Virtual Meetings
Tips for Hosts

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Virtual Meetings Overview
Tips for Meeting Hosts

MEETING MANAGEMENT
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- Make someone else the Host
- Invite others to join the meeting

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- Mute Participants on Entry
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MANAGE PARTICIPANTS
- Breakout Rooms
- Remove Participant
The Waiting Room feature allows the host to control when participants join your meeting. As the meeting host, you can admit attendees individually, or hold all attendees until you are ready to begin.

If you notice an unwanted guest has joined or a participant is disruptive to your session, you have the option to remove them in a manner that is consistent with your state’s laws.

Mute all participants on joining, do not allow participants to unmute themselves, limit screen sharing to the host.

If you are scheduling a meeting where sensitive information will be discussed and you do not want participants to start the meeting without you, it’s best to disable join before host functionality.

Setting a strong password for your meeting can prevent unanticipated guests from joining. When scheduling a meeting, under Meeting Options, select Require meeting password, then specify a strong password.

Once all anticipated participants have joined, the host can lock the meeting. When a meeting is locked, no one else can join the session, regardless of having a password, unless the meeting is subsequently unlocked.

Ways to Secure Meetings

Tips for Meeting Hosts

- **LOCK MEETING**
  - Once all anticipated participants have joined, the host can lock the meeting. When a meeting is locked, no one else can join the session, regardless of having a password, unless the meeting is subsequently unlocked.

- **REQUIRE PASSWORD**
  - Setting a strong password for your meeting can prevent unanticipated guests from joining. When scheduling a meeting, under Meeting Options, select Require meeting password, then specify a strong password.

- **WAITING ROOM**
  - The Waiting Room feature allows the host to control when participants join your meeting. As the meeting host, you can admit attendees individually, or hold all attendees until you are ready to begin.

- **DISABLE ‘JOIN BEFORE HOST’**
  - If you are scheduling a meeting where sensitive information will be discussed and you do not want participants to start the meeting without you, it’s best to disable join before host functionality.

- **CONTROL AUDIO/SHARING**
  - Mute all participants on joining, do not allow participants to unmute themselves, limit screen sharing to the host.

- **REMOVE PARTICIPANT**
  - If you notice an unwanted guest has joined or a participant is disruptive to your session, you have the option to remove them in a manner that is consistent with your state’s laws.

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Meeting Management
Clarifications and Best Practices

01 WAITING ROOM

• When a waiting room is set up for a meeting, anyone who joins the meeting will first be sent to the Waiting Room.
• The Host will see participants as they join and can individually allow them into the meeting (or not).
• The Host can also send participants back to the waiting room.
• This could be used to screen the people who join the meeting, or to temporarily separate participant(s) from a portion of the meeting.

02 ADD CO-HOST

• It is recommended there be at least two co-hosts.
• One to manage participants and the other to share the screen.
• These can be set at the time of creating the meeting or you can assign individuals as co-hosts when they join the meeting.

03 MAKE HOST

If the Host needs to leave before the meeting is finished, they can designate someone else to be the Host for the remainder of the meeting.
Content Management
Clarifications and Best Practices

Screen Sharing

The Host determines who can share their screen.
For a presentation only meeting, it would be best to not allow participants to share their screen.
For a collaboration-type meeting, only allow one person to share their screen at a time.

Annotation Tools

Annotation on a shared screen can be very helpful to highlight certain items or add explanatory notes.
Like screen sharing, allowing others to annotate should be used judiciously.

File Upload

Files can be shared by the Host or the participants.
Files are uploaded in the Chat area, so they can be sent to Everyone or only to selected participants.
Manage Participants
Clarifications and Best Practices

Waiting Rooms
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Breakout Rooms
Breakout Rooms are a very handy feature that can be used in a variety of ways:
- To create small groups for discussion, then merge back to the larger group
- To isolate Board Members for Executive Session meetings
- To accommodate interviewing several candidates as part of the same Zoom meeting (isolate each candidate in their own breakout room, then have interviewers join the room for the interview.)
• As you can see on the Host toolbar, there are many buttons and settings available to the host.
• Be patient with yourself - It takes a little practice to remember where to click to adjust settings!
• Some buttons will result in a popup screen with additional options.
• Some settings can be managed from multiple locations on the toolbar or in the additional popup screens.
• The next slides will cover each button on the toolbar.
Host Audio settings  
Using the Zoom Toolbar

- Click the microphone icon to Mute or Unmute your audio
- Click the ‘up’ arrow next to the microphone icon to see additional options
  - Select microphone and/or speakers to use
  - Test microphone and/or speakers
  - Switch from computer audio to phone audio
Host Video settings
Using the Zoom Toolbar

- Click the camera icon to Start or Stop Video
- Click the ‘up’ arrow next to the camera icon to see additional options
  - If you have multiple cameras, select the one to use
  - Click Video Settings for additional settings (these may be limited depending on whether you have a Zoom account or are a guest)
From the Security button you can:
- Lock the Meeting
- Enable the waiting room
- Change what participants are allowed to do
  - Share Screen
  - Chat
  - Rename Themselves
- Remove a participant from the meeting
The Manage Participants button will open a new panel that shows a list of the meeting participants.

There are many functions that can be performed in this area.

These will be covered on the next three slides.

To close the Participants window, click the Manage Participants button again.
Manage Participants

Actions for Individuals

By hovering over a participant’s name, several actions can be taken for that participant:

• Mute the individual
• Open a chat with the individual
• Make them the meeting Host
• Make them a Co-Host
• Allow them to Record the meeting
• Rename them for the meeting
• Put the individual in a Waiting Room
• Remove them from the meeting
Clicking on the Invite button will allow you to invite others to join the meeting. In the popup, you can choose from a list of Zoom contacts, email others, or Copy the meeting URL or Invitation to paste in a message.
Manage Participants

Actions for All Participants

Other options at the bottom of the Participants window include:
- Mute All participants
- Unmute All participants
- Click the ellipsis for the additional options shown below

NOTE: Best practice recommendations are shown here
Polls are easy to create by editing the meeting online, prior to starting the meeting.

1. To launch the first poll, click the Polls button and then click Launch.
2. Monitor the polling progress and End Polling.
3. Share Results with participants, and close the polling window.
Chat Feature
Using the Zoom Toolbar

• To open the Zoom Chat area, click on the Chat button
• At the bottom of the Chat area, you can select whether the message is for Everyone in the meeting, or select individual participants
• Type your message and hit return
• As messages are sent and received, they will populate in the Chat window
• Click the Chat button again to close the Chat window
Additional Chat Options

Using the Zoom Toolbar

- Click the ellipses button to set more options for Chat
- Using the ellipses button, the Host can set who the Participants can Chat with:
File Upload
Using the Zoom Toolbar

• In the Chat area, click on the File button to upload a file
• You will be prompted to browse for the file
• Use the To: field to select whether Everyone will receive the file, or only certain participants.
• Once the file is received, it can be downloaded and opened
Screen Sharing
Using the Zoom Toolbar

- To start screen sharing, click the Share Screen button.
- A window will pop up where you can select which monitor, or which application from your computer you would like to share.
- If you plan to share a document, have it open before starting the meeting.
- It is recommended that only one person share their screen at any time.
- You will need to Stop Sharing before anyone else can share their screen.
- If you have allowed participants to share their screens, they also have a green Share Screen button on their toolbar.
Screen Sharing
Using the Zoom Toolbar

- When sharing a video clip, it is important to check the boxes to:
  - Share computer sound
  - Optimize Screen Sharing for Video Clip
- Checking these two options ensures the best experience for meeting attendees
To access the Advanced Options for screen sharing, click on the up arrow next to Share Screen.

There are two choices on the small popup:
- One participant can share at a time
- Multiple participants can share simultaneously

Click Advanced Sharing Options to see the larger popup.

The larger popup shows the recommended settings:
- One participant can share at a time
- Only Host can share (All Participants would be appropriate for a collaboration meeting)
- If All Participants can share, Who can start sharing when someone else is sharing?
Screen Sharing
Using the Zoom Toolbar

- When you start screen sharing, your Zoom toolbar will move and become somewhat smaller
- Click New Share to share something different from your computer
- Use the More button to access additional functions while sharing
- You can stop sharing by clicking on the red Stop Share button
The top bar is the smaller Host toolbar that you have while sharing your screen.

Click on Annotate to access the different Annotation tools.

The best way to get familiar with the tools is to host a meeting (maybe just with yourself) and try out each one.

Some of the more helpful tools are the Spotlight (to highlight where you are placing your cursor), the Text tool and the Draw tool.

You can Clear all the annotations or Save a copy of the annotated screen.
The easiest way to make sure your meetings are always recorded is to modify the Settings on your Zoom profile for Automatic Recording as shown below:

OR you can click the Record button on the Zoom toolbar and select to record locally on your Computer or to the Zoom Cloud.

You will see options to pause or stop recording.
Breakout Rooms
Using the Zoom Toolbar

- Breakout Rooms allow you to divide participants into any number of rooms, where they can talk amongst themselves for a period of time.
- Zoom can automatically assign the participants, or the host can manually assign individuals to particular rooms.
- Options include setting a time limit on the room and setting a countdown timer.
- Once options are selected, click Open All Rooms to send the participants to the Breakout sessions.
- Host can visit any breakout room and can move participants from one room to another.
• As the Host, you can use Reactions to give a visual thumbs up or clap during a meeting
• Click the Reactions icon and select your reaction
• The reaction will appear in your panel and all participants can see it
• Reactions will disappear after 5 seconds
• Meeting Participants can also use Reactions during a meeting
Raised Hand
Using the Zoom Toolbar

- Meeting participants can Raise their Hand to let the Host know they have a question or comment.
- When this happens, the host will see a popup that alerts them to the raised hand.
- A blue hand symbol will also appear in the Participants window.
- When resolved, the host can choose Lower Hand on the Participants window.
In-Meeting Checklist
Using Best Practices

1. Make sure you have Enabled the Waiting Room
2. Check Audio Settings
   a. Mute Participants on Entry
   b. Do Not Allow Participants to Unmute Themselves
   c. Do Not Play Enter/Exit Chime
3. Check Chat Settings
   a. Set to “Host Only”
4. Check Screen Share Settings
   a. One participant can share at a time
   b. Only Host can share
5. Assign Co-Host(s)
   a. Assign co-host permissions to at least one or two co-hosts to help manage the meeting. Note: they must be in the meeting before you can assign them as co-hosts.
6. Recording
7. Livestream