

Suggested Zoom settings for those of us who will be hosting meetings

And, even if you're just going to join meetings, a few good tips

Below I've included the settings for Zoom that I suggest you use – especially if you're ever going to host a meeting. But, even if you're just going to be a participant in meetings (and not be the host), getting these right will save you some aggravation as well.

These settings are for the free Zoom account. The free Zoom account is all that is needed to join a meeting, and more than adequate for normal use, even when hosting. The paid account (we have one for U3A in Kennet) lets us have much longer meetings, and permits connections via a land line telephone.

The only significant drawback to the free account is that for a meeting you host, it's likely the meeting would end automatically after 40 minutes. If it does, and you want to meet for longer than 40 minutes, you can just let everyone know (before you're bounced out that is) that if the meeting abruptly ends (at the 40-minute mark) everyone can just re-join the same meeting again (using the original link), and you have another 40-minute period to use. Simple!

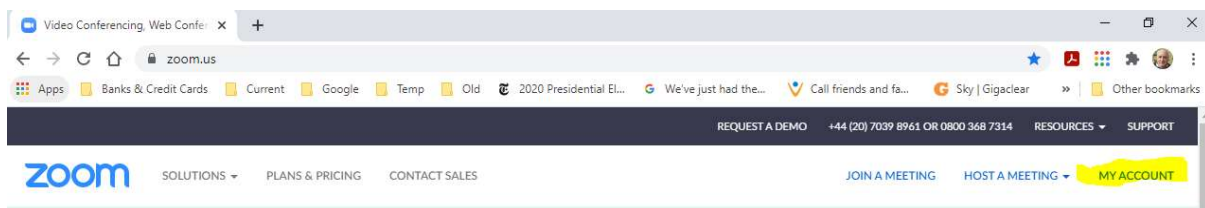
Using these settings should make it easy for all - for you, and the people you invite to your Zoom meeting. I must warn you, there are quite a few settings to deal with, and it will take some time to get them all set properly. However, the good news is that if you persevere and get them right, you shouldn't have fiddle with them ever again and you'll have smooth sailing from now on (fingers crossed and no promises made – plus, Zoom continues to update with improvements, and some things might change).

Adding to the complications (don't be worried, it's not that bad) Zoom has settings you need to configure via their website as well as in the 'App'. The website settings are the more generic type and are tied to your Zoom account.

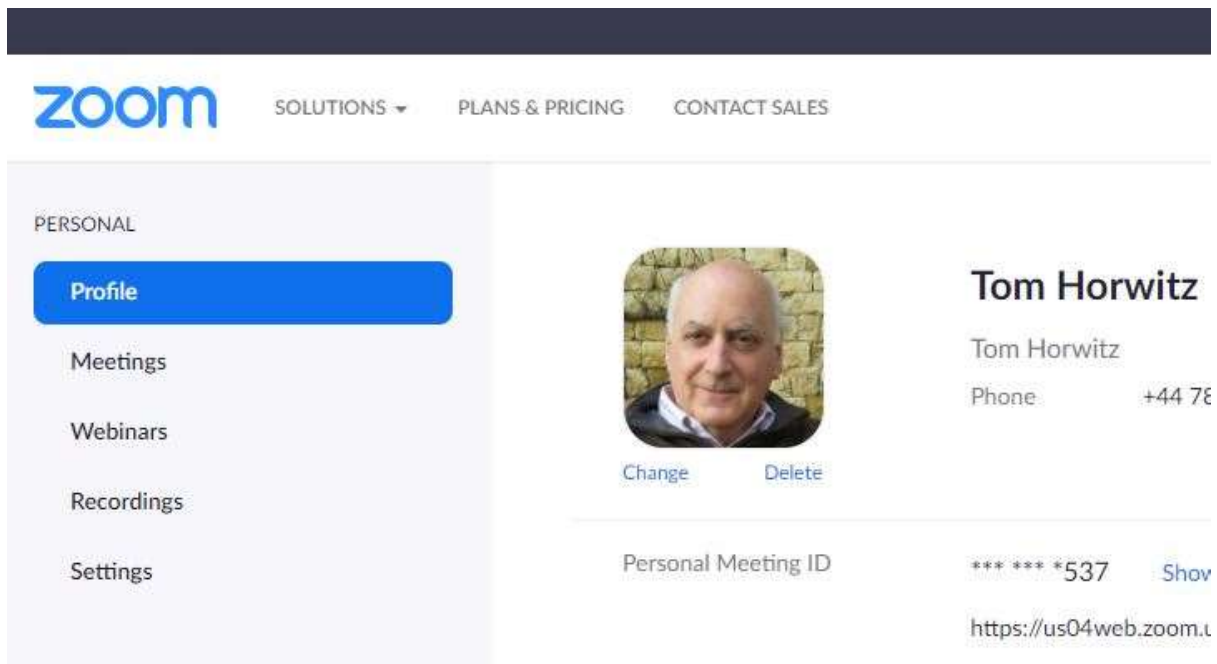
The second round of settings are located in the Zoom Application (the 'App'). They cover some other aspects. Further, it's the 'App' that is used to actually connect to your webcam, microphone and to the meeting itself. Once you get the settings correct on the webpage, you pretty much don't need it again. You can do the rest by using the 'App'.

OK, first let's tackle the settings on the website. Access the Zoom website (<https://zoom.us>) using your web browser (either Chrome, Edge, Internet Explorer, Safari, Firefox, etc). The website stores your account details, your email address, your password, and any personal details you've added.

Below is the main / home web page for Zoom. I've already logged in. If you don't have an account, then sign up for one. All you need is an email address.



If you click on My Account (far right, highlighted in yellow) you are taken to:



On the left, there are 5 options. The first one (Profile) has the blue band around it. Profile shows the information about you that you've included.

I've taken the time to add a picture (which is optional), and my full name. The name is used in your Zoom window. We suggest you set this to your name please, rather than 'tom's iPad' or your email address, or something else. That way, everyone will know who you are by name!

As a free account is just that, free, we suggest everyone have their own account to avoid confusion. Couples can each have an account, all they need is an email address to sign up.

Please do take the time to get your name right, it will help everyone.

Under Profile is Meetings – this will show all the upcoming meetings that you've scheduled (if any) and where you can schedule new meetings to host. Note, meetings you are invited to by another host do not show here, only meetings that you control.

We don't use Webinars and unlikely you'll need to worry about Recording. But, the **Settings** are critical. Click on Settings.

There are many settings to get right. Virtually all these settings apply to hosts, if you're only joining a meeting hosted by someone else, they aren't critical.

On the web site, you scroll down to find them all. I've captured, in the next several images, ALL of them. It may be hard to see the descriptions here, but hopefully you can just follow along with what I have set on my personal account. Just make sure your settings match.

Note, I'm just showing the settings, most are simply set to be either on or off. I'm not describing what they all are about, just how I think you should set them. Please know, these settings do

provide safety and would keep intruders out of your meetings (which was an issue in early Zoom days, months ago).

If anyone wants to discuss why I've set them as I have, I'll be glad to go over the details with you. The aim of this document is for 99% of us who just want to get it right based on a solid recommendation from someone who should know what's what.

Settings



Meeting Recording Telephone

Security

Require that all meetings are secured with one security option

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




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


Waiting Room

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

Meeting Passcode

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

Require a passcode for meetings which have already been scheduled 

Passcode for already scheduled meetings zoomers 

Note: I've set a default password – 'zoomers' – you can use whatever you wish.

Personal Meeting ID (PMI) Passcode



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

Passcode: zoomers [Hide](#) [Edit](#)

Require passcode for participants joining by phone



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

Embed passcode in invite link for one-click join



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

Only authenticated users can join meetings from Web client



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

Approve or block entry to users from specific regions/countries



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

Allow use of end-to-end encryption Technical Preview



Choose between enhanced encryption and end-to-end encryption when scheduling or starting a meeting. When using end-to-end encryption, several features (e.g. cloud recording, phone/SIP/H.323 dial-in) will be automatically disabled. [Learn more](#)

Default encryption type

If the admin locks this setting, users will not be able to change the encryption type for meetings (i.e. scheduled, instant, PMI).

- Enhanced encryption ? End-to-end encryption ?

Schedule Meeting

Host video

Start meetings with host video on



Participants video

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



Audio Type

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

- Computer Audio

Allow participants to join before host

Allow participants to join the meeting before the host arrives



Participants can join 5 minutes ▾ before start time

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



Mute all participants when they join a meeting

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



Upcoming meeting reminder

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



In Meeting (Basic)

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


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



Chat

Allow meeting participants to send a message visible to all participants



Prevent participants from saving chat 

Private chat

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



Auto saving chats

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



Sound notification when someone joins or leaves



File transfer

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




Feedback to Zoom

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



Display end-of-meeting experience feedback survey


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



Always show meeting control toolbar

Always show meeting controls during a meeting 



Show Zoom windows during screen share 



Screen sharing

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



Who can share?

Host Only All Participants 

Who can start sharing when someone else is sharing?

Host Only All Participants 

Disable desktop/screen share for users


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




Annotation

Allow host and participants to use annotation tools to add information to shared screens 



Allow saving of shared screens with annotations 

Only the user who is sharing can annotate 

Whiteboard

Allow host and participants to share whiteboard during a meeting 




Remote control

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




Non-verbal feedback

Allow meeting participants to communicate without interrupting by clicking on icons (e.g. yes, no, go slower). These icons are found in the Reactions menu in the toolbar, and when selected, they display on the participant's video and in the participants list for 10 seconds. 



Meeting reactions

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



Allow removed participants to rejoin

Allow previously removed meeting participants and webinar panelists to rejoin



Allow participants to rename themselves

Allow meeting participants and webinar panelists to rename themselves.



Hide participant profile pictures in a meeting

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



In Meeting (Advanced)

Report to Zoom

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



Breakout room

Allow host to split meeting participants into separate, smaller rooms

Allow host to assign participants to breakout rooms when scheduling



Remote support

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

**Closed captioning**

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

**Save Captions**

Allow participants to save fully closed captions or transcripts


**Far end camera control**

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

**Virtual background**

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



Allow use of videos for virtual backgrounds 


Video filters

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



Identify guest participants in the meeting/webinar



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

Auto-answer group in chat



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

Only show default email when sending email invites



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

Use HTML format email for Outlook plugin



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

Allow users to select stereo audio in their client settings



Allow users to select stereo audio during a meeting

Allow users to select original sound in their client settings



Allow users to select original sound during a meeting

Show a "Join from your browser" link



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


Show a custom disclaimer when starting or joining a meeting



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

Request permission to unmute



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

Email Notification

When 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

Other

Blur snapshot on iOS app switcher

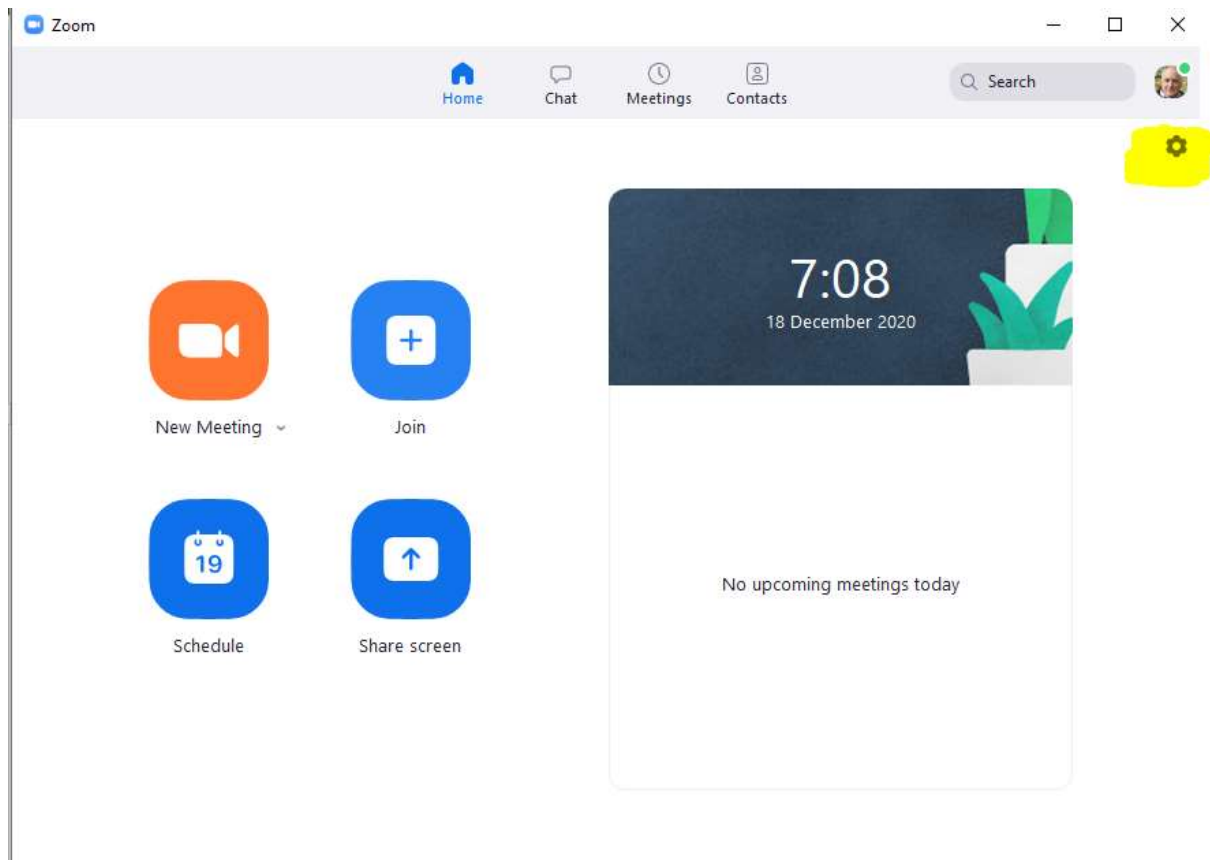


Enable this option to hide potentially sensitive information on the app switcher screen from Zoom. This screen will be shown only when multiple apps are open.

OK, that's the website taken care of. Now, we need to launch the 'App'. I assume you've all got the 'App' installed. If not, go to <https://zoom.us/download/> and install it. The 'App' is

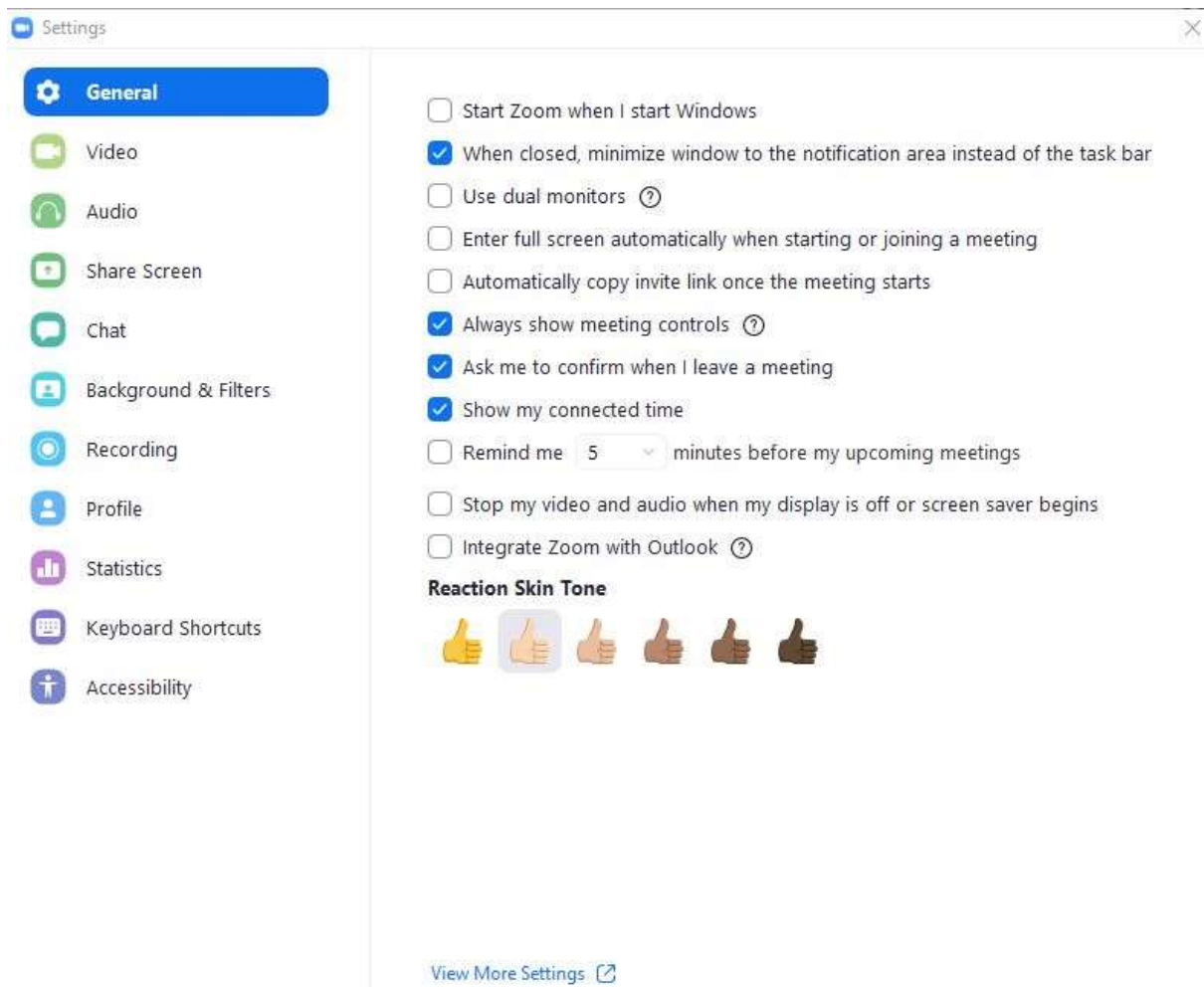
used to actually connect to your webcam, microphone and to the meeting itself. These 'App' settings are best for everyone, whether you host or not.

The main screen of the 'App' (Home) is shown below.



In the top right corner is a little gear symbol that I've highlighted in yellow – click this.

Some settings are found here, only a few need your attention.



The image shows a screenshot of the Zoom application's settings window, specifically the 'General' tab. The window title is 'Settings' and it has a close button in the top right corner. On the left side, there is a vertical navigation menu with icons and labels for various settings categories: General (selected), Video, Audio, Share Screen, Chat, Background & Filters, Recording, Profile, Statistics, Keyboard Shortcuts, and Accessibility. The main content area on the right lists several settings, each with a checkbox and a help icon (a question mark in a circle). The settings are: 'Start Zoom when I start Windows' (unchecked), 'When closed, minimize window to the notification area instead of the task bar' (checked), 'Use dual monitors' (unchecked), 'Enter full screen automatically when starting or joining a meeting' (unchecked), 'Automatically copy invite link once the meeting starts' (unchecked), 'Always show meeting controls' (checked), 'Ask me to confirm when I leave a meeting' (checked), 'Show my connected time' (checked), 'Remind me' (unchecked) with a dropdown menu set to '5' and the text 'minutes before my upcoming meetings', 'Stop my video and audio when my display is off or screen saver begins' (unchecked), and 'Integrate Zoom with Outlook' (unchecked). Below these settings is a section titled 'Reaction Skin Tone' which shows a row of six thumbs-up emoji icons with different skin tones. At the bottom of the settings area, there is a link that says 'View More Settings' with an external link icon.

Settings

General

- Video
- Audio
- Share Screen
- Chat
- Background & Filters
- Recording
- Profile
- Statistics
- Keyboard Shortcuts
- Accessibility

- Start Zoom when I start Windows
- When closed, minimize window to the notification area instead of the task bar
- Use dual monitors ?
- Enter full screen automatically when starting or joining a meeting
- Automatically copy invite link once the meeting starts
- Always show meeting controls ?
- Ask me to confirm when I leave a meeting
- Show my connected time
- Remind me 5 minutes before my upcoming meetings
- Stop my video and audio when my display is off or screen saver begins
- Integrate Zoom with Outlook ?

Reaction Skin Tone

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[View More Settings](#)

- General
- Video**
- Audio
- Share Screen
- Chat
- Background & Filters
- Recording
- Profile
- Statistics
- Keyboard Shortcuts
- Accessibility



Camera

Logitech HD Webcam C270

Original ratio HD

My Video

- Mirror my video
- Touch up my appearance
- Adjust for low light

Always display participant names on their video

Advanced

Settings X

- General
- Video
- Audio**
- Share Screen
- Chat
- Background & Filters
- Recording
- Profile
- Statistics
- Keyboard Shortcuts
- Accessibility

Speaker

Test Speaker Speakers (Realtek High Definition Audio) ▾

Output Level: ▬

Volume: ◀──────────●──────────▶

Use separate audio device to play ringtone simultaneously

Microphone

Test Mic Microphone (HD Webcam C270) ▾

Input Level: ▬

Volume: ◀──────────●──────────▶

Automatically adjust microphone volume

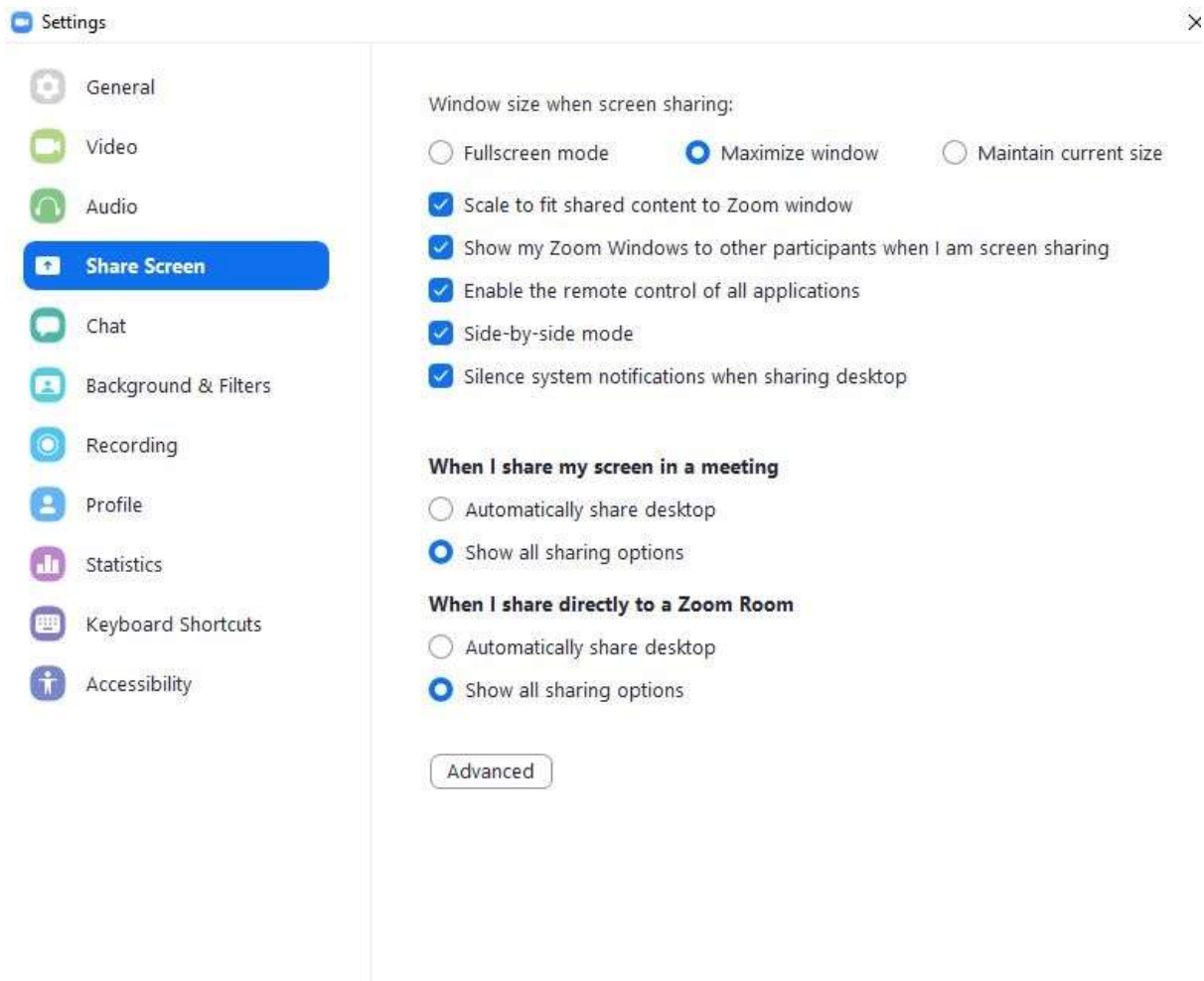
Suppress background noise Auto ▾ ⓘ

Select the default noise suppression level (low) to optimize for music

Ringtones Default ▾

- Automatically join audio by computer when joining a meeting
- Mute my microphone when joining a meeting
- Press and hold SPACE key to temporarily unmute yourself
- Sync buttons on headset

Advanced



That's it!!!

When it's time to scheduling a meeting, I suggest you use the 'App' and:

- Generate a new meeting ID for each meeting
- Create a different password as well for each meeting
- Don't bother with using the waiting room. If you do both of the above, only those people you invite will be able to join

Just go to the home screen and click on schedule.



New Meeting ▾



Join



Schedule



Share screen

7:08
18 December 2020

No upcoming meetings today

Schedule Meeting

Topic

Tom Horwitz's Zoom Meeting

Start:

Duration:

Recurring meeting Time Zone: London

Meeting ID

Generate Automatically Personal Meeting ID 761 759 1537

Security

Passcode Waiting Room

Encryption

Enhanced encryption End-to-end encryption

Video

Host: On Off Participants: On Off

Calendar

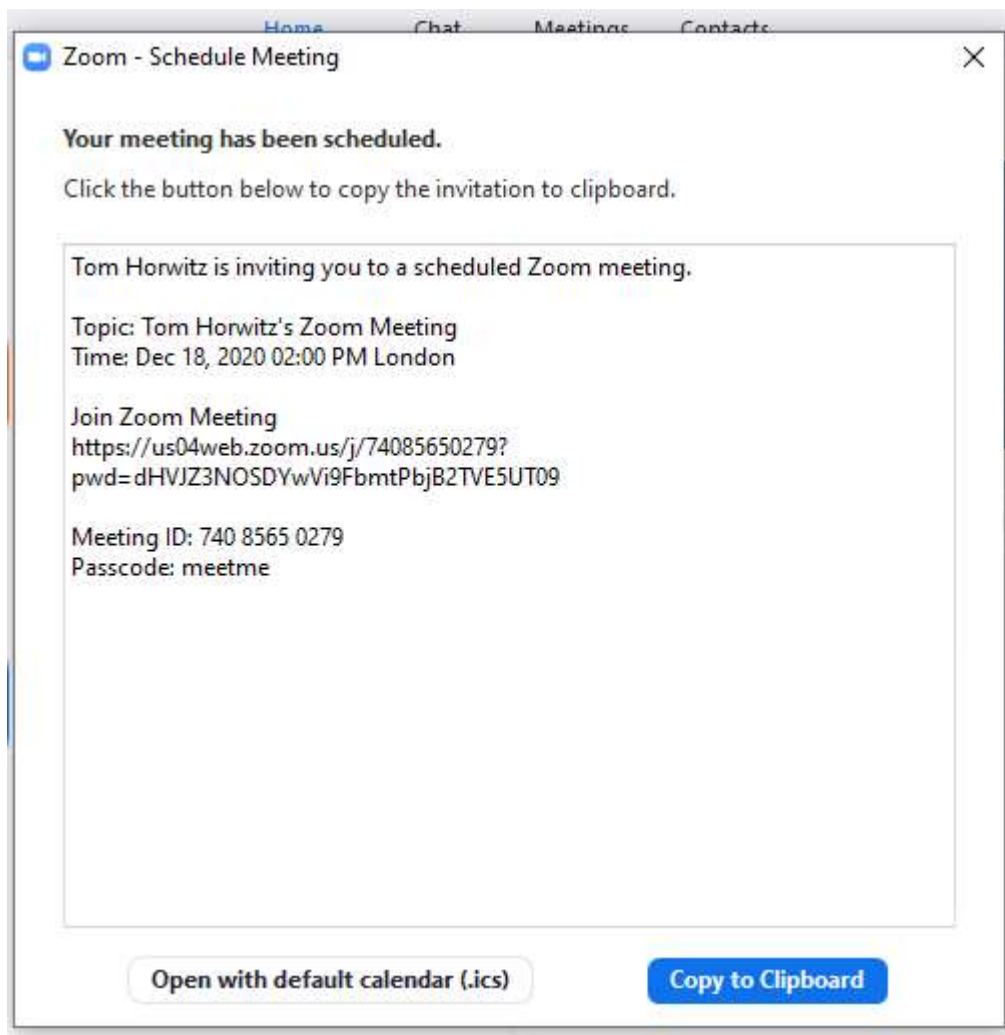
Outlook Google Calendar Other Calendars

Advanced Options

Save

Cancel

After you save it, the information appears in a window (below). Copy that information and email it to your participants. They just click on the link and away you go.



Questions, suggestions, comments please let me know and I'll pass them on.

Enjoy

Tom

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