

# Zoom Meetings: Etiquette and Best Practices for Meeting Hosts v2 (updated 8/3/20)

---

Based on Guidelines from Zoom and the University of Pittsburgh Information Technology  
Links in blue font go to the topic listed in the Zoom help center.

With the shift to the virtual 2020 Big West Zone Institute we are all learning about the Zoom communication program. It is important that we offer a positive experience to our participants. The following tips and information are offered to help you achieve that and ensure a consistent feel for our attendees.

## Scheduling Your Zoom Meeting: Use the Recommended Big West Zone Institute Event Parameters

The 2020 Big West Zone Institute events will include options to attend unique Zoom meetings. There will be up to 80 Zoom events offered during the Institute. Each event has their own Registered Attendees list. To ensure consistency and success for each event, please set up your meeting using parameters listed below and shown on the figure.

To set up your meeting, log into your Zoom account at Zoom.us or use your Zoom app. Select “Schedule A Meeting, “Meetings”/ “Schedule a New Meeting” or “Schedule” on your screen (each platform is slightly different, but you get the idea.)

Enter these meeting parameters on the Schedule a Meeting page. *If you use a mobile device or the Zoom desktop app you see slightly different wording and order of the selections, but the needed data is the same.*

- Topic: Enter your meeting title as listed in the spreadsheet with the program.
- Description: Enter a short summary of the meeting
- Use a template: If you are scheduling a lot of meetings for the Institute, you may consider setting up a template. Saving templates is not covered in this recommendation document.
- When: Enter the meeting start date and time in Pacific Time.
- Duration: Enter meeting duration in hours and minutes.
- Time Zone: Select Pacific Time. This is important since we have participants from multiple time zones. In the same field, do not check the “Recurring Meeting” box.
- Registration: Do **not** check the “Required” box.
- Meeting ID: Select “Generate Automatically”
- Security: Passcode - check this box and note automatically generated passcode. You can also enter your own unique passcode. Save this passcode as you will need to send it to each participant. Select Waiting Room.
- Video: Select “On” for both host and participant.
- Audio: Select “Both” and leave the option to “Dial from United States of America.”
- Meeting Options: Do **not** select “Enable join before host”  
Select “Mute participants upon entry”  
Do **not** select “Only authenticated users can join”

Do **not** select Breakout Room pre-assign UNLESS you are using breakout rooms.

Select "Record meeting automatically" if you want to record your meeting for future viewing by others.

- Alternative Hosts: Do not use this option. Alternative hosts are licensed users on the same account. Instead we will use co-hosts to assist with certain meeting functions.
- Co-hosts. The co-host feature allows the host to share hosting privileges with another user, allowing the co-host to manage the administrative side of the meeting, such as managing participants or starting/stopping the recording. The host must assign a co-host. There is no limitation on the number of co-hosts you can have in 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**.

Once a participant has been made a co-host, they'll have access to the co-host controls.

- Click "Save." Your meeting will be saved to your Zoom account. Take note of the Meeting ID, Meeting Passcode, and Invite Link. You will need to send these to all meeting attendees. An easy way to copy this is to click "Copy meeting invitation" and paste this in the invitation you send to attendees. It will look something like this:

"Your Name" is inviting you to a scheduled Zoom meeting.

Topic: Big West Zone Institute Opening General Session  
Time: Nov 12, 2020 09:00 AM Pacific Time (US and Canada)

Join Zoom Meeting

<https://us02web.zoom.us/j/83988244302?pwd=NGJtcWdRVzliRWtjZWWhSb0lIQnBHdz09>

Meeting ID: 839 8824 4302

Passcode: 126441

One tap mobile

+12532158782,,83988244302#,,,,0#,,126441# US (Tacoma)

+13462487799,,83988244302#,,,,0#,,126441# US (Houston)

Dial by your location

+1 253 215 8782 US (Tacoma)

+1 346 248 7799 US (Houston)

+1 669 900 9128 US (San Jose)

+1 301 715 8592 US (Germantown)

+1 312 626 6799 US (Chicago)  
+1 646 558 8656 US (New York)  
Meeting ID: 839 8824 4302  
Passcode: 126441  
Find your local number: <https://us02web.zoom.us/j/83988244302>

Your meeting attendees will appreciate your invitation sent in this automatically generated format. The consistency among all the Zoom invitations for the General Sessions, Special Sessions, Rotary Fellowships, and social events will be similar in format.

If you need to edit any of the above parameters after the meeting is scheduled, you can log into your Zoom account, select “Meetings” then select the meeting you wish to edit. Click the “Edit” link and make the necessary changes. **Remember, if you edit the meeting passcode, date, or time you must update your guests by sending them the revised meeting invitation.**

## Don't Make These Private Meetings Public

Whenever possible, distribute your Zoom meeting invitation only to those individuals who will be attending your meeting. If you share your meeting link on social media or other public platforms, anyone who sees the link will be able to join your meeting (unless you have set a passcode for your meeting as recommended above and share that privately with attendees). You don't want bad people, who can share the meeting information or post inappropriate or offensive material (“zoom bombing”).

- **Note:** If a Zoom bomber disrupts your meeting, **immediately** remove the person and [report it to Zoom](#) with “Zoom bombing” as the subject. Include the date, time, meeting ID, and any other relevant information.

## Manage Screen Sharing

Only hosts and co-hosts have the ability to share their screens by default. However, hosts may enable screen sharing for participants on a per meeting basis or change settings to enable participant screen sharing by default for all meetings.

Once you have opened your Zoom meeting, click the **Security** icon at the bottom of your screen in the meeting host's toolbar to easily enable and disable screen sharing and other common security settings from within an active meeting.

- **Note:** The **Security** icon is available only in version 4.6.10 or later of the Zoom client. To ensure you are using the latest client, open the Zoom desktop client, click the security icon in the upper left hand corner to see your current Zoom version.

## Manage Your Participants – Some Options for Your

- **Lock the meeting:** Locking a Zoom meeting that is in progress prevents new participants from joining, even if they have the meeting ID and passcode. When you are in the meeting, click **Participants** at the bottom of the window, then click the **Lock Meeting** button in the pop-up window that will come up when you click the three dots. If you are on a mobile device the three dots are at the top of the screen. Select “meeting settings” to find **Lock Meeting**.

- [Set a meeting passcode](#) (as recommended above)  
This option requires attendees to enter a passcode that you provide before they can join the meeting. Requiring a passcode makes it easier to share the Meeting ID publicly because you can send the meeting passcode privately (for example, via email).
- [Remove unwanted or disruptive participants](#)  
Navigate to the **Participants** menu, mouse over a participant's name, and click **Remove**. They will not be able to rejoin unless you allow them to do so (see below).
- [Allow removed participants to rejoin](#)  
If you remove the wrong person from a meeting or if an authorized participant inadvertently drops out, you can allow them to rejoin. Go to [Admin/Account Management/ Account Settings on your Zoom Account web page](#). Scroll down to "Allow removed participants to rejoin" and toggle this option on.
- [Place participants on hold](#)  
You can place individual participants on hold during a meeting. Prerequisites include having Host permission in the meeting and the [Waiting room](#) disabled  
Note: The attendee on hold feature is similar to waiting room. The main difference is that participants are automatically placed in the waiting when they join the meeting. On the other hand, you manually place an attendee on hold during the meeting.
- Using attendee on hold in your meetings: If the setting is enabled, you can put an attendee on hold during a meeting. During the meeting click on Manage Participants in the host controls. Hover over the name of the attendee you want to put on hold. Click More, then Put on hold. The Participants List will now indicate that this attendee is on hold. They will see a screen indicating that the meeting host will let them in shortly. Click Take off hold in the participants' list whenever you are ready to bring them back into the meeting.
- Stop video  
As a meeting host, you can turn off someone's video. This will allow hosts to block unwanted, distracting, or inappropriate gestures on video.
- [Mute participants](#)  
You can mute/unmute individual participants or all participants at once. This allows you to block unwanted, distracting, or inappropriate noise. To mute everyone, click **Manage Participants** and select **Mute All**. You should enable **Mute Upon Entry** in your settings to keep noise at a minimum during large classes or meetings.
- [Turn off file transfer](#)  
In-meeting file transfer allows people to share files through the in-meeting chat. Toggle this off to keep the chat from getting bombarded with unsolicited pics, GIFs, memes, and other content.
- [Turn off annotation](#)  
You and your attendees can doodle and mark up content together using annotations during screen share. You can disable the annotation feature in your Zoom settings to prevent people from writing all over the screens.
- [Disable private chat](#)  
Zoom has in-meeting chat for everyone, or participants can message each other privately. To cut back on distractions, you can restrict participants' ability to chat amongst one another while your event is in progress. This also helps prevent anyone from receiving unwanted messages during the meeting.
- [Review Zoom's best practices for securing meetings](#)  
Zoom has compiled a list of pre-meeting and in-meeting settings you can use to protect your meetings.

## Additional Meeting Tips

- **Use poll questions** periodically to engage your audience and keep them focused.
- **Monitor the chat function** for questions as they come in, to see if people are expounding on something you covered, or to see if people are expressing poor understanding.
- **Enable video only for the presenter.** You can only see a limited number of participants anyway, depending on your screen size, and enabling video gobbles up network resources. If you plan to lecture without feedback (e.g., for a large seminar), you can also disable participant audio.
- **Schedule one or more feedback breaks.** You can assist those who have questions during the meeting.
- **Address Internet disruptions:** At this time, many network providers are seeing massive increases in residential bandwidth use during the day, and many users are being throttled. If participants are experiencing lagging or skipping, suggest that they use their computer to access video, while simultaneously dialing in by phone for the audio.