# Introduction

This example of Zoom protocols incorporates our experience with running Zoom meetings over a few years. It is not exhaustive, for several reasons: the platform continues to evolve; our experience and purpose is likely different from yours so you may require different questions and settings; and exhaustive would be awfully long and complicated. Also, none of it should be construed as recommendations for settings. These must depend on your circumstances and requirements. We’re providing this example with some explanations only as a starting point.

As of April 2020, Zoom has enabled passwords and turned on Waiting Rooms by default, to deal with security issues (Zoombombing). There will no doubt be other security enhancements coming.

This example assumes Zoom meetings rather than Zoom webinars.

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# Bigger Questions

Determining these will guide decisions around the various Zoom settings detailed below.

## Privacy & Security

* Zoombombing. Unfortunately, Zoombombing (invading and disrupting others’ meetings, classes, etc.) seems to have become an occupation for some folks, so it is critically important to protect your meetings. Inform yourself about the available security settings, and make use of them.
  + See <https://www.wired.co.uk/article/zoom-privacy-settings> and [Keep Uninvited Guests Out](https://blog.zoom.us/wordpress/2020/03/20/keep-uninvited-guests-out-of-your-zoom-event/)
  + Identify critical settings that will provide the security you need for your purposes (including using cohosts)
* cookie preferences – more related to privacy. See <https://blog.zoom.us/wordpress/2020/03/29/zoom-privacy-policy/>

## Event Info

* Event Title
* Event Date and Time (and time zone translations if needed)
* Zoom Meeting ID
* Presenters
* Support Staff
* Who are the participants? How will they be invited? (This relates to security considerations as well as logistics.)

## Pre-Event Choices

* Location for the host computer and any tech support personnel  
  In choosing Location, consider internet connection speed and reliability, noise level of surroundings, activity level of surroundings (will participants see people walking back and forth behind you?), etc.
* Meeting and Tech Support & Backup
  + Who will serve as contact person for those having tech difficulties? How will people know how to contact them? Phone call? Text? WhatsApp? Other?
* Recording
  + Is this meeting to be recorded?
  + Who will enable recording? (or will it automatically begin?)
  + What message will you give participants about recording?
  + Where will the recording be stored at the end of the meeting? (Cloud rec is easier to save and share, but may add security risk - be sure you understand trade-offs)
* Security level and requirements  
  Is your event public (anyone can attend), semi-public (you may not know all attendees), or private (you know everyone)? What do you need to protect against? What meeting setup features will help with that? See the [Zoombombing blog post](https://blog.zoom.us/wordpress/2020/03/20/keep-the-party-crashers-from-crashing-your-zoom-event/) for some considerations and settings suggestions (also [USC](https://keepteaching.usc.edu/tools/zoombombing-resources/)). Security considerations will affect several of the following decisions.
  + Meeting password on (unless there’s good reason for off)
  + Participant [authentication](https://support.zoom.us/hc/en-us/articles/360037117472-Authentication-Profiles-for-Meetings-and-Webinars)
  + File transfer via chat on/off
  + Annotation for participants on/off
  + Private chat on/off
  + Participant save chat on/off
* Waiting Room  
  The Waiting Room feature allows you to control when participants enter the room. Only the Host can start a waiting room, but Cohost can place participants in the waiting room or admit/remove participants from it.  
  A Waiting Room is helpful if:
  + you want control over who enters, and when
  + the presentation team needs to make sure you are organized together prior to the start of the session
  + you expect people to sign in early as they are figuring out Zoom - and you don’t want to manage participant interaction while this is happening
  + you have information you want presented to participants before they enter the room
  + you want to start the event with a splash - all people entering at once at the designated start time
* Participant Management in-meeting  
  (requires being at least a cohost - See this [Zoom doc](https://support.zoom.us/hc/en-us/articles/201362603-Host-and-Co-Host-Controls-in-a-Meeting) for more details.)
  + How do you want participants to signal when they want to speak? (Zoom Hand raise, physical hand raise, unmute) (people calling in will have fewer options)
  + Do you want participants to be able to mute/unmute themselves? (We generally prefer this, but it’s not the best choice for presentation-heavy meetings.)
  + How will you organize participant interaction?
    - if all are speaking, it’s most efficient for the host or a co-host to decide who is speaking when and call on people
    - if “popcorn” be sure people know how to signal and can manage their entry/exit
  + Who will troubleshoot when participants are muted or unmuted at the wrong time (e.g., if participants are leaving mics open with too much bg noise)?
  + Who will monitor the waiting room if you have one?
  + Who will watch for raised hands?
  + Who will remove participants if need be? (e.g., if they are disruptive)
  + What is the preferred protocol for the co-host to alert the presenter if they are monitoring hand raising, etc.? (e.g., speak, send chat, send text, etc.)
* Chat Functionality
  + Who will monitor the chat? Depending on the nature of the presentation and discussion, some presenters will monitor the chat themselves and some will benefit from a second pair of eyes on it. It helps to have someone (not the presenter) monitor chat, respond to it and/or bring important questions/comments to the presenter’s attention
  + Who is tasked with adding links or other info from the presentation into the chat?
* Screen Share/PPT
  + Best to limit screen sharing to Host only unless you specifically want others to be able to share screens (can be handled via a default setting, or changed once in the meeting)
  + Will Screen sharing or PPT be used?
  + Who will do this? In some cases the presenter will do this but we’ve found it’s better to have a second device (managed by the presenter or by someone else) to split the load on the presenter’s device.
* Agenda Tracking/Time Tracking (Who is doing this?)
* What Printed (and linkable) resources are needed? (Handouts, agendas, etc)  
  Create links in advance that can be added to the chat.
* Will you use Breakout Rooms? (pre-assign or random)  
  Breakout rooms are great for small-group workings.Note that only the Host can initiate and work with breakout rooms.
  + How many rooms will you need?
  + Will small groups be pre-assigned or randomly assigned by Zoom?
  + How long will break-out sessions last?
  + Is anyone on the presentation team participating in breakout rooms? (If not, you’ll need an extra breakout room for staff - or you’ll need to manually remove them from randomly generated groups to ensure a good distribution of the other participants.)

## Equipment Needed

* Presenters:
  + Primary computer  
    Make sure this computer is sufficiently powerful to handle this kind of session. If not, unfortunate things will happen such as presenter’s audio/video freezing.
  + Additional monitor   
    especially helpful if primary computer is a laptop, and/or using PPT or some other visual presentation
  + Conferencing camera/mic/speaker (“Walle”)    
    improves both audio and visual; more control over camera; helps esp if multiple participants in one room
  + Additional computer   
    especially useful for a dedicated PPT sign-in - sometimes Zoom + PPT will overwhelm a single computer and freeze the audio/video
  + Comfortable chair
  + Microphone   
    or phone used as mic; include power cord for phone; be sure to test the audio, and be aware of the impact of distance, mic orientation, and the way the presenter’s head is turned (if, e.g., looking at a different monitor)
  + Headphones  
    headphones with a mic really work best for a Zoom presentation
  + Extra power Strip
  + Folding table/extra space for additional materials
  + Space selection/setup
    - Location
    - Lighting
    - Background selection/design - be aware, try it out before session  
      may use blanket or other decoration for background coverup
* Support Staff:
  + Laptop
  + Headphones
  + Comfortable set up
* Participants:
  + Device w Zoom Access
    - clarify in advance if you want to prioritize people having a video (vs audio being enough)
    - phone and iPad are options - but will limit participant’s ability to participate in chat or other functions so be clear in advance what functionality you want people to have

# Zoom Settings

For the particular session you’re doing, review all the settings below and customize as needed. For details on security-related settings, see the [Zoombombing blog post](https://blog.zoom.us/wordpress/2020/03/20/keep-the-party-crashers-from-crashing-your-zoom-event/).

## Zoom- General and Waiting Room Settings

* **“My Meeting Settings”/Meeting tab**These are some of the personal meeting settings (Zoom keeps adding more, so it’s not exhaustive).  Some overlap with meeting settings (which setting wins? meetings...but it may vary). Some of these settings may be different for everyday vs. special events - remember to return to everyday settings if needed!
  + All videos off to start (hosts and participants)
  + Audio Type: telephone and computer audio
  + Join before host off (waiting room on overrides this setting on)
  + Use Personal meeting id when scheduling – off (security)
  + (several pwd-related settings now locked on for security)
  + Mute participants on entry - No or yes - doesn’t matter - do this at specific meeting level
  + Calendar integration and meeting reminders off
  + End-to-end encryption on (this applies only to specific circs)
  + Chat - usually On (unless off for security reasons)
    - Private chat on (unless you want to disable private chat)
    - Can also prevent participants from saving Chat here
  + Auto-save chats On (so host doesn’t have to remember to do so)
  + Play sound when people join/leave - gen yes (depends on circs)
  + File transfer - No (security; unless want for some specific reason)
  + Zoom’s ending feedback survey and experience survey - no
  + Allow hosts to add co-hosts - yes
  + Polling - yes
  + Allow host to put attendee on hold - yes
  + Always show meeting control toolbar - yes
  + Show zoom windows during screen share - yes
  + [Nonverbal feedback](https://support.zoom.us/hc/en-us/articles/115001286183-Nonverbal-Feedback-During-Meetings) - maybe (allows raise hand, go slower, etc.)
  + Allow removed participants to rejoin - no
  + Breakout room - yes
  + Remote support - no
  + Closed captioning, far end camera control, group HD video, virtual background, identify guest participants, auto-answer group in chat, email options, audio options - all off (review)
  + Screen sharing - on
    - Consider whether Host Only or All Participants (security)
  + Disable desktop/screen share for users - prob Yes (security)
  + Annotation, whiteboard, remote control - No (for higher security, public mtgs)(*yes* appropriate for some mtgs)
  + Virtual background - No (security)
  + Attention tracking - no
  + Waiting room - on (see customized set-up)
  + Show a “join from your browser” link – no (unless needed)
  + allow live streaming - no
* **Waiting Room *(Settings/Advanced Settings/In Meeting(Advanced))***
  + Turn on Waiting Room - then choose who goes into Waiting Room
    - Select Guest Participants Only (puts non-logged in folks only in waiting room)
      * (if desired - otherwise only hosts/cohosts can do this) Select “Allow Internal Participants to admit guests from the waiting room…”
  + Customize the Waiting Room   
    Click the little pencil beside “Customize the title, logo, and description”
    - Edit “Welcome” Message
    - Edit “logo” - can add image from here
    - Edit “instructions”

## Zoom Meeting setup - Meeting settings - prior to session/day

1. **Meeting settings for the meeting***Note: Never use your Personal Meeting ID for public events (or, even semi-public events). That gives the random public access to your “personal virtual space” any time.*
   * Topic: **Meeting name**
   * Description: **None**
   * set up as a **scheduled meeting** (actual times per conference schedule and host’s time zone; Zoom will adapt to other time zones) or a **recurring meeting** (that can be used at any time)
   * Video
     + Host: **off at start**
     + Participant: **off at start**
   * Audio:
     + **Both**
     + No need to add other countries unless you are working with specific other locations - this setting only relates to phone #’s included in email invite
   * Meeting options -
     + **we generally check the following**
       - Mute upon entry
       - enable waiting room
       - record automatically - on local computer (but there are many considerations around recording, so be aware!)
       - join before host
         * not relevant if waiting room is activated
         * if on, it does mean this meeting can be used ***without the meeting owner’s presence***
     + we generally do not check
       - meeting password (security handled other ways)
       - personal meeting id (never use this here)
2. **My Meeting Settings/Recording tab (REMEMBER TO CHANGE BACK AFTER SESSION IF NEEDED)**
   * Control these settings by meeting rather than universally (Turn cloud recording off)
3. **My Meeting Settings/Telephone tab (REMEMBER TO CHANGE BACK AFTER SESSION IF NEEDED)**
   * 3rd party audio - off?
   * mask phone number in participant list - ON
   * add specific countries outside US to Global Dial-in regions

# Checklists

## Responsibilities Checklist

Using the considerations and information above, assign responsibilities for the session. Here is a template/example of responsibility assignment by role.  See also the [Zoom host cohost controls doc](https://support.zoom.us/hc/en-us/articles/201362603-Host-and-Co-Host-Controls-in-a-Meeting).

* Host responsibilities
  + waiting room - let participants into the session at start time
  + give standard opening and closing
  + monitor time
* Co-host responsibilities
  + add key info into the chat
    - demonstrate initial self introductions
    - send link for Zoom protocol (at beginning)
    - send telephone and email (at end):
      * (phone number if applicable)
      * (email address if applicable)
  + monitor chat
    - watch and respond to chat as appropriate
    - signal to host if any chat needs addressing
    - potentially curate chat and speak representative questions/comments
  + monitor waiting room
    - watch for late-coming attendees, and let them in
  + monitor participants
    - remove disruptive or unwelcome participants if need be
    - disable video/mute participants
  + monitor and troubleshoot overall quality of experience
* Tech support responsibilities  
  Zoom resource for supporting different devices: <https://support.zoom.us/hc/en-us/articles/201362663>
* monitor the phone and help people
* monitor support email and help people
* update attendance gsheet
* deal with any “day-of” registrations
* monitor for recording issues, participant stuff, equipment problems, etc.
  + let co-host know via chat if there are tech issues they may not be aware of - sound, video, other

## Session Overview Checklist

**Day Prior**

* All software updated and backed up
* Confirm all resources are available
* Make stickies w/Zoom meeting ID for easy reference
* Print copies of all scripts and resources

**Day of**

* Location: If going to a different location, make sure you bring all needed equipment (make a list!) and arrive in plenty of time to set up and test.
* Set up equipment @
* Test equipment by @
* Open room for presenters @  
  Recommend do this at least 15 minutes prior to formal start of session
  + Assign Co-Hosts @
  + Zoom Settings @
  + Set up Waiting Room @
  + Set up PPT/Screen Share @
  + Make sure all presenters are ready:
    - Are all hosts & Content Expert Facilitators on and functional?
    - Check sound, video, presentations
    - Any questions or clarifications?
    - have any needed docs or web pages open - zoom logistics, access information page, zoom session protocol
  + if recording, make sure recording is turned on (at appropriate time)
* Let participants in room @
* Lock the room once everyone’s in (if desired- prevents anyone else from joining)
* Create Breakout Rooms @
* Post Chat Resources @

**After Event**

* Save recording to (Google Drive? Other location?)
  + Location:
* Undo settings that generally affect Host’s zoom
  + Waiting room *(Settings/Advanced Settings/In Meeting(Advanced)/15th option)*
  + Automatic save of chat *(Settings/Advanced Settings/In Meeting(Basic)/4th option)*
  + Undo “Mute Participants Upon Entry”
* Undo settings specific to this Zoom room
  + automatic recording *(specific meeting panel/Edit/Advanced Options/3rd option)*

# Scripts

The following are examples, and must be modified to fit the particular situation and setup.

## Opening Script for Sessions Example (a little <2 minutes)

**Welcome** to <event>, hosted by <organization>. This gathering is <speak intent>.

I am <NAME>, and my first task is to orient you to this session, <NAME OF SESSION>, which will last <#> minutes. First I want to let you know that this session is being **recorded**. That recording will be used for <add intent>.

I’ll start with some **Zoom logistics and orientation**.  Here’s how it looks on a computer (adapt this for phones).

Right now you are likely **muted** and your video is off. This is a good place to start. (Change this if this is meant to be a more interactive session and you want people to turn their videos on.) You will be able to mute and unmute yourself during the course of this session - and the co-host <name> will also help with this if needed. (change this if all muting/unmuting is being controlled by hosts). You can mute/unmute in at least three ways:

1. hover your cursor in the top right of your picture pane
2. use the button or click on the microphone in the participant pane
3. click on the microphone in the bottom left of the zoom screen (you may need to hover your cursor there to see it)

In the upper right corner of your screen, you can toggle between **speaker view and gallery view**. We recommend that you begin in speaker view as the session gets started - this will feature me right now as I orient you. At other times it will be better to see everyone here in gallery view.

If you only have one screen, we don’t recommend that you put your Zoom screen in full screen mode because you probably want two other panes open. In the menu at the bottom of your screen (you may need to move your cursor to the bottom of the screen to see this), click on “**participants**.” This opens the participant pane where you can see the “raise hand” button. We’ll be using that as a signal if you have a question during the teaching.

The participant list shows everyone that is here - and your names are on your picture panes as well. If you’d like to change the name listed here, you can do that by

Also along this bottom panel you’ll see “**Reactions**.” If you click on that, you’ll see two options: clapping hands and a thumbs up. This is a way for us to interact silently - a virtual version of “I agree!” or “thank you for saying that!” Click on one of them now. You’ll see that they come up for a brief time and then disappear on their own.

Now we’re going to talk about using the **chat function**. If you haven’t already, we recommend that you open the chat pane by clicking on the chat icon at the bottom of your screen. (If you don’t see it, you may have to click the 3 dots above “More”.) We encourage you to **add comments and questions** during the course of the session.  The chat will be monitored by <NAME> who is serving as co-host for this session.

We may also post **resources** in the chat during the session. For example, right now <NAME> is posting a link to our Zoom information page which can help you navigate this zoom experience. (include link here, for easy posting)

If you are encountering **technical difficulties**, you can also chat <who> **privately**.

So that we know you have found the chat, and so that we can get to know each other, we ask you to **post a brief hello** in the chat now.

# Work in progress…

How to [add picture to personal account or make other profile changes.](https://support.zoom.us/hc/en-us/articles/201363203-My-Profile)