

## WEBCAST TECH CHECKLIST

✓	#	ASSIGN	ITEM
A. SCHEDULING YOUTUBE LIVE STREAMS IN YOUR YOUTUBE CHANNEL			
	1		Sign on to your youtube account which has your youtube channel.
	2		Click on the camera <b>CREATE</b> icon in the upper right corner, then <b>Go Live</b> .
	3		Click on the <b>Manage</b> icon (3rd icon from the top left corner).
	4		Click on <b>SCHEDULE STREAM</b> .
	5		Click on <b>CREATE NEW</b> .
	6		In <i>Create a title</i> , specify the name of your event. It should include the date.
	7		Specify <b>Unlisted</b> for a rehearsal <b>OR</b> Specify <b>Public</b> for the webcast itself.
	8		In <i>Add a description</i> , provide a brief description of the webcast. If it is the rehearsal, you can say so.
	9		Specify <b>Nonprofits &amp; Activism</b> for the category.
	10		Specify <i>Date</i> and <i>Time</i> . For the event itself, this should be the official start time.
	11		<b>UPLOAD CUSTOM THUMBNAIL</b> to display the graphic for the youtube live stream link. <b>Note:</b> you will want to have made an uploadable image available beforehand.
	12		Specify <b>No</b> , it's not made for kids
	13		Then click on <b>CREATE STREAM</b>
B. SETTING YOUR ZOOM PERSONAL SETTINGS BEFORE SCHEDULING YOUR ZOOM SESSION			
	14		Sign on to the zoom account where the zoom rehearsal/webcast will be hosted. This needs to be a paid zoom account so the webcast can be longer than 40 minutes.
	15		Under <b>PERSONAL / Settings / Meeting</b> :
	16		Specify <b>Waiting Room</b>
	17		In <b>Waiting Room Options</b> , click on <b>Customize Waiting Room</b> message. Click on <b>Add waiting room description</b> . Enter the text that you want people coming into the waiting room to see. You will want to ask that they use their full name as their zoom name. This is really the only way we have to determine if this person is who they say they are. They will have to leave in order to change their zoom name. You may want to include your cell phone number so they can contact you if necessary. Click on the check mark when finished. There is a maximum of 400 characters allowed for the waiting room description. Click on <b>CLOSE</b> to return to the <b>Settings</b> .

	18	Specify <b>Embed passcode</b> in invite link for one-click join.
	19	Specify <b>Enable Personal Meeting ID</b> .
	20	Specify <b>Mute participants</b> upon entry.
	21	Specify <b>Chat</b>
	22	Specify <b>Private Chat</b>
	23	Specify <b>Auto saving chats</b> .
	24	Specify <b>Sound notification</b> when someone joins or leaves Specify <b>Host and co-hosts only</b>
	25	Specify <b>Co-host</b>
	26	Specify <b>Polling</b> (you never know)
	27	Specify <b>Always show meeting control toolbar</b>
	28	Specify <b>Show Zoom windows during screen share</b> (this shows the speaker)
	29	Specify <b>Screen sharing</b>
	30	Specify <b>Who can share? All Participants</b>
	31	Specify <b>Who can start sharing</b> when someone else is sharing? <b>Host Only</b>
	32	Specify <b>Meeting reactions</b>
	33	Specify <b>Allow removed participants to rejoin</b> (in case they left the session due to a device failure)
	34	Specify <b>Allow participants to rename themselves</b>
	35	Specify <b>Breakout room</b> (you never know)
	36	Specify <b>Allow host to assign participants to breakout rooms</b> when scheduling
	37	Specify <b>Virtual background</b>
	38	Specify <b>Allow live streaming meetings</b> <b>*Note: This is critical if you wish to live stream.</b>
	39	Check off all the live stream options. The one that you will be using is the <b>Custom Live Streaming Service</b> . <b>*Note: In an emergency, you may have to switch to an alternate live stream option such as YouTube or Facebook. Always keep your options open.</b>
	40	Under <b>PERSONAL / Settings / Recording</b> :
	41	Click on <b>Cloud recording</b> . Click on all the options specified under <b>Cloud recording</b> . This is a possible backup if the youtube recording fails for some reason.
	42	Under <b>PERSONAL / Settings / Telephone</b> :
	43	For <b>Choose where most of the participants call into or call from the meeting</b> , click on <b>Canada</b> .
	44	Click on <b>Mask phone number</b> in the participant list
	45	Click on <b>Global Dial-in Countries/Regions</b> and specify <b>Canada</b> . This will save you from incurring long distance charges if someone calls an out of country number.
	46	You have completed changing your personal settings. You can sign off or go to the next section.
	<b>C. SCHEDULING YOUR ZOOM SESSION</b>	

	47		Sign on to the zoom account where the zoom rehearsal/webcast will be hosted. This needs to be a paid zoom account so the webcast can be longer than 40 minutes.
	48		Click on <b>Schedule a Meeting</b>
	49		Specify the <b>Topic, Description, When Date/Time, Duration, Time Zone</b> . <b>*Note:</b> Always schedule the zoom session a half hour before the official start: Program Sponsor, MC, tech team members join a half hour before the official start; speakers/presenters/panelists join 15 minutes before the official start. <b>*Note:</b> Always add an extra half hour to the end of the zoom session to provide time for a quick debrief on the webcast from the Program Sponsor, MC and tech team members.
	50		Specify <b>Meeting ID - Generate Automatically</b>
	51		Specify <b>Security - Waiting Room</b>
	52		Specify <b>Video Host off, Participant Video off</b>
	53		Specify <b>Audio Both</b>
	54		Specify <b>Meeting Options - Mute participants upon entry</b>
	55		Remember to <b>Save</b>
	56		Save your zoom session in your calendar whichever one you use.
	57		Add guests to your google calendar entry and send to them at the appropriate time. <b>*Note: the zoom link for the webcast must be distributed carefully and discreetly. If it is exposed to the public, you leave the zoom session open to zoom-bombing by unwanted participants who may intentionally disrupt your webcast. This is not as much a concern with the zoom link for a rehearsal/tech check-in.</b>
	<b>D. LINKING YOUR ZOOM SESSION TO THE YOUTUBE LIVESTREAM LINK</b>		
	58		In zoom, go back to your zoom meeting. Go to the bottom of the zoom meeting entry.
	59		Click on <b>Live Streaming</b> . Click on <b>configure live stream settings</b> .
	60		For the next 3 steps, you will be going to your youtube session, copying an item, going to your zoom session, pasting the item, and repeat this sequence 2 more times:
	61		Copy the Stream Key from the youtube studio session to the streaming Key in your zoom session. <b>*Note: the order is different between youtube and zoom.</b>
	62		Copy the Stream URL from the youtube studio session to the streaming URL in your zoom session. <b>*Note: the order is different between youtube and zoom.</b>
	63		In the youtube studio session, click on the <input type="checkbox"/> arrow in the upper right corner. Click on <b>COPY</b> to copy the <b>Live streaming page URL</b> to the same in your zoom session.

		When you have transferred all 3 items, click on <b>Save</b>
	64	You have now linked your zoom session to your youtube livestream link!
	65	You may want to test the live stream from zoom to youtube to ensure the link is working properly. In order to do this, you must start up your live zoom session. <b>Go to step 86.</b>
	<b>E. STARTING UP YOUR ZOOM SESSION AND GOING LIVE ON YOUTUBE</b>	
		<b>45 minutes before the official start of the webcast</b>
	66	Sign on to your youtube account which has your youtube channel.
	67	Click on camera <b>CREATE</b> icon in upper right corner, then <b>Go Live</b> .
	68	Click on <b>Manage</b> icon (3rd icon from the top left corner).
	69	Click on your youtube live stream. This will bring you to the youtube studio screen.
	70	Sign on to the zoom account where the zoom rehearsal/webcast will be hosted.
	71	Start your webcast.
	72	The next 3 steps are done on your device separate from youtube or zoom:
	73	If you have Powerpoint/Google slides to show, pre-load them beforehand.
	74	If you have a video MP4 file or an audio MP3 file to play, pre-load them and cue them up ready to play. <b>*Note: Do not use a youtube or vimeo link. You may get an ad unexpectedly. These need to be converted from youtube or vimeo beforehand. There are many different conversion apps for doing this.</b>
	75	If you have a graphic to display, pre-load them beforehand.
	76	When you click on Share Screen in your live zoom session, if you are playing a video or audio file, be sure to click on <b>Share Computer Sound</b> . If a video file, be sure to click on <b>Optimize Screen Sharing for Video Clip</b> .
	77	Click on the pre-loaded screen that you want to screen share whether it be Powerpoint/Google slides, an MP3 audio file, an MP4 video file, or a graphic of some sort.

78		Click on the <b>Advanced</b> option on the top bar. Click on <b>Portion of Screen</b> . Then click on <b>Share</b> . You will see a yellow frame that you can expand or shrink to share only what you want to be shared on your device's screen. <b>*Note: you will want to perform this activity before going live as the frame will remember where you have positioned it. This becomes problematic if you are screen sharing multiple items (graphic card, video, slide) that are located in different parts of your device's screen. Make yourself aware where to best position the multiple items so as to reduce the amount of re-framing that you have to do, within the live zoom session. Practise your transitions from one to the other. The other option is to have your wrangler or backup tech lead prepare the next screen share, especially if they are one after the other. Again, practise the transition from one to another.</b>
		<b>30 minutes before the official start of the webcast</b>
79		Your Program Sponsor, MC, panel moderator, question moderator, tech team should sign on to your zoom session a half hour before the official start time. You will have to let them in from the waiting room.
80		<b>ALWAYS designate a co-host(s) to ensure that if your hosting device goes down, the webcast will continue to run. You can make the persons actively involved in the zoom session co-hosts. This may include the Program Sponsor, MC, panel moderator, question moderator, the tech lead and wrangler.</b>
81		You may want to set up a second device for zoom chatting, viewing the zoom session as a viewer. <b>*Note: Minimize other zoom work on the zoom hosting device or your viewers may see blackouts during the webcast.</b> Rename your second device differently from your hosting zoom name, so you can differentiate.
82		In Video settings located beside the video icon in the lower left corner of your screen:
83		Specify <b>Always display participant names on their video</b>
84		Specify <b>Hide non-video participants</b>
85		Clicking on the <b>Security</b> icon, ensure that <b>Enable Waiting Room</b> is checked off
86		Click on <b>Live on Custom Live Streaming Service</b> . You can go to your youtube studio session and you will see your zoom session being live streamed. You can stop the live stream from the zoom end. <b>*Note: do not start the GO LIVE in youtube. You cannot stop and restart a youtube GO LIVE.</b>
		<b>15 minutes before the official start of the webcast</b>

	87		Your speakers/presenters/panelists should be signing on to your zoom session 15 minutes before the official start time. If they are late, contact them by phone using your Contacts Sheet which should have been completed prior to the webcast. Identify them through their zoom name, and admit them into the live zoom session, usually with video off and muted. Welcome them, provide them with any last minute instructions or advice, ask if they have any questions. Wish them good luck!
	88		The tech lead and wrangler should turn off their videos and mute themselves during the webcast, unless they have to say something urgently, such as 'Turn on your audio!'.
	89		Schedule a 2 minute 'absolute silence' when everyone's video is off and everyone is muted. This is when the tech lead will start up the youtube live stream.
			<b>2 minutes before the official start of the webcast</b>
	90		When you are ready to go live, go to your youtube studio session and click on the GO LIVE in the upper right corner to start your youtube live stream. <b>*Note: Once started, you cannot stop and restart, so only start this when you really want to go live!</b>
	91		The tech lead will then notify the first person to speak, usually the MC, that they can start via zoom chat. <b>*Note: Anything that is said in the live zoom session is being broadcast via the youtube live stream. You do not want to say anything verbally unless it is intentional. Always consider your mic as 'hot'. Never say anything that you would not want the public to hear!</b>
<b>F. DURING THE WEBCAST</b>			
	92		The tech lead is in constant communication with the MC/panel moderator and speakers/presenters/panelists where necessary via zoom chat. Also, the rest of the tech team: the wrangler via zoom chat; youtube chat moderator and youtube watcher, via cellphone texting. The tech lead addresses any tech problems that come up during the webcast. The tech lead may relay audience counts, times, whether on track with the Master Schedule, etc. to the MC and others, via zoom chat.
	93		The tech lead may have slides and/or graphics to present, MP3 audio or MP4 video files to play.
	94		The tech lead and/or wrangler may be turning off the video or the audio for speakers/presenters/panelists.
	95		The tech lead and/or wrangler may be spotlighting or not the MC/panel moderator or speakers/presenters/panelists. <b>*Note: spotlighting focuses the audience on 1 person. Speaker view and pinning only affect the individual's device.</b>



G. AT THE END OF THE WEBCAST			
	96		The tech lead stops the youtube live stream. The youtube chat can be copied after youtube performs its initial processing. The tech lead needs to remember to copy the youtube chat <b>before editing it.</b> <b>*Note: if you edit the youtube recording before saving the youtube chat, you will lose the youtube chat.</b>
	97		The tech lead can save the zoom chat if it is deemed useful. The tech lead can then <b>stop the zoom custom live stream, not the live zoom session.</b>
	98		The tech lead conducts a brief debrief with the Program Sponsor, the MC, and the tech team, and each person goes over what worked and what didn't work. If there is something worth noting, the tech lead documents it for future webcasts. No more than 15 minutes, please.
	99		The tech lead then shuts down the live zoom session.
H. EDITING THE YOUTUBE VIDEO RECORDING			
	100		Sign on to your youtube channel.
	101		Find your video recording and the editor mode for your recording. Sometimes, this is tricky to find.
	102		Make a copy of the youtube chat. <b>*Note: You must do this before you start editing the recording.</b>
	103		After the initial processing by youtube of the webcast video recording, you will be able to trim the start and end of your video, as well as do cut-outs of portions in the middle of your video, where deemed necessary. <b>*Note: the youtube live stream link is the same link that you use to get to the youtube video recording, so you will want to edit as soon as you can, as it becomes publicly available immediately after youtube processing.</b>
	104		There are several youtube videos on how to perform youtube editing. Once you save your edits, youtube will take several hours to process your video.
	105		Congratulations! You have completed your webcast!

## ASSUMPTIONS

1. The speakers/presenters/panelists are in the live zoom session. If the participants/audience interact via a youtube live stream, a shared google doc(s) is used to:
  - a. Communicate questions/comments from the participants/audience to the speakers/presenters/panelists, executed by a youtube chat moderator.
  - b. Communicate links/contact info/other info from the speakers/presenters/panelists to the participants/audience, executed by a youtube chat moderator.

2. The live zoom session is streamed via youtube to the participants/audience.  
Youtube will automatically make a video recording of your youtube live stream.

Updated by: Ray Nakano

Updated on: October 5, 2020