

## Zoom Tips & Best Practices

Zoom is a video conferencing service for virtual meetings. This document was created to share Zoom best practices for all of Jefferson Regional Foundation's virtual meetings. This document also provides some detailed how tos for Zoom security, basic meeting set up, and advanced features.

### Best Practices for Virtual Meetings

#### Before the Meeting:

- 1. Determine What Features Will Work Best for Your Meeting:**
  - a. Settings should indicate that the meeting will not begin until speaker has arrived.
  - b. Participant's video should be turned on and participants should be notified ahead of time that their video will be shown. The exception being large calls with limited participant interaction.
  - c. Settings should indicate that participants are muted upon entry. Participants are able to unmute themselves when needed.
  - d. For highly interactive meetings, chat, breakout rooms, and polling features are described in detail below.
  - e. Record meetings (onto the cloud) that the Foundation wants to be shared broadly to a wide audience and to partners who were unable to attend. The recording can be uploaded onto the Jefferson Community Collaborative's YouTube.
- 2. Ensure that the following security tips are in place (details can be found below):**
  - a. Enable registration
  - b. Enable waiting room
  - c. Lock screen sharing
  - d. Mute participants upon entry
- 3. Share Meeting Format with Attendees in Advance:**
  - a. **But Always Provide a Call in Option:** Video conferencing can work very well, but it relies on a strong internet connection that may not always be available. People need the ability to participate via audio.
  - b. Specify if their video will be expected / turned on at the start of the call.
  - c. Provide meeting agenda, handouts, slides, attachments, and notes to navigate zoom (notes template below).

#### During the Meeting:

- 4. Start the meeting early so participants can enter the zoom meeting, and you can provide any needed technical assistance**
- 5. Hosts or Co-hosts Should Introduce the Participants**
  - a. For smaller calls, guide participants to introduce themselves and possibly include a small icebreaker (15 and below).
  - b. For medium sized calls briefly introduce participants (name and organization) on the call, and ask if anyone has not been introduced (over 15 participants).
  - c. Unnecessary for large calls (over 50 participants).
- 6. Have two staffers on for larger interactive meetings**
  - a. Be sure to have an additional staff member or participant identified to help with technical assistance or take notes on the call.

- b. Good practice to have chat and presentation run by two separate people, the host can designate a co-host to share functions (details below).
- 7. Take Advantage of Opportunities to Interact**
  - a. Utilize breakout rooms if it makes sense for your call (more on this function below).
- 8. Utilize the Mute Function**
  - a. Mute yourself by pressing the microphone icon, or the host or co-host can mute participants by either finding them under “manage participants” or find their image and toggle through the options to mute them.
  - b. Unmute yourself by pressing the microphone, or temporarily unmute yourself by pressing the space bar while talking.
  - c. Although participants should be muted upon entry, sometimes participants can become unmuted and create ambient background noise that disrupts the meeting. If you’re hosting or a co-host you can mute participants.
- 9. Check on Call in Participants**
  - a. Remember to ask those who called via phone in if they have any comments or questions.
- 10. Evaluation**
  - a. Polling is a great way to gather participant evaluations. Zoom allows single choice or multiple-choice responses but does not allow for open ended responses. Consider signaling for participants to respond to open ended questions in the chat.
  - b. Zoom also has “reactions” (thumbs up and clapping) available in the tool bar, that can be used for quick evaluations (e.g. if the slideshow is being shared properly etc.).

#### **After the Meeting:**

- 11. Debrief Meetings**
- 12. Send a Follow Up Email**

## **Detailed How-Tos: Setting Up Your Meeting**

### **13) Scheduling meetings:**

- a) To schedule a meeting, click the “schedule a meeting” button at the top of the Zoom web page. Sometimes I find it can disappear from the home page, but if you click “my account” it will appear at the top. Alternatively, you can also schedule meetings from the account profile tool bar, located on the left, and click “meetings”.
- b) Ensure that the time zone is correct when setting the time for the meeting.
- c) Under “Meeting Options”, enable the function to “mute participants upon entry”.
- d) When you schedule and create a meeting, you are now the meeting host, and have the main controls over the meeting – you are able to make co-hosts and can also designate another participant as the host.

### **14) Editing meetings:**

- a) Hosts are able to edit meeting settings by clicking “my account” > “meetings” > clicking on the meeting you want to edit > scrolling to the bottom of the page > clicking “edit meeting”.
- b) Please note that certain edits will actually change the meeting link, so if you are making edits after sending the original meeting information, verify that it is still the same.
  - i) Making edits to basic features such as muting, video, adding a poll, adding breakout sessions, will not change the original meeting link.

- ii) Adding required registration or password protection will change the original meeting link.

#### 15) Invites:

- a) There are several ways to invite participants to a Zoom meeting. You can manually copy the meeting information by clicking on your meeting, and then clicking the text that says “copy the invitation”. This can then be sent out in an outlook email or calendar invitation.
- b) You can also add participants to a meeting during the call by sending the invite in an email, or again copying the information into an email to be sent out. There is a “copy invitation” button which will copy the meeting details onto your clipboard, located on the right side of the meeting details.

#### 16) Co-Hosts:

- a) Hosts can create co-hosts on a Zoom call to give them access to the same in meeting controls as the host. There are no limits to how many co-hosts can be on a call.
- b) To enable, find the person you want to be a co-host, and click on the buttons on the top right of their box, and click “make co-host”.
- c) If you find you are unable to make a co-host, the co-host function may be disabled on your account. Go to “my account” > “settings” > click to enable “co-host”.

#### 17) Registration:

- a) Scheduling a meeting that requires registration will allow you to have your participants register with their e-mail, name, other questions, and custom questions. You can also generate meeting registration reports if you want to download a list of people that registered.
- b) Enable registration when scheduling a meeting. Click “required” to enable.
- c) <https://support.zoom.us/hc/en-us/articles/211579443-Registration-for-Meetings>

### Detailed How-Tos: Advanced Features

#### 18) Screen Sharing:

- a) Screen sharing is a beneficial feature which allows hosts, speakers, or participants to share their screen and display it to all of the participants on the call. You are able to share anything on your screen including slides, documents, webpages, or a whiteboard for notes.
- b) To access, during a meeting click the “share” button located in the middle of the zoom tool bar and identify the item you’d like to share.

#### 19) Q&A chats:

- a) The chat box can send messages either publicly or privately to individual users.
- b) The host can set the chat for participants to “chat with no one”, “the host only”, “everyone publicly”, or “everyone publicly and privately”.
- c) Hosts are able to change the settings on the chat once they are in the meeting. To change the settings, open the chat and click on the three dots to the bottom right of the chat.

#### 20) Breakout rooms

- a) The host can send participants into breakout rooms. Hosts can determine the number of rooms that participants are sent into and where the participants are sent. Determining what break out room participants are sent to can be assigned either manually by the host or randomly generated.

- b) Breakout rooms can be assigned before the meeting: when scheduling a meeting click “breakout room pre-assign”. Hosts 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.
- c) Hosts can bring everyone back to the “main session” and close the breakout room sessions. Participants will be shown a countdown from 60 seconds, and then their breakout room will close and everyone will be sent back to the “main session”. Participants are also able to leave the breakout room to re-enter the “main session” whenever they would like.

#### **21) Polling**

- a) Zoom allows for up to 10 questions in each poll and allows hosts to create a max of 25 polls for a single meeting. Polls questions can be multiple choice or simple yes/no format, but are unable to be open-ended within the poll format. For open-ended questions, indicate for participants to respond in the chat.
- b) There is an anonymous feature (if not chosen, the final poll results will list the participant’s names and email addresses).
- c) Hosts are able to administer the polls when they choose during the event, and have the ability to share the results live in the meeting.
- d) To make a poll, schedule the meeting, and then select to edit the meeting. At the bottom of the edit page, there will be an option to create a poll.
- e) If you find you are unable to make a poll, the polling function may be disabled on your account. Go to “my account” > “settings” > click to enable “polling”.

**22) For assistance with additional features, visit:** <https://blog.zoom.us/wordpress/>

## **Zoom Security Tips: How to Prevent Zoom Bombing**

#### **23) Registration:**

- a) Enable registration so you know who will be on the call. When registration is required, rather than a link to the zoom meeting or call information, participants are given a link where they must register for the meeting. Hosts are then able to see the names and emails of the registered participants in the meeting details.
- b) This function is available when scheduling the meeting.

#### **24) Waiting room:**

- a) Enable waiting room to select who is allowed into the call, available when scheduling or editing the meeting. The host then will have to allow each individual participant entrance into the meeting.
- b) This feature is less beneficial with large groups but can be beneficial to choose when to allow a speaker to join the call as they wait in the waiting room.
- c) Unless your Zoom has not been updated, this should be enabled as a default setting.

#### **25) Restrict Screen Share:**

- a) Disable the participant screen sharing function. This disallows participants to share their screen with the group.
- b) To enable, during the call, click the little arrow next to “screen share” and click “advanced sharing options” and under the middle panel titled “who can share” press “only host”.

#### **26) Manage Participants: Mute & Remove:**

- a) When scheduling the meeting, select “mute participants upon entry”. Hosts and co-hosts are able to mute and remove participants as needed.

- b) Find the square of the person you want to mute or remove, and in the upper right-hand corner of their image you can mute or remove them. You can also press “manage participants” to mute or remove participants.
  - c) Hosts can also stop a participant’s video.
- 27) Password Required for Meeting Entry:**
- a) Enable passwords on meetings which would be necessary to enter, available when scheduling the meeting.
  - b) Unless your Zoom has not been updated, this should be enabled as a default setting.
- 28) Lock Meetings:**
- a) Hosts are able to “lock a meeting”, not allowing any other participants to join.
  - b) Useful for small meetings, or staff meetings when you can be sure all participants have joined.
- 29) Restrict the Chat:**
- a) Hosts can alter the chat to only allow participants to chat with the host.
  - b) Be sure that this function makes sense with your meeting.
- 30) Zoom has now added a “security” button to the toolbar with quick access to many of these functions.**

## **Zoom on iPad and iPhone (phone/tablet/app assistance)**

- 31) Zoom must be installed on your device from the app store.**
- 32) Audio & Video:** When opening the app for the first time, it will ask you for permission to use the device’s microphone and camera. Grant permission for Zoom to use the microphone and camera.
- a) If you need to change permission settings, or did not allow by accident, go into your device settings and scroll to find the “Zoom” application. Tap on the Zoom app and ensure that “microphone” and “camera” are enabled.
- 33) To join the meeting:** press “join a meeting” and enter the meeting ID number.
- 34) Once you are in the meeting,** the top of the screen will show your meeting controls. The tool bar that appears at the top will allow you to turn on your camera and microphone.
- a) If your meeting controls do not appear on your screen during a meeting, go to the Zoom app and click “settings” and then press “meetings” and scroll to find and turn on “always show meeting controls” so meeting controls (the tool bar) are always visible on the screen.
- 35) Videos that step you through the above:**
- a) <https://www.youtube.com/watch?v=KIdodM2dvxA>
  - b) <https://www.youtube.com/watch?v=2bLIVzPJTdQ>

## **Sample Instructions for Meeting Speakers**

1. Please join the meeting using either your phone or computer with the Zoom Meeting details provided below. Your video will be shared when you enter the Zoom meeting.
2. The host will be clicking through a simple slideshow as you present. All participants will be automatically muted. When it is your turn to speak, please “unmute” yourself by...
  - o If you are joining by computer, please click the microphone symbol in the corner of your screen that says “unmute” or press on the space bar to temporarily unmute yourself.
  - o If you are calling in by phone, please press \*6 to unmute (video not possible through call in). If you experience any issues in joining the call, don’t sweat it. We’ll be moderating and can provide live assistance.

## **Sample Meeting Instructions for Participants**

1. Please join the meeting using either your phone or computer with the Zoom Meeting details provided below. Your video will be shared when you enter the Zoom meeting.
2. All participants will be automatically muted upon entry. When you need to speak, please “unmute” yourself by...
  - If you are joining by computer, please click the microphone symbol in the corner of your screen that says “unmute” or press on the space bar to temporarily unmute yourself.
  - If you are calling in by phone, please press \*6 to unmute (video not possible through call in). If you experience any issues in joining the call, don’t sweat it. We’ll be moderating and can provide live assistance.