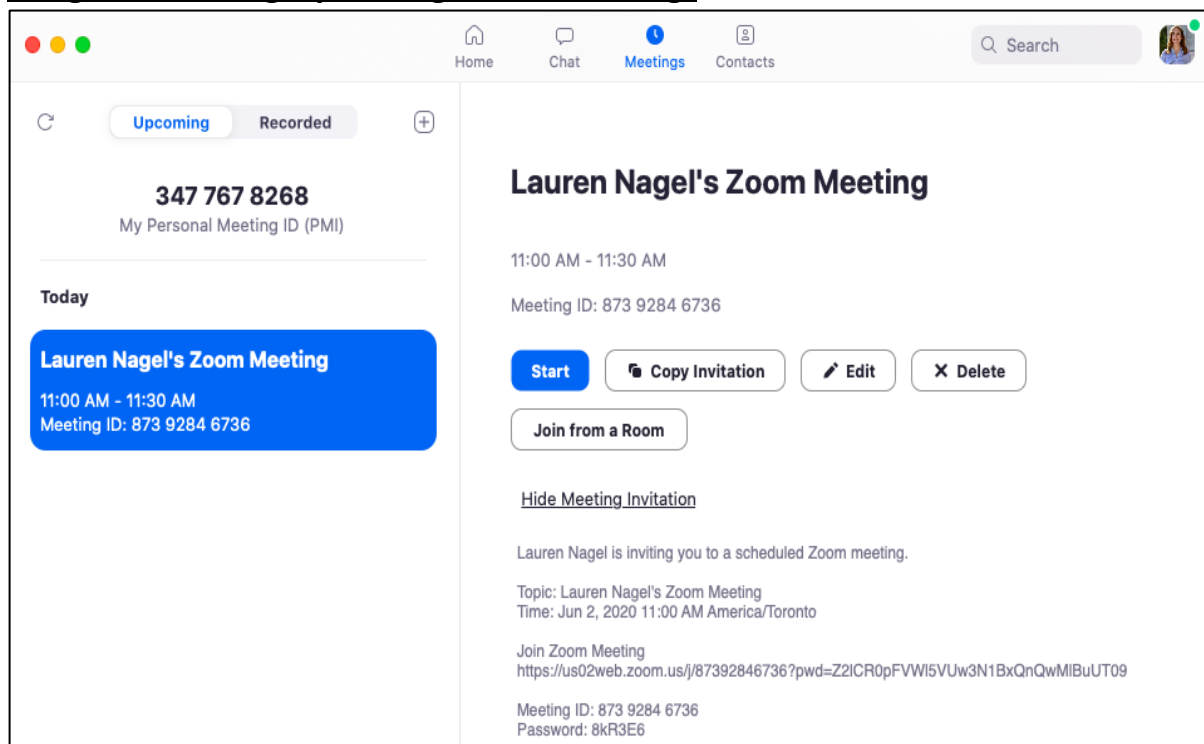
- **Enable a Waiting Room:** Prevents participants who join the meeting from seeing the host right away by putting them in a virtual “waiting room”. Selecting this option means the host will need to remember to move participants from the waiting room to the meeting, which can be unnecessarily complicated. Only use this option if there is a benefit, such as verifying participants’ identities before they enter the meeting.

**Image 10: Scheduling a Zoom Meeting**



- **Enable join before host:** If this box is checked, members can join the meeting and see the other participants before the host joins. If it is not selected, participants get a message saying “The meeting has not yet started, the host will begin the meeting shortly” until the host joins.
  - **Mute participants upon entry:** This will mute the microphones of participants joining the meeting, a useful feature to eliminate background noise.
  - **Automatically record meeting on the local computer:** The meeting will automatically start recording when the host joins. The host can also start recording after joining the meeting.
7. Once you have entered all the meeting details, click “Schedule” and it will automatically appear in the “Meetings” page of Zoom and on your computer’s calendar with a link to the meeting.
  8. To **share the meeting invitation**, click to the Meetings page at the top of the Zoom window. In the left-hand panel is a list of upcoming meetings (Image 11). Clicking on the upcoming meeting will bring up the meeting details, with options to Start, Edit or Delete the meeting, as well as an option to Copy the Invitation. Slightly lower, clicking “Show Meeting Invitation” will provide the details of the meeting that you can share with participants. The most important elements are the link to the meeting, the meeting ID, and the password. This information can be copy-pasted into an email to send to members.

**Image 11: Finding Upcoming Zoom Meetings**



9. To **join the meeting**, participants simply click the link provided, which will prompt them to download or open Zoom, then enter the meeting password. [This video](#) explains the process for participants, using an identical technology called TELUS Business Connect Meetings.
10. To **start the meeting as the host**, go to the Meetings page, click on the meeting you would like to begin, then click “Start”. [This video](#) explains the features for participants such as using the chat, raising a hand, and switching between gallery and speaker view.
11. To **add a co-host for the meeting**, click “Participants” in the control bar at the bottom. A list of participants will appear in a panel on the right. Hover over the name of the person you would like to make a co-host, click on “more”, and then “make co-host”. They now have the ability to mute or remove participants from the meeting, record the meeting and end the meeting.
12. To **record the meeting**, click “Record” in the control bar at the bottom of the window. When the meeting ends, the recording will begin downloading to your computer automatically.
13. To **share your screen**, click “Share Screen” in the control bar at the bottom. This gives several options such as sharing your entire screen, sharing just one window, or sharing a whiteboard to draw on to illustrate a point. When you are finished screen sharing and would like to return to video mode, click the red “Stop Share” button at the top of the window. **Note: to start sharing a new window, you may need to stop sharing and re-start for the new window to be visible.**
14. To **end the meeting**, click “End” at the bottom right corner.

### Troubleshooting Zoom

- Two boxes appear in a meeting for the same person
  - Are they calling in on a telephone? Are they joining the meeting from two separate devices at the same time (i.e. an iPad and a computer)?
  - Figure out which one is providing the video/ audio for that person then delete the other
- Screen sharing is not showing the window I want to share
  - Stop screen sharing and then start screen sharing again, in the pop-up menu, does the window you would like to share now appear? If so, click on it or click on share Desktop.
- Other participants should be in the call but I am the only one
  - Check and see if you have the wait room enabled. If so, you will have to select the option in the control bar to admit participants from the wait room into the meeting
- A participant’s microphone worked in a previous Zoom meeting but is no longer working
  - Have them try restarting their device/ computer

## Platform Pros and Cons

See table 2 for a summary of the pros and cons of the platforms.

**Table 2: Pros and Cons of the Platforms**

	Pros	Cons
<b>Skype</b>	<ul style="list-style-type: none"> <li>Participants do not need to make an account or download a program</li> </ul>	<ul style="list-style-type: none"> <li>Can only accommodate 50 participants</li> </ul>
<b>Zoom</b>	<ul style="list-style-type: none"> <li>Many people are already familiar with this technology</li> </ul>	<ul style="list-style-type: none"> <li>A small cost for meetings longer than 40 minutes</li> <li>The application must be downloaded for best results</li> </ul>

## Tips and Tricks for Conducting Online Meetings

### Before the Meeting

- To prevent technical difficulties on the day of your meeting, hold a test-run beforehand (1 day to 1 week in advance) so that participants can practice logging-in. If not for all participants, at least for presenters.
- Let participants join the meeting 10-15 minutes before the start time so that set-up does not cut into the time allotted for the meeting.
- Make sure you have the most updated version of the platform you are using as outdated versions can cause problems, most updates can be found on the company’s web site or by googling “Zoom/Skype update”.
- Let participants know how they will be able to ask questions and participate in the meeting – Do they use the chat feature? The “raise hand” feature? Are they able to speak freely in smaller meetings?
- Assign roles to members of your team: PowerPoint presenter, poll operator, chat supervisor, etc. Note: they will all need to be made co-hosts for this to be most effective.

### During the Meeting

- In some programs there is a feature that plays the sound of a doorbell whenever someone new joins the meeting, this can be quite distracting after the meeting has started so disable this feature unless it provides a benefit to your meeting.
- Make sure everyone uses their full name in their ID box to keep track of who is in the meeting.
- Ask everyone to mute themselves unless they are presenting to reduce background noise, if someone still has background noise, the meeting host can mute them.

### To Learn More

- There are more features that are available with these platforms that were not explained in this guide in order to keep it simple.
- If you would like to learn about more Skype features such as reactions, private conversations and live subtitles, [click here](#).
- If you would like to learn about more Zoom features such as polling / voting, virtual backgrounds, and breakout rooms, [click here](#).

## Contact and Support Resources

If you would like advice or help with how to use these platforms, contact information is provided below for the various companies. Unless your question is COPA-related, please reach out to the company's customer service first as we are not IT or platform experts. Read through this entire guide to find answers as we have troubleshooted many common issues and provided answers in the platform-specific and "Tips and Tricks" sections. Searching your question on YouTube or Google can also provide lots of helpful answers, from official business sites or technology forums.

### **Skype**

Customer Care: 1-800-642-7676

Canada Support: 1-877-568-2495

Support site: <https://support.microsoft.com/en-us/contactus/>

Social Media

Facebook: <https://www.facebook.com/Skype/>

Twitter: <https://twitter.com/Skype>

### **Zoom**

Sales: 1-888-799-9666

Help Center: <https://support.zoom.us/hc/en-us>

Submit support a ticket after (must be logged into your account): <https://support.zoom.us/hc/en-us/requests/new>

Social Media

Facebook: <https://www.facebook.com/zoomvideocommunications/>

Twitter: [https://twitter.com/zoom\\_us](https://twitter.com/zoom_us)

### **COPA**

Lauren Nagel

Director of Membership Communication

613-236-4901 ext. 104

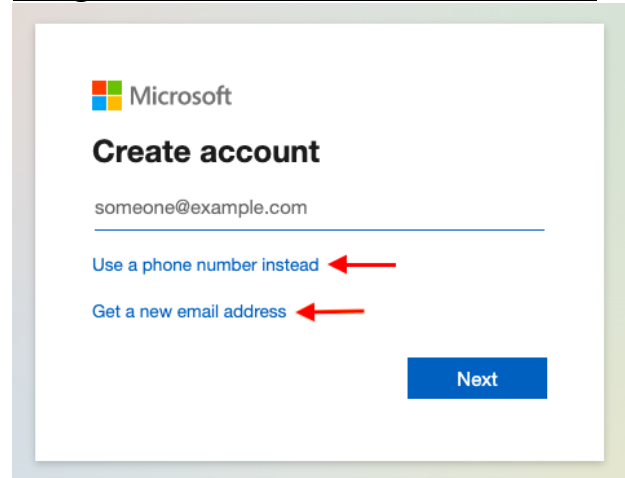
[Lnagel@copanational.org](mailto:Lnagel@copanational.org)

## Appendix A

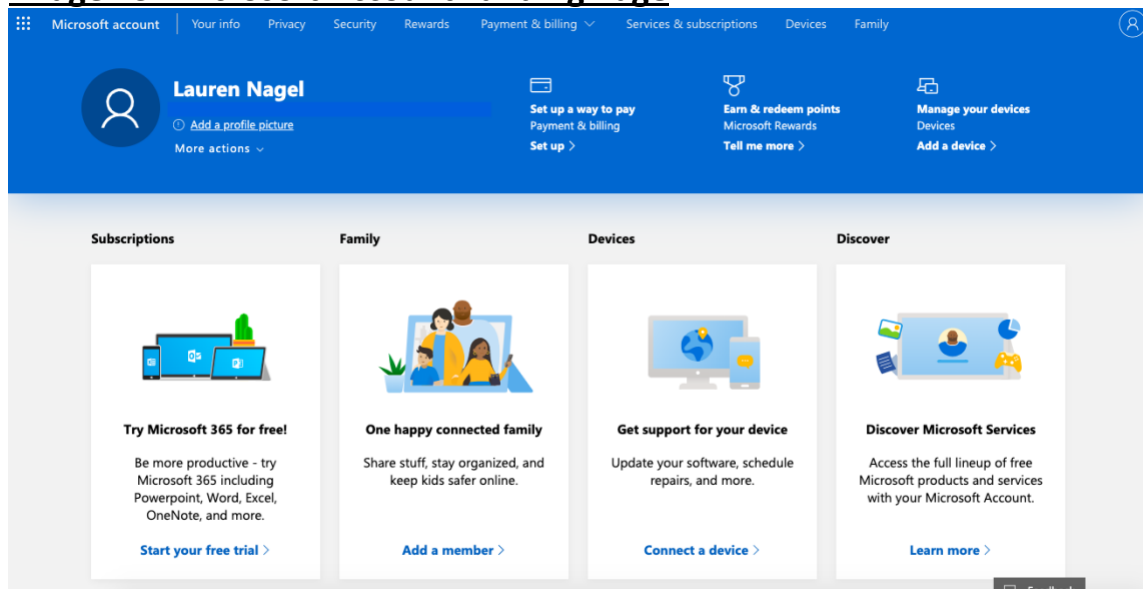
### Creating a Microsoft Account for Skype

1. In order to use Skype, you must have a Microsoft account. Click here to create one: <https://signup.live.com/?lic=1>.
2. Enter your email address or your phone number after clicking “Use a phone number instead” (Image 12). You can also click “Get a new email address” to create a new email account, which will end in @outlook.com or @hotmail.com.
3. After entering your email, phone number, or creating a new email, click “Next” then create a password on the next screen and click “Next”.
4. The next steps will prompt you to enter your full name then country and birth date, enter the information click “Next” again.
5. A verification code will be sent to your email address. If you do not see the email from Microsoft, check your Junk folder. Enter the security code from the email into the “Verify email” box in your browser and click “Next”.
6. You may be asked to confirm you are human, follow the instructions and click “Next”.
7. If the account creation is successful, you will be brought to this landing page (Image 13). You can now return to step 2 of “Organize a Meeting with Skype”.

**Image 12: Create a Microsoft Account**



**Image 13: Microsoft Account Landing Page**

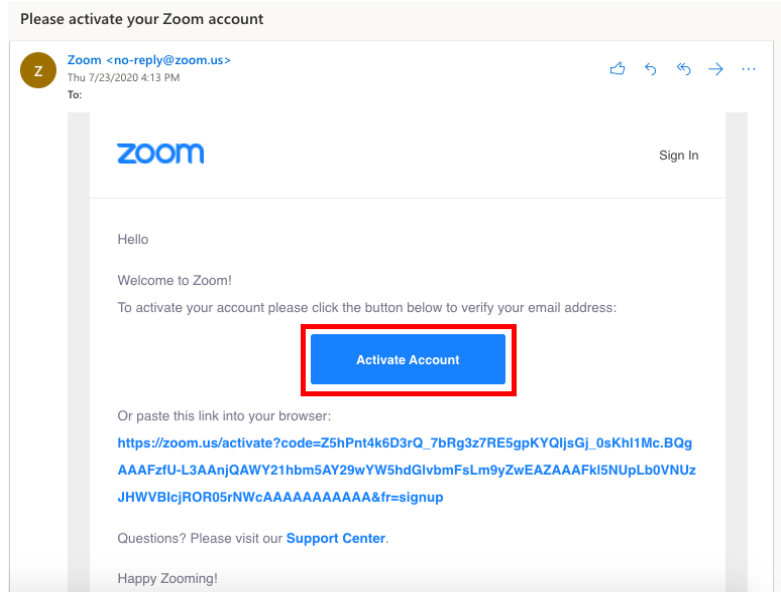


## Appendix B

### Creating a Zoom Account

1. To create a Zoom account, go to <https://zoom.us/pricing> - click on the plan you require based on your meeting needs. Confirm your date of birth and enter your email address. If you are purchasing a Pro account you will be asked for your payment information.
2. A confirmation email will be sent to your email address, if you do not see it, check your Junk folder. In the confirmation email, click “Activate Account” (Image 14).
3. A new window will open, you may be asked “Are you signing up on behalf of a school?”, select “No” then click “Continue”.
4. You will reach this page (Image 15) and be prompted to finish creating an account by entering your name and creating a password. Fill in this information then click “Continue”.
5. You will be brought to a screen that says “Don’t Zoom alone”. At this point you can close this window and return to point 2 in the “Organize a Meeting with Zoom (Free and Pro Plan)” section on page 9.

**Image 14: Zoom Confirmation Email**



**Image 15: Finish Creating Your Zoom Account**

