Hosting a Zoom online meeting for online training courses – Zoom settings

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This guide is based on Zoom version 5.11.4. If you are not on the latest version, download it here:
https://zoom.us/download (what you see in your Zoom Settings may depend on your employer's Global
Zoom Settings]

**Zoom now has a myriad of functions and settings. This document will help you to get those settings
right for your purpose. The second half of this document provides more tips for hosting Zoom
events.**

A separate document explaining the breakout room function is available on the UKCEH Training FAQ page.

Contents

Introduction

Some of these instructions apply for UKCEH staff only. Please apply accordingly to your own situation.

If you are scheduling and hosting a Zoom meeting for a purpose other than hosting an online training course, you can still use this guide, but may wish to choose slightly different settings.

Short video tutorials:

These are the two official Zoom video tutorials:

1. Scheduling a Meeting with Zoom Website: https://support.zoom.us/hc/en-us/articles/201362413-Scheduling-meetings
2. Meeting Controls: https://support.zoom.us/hc/en-us/articles/360021921032-Zoom-Rooms-meeting-controls-and-settings

   **It is important that host <u>and</u> co-host follow the instructions for Zoom meeting settings (Steps 1-14)**

Settings (apply to all meetings you host)

Meeting settings

Step by Step instructions

Most of these settings cannot be changed once the meeting has started, so it is <u>essential </u>that you get these settings right before you start your meeting.

1. UKCEH: You must be connected to the UKCEH network, e.g. via a UKCEH-networked laptop (VPN <u>not </u>required)
2. Log into Zoom using your Zoom account
   a. UKRI/ UKCEH account https://ukri.zoom.us/
   b. Any other Zoom account https://zoom.us/signin
3. UKCEH: If you are doing this for the very first time, you need to activate your account first. Follow instructions sent to you by email.
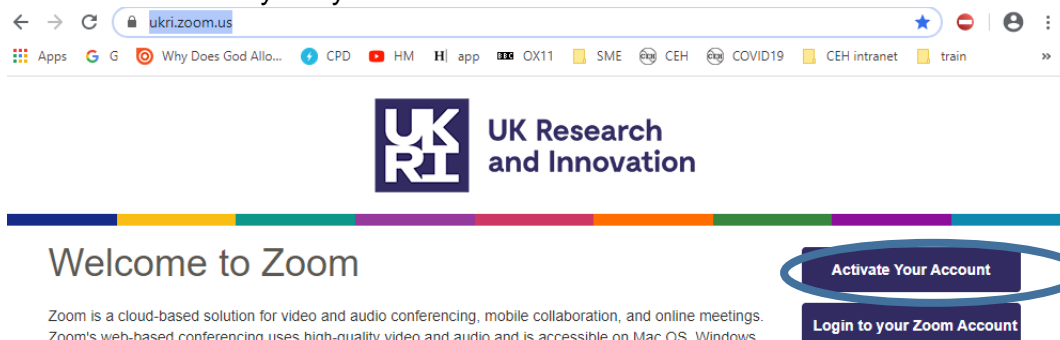

4. UKCEH/UKRI family: If you have already activated your account, click on **Login to your Zoom Account.** You do not need to type in any user ID or password. The system will take your credentials from your UKCEH log-in

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Activate Your Account

Login to your Zoom Account

5. There is an alternative log-in route, e.g. via an icon on your desktop, where you welcome screen looks like this (but you will need to log into your account online to see all the settings you want to change in the following sections –see next step)
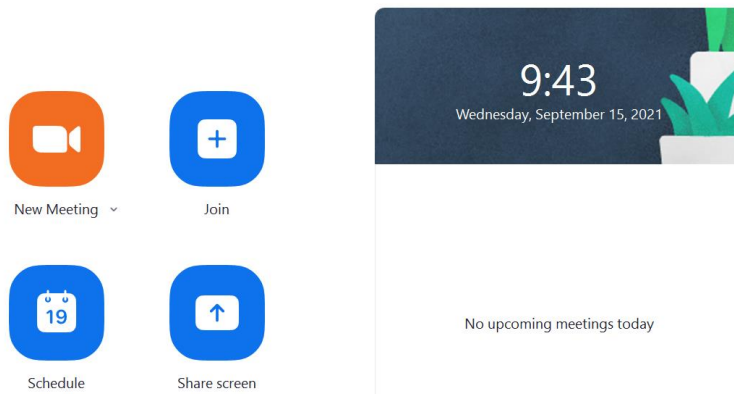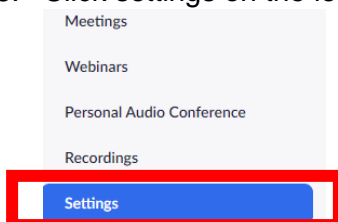

6. Your Zoom account will look something like this (but view may differ depending on your organisational set-up):
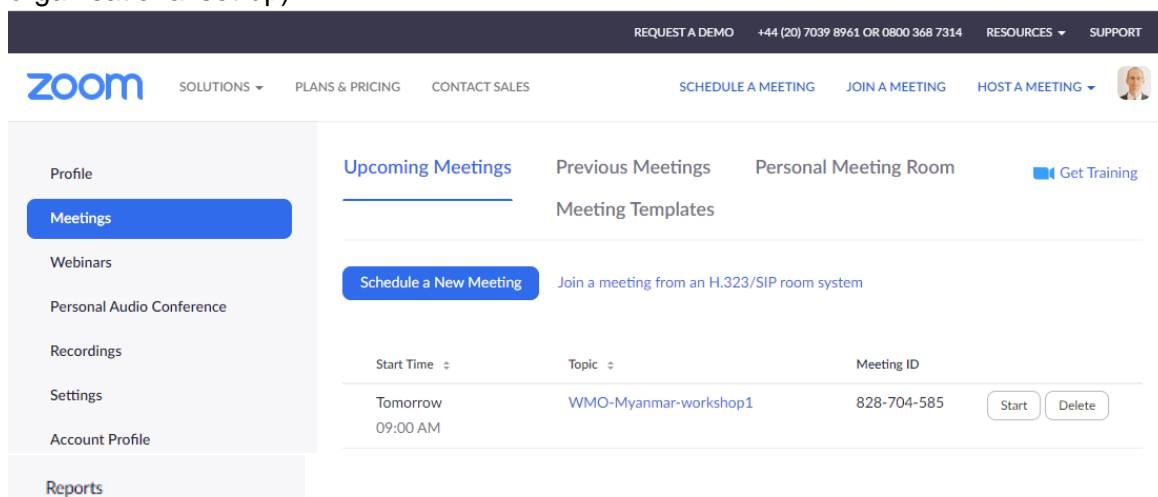

7. You must set the (default) **Settings** for all meetings correctly <u>before </u>you schedule a meeting. (Don't worry if you have already scheduled the meeting. Follow these steps, and then do one extra step afterwards (**Step 15**).

8. Click settings on the left hand panel

9. Make sure, your internet browser screen has the full width, so you can see the full menu. On the "**Meeting**" tab of **Settings**, you have a choice of 6 groups of settings.
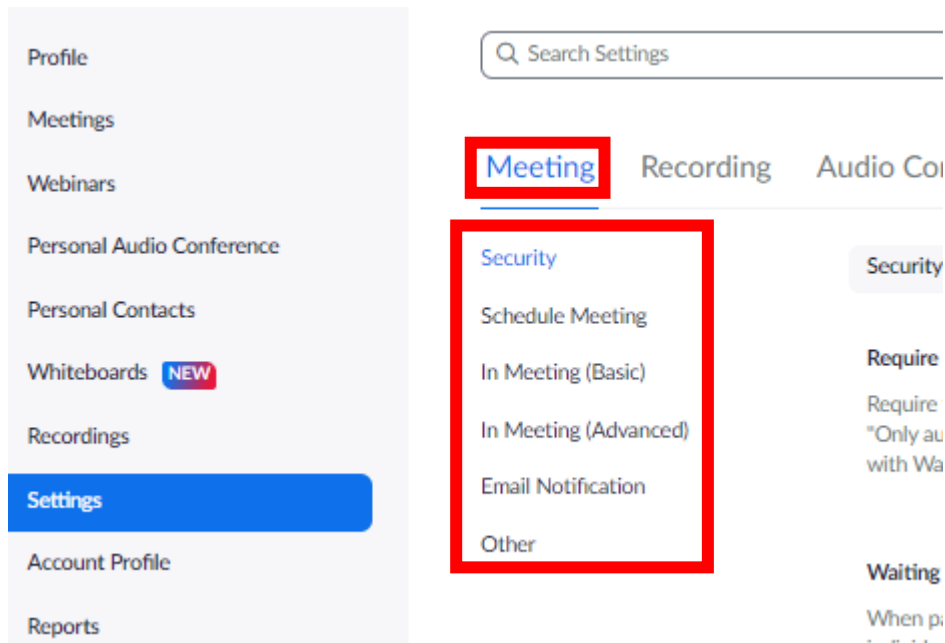
10. The following screen shots will talk you through the recommended settings for all setting options. Once you click on one group of settings, e.g. In Meeting (Advanced), you will jump to that section of settings, but wherever you are you can always scroll up and down to see all settings from all 5 groups of settings. **Some settings may be locked by your admin**.

'Security' Settings

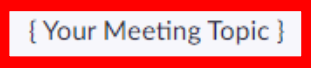| Recommended setting	comment
Security **Require that all meetings are secured with one security option** Require that all meetings are secured with one of the following security options: a passcode, Waiting Room, or "Only authenticated users can join meetings". If no security option is enabled, Zoom will secure all meetings with Waiting Room. Learn more v **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. **Waiting Room Options** The options you select here apply to meetings hosted by users who turned 'Waiting Room' on ✓ Everyone will go in the waiting room Edit Options Customize Waiting Room	Essential: ON

It is a good idea to customize the waiting rooms, e.g. with your organisation's logo. When you set up the Zoom meeting, choose a good "topic"/meeting name, as this will show in the waiting room. Give the learners/ participants reassurance that "they are in the right place".

Customize Waiting Room

Meeting ID : 888-888-888

Welcome! Please wait, the meeting host will let you in soon.

60 / 64

{ Your Meeting Topic }

e.g. Evidence Synthesis Training 13 April 2021

| Recommended Security Settings continued		comment
Require a passcode when scheduling new meetings A passcode will be generated when scheduling a meeting and participants require the passcode to join the meeting. The Personal Meeting ID (PMI) meetings are not included.	(on)	(the following are set by admin or not relevant for training courses)
Require a passcode for instant meetings A random passcode will be generated when starting an instant meeting	(off)	
Require a passcode for Personal Meeting ID (PMI) ● Only meetings with Join Before Host enabled ○ All meetings using PMI	(on)	
Require a passcode for Personal Audio Conference	(off)	
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	(on)	ESSENTIAL: ON
Require a passcode for Personal Audio Conference	(off)	(not relevant for training)
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.	(on)	ESSENTIAL: ON
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.	(off)	Recommended: off this is convenient, but less helpful for learners joining via mobile phone or web-browser (where you have to enter meeting ID and passcode separately)
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. Learn more	(off)	

Recommended Security Settings (continued)	comment
	Leave these settings as they are by default

Approve or block entry for users from specific countries/regions

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

Choose between enhanced encryption (encryption keys stored in the cloud) and end-to-end encryption (encryption keys stored on your local device) 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 ⑦   ◯ End-to-end encryption ⑦

Schedule Meeting

Host video

Start meetings with host video on

Recommended: ON

Participants video

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

Recommended: ON

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

Recommended: ON

Allow participants to join before host

Allow participants to join the meeting before the host arrives

ESSENTIAL: OFF

Recommended Security Settings (continued)

Allow Zoom Rooms to start meeting with Host Key ⓥ	○	(locked by admin)
The administrator has locked this setting and you cannot change it. All of your meetings will use this setting.		
Enable Personal Meeting ID	●	Recommended: ON
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	○	Recommended: Off
You can visit Personal Meeting Room to change your Personal Meeting settings.		
Use Personal Meeting ID (PMI) when starting an instant meeting	○	Recommended: Off
Add watermark	○	ESSENTIAL: OFF
Mute all participants when they join a meeting	●	Recommended: ON
Automatically mute all participants when they join the meeting. The host controls whether participants can unmute themselves. ⓥ		
Upcoming meeting reminder	○	Recommended: Off
Receive desktop notification for upcoming meetings. Reminder time can be configured in the Zoom Desktop Client. ⓥ		
Meeting Templates	○	Recommended: Off
Allow Admins to define 'Meeting Templates' and make them available to users.		
Webinar Templates	○	Recommended: Off
Allow Admins to define 'Webinar Templates' and make them available to users.		

'Schedule Meeting' Settings

Recommended setting	Comment
Schedule Meeting	
Host video Start meetings with host video on	<u>ESSENTIAL: ON</u>
Participants video Start meetings with participant video on. Participants can change this during the meeting.	Recommended: ON (so you can immediately engage with the learners visually)
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	Recommended: ON (so that people with computer audio problems can use phone call in as an alternative)
Allow participants to join before host Allow participants to join the meeting before the host arrives	<u>ESSENTIAL:OFF</u>
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 [v]	(the following are not relevant for training courses)
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. [v]	<u>RECOMMENDED: OFF</u> (otherwise you will have a real cacophpony of distracting sounds as people join)
Upcoming meeting reminder	(personal choice)

'In Meeting (Basic)' Settings

Recommended setting	Comment
In Meeting (Basic)	
Require encryption for 3rd party endpoints (SIP/H.323) ⬤ON 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.	Recommended: ON
Meeting chat ⬤ON Allow meeting participants to send chat messages By default, allow participants to chat with [Everyone and anyone directly ⌄] 🗹 ☑ Allow users to save chats from the meeting 🗹 ○ Host and co-hosts 🗹 ⬤ Everyone ○ Only users in your account 🗹	**ESSENTIAL: ON** ==ESSENTIAL: Allow== (this also allows to copy the chat)
Meeting chat - Direct messages ⬤ON Allow meeting participants to send direct messages to other participants	**ESSENTIAL: ON**
Meeting chat - Auto-save ⬤ON Automatically save chat messages to a local file on the host's computer when the meeting ends	**ESSENTIAL: ON**
Webinar chat ⬤ Sound notification when someone joins or leaves ○OFF	Webinar chat (only relevant for Zoom webinars) Recommended: OFF
Send files via meeting chat ⬤ON Hosts and participants can send files through the in-meeting chat. 🗹 ☐ Only allow specified file types 🗹 ☐ Maximum file size 🗹	**ESSENTIAL: ON**
Send files via webinar chat 🗹 ⬤ ☑ Allow panelists to send files via webinar chat ☐ Only allow specified file types ☐ Maximum file size	Webinar chat (only relevant for Zoom webinars)
Feedback to Zoom ○	Recommended: OFF (pretty annoying)

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. ⒱

Recommended: OFF

Co-host

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

ESSENTIAL: ON

Meeting Polls/Quizzes

Allow host to add polls before or during a meeting ⒱

☐ Allow host to create advanced polls and quizzes ⒱
☐ Allow alternative host to add or edit polls and quizzes ⒱

ESSENTIAL: ON

Meeting Survey

Allow host to present survey to participants once a meeting has ended ⒱

Recommended: OFF

Webinar Polls/Quizzes

Allow host to add polls before or during a webinar

☐ Allow host to create advanced polls and quizzes ⒱
☐ Allow alternative host to add or edit polls and quizzes ⒱

[only applies to webinars]

Webinar Survey

Allow host to present surveys to attendees once a webinar has ended

[only applies to webinars]

Always show meeting control toolbar

Always show meeting controls during a meeting ⒱

Recommended: ON

Show Zoom windows during screen share ⒱

Screen sharing

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

How many participants can share at the same time? ⑦

🔘 One participant can share at a time

⚪ Multiple participants can share simultaneously (dual monitors recommended) ⒱

Recommended: ON
ESSENTIAL: ON

Recommended: One

> When 'Remote Support' is enabled, you can't enable multiple participants to share simultaneously

Who can share?

⚪ Host Only   🔘 All Participants ⑦

Recommended: All

Who can start sharing when someone else is sharing?

🔘 Host Only   ⚪ All Participants ⑦

Recommended: host only

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In Meeting (basic) recommended settings (continued)	Comment
Disable desktop screen sharing for meetings you host When this option is on, users can only share selected applications and files. This option may not be applicable to users using web clients. ⓥ	Recommended: OFF
Disable screen sharing when guests are in the meeting Guests include users who are not signed in or not in the same account. Participants who dial-in via phone or join with SIP/H.323 devices will still be able to screen share. ⓥ	(set by admin)
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 ⓥ	ESSENTIAL: ON
Whiteboard (Classic) Allow host and participants to share whiteboard during a meeting ⓥ ☑ Allow to save the whiteboard content ⓥ ☑ Automatically create local export when sharing is stopped ⓥ ○ Save as PNG ● Save as PDF	ESSENTIAL: ON
Remote control During screen sharing, the person who is sharing can allow others to control the shared content ☑ Allow remote controlling user to share clipboard ⓥ	ESSENTIAL: ON
Slide Control During a presentation, the person who is sharing can allow others to control the PowerPoint or Keynote slide presentation ⓥ	Recommended: ON
Non-verbal feedback	ESSENTIAL: ON
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. ⓥ ● All emojis ⓥ	ESSENTIAL: ON

In Meeting (basic) recommended settings (continued)		Comment
Webinar reactions Allow attendees and panelists to communicate their emotions with emojis (e.g. clap, heart, laugh). Hosts can control when reactions are available, and users can customize their viewing experience by choosing from three levels of emoji display (full, compact, hidden). ⓥ	⚪	[Webinar not relevant]
Join different meetings simultaneously on desktop Allow user to join different meetings at the same time on one desktop device ⓥ	🔵	<u>Recommended: ON</u>
Allow removed participants to rejoin Allow previously removed meeting participants and webinar panelists to rejoin ⓥ	⚪	Recommended: OFF
Show invitee list in the Participants panel Users invited to meetings on other platforms (e.g. Google, Outlook, or Exchange) will also be shown on this list ⓥ	⚪	Recommended: OFF
Allow users to change their name when joining a meeting By disabling this setting, users will always use their name on profile page to join a meeting ⓥ	🔵	<u>ESSENTIAL: ON</u>
Allow participants to rename themselves Allow meeting participants and webinar panelists to rename themselves. ⓥ	🔵	<u>ESSENTIAL: ON</u>
Allow host or co-host to rename participants in the waiting room Participants will be notified of name change ⓥ	🔵	Recommended: ON
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. ⓥ	⚪	Recommended: OFF

'In Meeting (Advanced)' Settings

Recommended settings	Comment

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. ☑

Recommended: OFF

Webinar - Session Branding

Allow hosts to visually customize a webinar by setting a session background. Hosts can also set the virtual background and name tags are applied to hosts, alt-hosts, panelists, interpreters and speakers. ☑

[only relevant to webinar]

Q&A in webinar

Allow attendees to ask questions for the host and panelists to answer

[only relevant to webinar]

Breakout room

Allow host to split meeting participants into separate, smaller rooms

☑ Allow host to assign participants to breakout rooms when scheduling ☑
☑ Allow host to broadcast message to participants ☑
☑ Allow host to view activity statuses of participants in breakout rooms (e.g. share screen, reactions) ☑

Activity statuses will not be displayed for participants with earlier versions and for certain devices (e.g. phone, H.323, and SIP).

<u>ESSENTIAL: ON</u>

(pre-assignment only seems to work with people from your own organisation)

Remote support

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

Recommended: ON

Manual captions

Allow host to type closed captions or assign a participant/3rd-party service to add closed captions

☑ Allow host to type or assign a participant to type
☑ Allow use of caption API Token to integrate with 3rd-party Closed Captioning services

Recommended: ON

Automated captions

Recommended: ON

Translated captions

Allow users to enable automated translated captions in these language pairs in meetings.

Recommended: ON

Full transcript

Allow viewing of full transcript in the in-meeting side panel

Recommended: ON

Save Captions

Allow participants to save fully closed captions or transcripts

(set by administrator)

In Meeting (Advanced) Recommended settings (continued)	Comment
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 language interpretation by default	Recommended: ON
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.	Recommend: OFF
Group HD video Activate higher quality video for host and participants. (This will use more bandwidth.)	Recommend: OFF
Virtual background Customize your background to keep your environment private from others in a meeting. This can be used wi or without a green screen. ☐ Allow use of videos as virtual backgrounds ⓘ	<u>ESSENTIAL ON</u> Recommend: OFF (video may become a distraction)
Video filters Turn this option on to allow users to apply filters to their videos ⓥ	Recommend: OFF
Avatars Enable this option to allow users to select an avatar that will be shown in meetings. ⓥ	Recommend: ON
Immersive View Allow hosts to curate case-specific scenes, such as a classroom or boardroom for their meetings or webinars. ⓥ	(locked by admin)
Focus Mode A mode that shows only hosts and co-hosts' videos and profile pictures during a meeting. Focus Mode can be found in the "More" menu in the in-meeting toolbar. ⓥ ☐ Allow host to enable focus mode when scheduling ⓥ	(optional)
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. ⓥ	Recommended: OF
Auto-answer group in chat Allow user to add others to an 'Auto Answer Group'. Calls from members of a user's 'Auto Answer Group' will	Recommended: OFF

Only show default email when sending email invites	⬤	Recommended: OFF
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	⬤	Recommended: ON
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	⬤	Recommended: ON
Allow users to select stereo audio during a meeting		
Show a "Join from your browser" link	⬤	Recommended: ON
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 "Always join from browser" option when joining from join.zoom.us	⬤	Recommended: OFF
Allow account members to enable "Always join from browser" when they join meetings from join.zoom.us.		
Allow livestreaming of meetings	⬤	Recommended: OFF
Allow livestreaming of webinars	⬤	(Webinar)
Show a custom disclaimer when starting or joining a meeting	⬤	(locked by admin)
Create your own disclaimer that will be shown at the start of all meetings hosted by your account		
Request permission to unmute	⬤	ESSENTIAL:ON
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. ⓥ		
Enable "Stop incoming video" feature	⬤	Recommended: OFF
Allows meeting participants to turn off all incoming video feeds on their screen (does not effect other participants' screens). To access this feature, click the view button at the top-right corner of your screen. ⓥ		
Save Gallery View	⬤	Recommended: OFF
After re-ordering the gallery, the host may save the arrangement as a custom seating chart to the unique		

Email Notification Settings
This is a personal choice, but I would turn them all off (leave default).

Other Settings
Not really relevant for training. Recommend to leave defaults as they are.

Recording Settings
It is a good idea to record a meeting, for example

1) To proof your trainers acted professionally
2) To learn from your own training delivery
3) To recap on learners feedback of Q&A
4) To let learners who missed the course watch a recording of the training instead
5) To use the recording for future internal training or external commercial training purposes

To ensure, you do not break confidentiality nor data protection (GDPR), I recommend the following:

1) During course sign up ask the learners for their permission (for their voice only) to be recorded
2) Announce in the joining instructions that the training will be recorded
3) During the event, always have at least one trainer spotlighted (see below). Spotlighting will override "active speaker", i.e. when you record active speaker, you will actually record the spotlighted person (and not any learners who are speaking)
4) Apply the following Settings

Settings: recommended recording settings	Comment
	Recommended: OFF Recommended ON ESSENTIAL to avoid issues with GDPR (an audio file only may be useful if you want to combine with other media) Recommended ON

recommended recording settings (continued)	Comment
Advanced cloud recording settings ☐ Add a timestamp to the recording ⦿ ☐ Display participants' names in the recording ☑ Record thumbnails when sharing ⦿ ☑ Optimize the recording for 3rd party video editor ⦿ ☐ Audio transcript ⦿ ☐ Recording highlights ⦿ NEW ☐ Save panelist chat to the recording ⦿ ☑ Save poll results shared during the meeting/webinar ⦿ ☑ Save closed caption as a VTT file Allow cloud recording sharing ⬤▭	Timestamp Recommended OFF Recommended ON (So that the Zoom host can share directly with colleagues, e.g. for editing

Automatic recording

Record meetings automatically as they start

IP Address Access Control

Allow cloud recording access only from specific IP address ranges

Require users to authenticate before viewing cloud recordings

Right before sharing cloud recordings, meetings hosts can choose from one of the options configured below to require users to authenticate before viewing recordings.

Authentication Options:

Signed-in users in my account (Default)

Edit

Hide in the Selection

The following 3 options are recommended: on to protect your organisation's IP

Set recording as on-demand by default

Users must register before they can watch the recording

Require passcode to access shared cloud recordings

Recommended recording settings (continued)	Comment
Viewers can see the transcript ⬤ ⟶	(optional)
When this setting is turned on, users with the sharing link will be able to view transcripts of recordings. This setting is applicable to newly generated recordings only.	
Auto delete cloud recordings after days ⬤ ⟶	(optional)
Allow Zoom to automatically delete recordings after a specified number of days	
Specify a time range (days): 120	
The host can delete cloud recordings ⬤ ⟶	(optional)
Recording notifications - Zoom clients ⓘ	
Show a disclaimer to participants when a recording starts ○ All participants ⬤ Guest only ⑦	The following settings may be locked by the admin. They are there to ensure your organisation complies with GDPR
Play voice prompt for ⬤ All participants ○ Guest only ⑦ ○ No one ☐ Ask host to confirm before starting a recording	
Recording notifications - Phone users By default, phone users will hear one audio notification indicating tha ☐ Require phone-only users to press 1 to consent to being recorded ☑ Multiple notifications for phone users ⑦	

Scheduling a meeting

Note: meeting IDs in screenshots are blocked out with a little blue box ▬▬▬▬

Now that you have made your generic meeting settings, this will transfer into every new meeting you schedule. There are several settings that you can manually change, every time you schedule a new meeting (but you can only change some settings by changing the general meetings settings)

11. If you have already scheduled the online Zoom meeting (before changing the generic settings above), do the following (if not **skip to step 12**):

    In Meetings menu/ view (not in the settings/meetings tab). Click on the meeting you have already scheduled
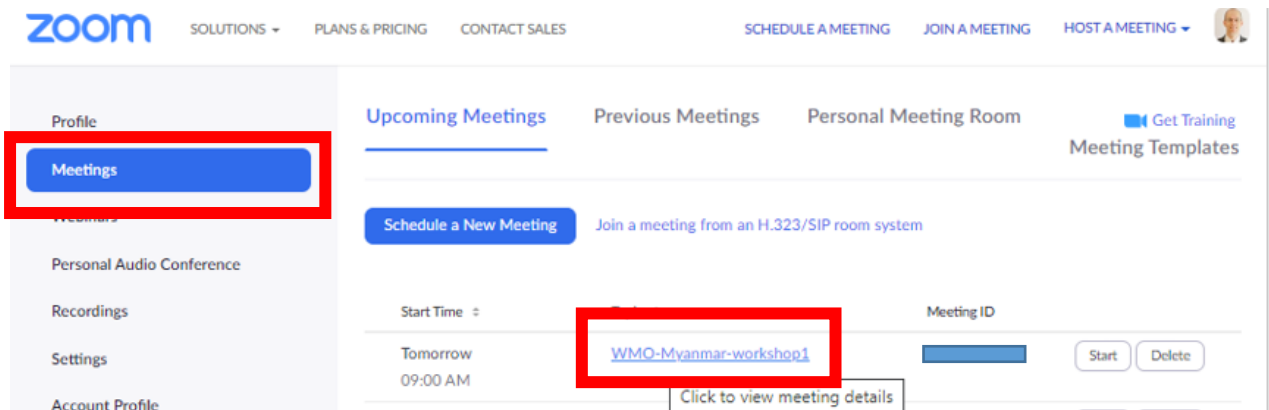
12. Scroll down to the bottom of the window and click on Edit this meeting
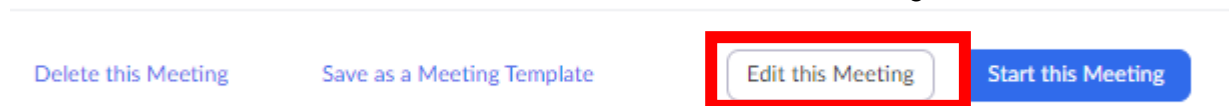
    Then skip to step 13.

13. At the top of the Zoom menu bar, click on **Schedule a meeting**
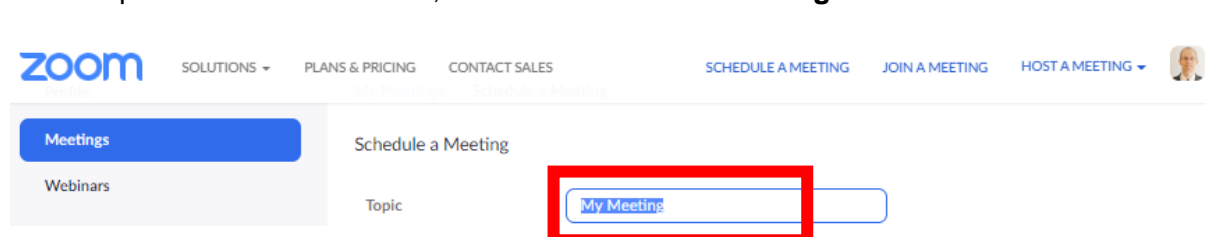
14. Enter/ check settings for Schedule a meeting

Scheduling meeting recommended settings	Comment
	Chose a good topic/ event name (→ waiting room!) If your training is running over several days, do a recurring meeting (i.e. the same log-in credentials apply every day of the course) ESSENTIAL: waiting room ESSENTIAL: HOST ON Recommended Learner: On ESSENTIAL: both Recommended: Mute Recommended: request permission Anyone listed here can take over the host role if you are late/ unavailable

<u>You can now copy the join URL and email to participants and/or enter into the training event's Joining Instructions</u>

Invite Attendees	Join URL: https://ukri.zoom.us/j/█████████	⌂ Copy the invitation

Scheduling a meeting for somebody else
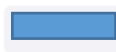
It is possible to give someone else (in your organisation) access to your schedules meetings. The full guidance for this is at: https://support.zoom.us/hc/en-us/articles/201362803

15. You may wish to do this on a reciprocal basis, i.e. You can schedule for someone else, and they can do it for you.

16. Settings/Other/Assign scheduling privilege to

17. Click on the + sign and enter the appropriate email address of your colleague

18. Log out of your Zoom account and back in

19. On Settings/ Other, you can see who you have assigned the scheduling privilege to and who can schedule meetings for and

Assign scheduling privilege to

█████@ceh.ac.uk ✕

I can schedule for

█████@ceh.ac.uk ✕

20. Next time you go to schedule a meeting, you can now select to schedule a meeting for you or someone else:

My Meetings > Schedule a Meeting

Schedule For	Myself	▲
		🔍
	Myself	
Topic	████ Christine ████ @ceh.ac.uk)	

21. Also under Meetings/ Upcoming, you can see meetings coming up for you and the person who assigned you priviliges:
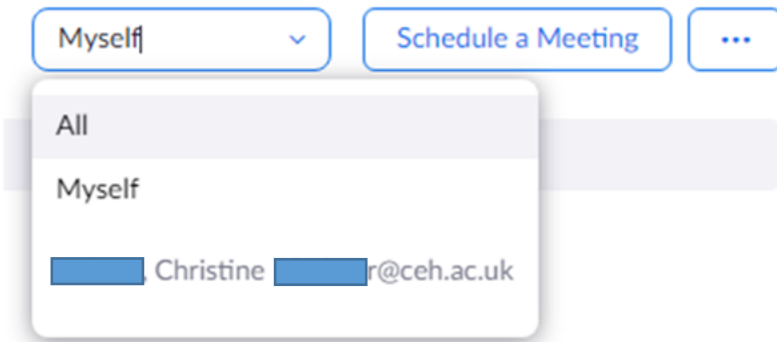
You are now all set up!

Have a great online training course!

Ingo Schüder

Further tips for hosts

Before the training course

1. **Broadband connectivity**
   - Always use a wired connection via your Ethernet cable.
   - Do not use VPN as this will slow down your broadband.
   - Brief trainers/ presenters and learners to do likewise.
   - Consider the trainers/ presenters joining the Zoom meeting from their workplace rather than from home, if they know they have unreliable and/or slow internet connection.
   - If a speaker/ expert/ presenter is not using any visual aids like PPT, they may consider joining from an Android or Apple smartphone (much lower demand on bandwidth – detailed guidance on UKCEH FAQ page)

2. **Detailed joining instructions**
   Make sure your learners get the joining instructions in good time. I recommend two weeks before and again 2-3 days before. Emphasize the need that each learner is responsible and needs to ensure they can get access to Zoom on the day. See the learner-directed guidance documents on UKCEH FAQ page
   UKCEH staff only: ask Ingo Schüder for a Zoom meeting joining instructions template.

3. **Remind trainers and learners of privacy issues**
   Do not allow taking screenshots of other learners, no recording using third party apps. Close tabs on web browser which may give away personal information (e.g. who you bank with). Other learners will be able to see into your home, so if you don't want e.g. your kids. to appear in the video feed, take appropriate measures.

4. **More visual prompts**
   Compared to face to face engagement you lose several communication methods (body language, volume/ tone if poor line, some gestures etc.) Especially for visual learners you want to give as many visual prompts as possible, e.g.
   a. Use "breaker slides" between each session

b. Have a slide for everything you may otherwise just consider announcing (and now an ….exercises, breaks, live demonstration

c. Use the [set of PowerPoint slides hosts may wish to screen-share during a meeting to explain Zoom functions to participants](#) (this also covers audio & video troubleshooting and intro to breakout rooms)

d. In share screen mode a PPT slide will take up only 60% of the learners screen (We recommend "Reading View" rather than "Slide Show" as PPT viewing option) – have the font size on slides accordingly 20+, 24 wherever possible

5. **Plan less content and more breaks**

6. **Hosting support**
Ask a colleague if they can host the meeting and take responsibility for things like monitoring the chat and learner's body language, troubleshooting, muting/ unmuting, spotlighting. This will help you to focus on the training.

7. **Have a mock run**
Ask all active players (trainers/ hosts) to join. If possible, invite some mock learners. Practice the transitions from one person to the other and from one medium to the other (e.g. PPT/ internet live demonstration). Practice breakout rooms and allocation of learners to these.
Especially if you have external presenters, make sure they are familiar with the technology (e.g. how to share a screen)

During the training course

1. **Multiple trainers –make others co-hosts**
The learning experience depends on the trainer: learner ratio. If you are doing exercises, a second trainer may be particularly useful. He or she does not have to join the whole meeting.
Make others co-hosts at the start of the meeting/ when they join. Participants/More/Make Co-Host.
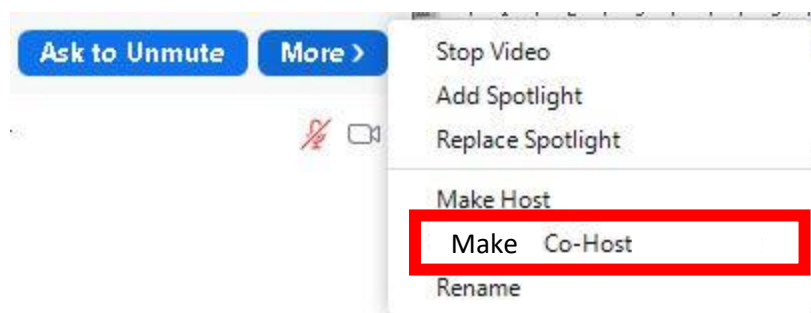
Co-hosts have additional "privileges" such as
- Admitting participants/ learners to the meeting
- Spotlighting other people
- Inviting others to unmute
- Making other people co-hosts
- Moving from one breakout room to another
- Starting a screen share while somebody else is screen sharing
- Moving from one breakout room to another

2. Change Learner names

Encourage all learners to show their (first) name, as they would like to be called (i.e. not 'iPad123').
Do only change their names for them <u>after</u> explicit permission to do so! Encourage them to change
their names themselves:
➔ Click on the three white dots in the blue square in the top/Rename

3. Engagement and participation

Make it clear which Zoom functions and tools you would like learners to use to participate/ engage.
(Preferably, turn off functions you do not want to use in generic settings [above] before the meeting
starts, e.g. if you do not intend to run a poll, turn that off – see <u>General meetings settings (apply to
all meetings you host)</u>

4. Make use of the different 'views'

Zoom now has at least 5 different views. For teaching/ knowledge input elements, encourage the
'Speaker View'. For group discussions, encourage learners to use 'Gallery View'
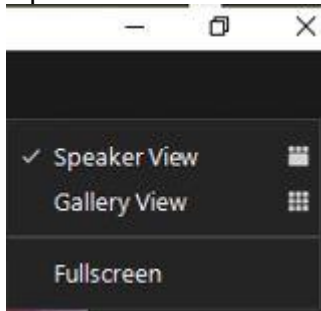
<u>Options when o screen share</u>   <u>Options during screen share</u>
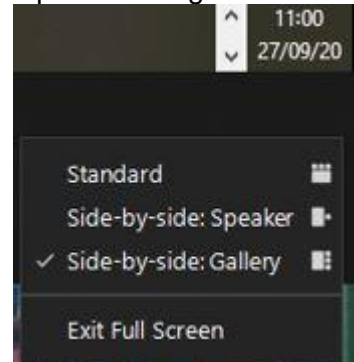
5. Use Spotlighting

Remember: Spotlighting overrules Zoom showing the 'active speaker'. Only the spotlighted person
is visible in Speaker View and Zoom only records the spotlighted person(s) (see above)
You can now have several people spotlighted at the same time (good for e.g. panel discussion –
use add spotlight – remove spotlight)
To switch the spotlight from trainer A to trainer B, chose "Replace spotlight"
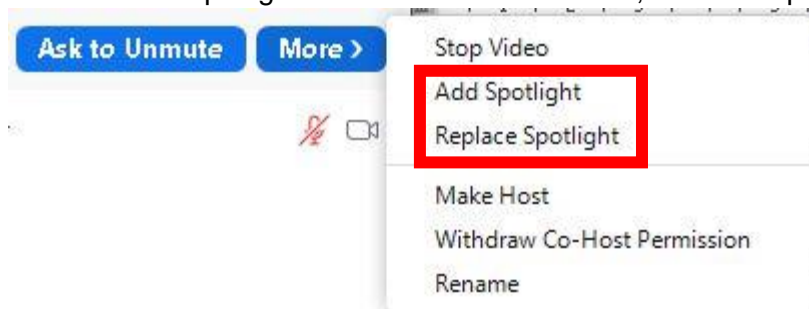
6. Muting/unmuting

Learners should be able to unmute themselves. The fastest way to unmute yourself is to press &
hold the space bar (works for 9/10 Zoom users). Note that from version Zoom 5.2 the host <u>cannot</u>
unmute a learner. The host can only invite a learner to unmute themselves (additional privacy
feature – people may have a cough attack or shouting at their kids and do not want to be unmuted).

7. Polling

This is a nice interactive feature.

You must enable polling in the meeting settings (see above).

Do this during the meeting set-up or afterwards:

- Menu: Meetings/Select the meeting
- Scroll down to the very bottom of the page (There is a small glitch in Zoom: if there is no "Add" button, edit the meeting, Save and then it should appear)

You have not created any poll yet.   Add

Type in a meaningful title (rather than just poll1), so the poll is easy to find later. Add the poll question, select anonymous (if appropriate) select single choice or Multiple choice (as appropriate) and type in poll options/ answers.

Add a Poll

Evidence Synthesis: Which tool is best

☐ Anonymous? ⊙

1. Which tool do you find more helpful?

    ⊙ Single Choice   ○ Multiple Choice

    XYZ

    ES tool

Add a question (if appropriate) and click 'Save' when done.

Once the meeting has started, click on the "Polls" symbol to launch your poll. If there is just one poll, that one will open:

Polling 1: Evidence Synthesis: Which tool is ...   Ed

1. Which tool do you find more helpful?

○ XYZ

○ ES tool

Launch Polling

Participants   Polls   Chat   Share Screen

If you created multiple polls, you need to select the poll you want to do from the drop-down menu:
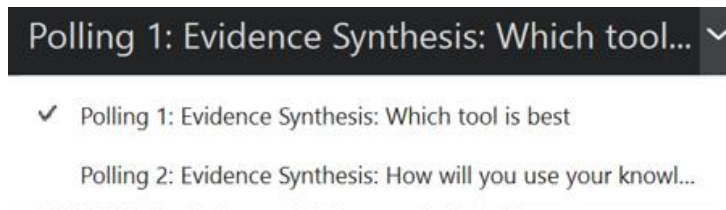
When the meeting has already started and you want to add a poll, you need to click on "Edit" and that will open the "Add a Poll" dialogue window.
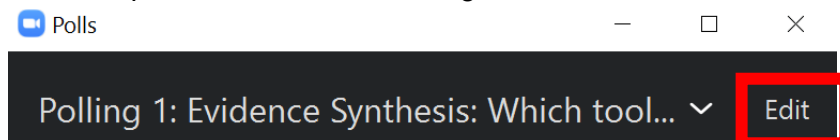
8. Chat the hyperlinks

The person supporting you as the host, could copy and bookmark all hyperlinks in PPT/ live web demonstrations in advance of the training course. They can then chat them at the correct time to participants, so they have access to these as well (e.g. online surveys/ discussion boards, data download etc.)

9. Changing settings during a live meeting

You can easily change some settings after the meeting has already started via the Participants menu. For example if you do not want to allow learners to unmute themselves during a presentation, you can turn this off, but turn it on again for a Q & A or discussion setting,
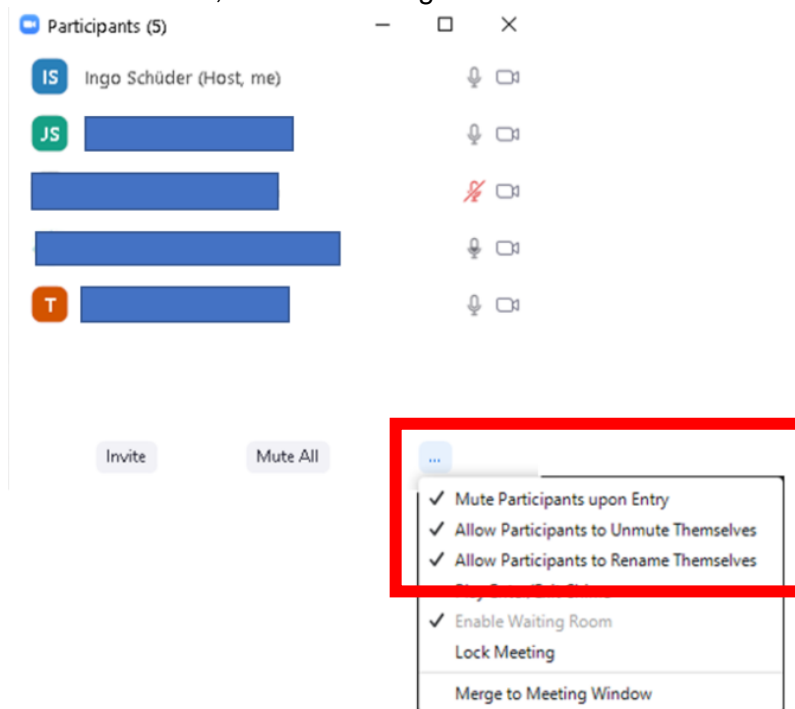
10. Recording:

So that you do not forget to start the recording you can do the following:

- Include in a co-host's role to remind the host to record.
- Set yourself a calendar item/ smartphone alarm.
- Put a big post-it on your screen
- Put a slide "start recording" before your presentation title slide

<div align="center">

START
RECORDING !

</div>

To protect your organisation's IP, I do not recommend you share the recording of the training course with the learners. You may want to post an edited version of the recording on an online learning platform, where you can control who and for how long people have access (i.e. rather than posting it on YouTube).

UKCEH uses LearnWorlds for this purpose: https://ukceh.learnworlds.com/

Ingo Schüder can give all UKCEH staff access to this learning platform.

The Recordings only become available once the meeting has ended (it can take up to an hour for the recordings to appear).

If you are using the latest version of Zoom, recordings may be available in three resolutions (H/M/L). This can be helpful e.g. in the context of needing small file sizes for learners form developing countries.

To share a raw recording:

1) Log into your Zoom account
2) Select Recordings on the left-hand side menu panel
3) Chose the desired recording
4) Click on Share

Just sharing with a colleague	Sharing with learners (not recommended/ use with care)
Share this cloud recording Share this recording — (on) ○ Publicly ● Only authenticated users can view: Signed-in users in my account Add expiry date to the link — (off) Viewers can download — (on) View recording on demand (registration required) — (off) Passcode protection — (off)	**Share this cloud recording** Share this recording — (on) ● Publicly ○ Only authenticated users can view Add expiry date to the link — (on) [7 days ∨] 2021-03-10, 11:59 PM [Save] Viewers can download — (off) View recording on demand (registration required) — (on) Passcode protection — (on) ****** ✏

5) It is best to check the recording link is in the desired format. It should look like this Schüder

– UKCEH shared a recording with you

Fill out the form below to watch/download the recording

Topic	Evidence Synthesis BEIS Day1 &2 (24 & 25 May 2022)
Date	May 24, 2022 08:52 AM London
Meeting Duration	288 minutes

* Required information

First Name*

Last Name*

Email Address*

Confirm Email Address*

Information you provide when registering will be shared with the account owner and host and can be used and shared by them in accordance with their Terms and Privacy Policy.

I'm not a robot — reCAPTCHA
Privacy - Terms

Register

Zoom Host checklist

You may wish to cut & paste these into a word document and create a bespoke check-list relevant to your event.

Before the meeting

Default/generic meeting settings match your Zoom function requirements.	
Meeting-specific settings match your Zoom function requirements.	
Initiate swap of mobile phone numbers between Host, Co-hosts, trainers etc.	
Agree whether or not you want to use WhatsApp (or MS Teams or another method) as a means of communication between active players outside Zoom	
Pre-course allocation to breakout rooms (only works for logged-in users, typically from your own organisation, e.g. co-hosts).	
Mock run date agreed with trainers.	
Explore & agree recording Y/N/which parts with active players	
When will Host be actively in meeting – all the time/ start/end/ BOR (when are BOR sessions?)	
Remind co-hosts not to be logged into their Zoom account when joining the meeting (this may mess up host/ co-host settings, incl. BOR)	
Protecting IP explored with trainers.	
Font size of slides/ best PPT presentation mode/ colour scheme explored with trainers.	
Have poll questions ready in word format (in case polling function fails)	
Set up poll questions in advance.	
Have list of pre-course preference for parallel sessions ready for manual allocation to breakout rooms.	
Have course-specific set of PPT slides for trouble-shooting/ Zoom functions/ breakout rooms ready.	
Explore if posting hyperlinks referred to in slides via chat is going to be helpful or a distraction.	
If posting hyperlinks via chat, have them all saved as bookmarks.	
Slide included in introductions stating how & when people can ask questions.	
Host to have copies of all PPT used available in PPT format plus all exercise material.	
Check consent to recording given with pre-meeting sign-up.	
Check any special requirements, e.g. hearing aid/ colour-blindness.	

Before meeting/mock run & to be repeated at start of the meeting

Anything from above you haven't done, yet	
Who will set up poll(s) when?*	
Declutter screen for screen sharing & how to screen share explored with trainers*	
Protecting personal info in background and online - explored with trainers*	
Who will do time keeping?*	
What is the latest you want to have a formal close?*	

Are the trainers happy to have informal chats during breaks and after the formal close of the course?*	
Agree who will do introduction and closing down the course*	
Practice start of recording – press button – wait for announcement – pause 1 sec – smile 7 show PPT/ /share screen/ spotlight	
Practice BOR	
How to communicate time keeping with trainer/ presenter*	
Who will admit late comers/ people re-joining after connectivity issues?*	
Explore with trainers/ presenters what will be record and what will not*	
How & when learners can ask questions explored with trainers (unmute/ raise hand/ chat/ during/after)*	
Agree with trainers/ presenters if/ how/who to encourage questions, e.g. via chat and/or Raise Hand and/or unmute.*	
Who monitors chat?*	
How will we deal with late-comers with audio/ video problems? Who? *	
Who will do spotlighting?*	

At the start of the meeting (before learners join) –reminders

points marked with * above	
Have list of attendees ready at start of meeting.	
Allocate co-host roles	
Hand over host role to the person who will do the BOR	
Check co-hosts have expected privileges (e.g. moving from BOR to BOR themselves without host's activity)	
Check BOR will work as expected (do you have "**Options**" available to you? – Zoom glitch – if not end meeting & restart)	
Talk through who does what, transitions, opening introductions and close.	
Supporting presenters/ trainers to introduce themselves with ["[Name] speaking here", especially if they have their video turned off, before they make a contribution.	
Speaker/ presenter - pause and wait for recording start/ end announcement.	
Supporting presenters/ trainers/observers -turn off sound when not speaking, Turn off video if doing other/ background work like typing.	
Active speaker to remember to check for timing communication, e.g. go faster button/chat.	
Allocate person to remind host to start/ stop recording.	
If posting hyperlinks via chat, have them all open in a web browser.	
Set up **BOR**	

At the start of the meeting (after learners have joined)

Run Zoom intro & audio & video trouble-shoot PPT	
Check learner audio & video & trouble-shoot accordingly	
Encourage learners to introduce themselves with ["[Name] speaking here, when asking a question	
Set up **BOR** (if not already done), so they are ready when you need them	
Consider changing the **BOR Options** default, e.g. tick Move all participants into BOR automatically, shorten countdown time to <60 seconds	
Host or trainer to agree with learners how and when to interrupt to ask question/ clarification (raise hand and/or chat and/or unmute)	
Ask learners for consent to recording.	

Additional considerations for IT security and privacy

Limit Distribution of Meeting Details. When possible, don't announce meetings on social media or other public outlets. Instead, send messages only to the participants. This advice is especially important if you're hosting any meeting with sensitive content on the agenda or likely to come up in the course of the meeting. Do not share the full link with the password info or password string on any public channel.

Know Who Has Connected. Carefully inspect the list of participants periodically, whenever possible. This can be done by the organiser/host or trusted participants. The Participants Panel can be viewed to the side of the active gallery. Any participants who are unauthorised or misbehaving can be terminated.

 Situational Awareness 01Be aware of everything that's within view of your camera. Whether working from home or an office, there may be diagrams, drawings, notes, or other items you don't want other participants to see. Remove these from view of the camera before the meeting starts

Situational Awareness 02Be aware of everything that's within any shared screen. There may be browser windows, tabs, bookmarks, browser history, files, applications, emails, names, instant messaging contacts or content, or other things you don't want other participants to see. Do not share the whole screen unless absolutely necessary; if screen sharing, only share the window required.

Situational Awareness 03 Be careful of your choice of virtual background –and remember that the last used background is the one the client will start up with

Situational Awareness 04 Be aware that participants can, and do, screenshot or film what 'they' can see, and can share that content to others.

Emergency Control Actions

U is for User. Press Alt+U when you are the meeting host to Display/Hide Participants panel–this will allow you to then control a user / stop their video / mute/umute and eject them if needed

M is for Mute. Press Alt+M when you are the meeting host and want to mute everyone else in the meeting.

S is for Stop. Press Alt+Shift+S when you are the meeting host and want to Start/Stop screen share Note: Will only work when meeting control toolbar has focus

Disclaimer:

UKCEH is putting this information in the public domain for the benefit of partners, customers and the UKRI family of organisations.

UKCEH does not have any affiliation with Zoom. UKCEH is merely using the Zoom service as a customer.

Dr Ingo Schüder of UKCEH, has collated this guidance to the best of his knowledge and abilities. All customers and partners use Zoom and this guidance at their own risk.

Please send suggested improvements and corrections to UKCEHtraining@ceh.ac.uk