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## Step-By-Step Instructions for Conducting Controlled Meetings Using Zoom

Johns Hopkins has an enterprise agreement with the virtual conferencing service Zoom. This service is managed by IT@JH. Information, training guides, instructions, etc. are available at <https://uis.jhu.edu/zoom/>.

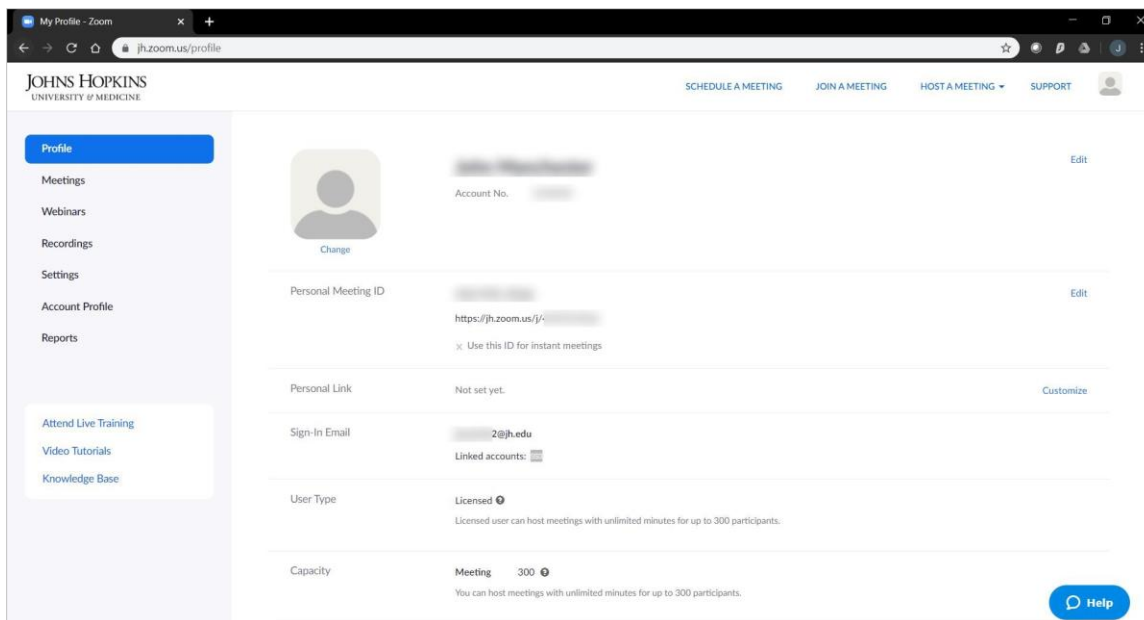
The key recommendations for using Zoom for structured, controlled meetings are:

- Always use a password for meetings to prevent unwanted participants from entering.
- Use the *Waiting Room* to control access to the meeting.
- Control the ability for participants to speak by muting them and preventing them from unmuting themselves. Unmute them as necessary.
- Prevent participants from screen sharing.
- Assign co-hosts to manage Zoom to allow presenter to focus on presentation.
- Ensure that hosts and co-hosts know how to stop video for any participant should the need arise.
- Test the scheduling and management of meetings in advance using the locations and hardware that will be used in the real meeting. This will ensure that:
  - Network connectivity to the devices is adequate.
  - Camera and microphone quality are appropriate and effective.
  - Lighting, setting, and background is appropriate.
  - Hosts and co-hosts know how to manage Zoom settings appropriately.
  - Content can be shared if needed.
  - Participants can be muted, admitted, removed, and controlled.
- The link to the meeting will contain an embedded password. While this may be shared with all invitees and participants, it should not be posted publicly on websites or social media. Zoom meeting links that are exposed to the public may result in unwanted and possibly disruptive participants joining. If this happens, the host/co-host should immediately remove them from the meeting. The waiting room feature will help, but hosts/co-hosts may not always know all of the names of people to be admitted and may inadvertently admit a 'bad actor'.

### **Profile**

The profile of the account being used to schedule the meeting should be reviewed prior to scheduling the meeting. Enterprise account provided by JHU is highly recommended.

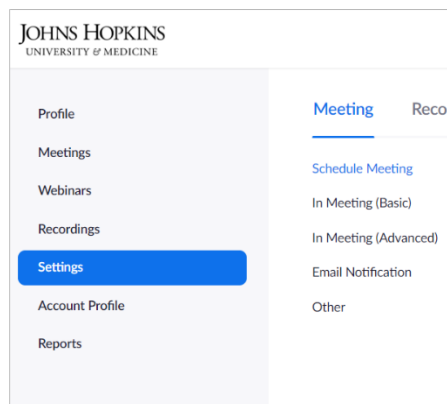
- Some accounts have limits to how long the meeting can last, or how many participants can join. Ensure that the Host account has adequate capacity for the meeting (time and number of participants).



## Settings

On the account to be used for hosting the conference, review the settings. The settings determine the default values for what happens when scheduling or running a meeting.

See [Zoom Settings](#) listing at the end of this document.




## Scheduling the Meeting

From the account configured (above) for the meeting, click on **SCHEDULE A MEETING**.



The first part is intuitive. Pay attention to the AM/PM and Time Zone.

Topic	<input type="text" value="Meeting Title"/>
Description (Optional)	<input type="text" value="Enter your meeting description"/>
When	<input type="text" value="03/26/2020"/>  <input type="text" value="2:00"/> <input type="text" value="PM"/>
Duration	<input type="text" value="1"/> hr <input type="text" value="0"/> min
Time Zone	<input type="text" value="(GMT-4:00) Eastern Time (US and Canada)"/>
	<input type="checkbox"/> Recurring meeting

For *Registration*, leave unchecked unless you want to manage preregistration of guests. More information is available at <https://support.zoom.us/hc/en-us/articles/204619915-Scheduling-a-Webinar-with-Registration>.

For *Meeting ID*, do not use a Personal Meeting ID. Choose **Generate Automatically**. This will create a random, unique ID for this meeting.

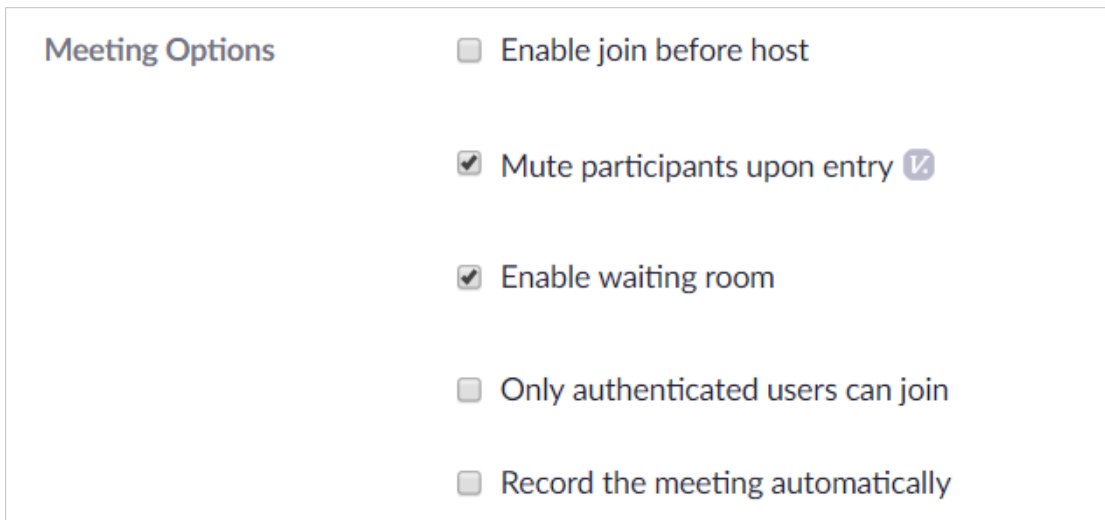
For *Meeting Password*, always use a password. Using the default will suffice, but a longer one would be better.

Registration	<input type="checkbox"/> Required
Meeting ID	<input checked="" type="radio"/> Generate Automatically <input type="radio"/> Personal Meeting ID <input type="text" value=""/>
Meeting Password	<input checked="" type="checkbox"/> Require meeting password <input type="text" value="180828"/>


For *Audio*, it is better to allow for **Both** to provide flexibility for guests.

Audio	<input type="radio"/> Telephone <input type="radio"/> Computer Audio <input checked="" type="radio"/> Both
	Dial from United States of America <a href="#">Edit</a>

For *Meeting Options*:



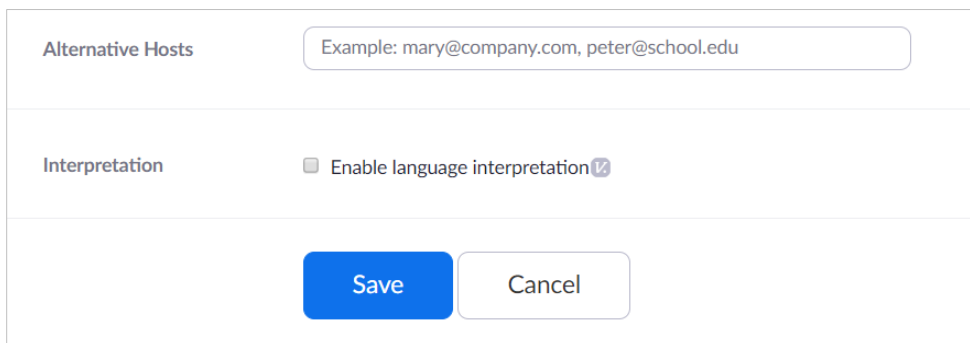
The screenshot shows the 'Meeting Options' section of the Zoom interface. It contains five settings, each with a checkbox:

- Enable join before host
- Mute participants upon entry 
- Enable waiting room
- Only authenticated users can join
- Record the meeting automatically

*Alternative Hosts* option allows you to schedule meetings and designate another licensed user on the same account to start the meeting or webinar if you are unable to. For example, if the Academic Coordinator is the *primary host*, it may make sense to add the advisor and the student as *alternative hosts*.

Additional information about *Interpretation* is available at <https://support.zoom.us/hc/en-us/articles/360034919791-Language-interpretation-in-meetings-and-webinars>.

After all of the values are set, click on **Save** to create the meeting.



The screenshot shows the final confirmation screen for creating a meeting. It has two main sections:

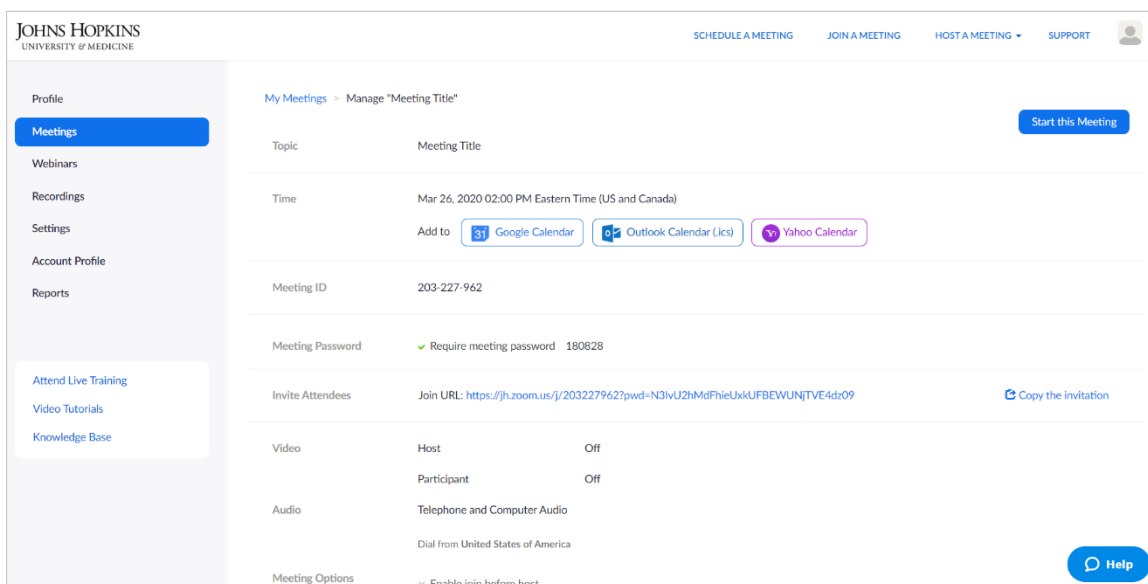
- Alternative Hosts**: A text input field containing the example text "Example: mary@company.com, peter@school.edu".
- Interpretation**: A checkbox labeled "Enable language interpretation" which is currently unchecked.

At the bottom, there are two buttons: a blue "Save" button and a white "Cancel" button.

The meeting settings will display. These will also be listed in the *Meetings* section of the account that created the meeting under the meeting *Topic*.

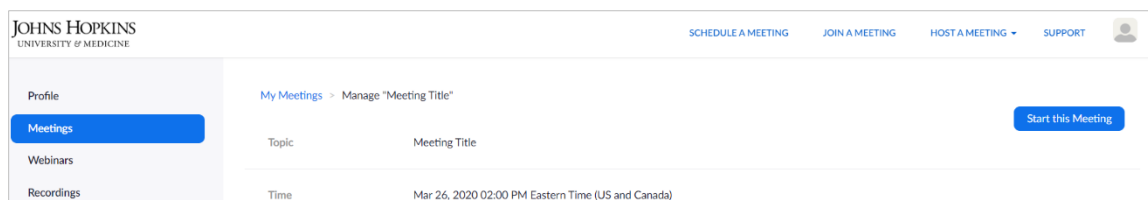
*Note that the Invite Attendees section includes a URL. This URL contains both the meeting ID and the password. This allows you to send a 'single click' link to invitees.*

If you click on **Copy the Invitation**, it provides more details, including phone numbers for people who choose not to use Computer Audio.



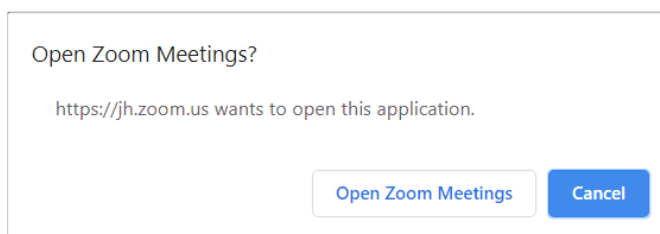
## **At Meeting Time**

Using the account that was used to schedule the meeting, or the account of the *Alternative Host*, find the meeting under *Meetings* and click on **Start this Meeting**.



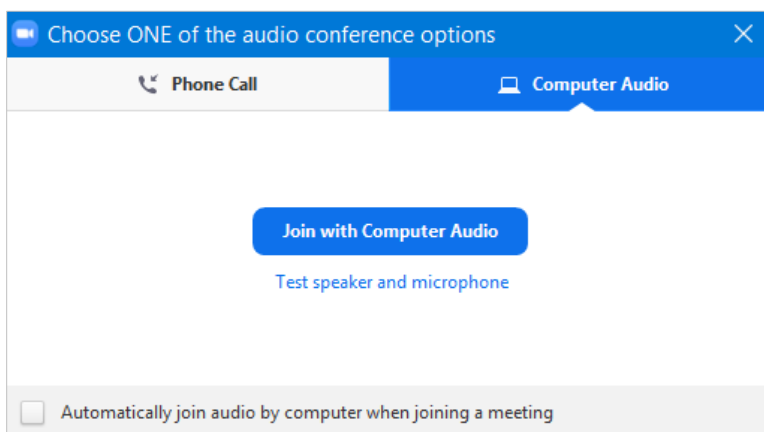
The system will prompt you to open the Zoom application. Click **Open Zoom Meetings**.

Meeting participants will see a similar prompt when they click the link to attend the meeting.



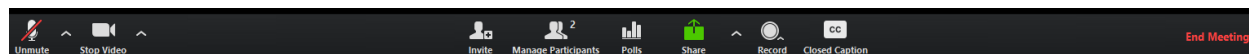
The system will prompt you to choose a method for meeting audio.

Meeting participants will see a similar prompt as they enter the meeting.



## **As Participants Arrive**

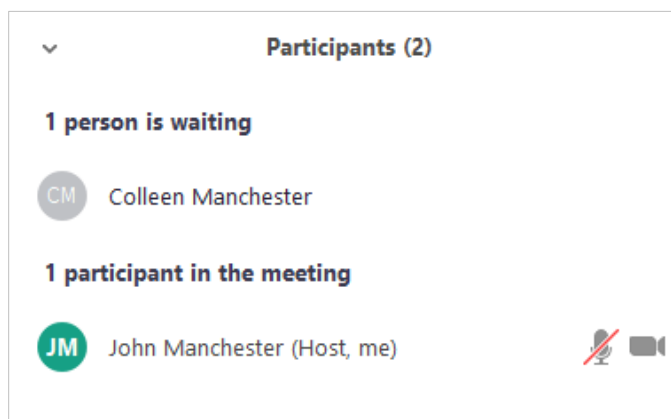
The following toolbar will display at the bottom of the *Host* screen.



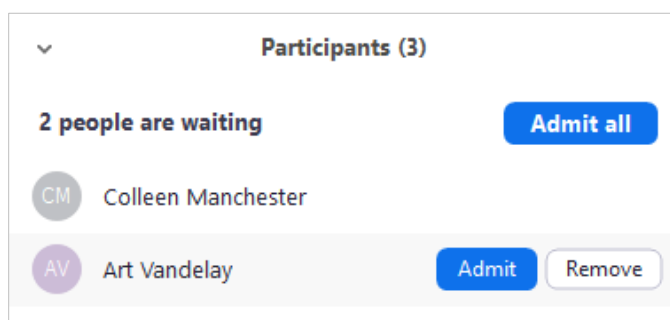
These tools are self-explanatory. The **Mute/Unmute** and **Start/Stop Video** buttons are for the host computer.

To manage actions of the participants, click on the **Manage Participants** button.

As participants arrive, they will be in the *Waiting Room*. The host/co-host will see them listed as such in the *Manage Participants* window.

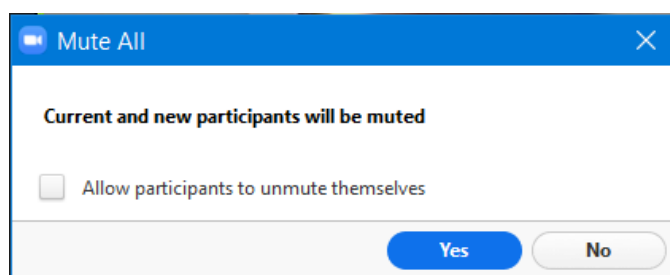


While in the *Waiting room*, participants will see a message on their screen stating, "Please wait, the meeting host will let you in soon".

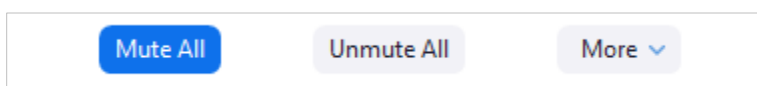


When the meeting is ready to start, the host can choose to **Admit All** or select participants and **Admit** them individually.

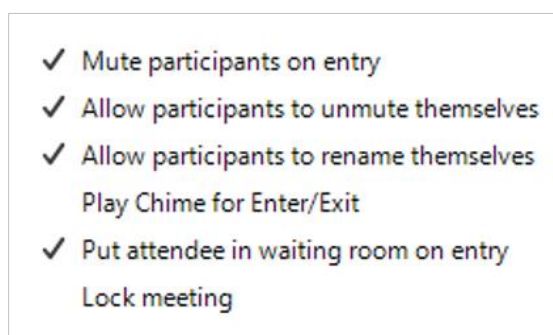
Once admitted, participants will see whatever content is being displayed, and hear audio that is being presented.



If set correctly, participants will be muted upon entry. However, they may be able to unmute themselves. To control this, use the controls at the bottom of the *Participants* panel.



Select **More**. The following list will display:



Ensure that **Allow participants to unmute themselves** is unchecked.

## **Assigning Co-Hosts**

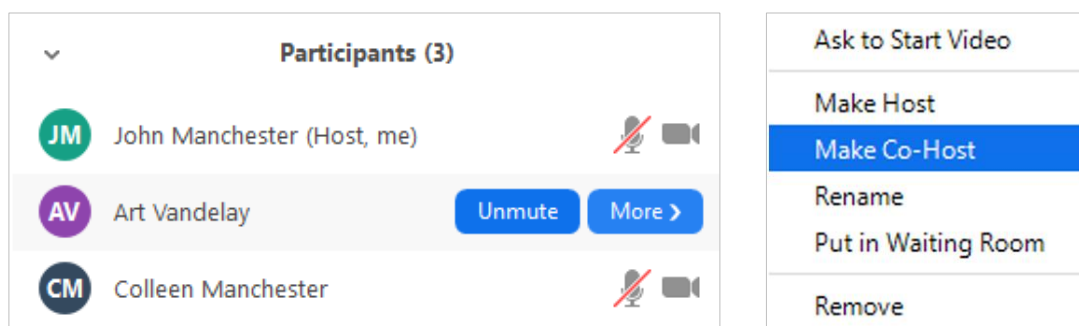
The actions of participants can be managed by either the host or a co-host using the *Manage Participants* panel.

The presenter should be focused on their presentation and not the administration of Zoom, but the *Host* role is the one that will not be muted when the **Mute All** button is pressed. As such, it is reasonable to have the main presenter be the host, but have a co-host assigned to manage the participants panel.

The host can assign co-hosts. This should happen before the meeting begins (before participants are allowed into the meeting).

### *To Assign a Co-Host*

Select a participant (hover over their name), click on **More** and then **Make Co-Host**.



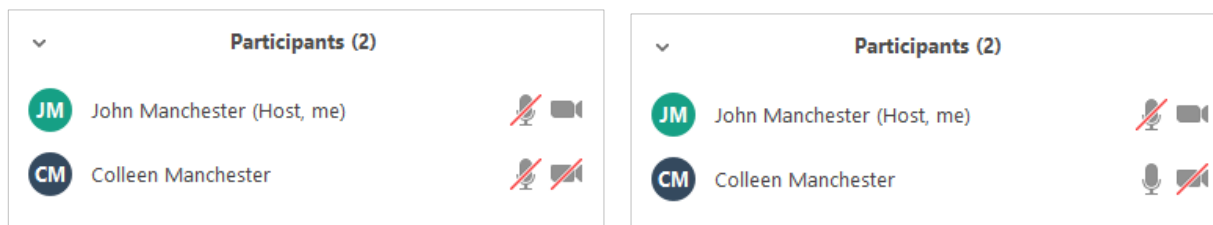
## **During the Meeting**

The significant participant administration during the meeting is allowing/restricting entry, monitoring for participant feedback, and unmuting/muting participants when appropriate.

### *To Mute or Unmute Participant*

Selecting the microphone next to a participant name will attempt to mute or unmute them. When unmuting, the participant may receive a popup stating, "The host would like you to unmute your microphone". The participant may choose **Unmute Me** or **Later** (or close the popup).

The icon next to an unmuted participant will show without the red line through it.

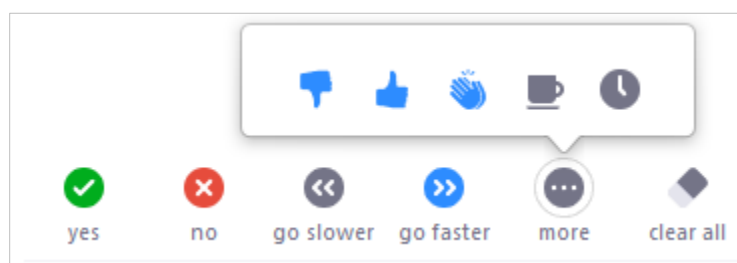


### *Participant Feedback*

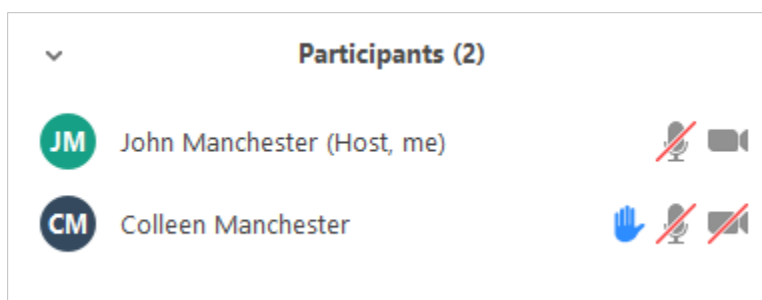
Participants may interact with the host through the icons at the bottom of their *Participants* panel.

Their options include 'raise hand' (not in graphic below), **yes**, **no**, **go faster**, **go slower**, 'thumbs up', 'thumbs down', 'clap', 'I need a break', and 'away'.

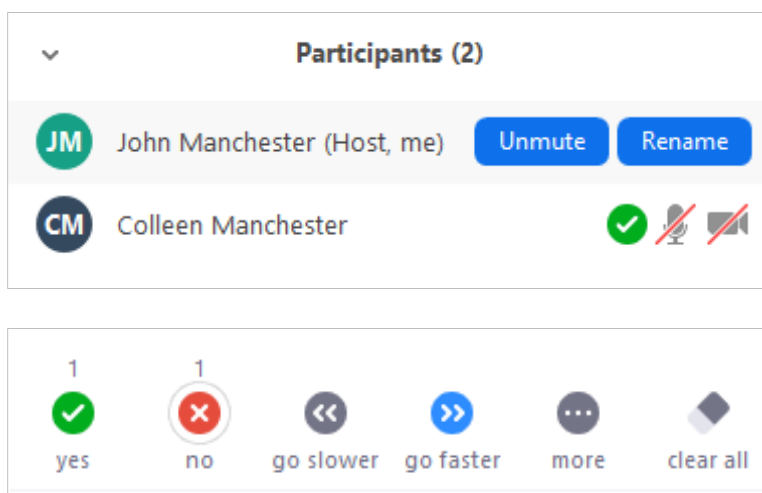




As participants click on these icons they will display (only one at a time) next to their name.



For the response type icons (yes, no, etc.), the host's icons will display the totals of each responses in addition to placing the appropriate icon next to each name.



Host/co-host can clear all feedback by clicking on **clear all**.

### **Using Participant Feedback to Conduct a Q&A Session**

At the appropriate times during the meeting, questions may be solicited from participants. Participants should be instructed to click the 'raise hand' icon in their *Participants* panel.

The co-host may then select individual participants, unmute them (they may need to unmute themselves also), and inform them that it is their turn to speak.

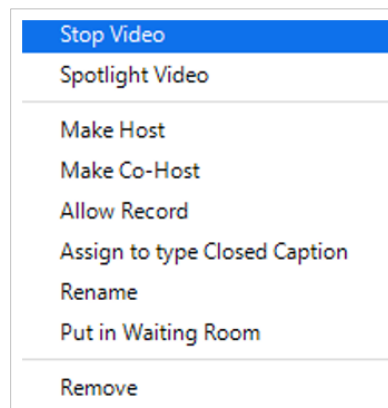
## **Use of Video**

Zoom meetings are designed to be a collaborative event, with all participants being able to turn on their video and audio and see who else is in attendance.

The default behavior in Zoom meetings is that a box will appear for each participant with their name in it. If they choose to **Start Video**, their video feed will display in that box. This may be appropriate for an interactive session that includes a Q&A session or presentations from more than one person.

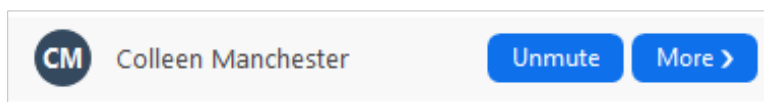
If video feed from all participants is distracting or unwanted, they could be asked to **Stop Video** for themselves until they are speaking. The host and co-host retain the ability to select any participant and **Stop Video**. Similarly, a participant may be selected and **Spotlight Video** chosen to make their video more prominent in participants' displays.

Zoom also provides a service called *Webinars* that have different controls and are intended for virtual gatherings of larger groups of people. Webinar settings are out of scope for this document.

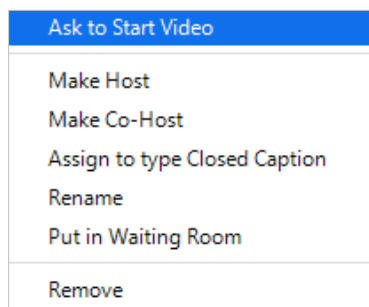


## **Other Host Controls of Participants**

Hover over any participant and click on **More**.



These options will be available.



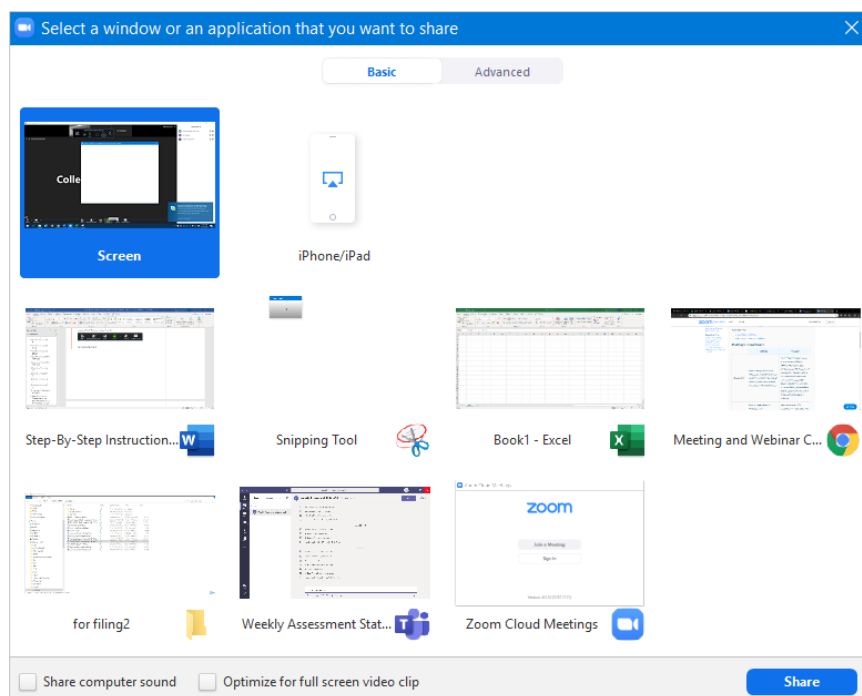
After you *Put in Waiting Room*, you may select that participant and *Admit* them back to the meeting. If you *Remove* them, the meeting will end for them and they will not be able to return.

## **Screen Sharing**

The host or co-host may share screen content during the presentation. To share, click on **Share** in the bottom toolbar.



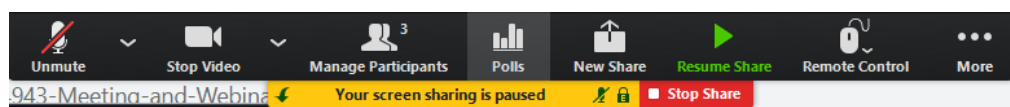
A box will display allowing selection of the content to be shared.



If the content being shared includes audio/video, the checkboxes at the bottom should be checked to share the computer audio and optimize video.

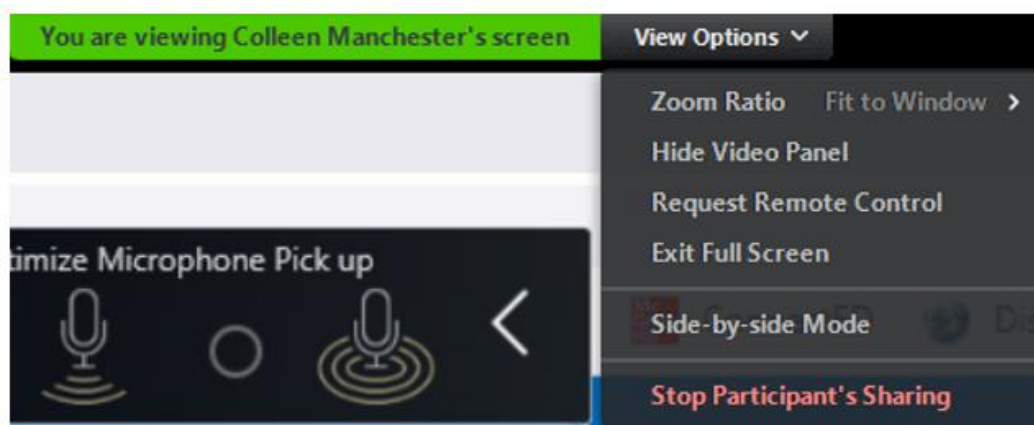
Click on **Share** once the correct option is selected.

Sharing can be paused or stopped using the toolbar, which will have moved to the top of the screen.

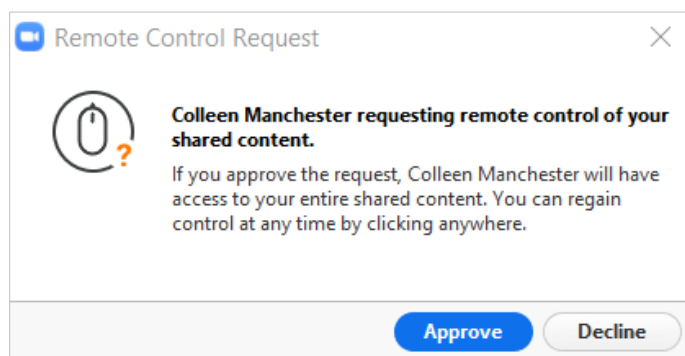


## **Remote Control of Screen Sharing**

While you are sharing a screen, participants may choose to **Request Remote Control** of your screen.



If remote control is requested, a dialog box will appear on the screen of the person whose content is being shared.



Remote control can be approved or declined.

Any participant that abuses the ability to request remote control may be removed from the meeting.

## **Zoom Settings**

The following settings are recommended.

*Note: The settings in **RED** differ from the default settings offered by Zoom.*

### **Host video**

Start meetings with host video on - **DISABLE**

### **Participants video**

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

### **Audio Type**

Determine how participants can join the audio portion of the meeting... - Telephone and Computer Audio

### **Join before host**

Allow participants to join the meeting before the host arrives - **DISABLE**

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

**Require a password when scheduling new meetings**

A password will be generated when scheduling a meeting and participants require the password to join the meeting. - **ENABLE**

**Require a password for instant meetings**

A random password will be generated when starting an instant meeting - **ENABLE**

**Require a password for Personal Meeting ID (PMI) - All meetings using PMI**

**Embed password in meeting link for one-click join**

Meeting password will be encrypted and included in the join meeting link to allow participants to join with just one click without having to enter the password. - **ENABLE**

**Require password for participants joining by phone**

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

**Mute participants upon entry**

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

**Upcoming meeting reminder**

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

**Require Encryption for 3rd Party Endpoints (H323/SIP)**

Zoom requires encryption for all data between the Zoom cloud, Zoom client, and Zoom Room. Require encryption for 3rd party endpoints (H323/SIP). - **DISABLE**

**Chat**

Allow meeting participants to send a message visible to all participants - **DISABLE**

**Private chat**

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

**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. - **DISABLE**

**Play sound when participants join or leave**

Play sound when participants join or leave - **DISABLE**

**File transfer**

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

**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 - **DISABLE**

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### **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. – DISABLE

### **Co-host**

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

### **Polling**

Add 'Polls' to the meeting controls. This allows the host to survey the attendees. – **ENABLE**

### **Allow host to put attendee on hold**

Allow hosts to temporarily remove an attendee from the meeting. – **ENABLE**

### **Always show meeting control toolbar**

Always show meeting controls during a meeting – DISABLE

### **Show Zoom windows during screen share** – DISABLE

### **Screen sharing**

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

Who can share? – HOST ONLY

Who can start sharing when someone else is sharing? – HOST ONLY

### **Disable desktop/screen share for users**

Disable desktop or screen share in a meeting and only allow sharing of selected applications – DISABLE

### **Annotation**

Allow participants to use annotation tools to add information to shared screens – **DISABLE**

### **Whiteboard**

Allow participants to share whiteboard during a meeting – **DISABLE**

### **Remote control**

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

### **Nonverbal feedback**

Participants in a meeting can provide nonverbal feedback and express opinions by clicking on icons in the Participants panel. – **ENABLE**

### **Join different meetings simultaneously on desktop**

Allow user to join different meetings at the same time on one desktop device – DISABLE

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

Allows previously removed meeting participants and webinar panelists to rejoin – DISABLE

### **Breakout room**

Allow host to split meeting participants into separate, smaller rooms – DISABLE

### **Remote support**

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

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### **Closed captioning**

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

### **Save Captions**

Allow participants to save fully closed captions or transcripts – **DISABLE**

### **Language Interpretation**

Allow host to assign participants as interpreters who can interpret one language into another in real-time. Host can assign interpreters when scheduling or during the meeting. – **ENABLE**

### **Far end camera control**

Allow another user to take control of your camera during a meeting. – **DISABLE**

### **Group HD video**

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

### **Virtual background**

Allow users to replace their background with any selected image. Choose or upload an image in the Zoom Desktop application settings. – **DISABLE**

### **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. – **DISABLE**

### **Auto-answer group in chat**

Enable users to see and add contacts to 'auto-answer group' in the contact list on chat. Any call from members of this group will be automatically answered. – **DISABLE**

### **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 – **DISABLE**

### **Use HTML format email for Outlook plugin**

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

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

Allow users to select stereo audio during a meeting – **DISABLE**

### **Allow users to select original sound in their client settings**

Allow users to select original sound during a meeting – **DISABLE**

### **Attention tracking**

Allows the host to see an indicator in the participant panel if a meeting/webinar attendee does not have Zoom in focus during screen sharing. – **DISABLE**

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## **Waiting room**

Attendees cannot join a meeting until a host admits them individually from the waiting room. If Waiting room is enabled, the option for attendees to join the meeting before the host arrives is automatically disabled. – [ENABLE](#)

**Choose which participants to place in the waiting room:** - All Participants

\* Note that there is an option to edit the message that participants see while in the waiting room.

## **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. – [DISABLE](#)

**Allow live streaming meetings** – [DISABLE](#)

## **When a cloud recording is available**

Notify host when cloud recording is available – [ENABLE](#)

## **When attendees join meeting before host**

Notify host when participants join the meeting before them – [ENABLE](#)

## **When a meeting is cancelled**

Notify host and participants when the meeting is cancelled – [ENABLE](#)

## **When an alternative host is set or removed from a meeting**

Notify the alternative host who is set or removed – [ENABLE](#)

## **When someone scheduled a meeting for a host**

Notify the host there is a meeting is scheduled, rescheduled, or cancelled – [ENABLE](#)

## **When the cloud recording is going to be permanently deleted from trash**

Notify the host seven days before the cloud recording is permanently deleted from trash – [ENABLE](#)

## **Blur snapshot on iOS task switcher**

Enable this option to hide potentially sensitive information from the snapshot of the Zoom main window. This snapshot display as the preview screen in the iOS tasks switcher when multiple apps are open. – [DISABLE](#)

## **Direct call a room system**

Enable direct call to a room system from client – [DISABLE](#)