

## Mediator Guide to Using Zoom

Set out below is a guide to using Zoom to conduct a two-party commercial mediation. The process below can be adapted for mediations with more than two parties. Our experience at CEDR is that video conference mediations can be very successful by providing a more cost effective and environmentally friendly mechanism for dispute resolution.

In order to create an environment which is conducive to settlement, it is important that the mediator is familiar with all the relevant equipment and functions.

This Guide should be read together with CEDR's Mediator Guide to Online Mediation, which covers process design points, practicalities and top tips when conducting a mediation online. A copy may be found on CEDR's website [here](#).

### **Party Participation**

The Guide below assumes that as the mediator, you have discussed the use of Zoom with the parties and that all participants consent to proceeding with a mediation using Zoom. It also assumes that you have a Zoom Pro account. Please do not use a free Zoom account as the security measures are not appropriate for a Commercial Mediation.

If parties have questions concerning Zoom's security or compatibility, please refer them to the Zoom website so that they can satisfy themselves that they are comfortable using Zoom.

Whilst Zoom is one of the most popular platforms to conduct a mediation, GoToMeeting, Skype for Business, Microsoft Teams, WebEx and other providers may also be used and should be discussed with the parties in advance.

### **Equipment**

Having the right kit is key to conducting a successful online mediation. In addition to using a Zoom Pro Account, see below a list of equipment needed.

#### **Essential Equipment/Functions**

- a. A laptop/tablet with a microphone and camera
- b. A strong secure internet connection →

Additional optional equipment that will create a more pleasant experience

#### **Your Default Settings**

1. Prior to setting-up a mediation call, please go into your Settings and ensure that the following are marked →

- a. Audio Type → Enable Telephone and Computer Audio
  - b. Join before host → Disable
  - c. Use Personal Meeting ID → Disable
  - d. Require Password → Enable
  - e. Embed Password in Meeting Link for One-Click join → Enable
  - f. Basic Settings
    - i. Auto saving chats → Disable
    - ii. Screen sharing → Enable
      1. Who can share → Host only (you can change this during the mediation)
      2. Who can start sharing when someone else is sharing? → Host only
  - g. In Meeting Advanced
    - i. Breakout room → Enable
    - ii. Select Data Center Regions →
      1. Select only the regions where you have a participant located.
      2. As Zoom is located in the US you cannot untick the US
    - iii. Waiting room → Enable
    - iv. Recording → Disable.
2. All other settings should reflect your agreement with the parties.

### **Setting up the Call**

3. Log-in to your Zoom Account at Zoom.us
  - a. It is better to do this through the website than the App as there is greater functionality on the website.
4. Go to Meetings → Schedule a New Meeting
  - a. Complete the relevant information
  - b. Be sure not to click:
    - i. Enable Join the Meeting Before the Host
    - ii. Record the Meeting Automatically
  - c. Be Sure to click:
    - i. For Meeting ID →
      1. Generate Automatically (this will ensure participants can't log-in to other sessions later)
      2. Do NOT use your Personal Meeting ID
    - ii. For Meeting Password → tick "Require a Password" and note the password
    - iii. For Video → click the requirements agreed with the parties

- iv. For Audio → click the audio source that is required, tick “Both” when in doubt
- v. For Meeting Options → Be sure to enable:
  - 1. Mute participants upon entry
  - 2. Enable waiting room
  - 3. Only authenticated user can join
  - 4. Breakout Room pre-assignSee below for a screenshot

**Meeting Options**

- Enable join before host
- Mute participants upon entry 
- Enable waiting room
- Only authenticated users can join: Sign in to Zoom
- Breakout Room pre-assign
  - [+ Create Rooms](#)   [↑ Import from CSV](#)
- Record the meeting automatically

- vi. Create at least four Break out rooms by clicking on +Create Rooms
  - 1. Room names may be edited by hovering your mouse to the right of the room and then clicking the pencil/pen icon when it appears.
  - 2. You can pre-assign participants to Breakout rooms at this stage. We recommend you do so in advance of the call for ease of administration on the day. **Be sure to hit save.**
  - 3. We recommend that you create the following rooms:
    - a. A room for each party;
    - b. A room for the mediator; - this can be used for the plenary sessions
    - c. A room for the lawyers;
    - d. A spare room or room of requirement;
  - 4. See example *(on next page)*

### Breakout Room Assignment 4 rooms, 0 participants

Assign participants to breakout rooms by adding their email. You can create up to 50 breakout rooms and assign up to a total of 200 participants.

Rooms	+	Room of Requirement
Claimant Room	0	<input type="text" value="Add participants"/>  No participants yet
Defendant Room	0	
Mediator Room	0	
<b>Room of Requirement</b>	<b>0</b>	

[Import from CSV](#) Cancel Save

- vii. For Alternative Host →
  - 1. Insert an alternate host if you have a co-mediator, an observer or technical/logistical support
    - a. The alternate host must have a Zoom account.
    - b. Be sure to only do this if agreed with the parties in advance.
- viii. Save the call.

5. Send the call details to the Parties.

My Meetings > Manage "My Meeting"

Start this Meeting

Topic: My Meeting

Time: Mar 23, 2020 05:00 PM London

Add to: [Google Calendar](#) [Outlook Calendar \(.ics\)](#) [Yahoo Calendar](#)

Meeting ID: 226-340-434

Meeting Password:  Require meeting password 709276

Invite Attendees: Join URL: <https://zoom.us/j/226340434?pwd=Q0RwY3ZCV1pzYTJNOFFNUGlsR28vdz09> [Copy the invitation](#)

- a. By either
  - i. Using the buttons provided in the Time section; or
  - ii. Copy and pasting the “Join URL” into the calendar invite using the call to action on the right. This will ensure that the password is included in the invite information.

### **Starting the Call**

6. To start the call, log-in to your Zoom Pro Account → go to Meetings → go to Upcoming Meetings
7. Click on the relevant meeting
8. Click Start
9. The call will open and your attendees should be in the waiting room. Attendees in the waiting room will not be able to speak or see you, or each other until admitted to the session.
10. Check to make sure your microphone and video are on. If they are you will be able to see yourself in the screen and the sound bars will come up when you speak.
11. If you need to invite additional attendees, you can do so by either:
  - a. Forwarding the meeting invite with the details to the attendee; or
  - b. Invite the individual(s) by using the “Invite button” on the control panel which appears when you hover at the bottom of the screen



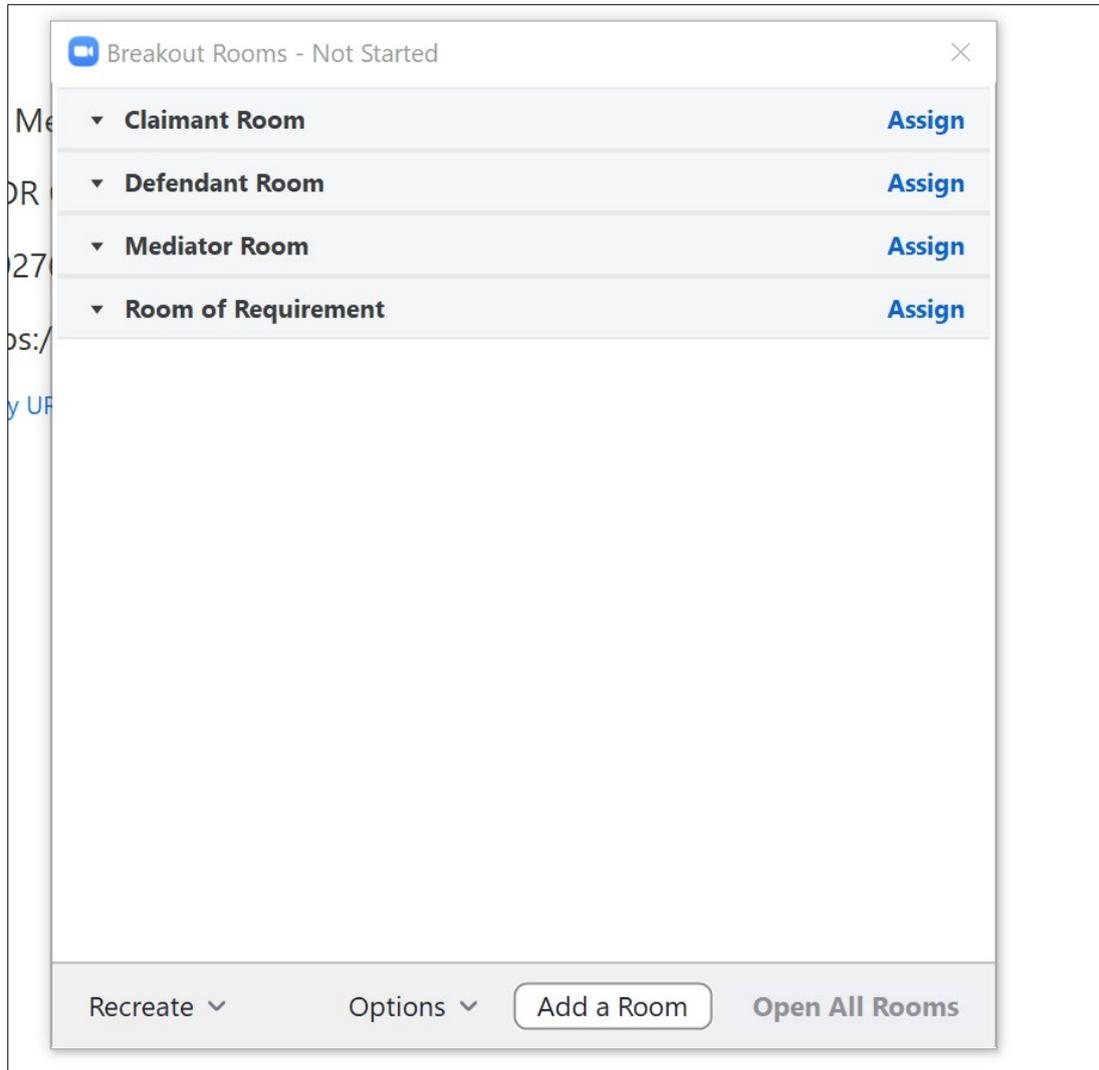
12. Once you are ready to start, either:
  - a. admit everyone to the call at the same time, by clicking Admit All in the Right-hand side:
    - i. This will bring all parties into the plenary session and they will be able to speak to each other
    - ii. You can either keep the parties here and do a group introduction or move them into their break out rooms.
  - b. admit the participants from one party and then move them to their breakout room before admitting the other party.
13. If you are having difficulty finding this, click Managing Participants on the control panel.

### **Managing Breakout Rooms**

14. To move parties into Breakout Rooms, click on the icon on the control panel (see above):



15. The following screen will pop up allowing you to move parties into the relevant rooms by hitting the Assign button. If you pre-assigned parties to rooms, these will be pre-populated. You must move all parties into a room in order to open the breakout rooms and close the plenary session:



- 16. You can then join a breakout room by selecting Join Room.
- 17. When you need to move to another room you can do so by clicking on the Breakout Room icon. The above menu will appear again and you can then join a different room.
- 18. You can move between the rooms using this method throughout the mediation.
- 19. If you want to bring all parties back to the plenary session click → End All Breakout Rooms. It will give the parties 60 seconds to join the plenary session before moving them there.
- 20. There is no way to close certain breakout rooms and leave others open. This is why we recommend that you have at least two extra rooms. This will allow you to move to a room if you need time to reflect or to move certain team members of each party

into a room of requirement so that they can have a discussion.

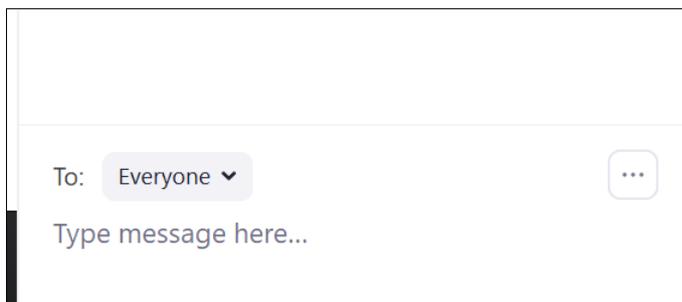
21. Parties can move between their assigned breakout room and the plenary session. They cannot move between breakout rooms without the host moving that person into a new breakout room.
22. As the parties can move themselves back into the plenary session, we recommend that you do not use this room for any private discussions. Instead use the room of requirement or the mediator room.

### **Messaging**

23. If you want to message either the entire room or an individual in the room, you can do so by clicking on the chat button on the control panel.



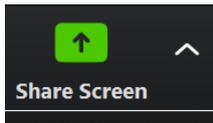
24. It will open up a messaging panel on the right-hand side of your screen.
25. Simply select your recipient from the drop down (either an individual, selection of individuals or the entire room) and type your message.



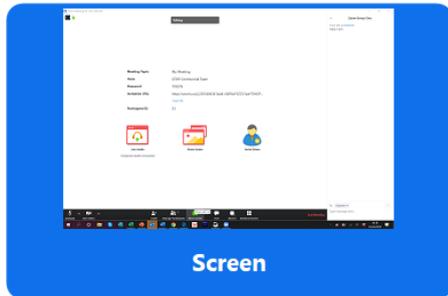
26. Please note you will only be able to message individuals in the room where you are present. For example, if you are in the Claimant room you will not be able to message those in the defendant room.
27. Also, as the host you can control who in the room members can chat with by clicking on the ellipse in the right-hand corner, next to the recipient drop down.
28. It is important not to include any confidential information in the messages as it is possible to save this.

### **Sharing your Screen**

29. To prevent other participants from sharing please click the carrot to the right of the Share Screen button -> select Advanced Sharing and then mark -> Only Host in response to the question of who can share the screen.
30. If you would like to share your screen with others in the room, then please click the green button in the middle of the control panel:



31. When sharing your screen, we recommend that you do not select → Screen



The reason is that this will show the parties any screen that you move to. It is easy to forget you are sharing and accidentally show the parties a confidential document. For this reason, have the document open and only select that document to share.

32. When you want to stop sharing your screen, simply stop sharing by hitting the



button:

### **Recording**

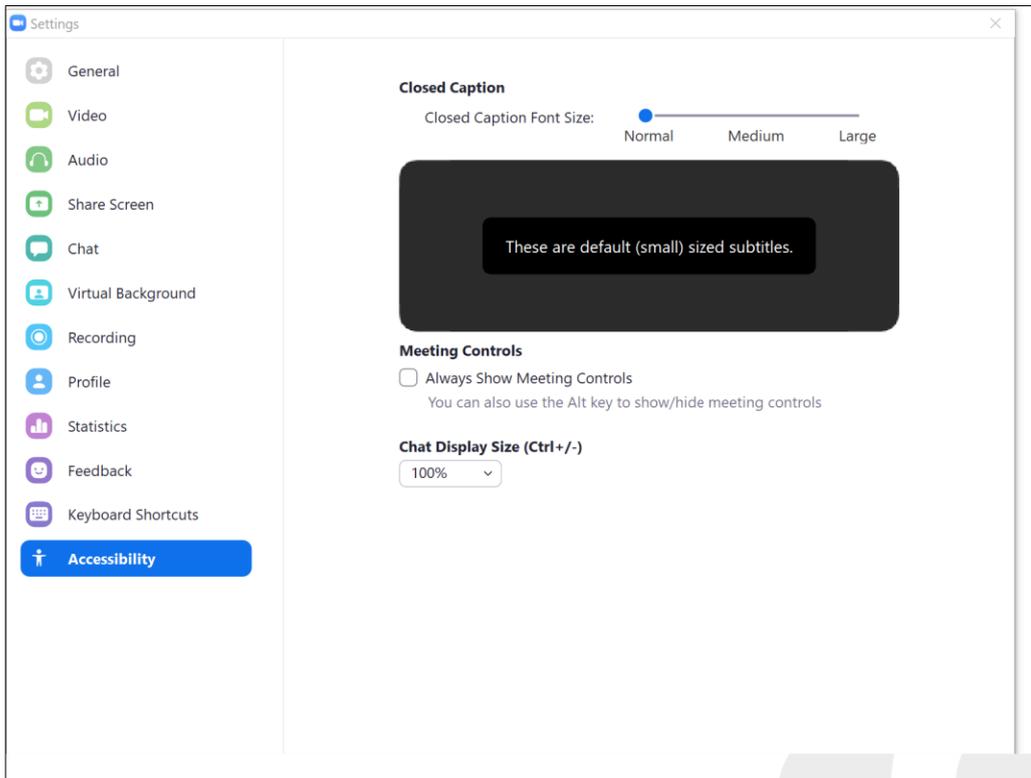
33. Ensure that you or other parties are not recording at any time during the mediation. If the recording is on, you will see the symbol below, typically in the top left-hand corner of your screen.



34. As the host you are the only member who can record.

### **Advanced Settings**

35. To access advanced settings, click on the carrot to the right of the mute and video buttons on the control panel. It will take you through to the following screen which will allow you to change additional settings.
36. You can use this to amend the setting to fit your needs and the points which are agreed with the parties.



## **Conclusion**

We at CEDR hope that you found this guide helpful. If you have any questions please contact CEDR by phone at 020 7536 6060 or email at [adr@cedr.com](mailto:adr@cedr.com).