

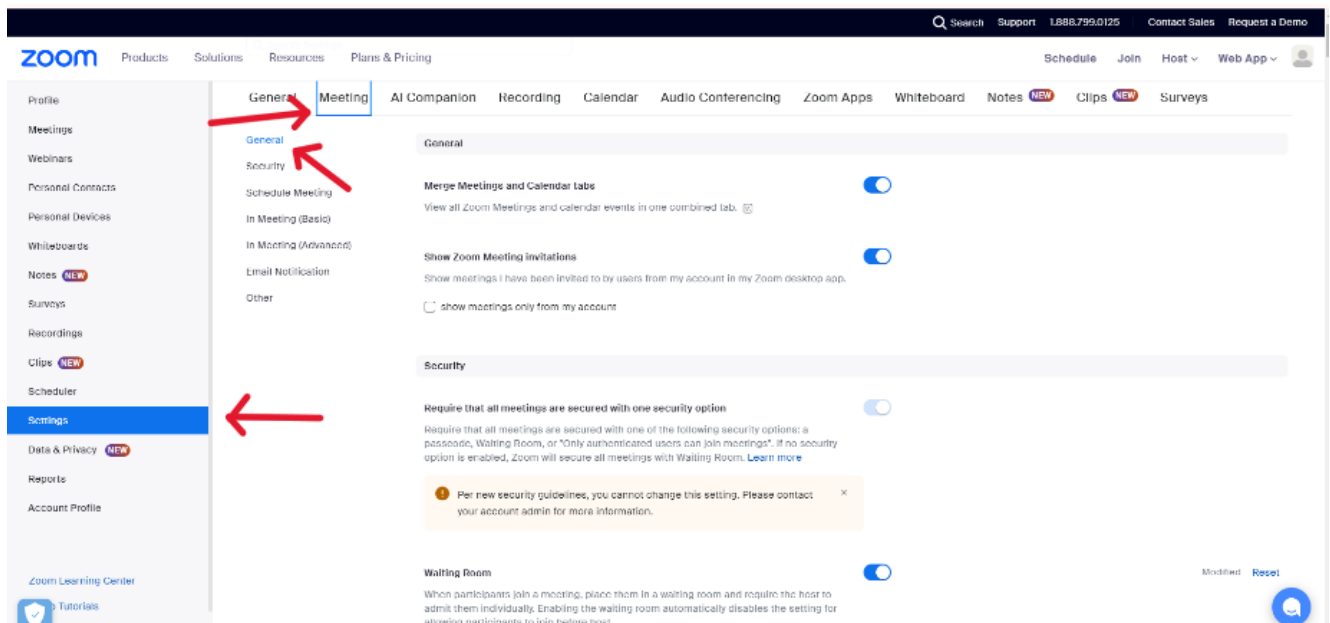
ZOOM Settings for Mediators

With appreciation to Claire Fowler (www.mediate.com), we have referenced a video in which Claire outlines the Zoom settings she uses for mediation with explanations for her preferences, which may be helpful. Here is her video

<https://www.youtube.com/watch?v=rlgx9YWn6B0&feature=youtu.be>

Special thanks to MWI Mediator, Peter Gorer, for originally compiling this information from Claire's video. Zoom has since updated and the locations for setting options are different than in her video. We have outlined the latest settings (as of June 2024) below. The following mirrors what you should see on Zoom Pro on your browser.

ZOOM SETTINGS



The screenshot shows the Zoom web interface. The top navigation bar includes 'Search', 'Support', '1.888.799.0125', 'Contact Sales', and 'Request a Demo'. The main navigation menu has 'Products', 'Solutions', 'Resources', and 'Plans & Pricing'. The 'Meeting' tab is selected in the top navigation. The left sidebar shows 'Settings' highlighted. The main content area displays the 'Meeting' settings, with the 'General' sub-tab selected. Settings include 'Merge Meetings and Calendar tabs' (checked), 'Show Zoom Meeting Invitations' (checked), 'Require that all meetings are secured with one security option' (checked), and 'Waiting Room' (checked). A warning message states: 'Per new security guidelines, you cannot change this setting. Please contact your account admin for more information.'

Once logged in, from the Zoom home page, click on “Settings” located in the column to the left. Another column will appear near the left side of the screen, start with “General” and scroll down to view and adjust each setting.

Settings > General

Merge Meetings and Calendar tabs - **ON**

Show Zoom Meeting Invitations - **ON**

Settings > Security

Require that all meetings are secured with one security option - **ON**

Waiting Room - **ON**

Waiting Room Options

- ✓ Everyone will go in the waiting room
- ✓ People in the waiting room are sorted by join order

Meeting Passcode - **ON**

Personal Meeting ID (PMI) Passcode - **ON**

Require passcode for participants joining by phone – **OFF** (Claire points out that this is useful because this setting allows participants to change their equipment easily. The host can see who is joining by phone.)

Embed passcode in invite link for one-click join - **ON**

Only authenticated meeting participants and webinar attendees can join meetings and webinars - **OFF**

Meetings & Webinar Authentication Options

Sign into Zoom (Default)

If waiting room is enabled, phone-only users will be placed in the Waiting Room.

If Waiting Room is not enabled, phone dial-in only users will:

- ✓ Be allowed to join the meeting

Be blocked from joining the meeting

Block users in specific domains from joining meetings and webinars - **OFF**

Only authenticated users can join meetings from Web client - **OFF**

Approve or block entry for users from specific countries/regions - **OFF**

Settings > Schedule Meeting

HOST VIDEO - **ON**

PARTICIPANTS VIDEO - **ON**

(This allows everyone to begin in the same room and say hello to each other.)

Audio Type

- Telephone and Computer Audio
- Telephone
- Computer Audio

Allow participants to join before host – **OFF**

Enable continuous meeting chat - **ON**

Allow Zoom Rooms to start meeting with Host Key - **OFF**

Enable Personal Meeting ID - **ON**

Use Personal Meeting ID (PMI) when scheduling a meeting – **ON**

(This is one preference mediators use because it helps with document sharing).

Other options:

Option 1: When the meeting starts with familiar participants already there, go to **HOST TOOLS**

at the bottom of the Zoom operating screen; click **LOCK MEETING**.

Option 2: Require password, by turning “Only authenticated meeting participants and webinar attendees can join meetings and webinars” – **ON** (This selection can be found under Settings > Meeting > Security).

Option 3: Require password when scheduling new meetings. This selection can be found under Settings > Meeting > Security > Meeting Passcode. Turn **ON**

Use Personal Meeting ID (PMI) when starting an instant meeting - **ON**

Add watermark - **OFF**

Mute all participants when they join a meeting – **OFF** (You want the parties to feel welcome).

Upcoming meeting reminder – **ON**

(Some might turn this off because it can be distracting. Some might prefer it to be on.)

Meeting Templates - **OFF**

Settings > In Meeting (Basic)

Require media encryption for 3rd party endpoints (SIP/H.323) - **OFF**

Meeting Chat - **ON**

By default, allow participants to chat with

- No one
- Host
- ✓ **Everyone**
- Everyone and anyone directly
- Allow users to save chats from the meeting - **OFF**
- Host and co-hosts
- Everyone
- Only users in your account
- Only users in your account can chat

New meeting chat experience

- ✓ Allow participants to delete messages in meeting chat
- ✓ Enable the Screenshot feature in meeting chat
- ✓ Allow participants to react to meeting chat messages using emojis

- **All emojis**
 - Select emojis
- Meeting chat – Direct messages – **OFF**
- Meeting chat – Auto-save - **OFF**
- Sound Notification when someone joins or leaves - **OFF**
- Announce number of participants for dial-in participants - **ON**
- Send files via meeting chat - **ON**
- Only allow specified file types
- Maximum file size
- Display end-of-meeting experience feedback survey - **OFF**
- Co-host – **ON**
- Meeting Polls/Quizzes - **OFF**
- Allow images uploaded in polls/quizzes to be displayed
- Allow alternative host to add or edit polls and quizzes
- Require answers to be anonymous
- Allow host to create breakout rooms from poll results
- Meeting Survey - **OFF**
- Show raised hand in toolbar - **ON**
- Show Zoom windows during screen share - **OFF**
- Screen sharing - **ON**

How many participants can share at the same time?

- ✓ **One participant can share at a time**
- Multiple participants can share simultaneously (dual monitors recommended)
Who can share?
- Host only
- ✓ **All Participants**
Who can start sharing when someone else is sharing?
- ✓ **Host only**
- All participants
- Screen Sharing Presenter View - **ON**
- Disable Desktop screen sharing for meetings you host - **OFF**
- Disable screen sharing when guests are at the meeting - **OFF**
- Restrict external users from using remote control and remote support in a meeting

- Prevent my screen from being controlled by an external user
- Prevent guest user's screen from being controlled in your meeting
Annotation - **ON**
- Allow saving of shared screens with annotations
- Only the user who is sharing can annotate
Whiteboard (Classic) - **ON**
- ✓ Use Whiteboard by default if available
- Allow to save the whiteboard content
- Automatically create local export when sharing is stopped
Remote Control - **ON**
- ✓ Allow remote controlling user to share clipboard
Slide Control - **OFF**
Non-verbal feedback - **OFF**
Meeting reactions - **ON**
- All emojis
- Selected emojis
- ✓ Allow participants to use floating video reactions
Allow removed participants to rejoin - **OFF**
Show invitee list in the Participants panel - **ON**
Allow users to change their name when joining a meeting - **ON**
Allow participants to rename themselves - **ON**
Allow host or co-host to rename participants in the waiting room - **ON**

Hide participant profile pictures in a meeting - **OFF**

Meeting timers – **ON**

Settings > In Meeting (Advanced)

- Report to Zoom - **ON**
- Q&A in meetings - **OFF**
- Breakout room – Meetings - **ON**
- Assign participants to breakout rooms when scheduling
- ✓ Broadcast message to participants

- ✓ **Broadcast voice to breakout rooms**
- Allow host to view activity statuses of participants in breakout rooms (e.g. share screen, reactions)
- Set default breakout room behaviors
 - Remote support - **OFF**
 - Manual captions - **OFF**
 - Automated captions - **ON**
 - Allow only the following users to enable captions for the meeting or webinar
 - Full transcript - **OFF**
 - Save Captions - **OFF**
 - Language Interpretation - **OFF**
 - Sign Language interpretation view - **OFF**
 - Far end camera control - **OFF**
 - Auto-accept far end camera control
 - Meeting – HD Video Quality - **OFF**
 - Virtual background - **ON**
- Allow use of videos as virtual backgrounds
 - Immersive View - **ON**
- Turn off custom background
 - Focus Mode - **OFF**
 - Identify guest participants in the meeting/webinar - **OFF**
 - Auto-answer group in chat - **OFF**
 - Only show default email when sending email invites - **OFF**
 - Use HTML format email for Outlook plugin - **OFF**
 - Allow users to select stereo audio in their client settings - **OFF**
 - Show a “Join from your browser” link – **ON**
 - Show “Always join from browser” option when joining from join.zoom.us - **OFF**
 - Allow livestreaming of meetings - **OFF**
- Facebook
- Workplace from Meta
- YouTube
- Twitch
- Custom Live Streaming Service
 - Show a custom disclaimer when starting or joining a meeting - **OFF**

Request permission to unmute - **OFF**

Enable "Stop incoming video" feature - **ON**

Save Gallery View - **OFF**

Allow users to join external webinars and events through mesh in the local area network - **OFF**

Settings > Email Notification

When a cloud recording is available - **ON**

- Send a copy to the person who scheduled the meeting/webinar for the host
- Send a copy to the Alternative Hosts
- ✓ **Notify when audio transcription is available**

When attendees join meeting before host - **ON**

When a meeting is cancelled - **ON**

When an alternative host is set or removed from a meeting - **ON**

When someone scheduled a meeting for a host - **ON**

When the cloud recording is going to be permanently deleted from trash - **OFF**

Settings > Other

Invitation Email

Choose email in language to edit

- **English**

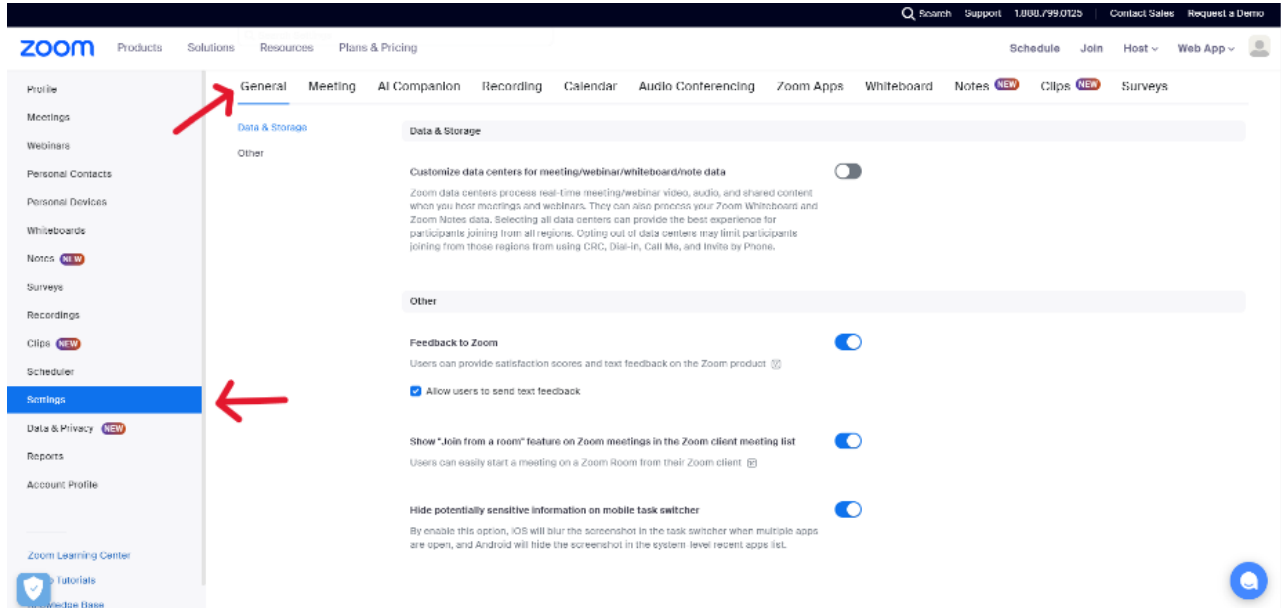
Schedule Privilege

Assign scheduling privilege to **Add**
No one

I can schedule for

No one

Settings > General



Customize data centers for meeting/webinar/whiteboard/note data - **OFF**

Feedback to Zoom - **ON**

✓ Allow users to send text feedback

Show "Join from a room" feature on Zoom meetings in the Zoom client meeting list - **ON**

Hide potentially sensitive information on mobile task switcher – **OFF**

Settings > Recording

Local recording – **OFF**

- Save chat messages from the meeting / webinar
- Save closed caption as a VTT file
Advanced local recording settings
- Hosts can give meeting participants permission to record locally

Cloud recording – **OFF**

- Record active speaker with shared screen
- Record gallery view with shared screen
- Record active speaker, gallery view and shared screen separately
- Record audio-only files
 - Record one audio file for all participants
 - Record a separate audio file of each participant
- Record the Interpretation
 - Record sign language interpreter
 - Record language interpreter
- Save chat messages from the meeting / webinar

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
- Create audio transcript
- Save panelist chat to the recording
- Save poll results shared during the meeting/webinar
- Save closed caption as a VTT file
- Participants can request host to start cloud recording

Allow cloud recording sharing – **OFF**

Automatic recording – **OFF**

IP Address Access Control - **OFF**

Require users to authenticate before viewing cloud recordings - **ON**

Set recording as on-demand by default - **OFF**

Require passcode to access shared cloud recordings – **ON**

Embed passcode in the shareable link for one-click access

- Allow invitees to access recordings without the passcode

Viewers can see the transcript - **OFF**

Viewers can see the chat - **ON**

Delete cloud recordings after a specified number of days - **ON**

The host can delete cloud recordings - **ON**

Recording notifications - Zoom clients

Play voice prompt for

- All participants
- Guest only
- No one
- Ask host to confirm before starting a recording

Recording notifications - Phone users

- Require phone-only users to press 1 to consent to being recorded
- Multiple notifications for phone users

Please share feedback and suggested improvements to this document by sending an email to zoom@mwi.org