



## Zoom Hosting Best Practices & Setup Guide

*ISSERVICE Technology has put together this “security best practices” guide regarding hosting Zoom meetings, using security best practices from various organizations and schools around the world. It may take some work now to implement these changes/settings, but will alleviate potential issues going forward. Many of the settings listed below are already correct by default, but it’s best to double check as you will need to change some of them. If you need help with anything, please reach out to us!*

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### Best Practices Summary

- Only post meeting IDs and join information on secure platforms (for example: Edsby, Microsoft Teams, or e-mail).
- Schedule each meeting; avoid using Personal Meeting IDs (PMI).
- The host should schedule and be the first to join every meeting (join before host OFF)
- Disable participant screen sharing and enable the waiting room. The host can assign co-hosts to allow others to temporarily share their screens.
- Do not send URLs (web links) through Zoom chat. Email them to your attendees if needed.
- Do not publish meeting URLs in public communication channels (on your website, on social media, etc)
- Remind participants to not share meeting details/links with others.
- Enable as many of the settings listed below as is possible and practical.

### 1. Creating an account

- a. Using your laptop/desktop, go to the [Zoom website](#).

- b. In the top-right, click “Sign Up, It’s Free”.
- c. Sign up with your organization’s email account (do not use linked google/facebook account options)
- d. Go to your email inbox and click the confirmation link in an email from Zoom.
- e. Follow the prompts to set up your account password. Please use a strong password, use the following website to generate one (10 character min) if you need to: <https://passwordsgenerator.net/>
- f. Click “Skip this step” when it asks you to invite colleagues.

## 2. Zoom app download links based on device type

- a. [Windows Desktop or Laptop](#)
- b. [Mac OSx](#)
- c. [Chromebook \(Chrome browser extension\)](#)
- d. [iOS device](#)
- e. [Android device](#)

## 3. Changing settings appropriately

- a. (need to do this on a browser on a laptop/desktop)
- b. Sign in to the [Zoom website](#).
- c. Click on your name or profile picture in the top right (might also say “My Account”).
- d. Click “[Settings](#)” on the left-hand side.
- e. There are three tabs for settings: Meeting, Recording, and Telephone...
- f. [Meeting](#)
  - Host video = ON
  - Participants video = ON
  - Audio Type = Telephone and Computer Audio
  - Join before host = OFF
  - Use Personal Meeting ID when scheduling a meeting = OFF
  - Use Personal Meeting ID when starting an instant meeting = OFF
  - Require a password when scheduling new meetings = ON
  - Require a password for instant meetings = ON
  - Require a password for Personal Meeting ID (PMI) = ON
  - Embed password in meeting link for one-click join = ON
  - Require passwords for participants joining by phone = ON
  - Mute participants upon entry = ON
  - Upcoming meeting reminder = OFF
  - Require Encryption for 3rd Party Endpoints (H323/SIP) = OFF
  - Chat = ON
  - Prevent participants from saving chat = ON/OFF (Your choice)
  - Private chat = ON

- Auto saving chats = ON
- Play sound when participants join or leave = ON
- Heard by host and all attendees = NO
- Heard by host only = YES
- When each participant joins by telephone, record and play their own voice = YES
- File transfer = YES
- Feedback to Zoom = NO
- Display end-of-meeting experience feedback survey = NO
- Allow host to put attendee on hold = YES
- Always show meeting control toolbar = YES or NO (your choice)
- Show Zoom windows during screen share = YES or NO (your choice)
  - Note that this can be very handy in certain situations
- Screen sharing = YES
- Who can share = HOST ONLY (this mitigates some zoom bombing capabilities if an unwelcome participant manages to get in)
- Who can start sharing when someone else is sharing = HOST ONLY
- Disable desktop/screen share for users = NO
- Annotation = YES or NO (your choice)
- Remote control = YES or NO (your choice)
- Nonverbal feedback = YES
- Allow removed participants to rejoin = YES
- Breakout room = YES
- Allow host to assign participants to breakout rooms when scheduling = YES or NO (Your choice)
- Remote support = NO
- Closed captioning = ON/OFF (Your Choice)
- Save captions = NO
- Far end camera control = NO
- Virtual background = NO
- Identify guest participants in the meeting/webinar = NO
- Auto-answer group in chat = NO
- Only show default email when sending email invites = NO
- Use HTML format email for Outlook plugin = YES or NO
- Allow users to select stereo audio in their client settings = NO
- Allow users to select original sound in their client settings = NO
- Attention tracking = YES
- **Waiting room = YES/NO** – It is recommended, as if there is a waiting room a zoom bomber will be “stuck” in that waiting room until allowed into the meeting by the host. Waiting room details can be [customized](#).
- Show a “Join from your browser” link = YES (important in case participants don’t have the app!)
- When attendees join meeting before host = NO (irrelevant because you won’t be allowing joining before host anyway)

- When a meeting is cancelled = NO
  - Blur snapshot on iOS task switcher = NO
  - Invitation email = English
  - Assign scheduling privilege to = No one
  - I can schedule for = No one
- g. [Recording](#)
- Local recording = YES/NO. No is preferred for security.
    - Note that this will allow both the host and the participants to record if desired
    - You can upload the recorded files to location of your choice, but make sure the location is not publicly accessible.
  - Automatic recording = NO
  - Recording consent = YES
  - Multiple audio notifications of recorded meeting = NO
- h. [Telephone](#)
- Show international numbers link on the invitation email = NO
  - Toll call = YES
  - Mask phone number in the participant list = YES

#### 4. Scheduling recurring meetings for your organization

- a. (using a browser on a laptop/desktop)
- b. Click "[Schedule a Meeting](#)" in the top right.
- c. Topic: Subjective to your needs
- d. Place a checkmark in the "Recurring meeting" checkbox.
  - Recurrence: choose "No Fixed Time"
  - This will allow you to use the same meeting "room" every time for your group, so that you don't have to keep posting new links each time for participants to use to join.
- e. Require meeting password = YES
- f. Host video = ON
- g. Participant video = ON
- h. Audio = BOTH
- i. Enable join before host = NO
- j. Mute participants upon entry = YES
- k. Enable waiting room = NO
- l. Breakout Room pre-assign = NO
- m. Click "Save"
- n. Copy the "Join URL" and post it on your invite email. This URL will work for all of your recurring Zoom meetings for that subject.

## 5. Starting one of the meetings that you've already created

- a. Via browser on laptop/desktop:
  - Sign in to the [Zoom website](#).
  - Go to your profile (top right) and then click the [Meetings](#) tab.
  - Click on "Start" beside the appropriate meeting.
  - If you haven't downloaded the Zoom app yet, it will prompt you to do so.
  - If you have already downloaded the Zoom app, it will prompt you to open it.
  - If you are unable to download the Zoom app, you can click "join from your browser" instead.
- b. Via Zoom desktop app (on laptop/desktop):
  - Sign in.
  - Click "Meetings" at the top.
  - Choose the appropriate meeting from the left side.
  - Click "Start".
- c. Via Zoom Android or iOS app:
  - Sign in.
  - Click "Meetings" at the bottom.
  - Click "Start" beside the appropriate meeting.

## 6. Meeting features and security tips

- a. Host and participants should use a headset/headphones with microphone - this gives a huge boost to audio quality
- b. **LOCK the meeting once all known participants have joined. This will prevent unwanted participants (Zoom Bombing)**
- c. Unless you know you need it, [disable in-meeting file transfer](#).
- d. Do not put meeting invites in your email calendar if that calendar is shared with other people.
- e. Mute/unmute individuals or all as needed.
- f. Put attendee on hold if needed (e.g. if someone is disrupting the meeting).
- g. Things host should pay attention to during the meeting:
  - Nonverbal feedback (raise hand, thumbs up, etc.)
  - Text chat
- h. Screen sharing
  - Annotating
  - Whiteboard
- i. [Breakout rooms](#) - fantastic for small group discussions/work!
  - Many groups will be much more comfortable speaking/sharing in a smaller group than with the whole company.
  - Attention tracking (only during screen sharing) allows you to make sure participants are focusing on the screen sharing rather than doing something else.

- j. Start your meeting early to make sure you're all set to go, including having other documents/sites open and ready to share during the meeting.
- k. Build in lots of time at the beginning of the first meeting with your group to introduce your group to the Zoom features, deal with audio/video difficulties or any other concerns.
- l. Zoom features to explain:
  - How to mute/unmute
  - Use nonverbal feedback (raise hand, thumbs up, etc.)
  - Use chat to ask questions if you're uncomfortable asking verbally
- m. Send out a meeting agenda to participants before the meeting.
- n. Host should ALWAYS end the meeting (exit the meeting) before participants.

## 7. Challenges

- a. Insufficient internet speed (one family emailed already for example) so joining Zoom meetings will be difficult - need to accommodate accordingly.
- b. Various platforms – ipad/iphone. Mac, PC, chromebook, web – not all features are available on all platforms.
- c. Expectation of technology – desktop computers typically don't have a mic or a camera included. Those using desktops will have to get one or both to be able to join/use zoom effectively.