u3a

London Region of U3As

SHARED PRACTICE GUIDE 009 – Zoom Guide for Hosts
Rev 04-5

1.   Introduction

Shared practice guides (SPG) are a vehicle to share knowledge between the U3As in the London area. They are created by collating knowledge and experiences from those U3As. They are only a guide – what worked for one U3A might not work for your U3A. If in your experience something is wrong or you disagree with something, please write in to allow an update to be created and published. It's hoped these Guides will grow over time with more shared experiences.

Much of this Guide is applicable to Zoom Basic and Zoom Pro accounts. However there are some specifics regarding Zoom Pro. This is added as a separate Section below.

2.   Scope

This particular SPG addresses the aspect of how to hold (or 'Host') an online meeting using the 'Zoom' software.

3.   Background

During the Coronavirus crisis and UK government national guidance a number of normal U3A activities have had to be curtailed or cancelled. One way to try to keep offering activities to members is to move some groups online.

4.   Introduction to Zoom

This guide is to help U3As use Zoom for discussion groups without physical meetings.   It is

to enable you or another member of your group to become a Zoom **Host** and set up and run Zoom meetings for your group.

This Guidance is for Zoom **Hosts** only and should **not** be sent to group members.

The separate **Zoom Guide for Meeting Participants** should be sent to your group's members before you invite them to their first Zoom meeting.

5.   About Zoom

Zoom is a computer application that enables people who are in different locations to 'meet' together face to face. The meetings are set up and managed by the **Host**, who will usually be the Group Coordinator / Group Leader but can be another member of the group.

Members other than the **Host** are **Participants** who join the meeting by clicking on a link in an email sent to them by the **Host**.

6.   Setting Up and Using Zoom

If you don't yet have a Zoom account you need to create one. This doesn't involve any cost. Most of the time this is easy to do – as the following few instructions under a) show. But for some scenarios it's a bit more complicated and see the additional comments under b) below.

a) Creating a Zoom account

- Search the internet to find Zoom.us
- Click on Sign Up; Just click on the 'Basic' package, it's free
- Enter your email address
- You'll get an email in response
- Respond to the email
- Set up your password
- This may take several minutes to complete

b) Browser Guidance

How you create a new Zoom account to be a **Host** can depend on the browser you use as follows:

- Chrome:
  On a Mac: Click on File and then on New Incognito window
  On a PC with Windows click on the three horizontal lines at top right on your screen, and then on New Incognito
  On an iPad, tap on the two square boxes in the top right-hand corner of the screen, select Private and tap Done
- Safari: Click on File and then on New Private Window
- Firefox: Click on File and then on New Private Window
- Microsoft Edge: Click on the horizontal lines in the top right-hand corner of the screen and then click on New InPrivate Window

If your browser isn't in this list, you should be able to find what to do here:
https://www.howtogeek.com/269265/how-to-enable-private-browsing-on-any-web-browser/

c) Zoom App (for tablets or smartphones)

Beware: if you have downloaded the App and log in via the App you will not see all settings. If you want to adjust any of your Settings then you need to log in through the internet.

d) Setting up group meetings

Log into your Zoom account. It should open at the 'Profile' page.

i) General settings for all meetings:
- Select settings from the list at the top of the left side of the screen.
- A list of options will appear on the screen under 'Meeting' (ignore Recording and Telephone settings)
- You need to choose which defaults you want. One of the key choices is if you want joining the meeting to be password controlled or not.
- If not (recommended if you are only inviting known members) then for the "Use Personal Meeting ID (PMI) when scheduling a meeting", slide the option bar to Off.
- If you do want to use passwords per meeting then re the above, slide to the On position; and lower down at the 'Require a password for Personal Meeting ID (PMI)' you need to have this On (either for all meetings or just for those where you are allowing Participants to join the meeting before the Host)
- Another key Setting (under the 'In Meeting (Advanced) is regarding 'Waiting Rooms'. The securest method is to have this option on – but then you will have to accept Participants into the meeting at the beginning. The other way is to have this default set at off & then

Participants will be able to join the meeting directly themselves. As most of our meetings will be with only a few Members it is probably easiest to have this option set to off.

This means that participants who use the meeting link in the email you will send them with the meeting details won't need to enter the meeting ID as well.

It can be useful to have **Join Before** enabled so that participants can get into the meeting as soon as they log in - but see below (re risk of 'bombing').

Don't worry about all the other settings. You can always change them later if you want. Ignore the 'Recording' and 'Telephone' options (the default settings are fine).

ii) Then and for **all subsequent** meetings start here:
- At the top left-hand side of the Zoom Screen there is a heading Personal with a list of options
- Select Meetings
- Now at the top of the screen there's a list of options - select Schedule a Meeting
- Enter the date and time of the meeting and its full duration
- A message saying that free meetings can only last for 40 minutes and you need to upgrade will appear. Ignore it.
- Ignore the other settings – these will be populated by your Default settings
- Scroll to the bottom and press Save - see**below
- A new screen will appear with details of the meeting, including the **Join URL** link and the **Meeting ID** which is a number
- A box will appear with the date and time of the meeting and the Join meeting Link and the Meeting ID
- Click on Copy Meeting Invitation on the right-hand side of the screen
- Paste the invitation into an email and send it to all that you want to be participants.
- See also * and 'Phoning' section

* For those participants joining a meeting from a landline: you need to disable Password (as landlines don't allow a mix of numbers and text to be entered). If your auto invitation does not include a UK phone number, one or more of the numbers included in the Phoning section needs to be sent out with the invitation.
**Although free Zoom meetings are limited to 40 minutes, you can set the duration of the meeting for longer than 40 minutes. Each time Zoom closes the meeting after 40 minutes everybody can return to it again using either the URL or the Meeting ID in the invitation email you have sent them.
***When sending out the meeting invitation to Group members, it is recommended that this email is sent through Beacon (to ensure it goes only to only members & that it is bcc'd, ie blind copied, to comply with GDPR).

e) Joining the meeting

As **Host**, you join the meeting in a different way from the participants:
- Log into your Zoom account
- Select meetings from the list at the top of the left side of the screen
- Details of your meetings will appear on the screen
- Click on the Start button for the particular meeting
- A launch screen will appear
- Click on the link to your bowser at the bottom of the box on the screen

- A message Open Zoom.us will appear; click on the box on the bottom right of this message and you will enter the meeting

f) Running the meeting

If you've set the meeting up using a Zoom Basic account, explain to the participants at the beginning of the meeting that you will only get 40 minutes free time. Remind them about this again and how to sign in again a few minutes before the meeting cuts out.

There are two important icons and some useful tools for managing meetings.

On a computer or a tablet, these are found by clicking/tapping the bottom of the screen. On an iPad tap the top of the screen

On the left there are two icons
- The microphone*
- The camera

If there is a line through these they are switched off. Click on them to turn them on.

To the right of the icons there are several tools.

g) Participants

This tool shows the number of participants present in the meeting. When you click on this a list of all participants present in the meeting appears in a panel on the right-hand side of the screen.

Depending on the size of the group and how it operates you may decide to ask participants to use the **Hand Up** facility within this tool to indicate to you that they want to speak. Participants have a button at the bottom of their panel which the click to put their **Hand Up**. As **Host** you do not have **Hand Up.** Instead your panel has a list of participants who want to speak and you can call them in turn or how you think will work best.

In your panel there is a button you can click on to mute everybody else's microphone.   Participants can unmute their own microphones. Muting is useful to cut out background noise and you may wish to ask individual members to mute their microphone if they are its source.

h) Chat

This tool allows the group to send written messages to each other. It is unlikely to be used significantly by our groups but it is useful for you as to know how it works.

If you click on Chat a list of everybody in the meeting appears on the right-hand side of the screen. You can send a written message to everybody in the group or to one or more participants. Click on their name, type the message in the space at the bottom and press return to send.

i) Ending the meeting

At the right-hand side of these items at the bottom of the screen, in red is the link for ending the meeting. When you click on it you will get the option to end or leave the meeting. If the participants want to go on chatting after you wish to leave, click on Leave and appoint another participant as **host**, otherwise click on End the meeting.

7.   Zoom Pro Account

If the time limit of a Basic account is seen as annoying the only way to avoid it is to trade up to a paying account, like Zoom Pro, at £11.99 / month/ host. While this account is 'per host' there are ways around this so it can be shared for example between several Interest Groups.

Some things to remember:
- Meetings need to be centrally scheduled by a Zoom Administrator (ZA) to avoid meeting clashes.
- Recurring meetings will not require fresh invitations – the same link applies to all meetings in that series. However Group Coordinators/Leaders might need to remind members of that link prior to each meeting.
- **Meetings don't need a Host** (or Co-Host)! If the default in Settings is set to allow Participants to 'Join Before Host' then members can just join the meeting and start (if a Co-Host is required see instructions below).
- There is a way of the account holder, the Zoom Administrator (of the Pro account) to allow some one else (eg the Group Coordinator/ Leader) to become the Host – see below for details.
- If reception quality deteriorates for everyone, this may indicate that the Zoom server is overloaded. Firstly, ask people to switch off their video. If that does not resolve the problem, ask people to close the meeting, take a 5 minute break, then re-start the meeting. If only one person has a problem, ask them to close their device and start again.
- The Coordinator/Leader should arrive early to welcome their participants, keep the meeting to time and finish promptly. The Coordinator needs to ensure that all members have left the meeting before she/he leaves, first in, last out.
- See Appendix 1 for more guidance regarding large meetings.

It's suggested that the management of a Zoom Pro account (if you want to share it around) be unbundled to the following roles:

I) Zoom Administrator (ZA): Technically sophisticated member with some spare capacity and inclination to volunteer. The ZA is technically the Host for all meetings (but see below).

II) Co-host (CH): the Host can assign CH's (more than one is possible) -The Co-Host has all the same functionality as the Host. The CH could be the Group Coordinator / Leader or can be someone in the Group with a bit more technical expertise, ie a Zoom Helper (ZH). For large meetings (eg Monthly Meetings) it might be the Chair.

III) A Zoom Helper (ZH) can be created for some meetings. This might be someone with good IT skills who can then help the assigned Host (see below) or the Co-Host. They would not chair or lead the meeting but just be there to provide Zoom guidance.

IV) Participants (all Groups and their Members who would like to participate in online Zoom Meetings.

Detailed guidance:

A) Meetings are centrally scheduled by Zoom Admin (ZA) after receiving a request from eg Group Coordinators/ Leaders or the ZH.

The meetings need to be added to an account calendar. This can be a manual diary and held by the ZA or can be a public electronic schedule set up through eg Google Scheduler. This will show slots that are taken and slots that are still available for booking.

B) Recurring meetings are encouraged since they do not require fresh invitations to be generated and communicated, as the same link applies to all subsequent recurring meetings. Fortnightly Recurring Meetings are discouraged because they start clashing with multiple Monthly meetings after a month with 5 relevant weekdays in it, thus reducing the efficient utilisation of the Zoom Pro account in a significant way.

C) All Zoom Meeting invitations are set up to allow the following by default (see Appendix 2 for recommended default settings):

  i) Access from landline and mobile phones.

  ii) Access from any browser, which removes the need to download the Zoom App. This is done because downloading the Zoom App has caused problems with a small minority of members.

  iii) Members are able to join the meeting before the Host and interact with the other members present **even if the ZA (who is the default Host for all meetings scheduled) never joins the meeting.**

  iv) Sharing of screens without the host being present.

  v) Groups without a regular schedule are asked to book the next meeting after the currently booked one off meeting has taken place.

D) Group Coordinators/Leaders /ZHs are sent the meeting invitation by ZA. These should be forwarded to the Group's members. The Group Coordinators/ Leaders are encouraged to remind the members of their Group of the Zoom Meeting Invite prior to each meeting.

E) All members of the Group, including the ZH, can join meetings in the way that suits them best via the link across the Internet on a computer/tablet/smartphone or across the Telephony Network from their landline or mobile phone.

F) It is recommended that before the first meeting, Group Coordinator/Leader or their ZH should ensure that their members are comfortable with Zoom. If necessary, a "test" meeting should be arranged with the help of the ZA.

G) Creating a Co-Host for a Meeting

There are two ways that you can make a user a co-host. During a meeting:

  1. Hover over a user's video.
  2. Click the more icon:
  3. Click **Make Co-Host**.

Using the participants window:

  1. Click on **Manage Participants** in the meeting controls at the bottom of the Zoom window.

  2. Hover over the name of the participant who is going to be a Co-Host, and choose **More**.
  3. Click **Make Co-Host**.

H) At the start of each meeting, the assigned Host (see below) or the CH should remind members to mute their microphone when they are not speaking and avoid interrupting others.

I) Hand Icon: members should also be encouraged to use the raised hand icon to indicate their wish to speak so that the Coordinator can see them, if their device support the Gallery View. When it does not, another members can help the Chair know in which order the hands were raised.

J) If audio quality starts to deteriorate for everyone, it may indicate that the Zoom server is overloaded. Members should be asked to switch off their video. If that does not resolve the problem, ask people to close the meeting, take a 5 minute break, then re-start the meeting. If only one person has a problem, ask them to reboot/restart their device and join the meeting again.

K) Since a Zoom Pro account can only have one Zoom Meeting active at any time, the person requesting the meeting will be told when the meeting needs to be finished at the latest. This means that it is the responsibility of that person to ensure the meeting finishes at or before the scheduled end time. The CH has to End Meeting For All. The ZA therefore does not need to be present at all meetings.

L) To avoid the need for the ZA, the default Host, to attended all scheduled meetings he/she can pre-assign the Host role to someone else (eg a Group Coordinator / Leader). In the Pro account's 'Profile' settings there is a defined 'Host Key' (a 6 digit password or PIN). This Host Key can be given (eg emailed) to a meetings organiser so they can become the 'Assigned host'. This can be done at any time prior to a meeting – and the key stays the same for all recurring meetings. Armed with the key, the meeting organiser can join the meeting as a participant, then under the 'Participants' drop down box there is an options to 'Claim Host' privileges. On clicking that option a box will appear to allow the entering of the 'Host Key' number. Having done that the Assigned Host has full Host functionality (ie Mute All command). This process is probably only needed for certain (large) meetings. Otherwise holding a meeting without the ZA (the Host) present works adequately (see C iii above).

8.   Phoning

While it is generally recommended that Zoom is used via the internet (for strength of signal) it is possible to use Zoom via a phone (by landline or from a mobile phone). While you are logging in there is the option of "Join with Computer" or "Join with Phone". If you don't have an internet connection you can use the phone option. The instructions for dialling into a Zoom meeting are:

1. Call one of the 5 UK numbers provided:
+44 330 088 5830
+44 131 460 1196
+44 203 481 5240
+44 208 080 6591
+44 208 080 6592

2. Enter your Meeting ID followed by #, which is also the number at the end of the link to join a Zoom meeting

3. Enter your participant ID followed by #.

Step 3 can be minimised to just # if the meeting has been set up to not require a password.

More details can be found at Joining-a-meeting-by-phone

The auto generated invite to a meeting (which you copy & paste into an email to send to all participants) doesn't show phone numbers (in the Basic account). So you have to add these (see list above) if you know someone might want to join from a phone. Also if someone is to join from a landline, you need to make sure the 'Require Password' is set to Off in the meeting settings (or in your overall Settings).

9.   Privacy & Hacking Risk

You may have read articles recently regarding the lack of Privacy or the risk of 'Zoom bombing' (i.e. when your meeting is hacked and other material is streamed to the meeting). Each member ultimately needs to decide if they want to take this (low) additional risk by using Zoom. However you need to consider this in the wider sense – the use of any internet program, system or platform carries a risk. So what is the scale of this extra risk? We would suggest it's low. But each member needs to make their own conclusion.

10.   Beware of Zoom Bombing

Social distancing has driven a massive spike in video conferencing. That, in turn, has spawned an increase in so-called "ZoomBombing" attacks. These attacks target public group calls on the highly popular Zoom platform. Trolls look for meetings that allow attendees to share their screens by default. Once they've joined the meeting, they blast the other unsuspecting participants with offensive/extreme content. Until Zoom corrects the default configuration, we recommend the following:

To avoid this here are some tips for **Hosts** (in the Settings of your account). These can create restrictions so **Hosts** need to balance gain vs loss:

- Disable "Join Before Host" so people can't cause trouble before you arrive

- Change Screensharing to "Host Only"

- Consider turning on 'Waiting Room'. So you can see who is waiting to join the meeting and let them in, or not.

Please see Zoom's Support page for further details on managing participants in a meeting. Or the blog here

11.   Breakout Rooms

If you want to use the breakout room feature in a Pro account have a look at this clip (skip to about half way through):
https://www.youtube.com/watch?v=6i-NA563Ojk
More guidance added in Appendix 5. Also if you are doing online 'Pub' quizzes and want to use Breakout Rooms for your teams then see Appendix 6.

12.   Whiteboard

Are some of your Interest Groups or Committees wanting to replicate old style, being able to write up something on a whiteboard and share with the group? Then you can do this with Zoom. There is an option (needs to be enabled in settings) when you screen share and is useful for freehand drawing , freehand text, art work etc. But has nothing to with letting you choose what to show on screen share. You can manually choose to save the whiteboard or ask for it to automatically do so.

Whatever you have open on your PC or laptop will be available to screenshare with the meeting including whiteboard.

13.   Pin or Spotlight

Pin screen allows you to disable active speaker view and only view a specific speaker. Pinning another user's video will only affect your local view in the Zoom Room, not the view of other participants and will not affect cloud recordings.

Spotlight video puts a user as the primary active speaker for all participants in the meeting and cloud recordings. To spotlight, you need at least 3 participants in the meeting with their video on and can only be done by the host.

14.   Polling

There is a useful feature in Zoom to allow you to hold online voting (or polling as they call it). This allows you to set up the questions beforehand, then pose the question during the meeting and Zoom records the votes instantly. This is an acceptable means to take votes for AGM items (voting in Committee or approval of Resolutions). For details of how to do polling see the Zoom tutorial here:
POLLING

15.   Reference Material

There is a vast amount of further information online to assist with Zoom. There are also now Third Age Trust produced guides (that then carry links to further information). You can access their guides here.

16.   Feedback and Contact Point

If you feel any of the above is unclear or if you think something should be added please give us feedback. Send comments to: webmaster.londonregionu3a@gmail.com

If you need support in use of this guide, if you get stuck at any stage, we can offer support. Please contact: webmaster.londonregionu3a@gmail.com
and we will figure out the best way to help you.

APPENDICES

APPENDIX 1 – LARGE ZOOM MEETINGS

The following is additional guidance for running large meetings, for example monthly meetings, on Zoom. For those U3As that are considering hold their Monthly Meetings via Zoom then the key is there isn't really much difference between what hosting a 'normal' Pro Meeting and hosting (organising) a large monthly meeting. But you should have held several meetings using Pro to be totally familiar with the commands and functions of Pro.

So much of what is written in Section 7 above is the core for handling large meetings as well. Aspects that are even more important are:

- it is best to have the ZA (or at least a ZH) present at large meetings
- expect to need at least a Host, & one Co-Host eg ZA and Chair. But if your Chair is not very IT competent then you might need two Co-Hosts so you have Host, Chair/Co-Host and another Co-Host (ZH) to manage the meeting.
- always have the default Setting as 'mute all at start'. So as people join the meetings there is no background noise or cross chat allowed.
- then at the start the ZA / Host should unmute the Speaker and Chair/Co-Host (& any other Co-Host).
- So ZA/Host should join the meeting 10 mins before start time and do this set up
- The Chair (ie Co-Host) is then able to start the Monthly Meeting and introduce the Speaker.

The Pro default settings should be set (beforehand) to allow screen sharing by all Participants. This will then allow the Speaker to share their screen with any PowerPoint or YouTube material they may have.

Host and Co-Host(s) can see the hands up list (& chat questions) in the Participants or Chat windows. So at the end the two can take questions (the hands up always appear at the top so you don't need to scroll down through the long list of Participants). Remember to unmute the person you are taking the question (& re mute them afterwards). So you are continually clicking mute on or off as you are taking questions; and you need to take the hand down once the question is asked. You could preassign tasks – one Co-Host takes the question (does the unmute / mute), the other Co-Host takes the hand down.

At the end once the Chair has done the public thanking and closed the meeting the Host needs to remember to Close Meeting for All. So there is no real opportunity for a further private thankyou to the Speaker. Good idea maybe to do this as a follow up email a day or so after the meeting.

APPENDIX 2 – ZOOM PRO ACCOUNT DEFAULT SETTINGS
The following is a series of screenshots to show the recommended settings for using and sharing a Zoom Pro account.

Annex A - Settings in a typical Recurring Meeting being scheduled

Topic	iU3A Recurring Meeting for ABC Grc
Description (Optional)	Enter your meeting description
Use a template	Select a template ▾

When	13/05/2020 🔲 3:00 ▾ PM ▾
Duration	1 ▾ hr 0 ▾ min

☑ Recurring meeting **Every month on the Second Wed, 7 occurrence(s)**

Recurrence	Monthly ▾
Repeat every	1 ▾ month
Occurs on	○ Day 13 ▾ of the month
	● Second ▾ Wednesday ▾ of the month

| End date | ○ By | 13/11/2020 | 📅 |
| | ◉ After | 7 ▾ | occurrences |

Registration ☐ Required

Meeting Password ☐ Require meeting password

Video Host ◉ on ○ off

Audio
○ Telephone ○ Computer Audio
◉ Telephone and Computer Audio ○ 3rd Party Audio

Dial from **United Kingdom** Edit

Meeting Options ☑ Enable join before host

☐ Mute participants upon entry 🔲

☐ Enable waiting room

☐ Only authenticated users can join
☐ Breakout Room pre-assign

☐ Record the meeting automatically in the cloud

☐ Enable additional data center regions for this meeting

Alternative Hosts [Example: mary@company.com, peter]

[Save] [Cancel]

Annex B – Detailed Settings for the default Zoom Pro Accounts

Meeting   Recording   Telephone

Schedule Meeting

Host video
Start meetings with host video on

Modified   Reset

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

Modified   Reset

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
- ◯ 3rd Party Audio

Join before host
Allow participants to join the meeting before the host arrives

Modified   Reset

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

Require a password for Personal Meeting ID (PMI)   Modified   Reset

○ Only meetings with Join Before Host enabled

● All meetings using PMI

Password   640117   ✏️

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.

Only authenticated users can join meetings from Web client

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

Require a password when scheduling new meetings   Modified   Reset

A password will be generated when scheduling a meeting and participants require the password to join the meeting. The Personal Meeting ID (PMI) meetings are not included.

Require a password for instant meetings

A random password will be generated when starting an instant meeting

Embed password in invite link for one-click join

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

Require password for participants joining by phone   Modified   Reset

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.

Mute participants upon entry

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   Modified   Reset

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   Modified   Reset

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

Play sound when participants join or leave   Modified   Reset

Play sound when participants join or leave

◯ Heard by host and all attendees

🔘 Heard by host only

When each participant joins by telephone

◯ Record and play their own voice

File transfer

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

Modified   Reset

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

Modified   Reset

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. [V.]

Co-host

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

Modified   Reset

Polling

Add 'Polls' to the meeting controls. This allows the host to survey the attendees. [V.]

Modified   Reset

Always show meeting control toolbar

Always show meeting controls during a meeting [V.]

Modified   Reset

Show Zoom windows during screen share [V.]

Modified   Reset

Screen sharing

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

Modified   Reset

Who can share?

○ Host Only   ● All Participants ⑦

Who can start sharing when someone else is sharing?

● Host Only   ○ All Participants ⑦

Disable desktop/screen share for users

Disable desktop or screen share in a meeting and only allow sharing of selected applications.
🔽

Annotation

Allow participants to use annotation tools to add information to shared screens 🔽

Whiteboard   Modified   Reset

Allow participants to share whiteboard during a meeting 🔽

✅ Auto save whiteboard content when sharing is stopped

Remote control

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

Nonverbal feedback   Modified   Reset

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

Allow removed participants to rejoin   Modified   Reset

Allows 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 participants to Zoom   Modified   Reset

Hosts can report meeting participants for
inappropriate behavior to Zoom's Trust and
Safety team for review. This setting can be
found on the Security icon on the meeting
controls toolbar. ⓥ

Breakout room   Modified   Reset

Allow host to split meeting participants into
separate, smaller rooms

☑ Allow host to assign participants to breakout
   rooms when scheduling
   ⓥ

Remote support   Modified   Reset

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

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

Group HD video

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

Virtual background

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

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

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.

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

Allow users to select original sound in their client settings

Allow users to select original sound during a meeting

Select data center regions for meetings/webinars hosted by your account

Include all data center regions to provide the best experience for participants joining from all regions. Opting out of data center regions may limit CRC, Dial-in, Call Me, and Invite by Phone options for participants joining from those regions.

Modified   Reset

- ☐ Australia   ☐ India
- ☐ Canada   ☐ Japan
- ☐ China   ☐ Latin America
- ☑ Europe   ☑ United States
- ☐ Hong Kong, China

Waiting room

When attendees 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 attendees to join before host. 🇻

Modified   Reset

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

Modified   Reset

Allow live streaming meetings

Modified   Reset

Email Notification

When a cloud recording is available

Notify host when cloud recording is available

- ☐ Send a copy to the person who scheduled the meeting/webinar for the host

When attendees join meeting before host

Notify host when participants join the meeting before them

When a meeting is cancelled

Notify host and participants when the meeting is cancelled

When an alternative host is set or removed from a meeting

Notify the alternative host who is set or removed

Modified   Reset

When someone scheduled a meeting for a host

Notify the host there is a meeting is scheduled, rescheduled, or cancelled

Modified   Reset

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

Notify the host 7 days before the cloud recording is permanently deleted from trash

Modified   Reset

Other

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.

Modified   Reset

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: _u-xDrLmR1i94-NiJR5ysA
Secret:
LrmNYzXgs8gAhIP9iF4kszHhmjXDa61PtyDg

Regenerate

Meeting	**Recording**	Telephone

Recording

Local recording ⬜ Modified Reset
Allow hosts and participants to record the meeting to a local file

Cloud recording 🔵 Modified Reset
Allow hosts to record and save the meeting / webinar in the cloud

- ☑ Record active speaker with shared screen
- ⬜ Record gallery view with shared screen
  ⓘ
- ☑ Record active speaker, gallery view and shared screen separately
  - ☑ Active speaker
  - ☑ Gallery view
  - ☑ Shared screen
- ☑ Record an audio only file
- ☑ Save chat messages from the meeting / webinar

Advanced cloud recording settings

✅ Add a timestamp to the recording ⑦

✅ Display participants' names in the recording

✅ Record thumbnails when sharing ⑦

✅ Optimize the recording for 3rd party video editor
⑦

✅ Save panelist chat to the recording ⑦

Automatic recording

Record meetings automatically as they start

IP Address Access Control

Allow cloud recording access only from specific IP address ranges

Only authenticated users can view cloud recordings

The viewers need to authenticate prior to viewing the cloud recordings, hosts can choose one of the authentication methods when sharing a cloud recording.

Require password to access shared cloud recordings   Modified   Reset

Password protection will be enforced for shared cloud recordings. A random password will be generated which can be modified by the users. This setting is applicable for newly generated recordings only.

Auto delete cloud recordings after days

Allow Zoom to automatically delete recordings after a specified number of days

The host can delete cloud recordings

Allow the host to delete the recordings. If this option is disabled, the recordings cannot be deleted by the host and only admin can delete them.

Recording disclaimer ⬤ Modified Reset

Show a customizable disclaimer to participants before a recording starts 🖂

✅ Ask participants for consent when a recording starts
✅ Ask host to confirm before starting a recording

Multiple audio notifications of recorded meeting ⬤ Modified Reset

Play notification messages to participants who join the meeting audio. These messages play each time the recording starts or restarts, informing participants that the meeting is being recorded. If participants join the audio from telephone, even if this option is disabled, users will hear one notification message per meeting.

Meeting   **Recording**   **Telephone**

Show international numbers link on the invitation email ⬤

Show the link for Zoom International Dial-in Numbers on email invitations

Toll Call ⬤

Include the selected numbers in the Zoom client and the email invitation via the international numbers link. Participants can dial into meeting with the numbers

Only IT admin can make changes for this setting ✕

Austria   +43 12 535 501

United Kingdom	+44 131 460 1196
United Kingdom	+44 203 051 2874
United Kingdom	+44 203 481 5237
United Kingdom	+44 203 481 5240
United States of America	+1 253 215 8782
United States of America	+1 301 715 8592
United States of America	+1 312 626 6799
United States of America	+1 346 248 7799
United States of America	+1 669 900 6833
United States of America	+1 929 205 6099

3rd Party Audio

Users can join the meeting using the existing 3rd party audio configuration

Modified   Reset

Not set. ✏

Mask phone number in the participant list

Phone numbers of users dialing into a meeting will be masked in the participant list. For example: 888****666

Modified   Reset

Global Dial-in Countries/Regions

Click the Edit icon to choose countries/regions that frequently have participants who need to dial into meetings. The dial-in phone numbers of these locations appear in the email invitation, and can be used by participants dialing in from those locations.

United Kingdom   ✏

https://us02web.zoom.us/profile/setting?tab=telephony

**APPENDIX 3 – ASKING QUESTIONS PROTOCOL**

For small group meetings using Zoom it is generally easy to 'control' the meeting by the Host ensuring that people all have a chance to contribute and that there is not interruptions and cross conversations. Most members, after being a few Zoom meetings do realise that this discipline is required. In fact that this can be a criticism of Zoom – that conversations, discussions, can be stilted. Again it's down to the Host to manage and ensure there is free flowing discussions. Interruptions – to ask a question or make a point – can be handled by physically a member raising a hand, waiving at the screen to attract the attention of the Host. The Host does have to pay attention to the screen to spot these raised hands and hence bring them in at the appropriate time.

However when the Zoom meeting has a greater number of Participants then the challenge becomes larger. There are some other techniques to be used in these circumstances. There are two primary options. For a member who wishes to voice their own question there is the 'Hands-up' method; and for those that don't want to voice their question they can write and submit their question through the 'Chat' option.

For the Hands-up option: you should generally have all Participants on 'Mute All' to avoid background noise. You can look up the participants details by clicking on 'Participants' symbol (it will be at the bottom of the screen on some devices and at the top on other devices). As the example here:
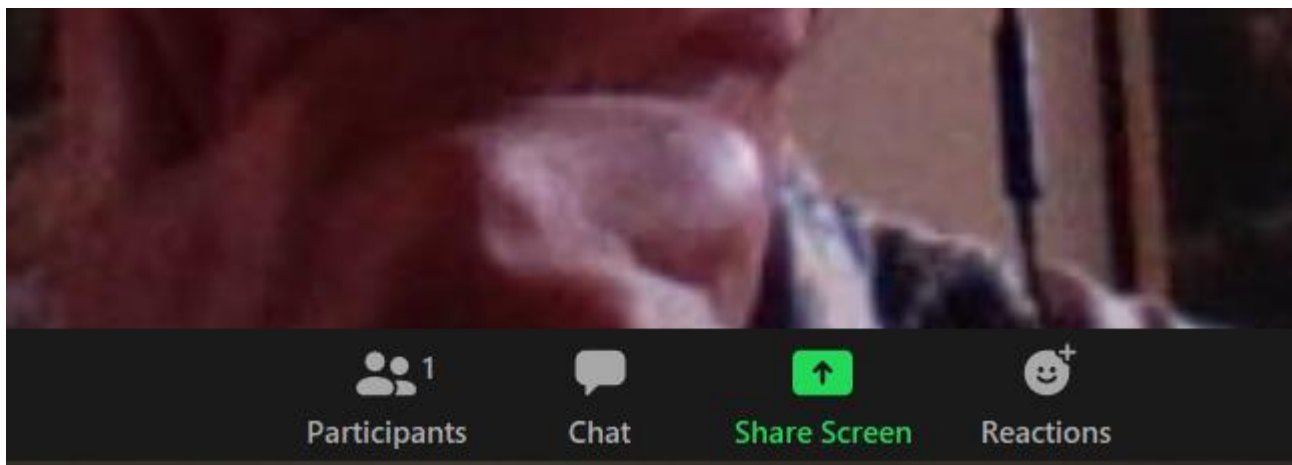
Once you've opened that box it will appear like this:
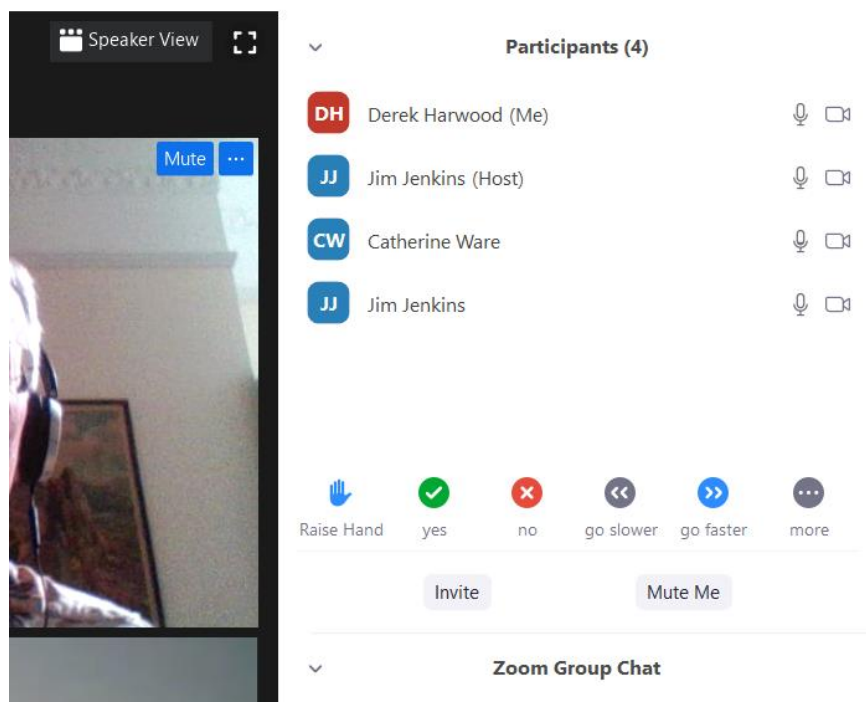
You can see the symbol bottom left. Anyone having clicked on this will be listed at the top of this screen for the Host to see. The Host (&/or Co-Hosts) need an agreed mechanism for unmuting, then re-muting, for each member to ask their question.

For the Chat option: also through the Participants box (as above) at the bottom or the Chat box, a member can write their question, then hit return, to submit it. They can send this to 'Everyone' (normal option), or they can send it 'Privately' to the Host. The meeting Host can then read out Chat questions received (without naming who has submitted the question) or may chose to group similar Chat questions together before reading out for the Speaker to answer.

APPENDIX 4 – SOUND SETTINGS

There has been feedback that, particularly if YouTube clips are being shared through Zoom.

It seems the best sound settings to cover this are (change from setting on left to those on the right):

CHANGES TO SOUND SETTINGS IN ZOOM PRO	
Allow users to select stereo audio in their client settings ⬜ Allow users to select stereo audio during a meeting	Allow users to select stereo audio in their client settings 🔵 Allow users to select stereo audio during a meeting
Allow users to select original sound in their client settings ⬜ Allow users to select original sound during a meeting	Allow users to select original sound in their client settings 🔵 Allow users to select original sound during a meeting

APPENDIX 5 – BREAKOUT GROUPS

Only the HOST has the 'Breakout Rooms' functionality. Depending on your device it will appear as:
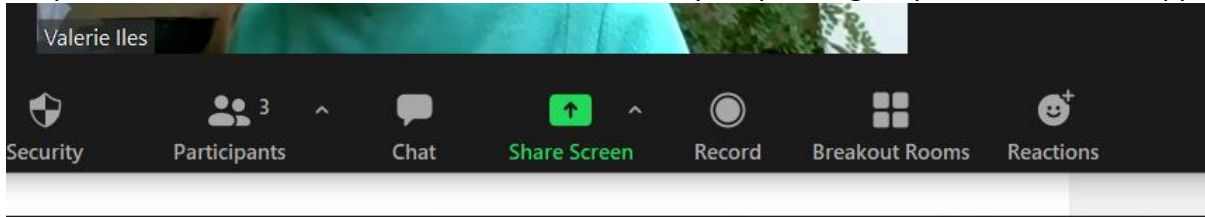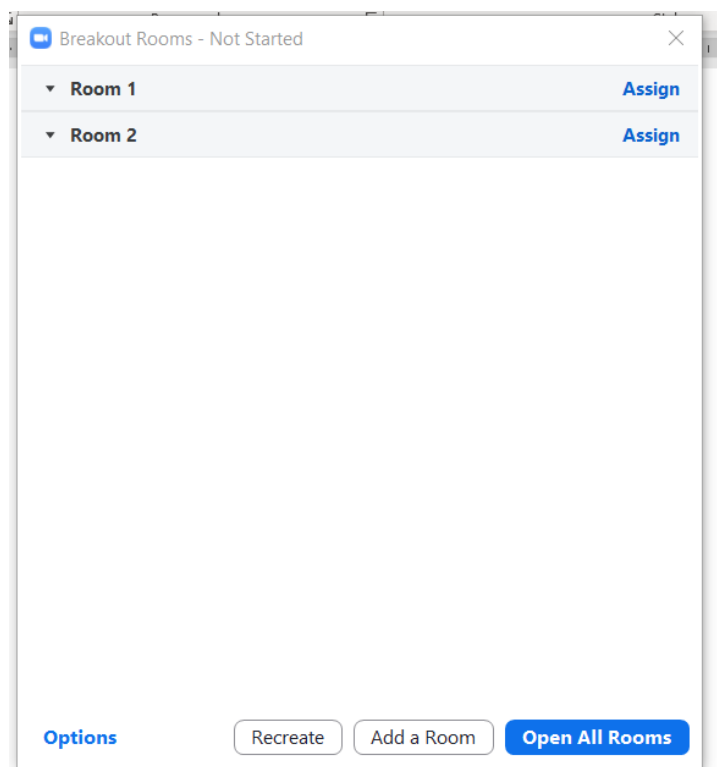

On selecting, pressing the 'Breakout Rooms' button the following window appears:
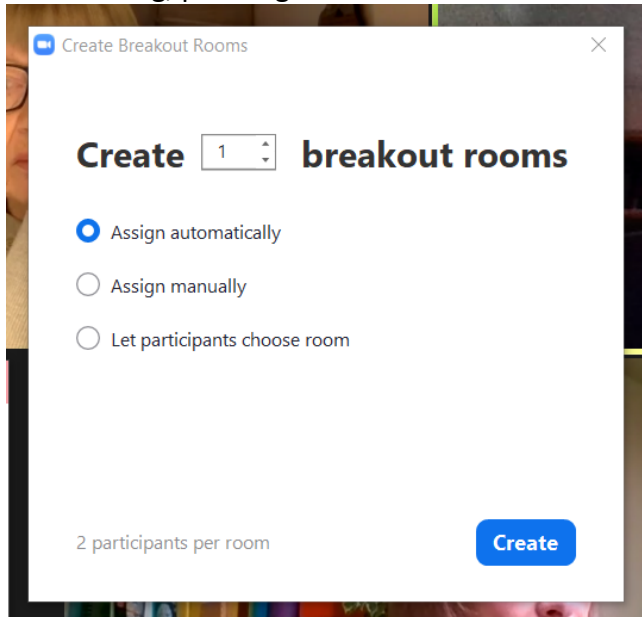
Decide how many rooms you want (better to have too many even if you don't use them all). But does also depend if you are assigning automatically (don't then want to end up with one person only in each room…...).

Then select 'Create'.

The number of Rooms you selected will appear.

Before selecting 'Open All Rooms' select 'Options'. The following window then opens:

The Defaults are as above but you may want to select other ones. You will have to tick 'Breakout Rooms To Close Automatically…' and set the time you want. The default also of 60 seconds for the warning that rooms are closing is quite long – you might want to change that to 30 seconds. The options selected are saved automatically. So then you can close that window, reverting to the previous window and 'Open All Rooms'. The next window opens:
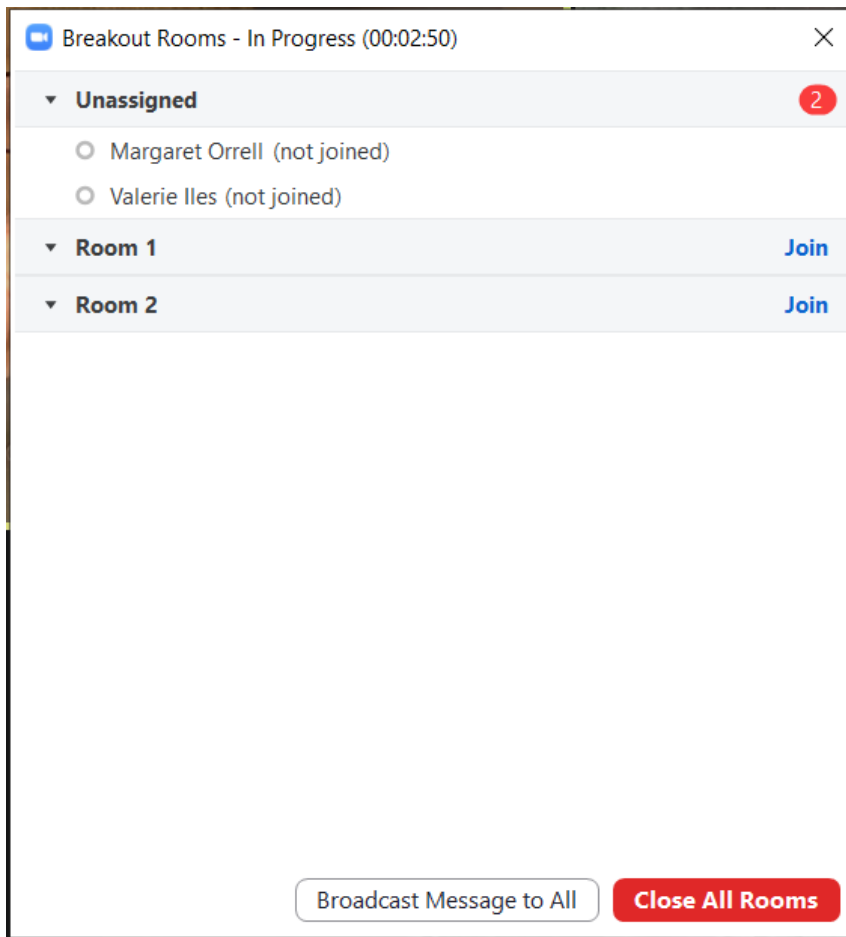
If you've clicked Manual Allocation (in the previous window) then you need click on each name and move them to the room you want.

That's it, rooms are in use.

You can let your pre-set time run out and Zoom will bring them all back into the main room (the plenary) or if things change you can select 'Close All Rooms' at any time from this window.

APPENDIX 6 – ONLINE QUIZZES USING BREAKOUT GROUPS

Screen Names

We are going to allocate everyone to teams randomly. This is because not everyone has a recognisable identification as their screen name (e.g. Fred's iPad, or iPad XYZ) so we are unable to match people up to pre-determined teams. Nevertheless it should be fun to meet a mix of familiar and unfamiliar people. Remember everyone is going to be a member of our U3A. But, as a courtesy to your team-mates, it would be best if you can have your name on your screen in some way. To edit your screen name:

•On PCs/Laptops - Right click your own image and click on "Rename"

•On Tablets - Go to "Participants", find your name, and click/touch "Rename" If you're using someone else's device you can still make these changes - you just have to change it back at the end of the event.

Breakout Rooms

Zoom uses "Breakout Rooms" to separate participants and we're going to use these to create teams. As above we're going to do this randomly but once you're in a team the system should keep you with that team. But remember which Breakout Room Number you're in - that's your team number. We'll start with about 6 members per team but we know that some couples will be playing together on one device so it's going to be pot luck as to how many each team actually has. Hopefully somewhere between 6 and 8. While we do introductions and when answers are read out between rounds, everyone is going to be muted. But as soon as you are put into your Breakout Room PLEASE REMEMBER TO UNMUTE YOURSELF. We are going to set a timer for each round. You will get a countdown when time is nearly up and then you will automatically be sent back to the main meeting room. But if your team has completed all the questions you can chose to leave the Breakout Room as soon as you wish. So expect to be sent into Breakout Rooms and back to the main meeting room several times over the course of the evening.

Chat

Normally we encourage the use of the "Chat" facility in Zoom for asking questions and generally chatting with people you know. But for this Quiz Night PLEASE DO NOT USE "CHAT" and reserve it for us to circulate the Quiz Questions (see below).

Questions

At the beginning of each round, before you are sent into your Breakout Room, we will copy and paste the 10 questions into the "Chat" box.

You should see a red alert come up against "Chat" to tell you a new message has arrived and you click/touch that to open "Chat". You will then be sent into your Breakout Rooms and you can start discussing answers as a team. We have found that PC/Laptop users will still see the questions in the "Chat" box when they go into the Breakout Room, but Tablet users will find their "Chat" box has been emptied. We will assume that each team will have sufficient PC/Laptop users to be able to read out the questions to their teammates with tablets. In the unlikely event that a team is made up entirely of tablet users, please summon the Host immediately and they will paste the questions into the tablet users "Chat" box. Once the Host knows you are a team of tablet users they will get the questions pasted in straightaway each round thereafter. PC/Laptop users can manipulate the size of the "Chat" box by picking up the sides and expanding it. Do this to ensure you can see all 10 questions.

Answers

During the first round could you please nominate one team member to be your scribe and spokesperson. This person should be the one to have noted down your answers, tick off the correct

ones when the answers are read out, and shout out your score when asked. If you have been nominated, please remember to unmute yourself when the Quizmaster starts to ask for each team's score. Remember - your Breakout Room No. is your Team No.

This Quiz Night is just for fun and there are no prizes on offer. We're trusting everyone not to look up answers and just use your own knowledge. So please enjoy the evening and make the most of meeting some old friends and some new friends.

APPENDIX 7 – CLOSED CAPTIONING, LIVE TRANSCRIPTION

This feature is available for Zoom Basic and Zoom Pro accounts. But only the automatic type is available in Pro. For the Basic account you have to type your own transcript (if you have a fast Secretary):

"If you are unable to provide captioning, Zoom also provides AI-powered live transcription for all paid accounts. This can be enabled by the host, and any participants can view the captioning as needed. "

Go to Settings; then In Meeting (Advanced); then:
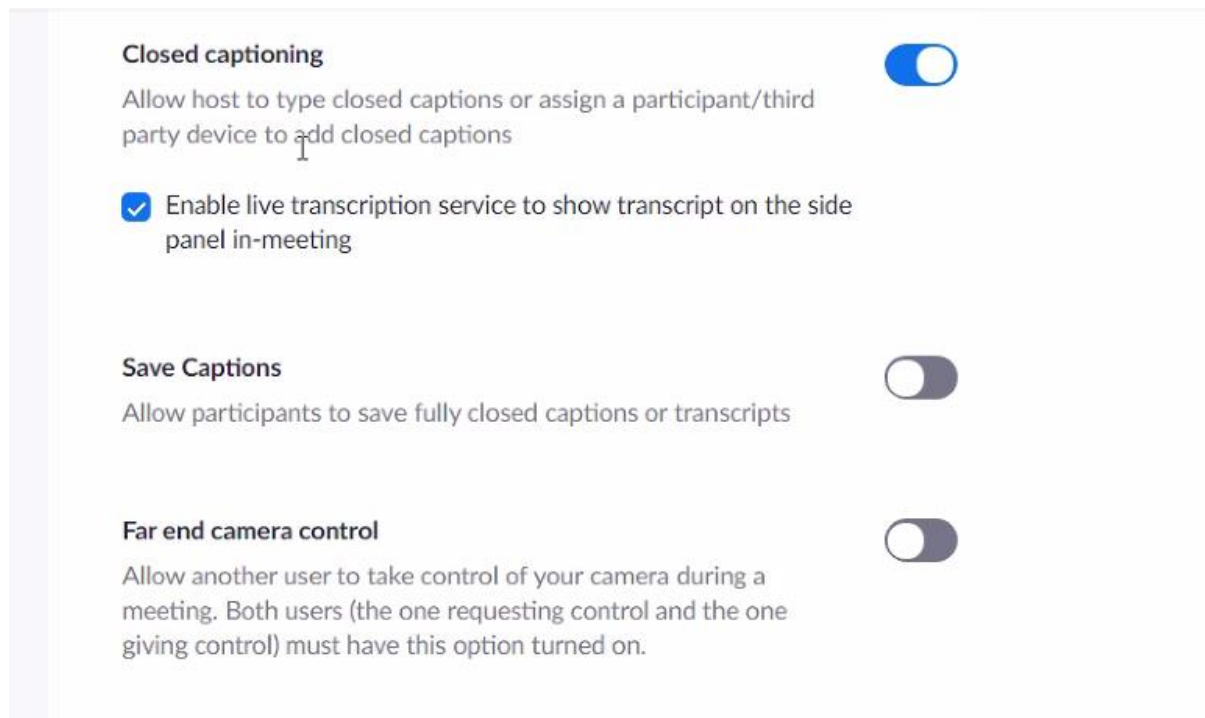
Once you have set it up in Settings, only the host initially has access to the Live Transcript button, where the facility can only then be switched on for the attendees by clicking the 'Enable Auto-transcription' button. Once this is done, all attendees will find the button added to their screen and they (but not, as far as I can see, the Host) will be able to adjust the transcription as required or turn it off.

If the host cannot be present at a meeting and someone else takes over as host by inserting the hosting code, they then obtain the Live Transcript button and can initiate for all other attendees. Or if a Co-host is enabled then they can switch on the function for that meeting.

Further guidance can be found here:

Closed captioning and live transcription – Zoom Help Center
(https://support.zoom.us/hc/en-us/articles/207279736-Closed-Captioning)