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.


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.

For Audio, it is better to allow for Both to provide flexibility for guests.
For Meeting Options:

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

**Alternative Host** 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*.


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

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*.

![Participants Panel]

**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.

![Unmute Participant]

*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**
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
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
**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**
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