

# HLAA Leadership Tech Workshop, March 25, 2021

## Session 1 How to Set Up a Zoom Meeting as a Host Zoom Account Setting, Recommendations

### Security

#### Require that all meetings are secured with one security option



Require that all meetings are secured with one of the following security options: a passcode, Waiting Room, or "Only authenticated users can join meetings". If no security option is enabled, Zoom will secure all meetings with Waiting Room. [Learn more](#)

Per new security guidelines, you cannot change this setting. Please contact your account admin for more information.

#### Waiting Room



When participants join a meeting, place them in a waiting room and require the host to admit them individually. Enabling the waiting room automatically disables the setting for allowing participants to join before host.

#### Waiting Room Options

The options you select here apply to meetings hosted by users who turned 'Waiting Room' on


- ✓ Everyone will go in the waiting room

[Edit Options](#) [Customize Waiting Room](#)

# Waiting Room Options

These options will apply to all meetings that have a Waiting Room, including standard meetings, PMI meetings.

Who should go in the waiting room?

- ☒ Everyone
- ☐ Users not in your account
- ☐ Users who are not in your account and not part of the allowed domains
- ☐ Users invited during the meeting by the host or co-hosts will bypass the waiting room 

If the host and co-hosts are not present or if they lose connection during a meeting:


- ☐ Move participants to the waiting room if the host dropped unexpectedly


Continue

Cancel



## Customize Waiting Room

Meeting ID : 888-888-888

Please wait, the meeting host will let you in soon. 



{ Your Meeting Topic }

Learn About Lipreading  

Logo should be in GIF/JPG/PNG format. The file size cannot exceed 1MB  
Logo minimum width or height is 60px and cannot exceed 400px

Close

## Meeting Passcode



All instant, and scheduled meetings that users can join via client, or room systems will be passcode-protected. The Personal Meeting ID (PMI) meetings are not included.

## Personal Meeting ID (PMI) Passcode



All Personal Meeting ID (PMI) meetings that users can join via client, or room systems will be passcode-protected.

## Require passcode for participants joining by phone



A numeric passcode will be required for participants joining by phone if your meeting has a passcode. For meeting with an alphanumeric passcode, a numeric version will be generated.

## Embed passcode in invite link for one-click join



Meeting passcode will be encrypted and included in the invite link to allow participants to join with just one click without having to enter the passcode.

## Only authenticated users can join meetings



The participants need to authenticate prior to joining the meetings, hosts can choose one of the authentication methods when scheduling a meeting. [Learn more](#)

## Meeting Authentication Options:

Sign in to Zoom (Default) [Edit](#) Hide in the Selection

☐ Allow authentication exception 

If Waiting Room is enabled, phone-only users will be placed in the Waiting Room.

If Waiting Room is not enabled, phone dial-in only users will:

- ☒ Be allowed to join the meeting
- ☐ Be blocked from joining the meeting

**Only authenticated users can join meetings from Web client**



The participants need to authenticate prior to joining meetings from web client

**Approve or block entry for users from specific countries/regions**



Determine whether users from specific regions or countries can join meetings/webinars on your account by adding them to your Approved List or Blocked List. Blocking regions may limit CRC, Dial-in, Call Me, and Invite by Phone options for participants joining from those regions.

**Schedule Meeting**

**Host video**



Start meetings with host video on

**Participants video**



Start meetings with participant video on. Participants can change this during the meeting.

## Audio Type

Determine how participants can join the audio portion of the meeting. When joining audio, you can let them choose to use their computer microphone/speaker or use a telephone. You can also limit them to just one of those audio types. If you have 3rd party audio enabled, you can require that all participants follow the instructions you provide for using non-Zoom audio.

☒ Telephone and Computer Audio

☐ Telephone


☐ Computer Audio

### Allow participants to join before host

Allow participants to join the meeting before the host arrives



### Enable Personal Meeting ID

A Personal Meeting ID (PMI) is a 9 to 11 digit number that is assigned to your account. You can visit [Personal Meeting Room](#) to change your personal meeting settings. [Learn more](#) 



### Use Personal Meeting ID (PMI) when scheduling a meeting

You can visit [Personal Meeting Room](#) to change your Personal Meeting settings.



### Use Personal Meeting ID (PMI) when starting an instant meeting



**Use Personal Meeting ID (PMI) when scheduling a meeting**




You can visit [Personal Meeting Room](#) to change your Personal Meeting settings.

**Use Personal Meeting ID (PMI) when starting an instant meeting**




**Mute all participants when they join a meeting**



Automatically mute all participants when they join the meeting. The host controls whether participants can unmute themselves. 

**Upcoming meeting reminder**



Receive desktop notification for upcoming meetings. Reminder time can be configured in the Zoom Desktop Client. 

**In Meeting (Basic)**

**Require encryption for 3rd party endpoints (SIP/H.323)**



By default, Zoom requires encryption for all data transferred between the Zoom cloud, Zoom client, and Zoom Room. Turn on this setting to require encryption for 3rd party endpoints (SIP/H.323) as well.

## Chat



Allow meeting participants to send a message visible to all participants

☐ Prevent participants from saving chat 

## Private chat



Allow meeting participants to send a private 1:1 message to another participant.

## Auto saving chats



Automatically save all in-meeting chats so that hosts do not need to manually save the text of the chat after the meeting starts.

## Sound notification when someone joins or leaves



Play sound for:

☐ Everyone


☒ Host and co-hosts only

When someone joins by phone:

☐ Ask to record their voice to use as the notification

## File transfer



Hosts and participants can send files through the in-meeting chat. 


## Feedback to Zoom



Add a Feedback tab to the Windows Settings or Mac Preferences dialog, and also enable users to provide feedback to Zoom at the end of the meeting

## Display end-of-meeting experience feedback survey



Display a thumbs up/down survey at the end of each meeting. If participants respond with thumbs down, they can provide additional information about what went wrong. 


## Co-host



Allow the host to add co-hosts. Co-hosts have the same in-meeting controls as the host.

## Meeting Polls



Allow host to use 'Polls' in meetings. Hosts can add polls before or during a meeting. 

## Always show meeting control toolbar



Always show meeting controls during a meeting 

## Show Zoom windows during screen share





## Screen sharing



Allow host and participants to share their screen or content during meetings

### Who can share?

☒ Host Only ☐ All Participants [?](#)

### Who can start sharing when someone else is sharing?

☒ Host Only ☐ All Participants [?](#)

## Disable desktop screen sharing for meetings you host



When this option is on, users can only share selected applications and files. [V](#)

## Annotation



Allow host and participants to use annotation tools to add information to shared screens [V](#)

☒ Allow saving of shared screens with annotations [V](#)

☐ Only the user who is sharing can annotate [V](#)

## Whiteboard



Allow host and participants to share whiteboard during a meeting [V](#)

☒ Allow saving of whiteboard content [V](#)

☐ Auto save whiteboard content when sharing is stopped [V](#)

## Remote control




During screen sharing, the person who is sharing can allow others to control the shared content

☒ Allow remote controlling user to share clipboard 


## Non-verbal feedback



Allow meeting participants to communicate without interrupting by clicking on icons (yes, no, slow down, speed up). These icons are found in the Reactions menu in the toolbar, and when selected, they display on the participant's video and in the participants list until dismissed. 


## Meeting reactions



Allow meeting participants to communicate without interrupting by reaction with emojis (e.g. clap, heart, laugh). These emojis are found in the Reactions menu in the toolbar, and when selected, they display on the participant's video and in the participants list for 10 seconds. Participants can change their emoji skin tone in Settings. 


## Allow removed participants to rejoin



Allow previously removed meeting participants and webinar panelists to rejoin 


### **Allow removed participants to rejoin**



Allow previously removed meeting participants and webinar panelists to rejoin 


### **Allow participants to rename themselves**



Allow meeting participants and webinar panelists to rename themselves. 

### **Hide participant profile pictures in a meeting**




All participant profile pictures will be hidden and only the names of participants will be displayed on the video screen. Participants will not be able to update their profile pictures in the meeting. 

## **In Meeting (Advanced)**

### **Report to Zoom**



Allow users to report meeting participants for inappropriate behavior to Zoom's Trust and Safety team for review. This setting can be found on the meeting information panel. 

### **Breakout room**



Allow host to split meeting participants into separate, smaller rooms

### Remote support

Allow meeting host to provide 1:1 remote support to another participant



### Closed captioning

Allow host to type closed captions or assign a participant/third party device to add closed captions



- ☒ Enable live transcription service to show transcript on the side panel in-meeting

### Save Captions

Allow participants to save fully closed captions or transcripts



### Far end camera control

Allow another user to take control of your camera during a meeting. Both users (the one requesting control and the one giving control) must have this option turned on.



### Group HD video

Activate higher quality video for host and participants. (This will use more bandwidth.)



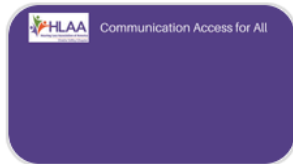
## Virtual background



Customize your background to keep your environment private from others in a meeting. This can be used with or without a green screen.


☒ Allow use of videos for virtual backgrounds 

### Manage virtual background




## Video filters



Turn this option on to allow users to apply filters to their videos 

## Identify guest participants in the meeting/webinar



Participants who belong to your account can see that a guest (someone who does not belong to your account) is participating in the meeting/webinar. The Participants list indicates which attendees are guests. The guests themselves do not see that they are listed as guests. 

**Auto-answer group in chat**

Allow user to add others to an 'Auto Answer Group'. Calls from members of a user's 'Auto Answer Group' will be automatically answered for that user.

**Only show default email when sending email invites**

Allow users to invite participants by email only by using the default email program selected on their computer

**Use HTML format email for Outlook plugin**

Use HTML formatting instead of plain text for meeting invitations scheduled with the Outlook plugin

**Allow users to select stereo audio in their client settings**

Allow users to select stereo audio during a meeting

**Show a "Join from your browser" link**

Allow participants to bypass the Zoom application download process, and join a meeting directly from their browser. This is a workaround for participants who are unable to download, install, or run applications. Note that the meeting experience from the browser is limited

**Show "Always Join from Browser" option when joining from join.zoom.us**

Allow account members to enable "Always Join from Browser" when they join meetings from join.zoom.us.

## Allow livestreaming of meetings



- ☐ Facebook
- ☐ Workplace by Facebook
- ☒ YouTube
- ☐ Custom Live Streaming Service

## Show a custom disclaimer when starting or joining a meeting




Create your own disclaimer that will be shown at the start of all meetings hosted by your account

Only IT admin can make changes for this setting

## Request permission to unmute



Select this option in the scheduler to request permission to unmute meeting participants and webinar panelists. Permissions, once given, will apply in all meetings scheduled by the same person. 

## Email Notification

### When a cloud recording is available



Notify host when cloud recording is available

## Invitation Email

Your meeting attendees will receive emails in language based upon their browser/profile settings. Choose languages which your expected attendees will receive content in to edit.

Choose email in language to edit

English



[Send me a preview email](#)

## Schedule Privilege

You can assign users in your account to schedule meetings on your behalf. You can also schedule meetings on behalf of someone that has assigned you scheduling privilege. You and the assigned scheduler must be on a Paid plan within the same account.

Assign scheduling privilege to +

No one

I can schedule for

No one

## Integration Authentication

Key: \*\*\*\*\*

Secret: \*\*\*\*\*



Regenerate