

ZOOM TIP SHEET

ACCOUNT SETTINGS

January 28, 2021 Based on Zoom Version 5.4.9.

UPDATE YOUR ACCOUNT AND CHECK CAPACITY

Check your Zoom account regularly to ensure you have the latest version. Open/sign into the Zoom app on your computer. Click your profile picture and choose 'Check for Updates'. Encourage participants in your meetings to do the same in order to have access to the latest features and security settings.

A paid account is required to host meetings that are beyond 40 minutes. To see the maximum number of participants allowed in your meeting go to the Zoom Website, www.zoom.us, and log-in. View Your Account/Profile.

ENABLE REQUIRED FEATURES FOR YOUR MEETINGS

Enable the features that you intend to use in your meeting **in the Zoom account where the meeting will be hosted**. This is the account where you will schedule the meeting and generate the meeting link. The host will use this account to open and manage the meeting. You will find these settings in your Zoom Profile <https://zoom.us/profile/setting>.

Here are the settings we recommend. Not every setting is mentioned here and the most important settings are indicated with a *.

MEETING TAB

Security

- *Waiting Room**, everyone will go in. People will arrive in their own private room. Hosts and cohosts can send messages to people while they are waiting.

Schedule Meeting

- *Audio type, telephone and computer audio** (Be aware you may have callers for whom long-distance charges will be an issue if you do not have a toll-free number associated with your account.)
- Allow participants to join before host, OFF

In Meeting Basic

- *Allow chat, ON** (the host can still disable chat in the meeting but this will allow you to turn it on when you want it)
- Prevent participants from saving chat, leave unchecked
- Sound notifications, HOSTS and COHOSTS
- File transfer, ON
- *Allow host to add cohost, ON**
- Allow host to use meeting polls, ON
- Always show meeting control toolbar (this prevents it from disappearing which can be confusing to new users)
- Show Zoom windows during screen share, OFF (unless you want to be able to demonstrate Zoom functions during the meeting)
- Screen sharing, HOST ONLY (the host can allow others to share on a request basis in the meeting, this is a feature that prevents unwanted sharing from intruders)
- Annotation and whiteboard, if you don't plan on using annotation or the whiteboard during meetings (the ability to write on the screen) turn them off as a preventative security measure
- Remote control, OFF as a security measure
- *Non-verbal feedback, ON (this will activate YES and NO buttons for participants which can be used for voting)**
- Meeting reactions, (up to you) these are different than the non-verbal feedback icons on the Participants Panel
- Allow removed participants to rejoin, ON (this is a security measure but we suggest leaving it on, because if someone is having difficulty leaving the meeting you may want to remove them and allow them to rejoin at a later time)
- Allow participants to rename themselves, ON
- Allow users to select Original sound in their client settings (important if people are offering live music)
- Allow live streaming, choose your platform, if you are using YouTube, also allow Custom Live Streaming option

In Meeting Advanced

- *Breakout room and assign participants, ON**
- Closed captioning, ON (if you intend to use this service, can be provided by a third party)

RECORDING TAB

- *Allow hosts to record, ON**
- Record active speaker with shared screen, ON
- Record an audio only file (an asset for minute takers)
- Save chat, ON if you intend to use it to engage participants (i.e. submit a question, evaluations)

- Allow shared access to cloud recording (up to you)

SETTINGS IN THE SCHEDULED MEETING

When you create the actual meeting on Zoom, you can choose these settings:

- Waiting Room ON
- Audio BOTH

Meeting Options

- Allow to join anytime (this means someone can return to this link another time and still use it which could interrupt another meeting you have scheduled, so leave it unchecked)
- Mute participants upon entry (choose this if you want to begin immediately without any visiting at the beginning)
- Breakout Room pre-assign
- Auto-record

After you Save your meeting you can set up these features at the bottom of the meeting settings.

- Set up a poll See [Zoom Support Polling for Meetings](#)
- Add a Live Streaming option choosing the *Custom Livestreaming Option* in order to set up your meeting in advance, even if you are streaming with YouTube. The YouTube streaming option requires you to go live immediately without a test. See more on set-up at [Zoom support Live streaming.](#)

LINKS

[Zoom Support Article on How to Update Livestreaming](#)