

Getting started as a Zoom Host

This is a running diary of my experience *en route* to my first Zoom hosting. We had a fun, productive meeting, so I hope this will smooth the path for your online events. You'll see here what I had to do to get ready, the differences between Zoom Host and guest functions, and a quick summary of how to run a Zoom session.

Preliminaries

Infrastructure

Operating system — The Zoom website says their software will run on just about anything digital. I've attended meetings using an iPad and a PC running Windows 10; other people at the same meetings came in through Android phones and Macs.

Hardware — As a Host you will need audio and video capability. Smartphones, tablets and most laptops already have cameras and microphones as part of the package. My deskside PC didn't. If your system doesn't qualify or if you're not happy with the picture or sound quality, the product category to ask about or search for is "webcam," which should supply both functions. When I looked, practically everything in the category was marked "out of stock" (everybody and their brother-in-law was looking at the same time because of online schools and such) but I did manage to find separate devices that together deliver the goods. Stocks now seem to be in better condition at the major outlets.



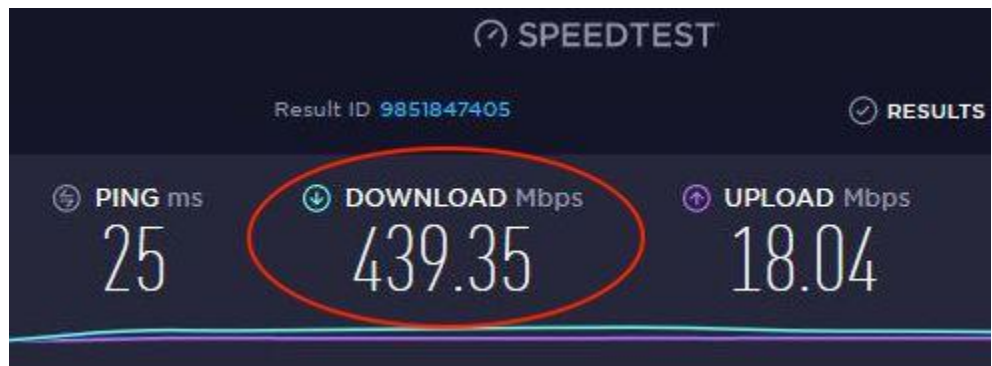
Pretty much all webcams use a USB connection, but I've seen half-a-dozen different-shaped "Universal Serial Bus" plugs so you might need an adapter as well as a cable to tie camera to device. Something to check for.

Software — Zoom has its own app, the Zoom Client. The same Client runs in either Guest or Host mode. If you've already attended a Zoom meeting by clicking on a *zoom.us* link (more about that below), then the Client downloaded and installed itself when that first meeting started and you're done. Check your programs/apps list for Zoom's distinctive icon, a white camera profile inside a blue oblong.



If the Zoom Client app isn't already on your system you can download it manually. In the Android and Apple ecosystems search for it in their respective app store, or you can use your browser (I've been successful using it with Chrome, Firefox and Safari) to download it directly from *zoom.us*. Hover your cursor over "*Resources*" at the top right of their web page and select *Download Zoom Client* from the drop-down menu. The client will install and even show up as a in.

Internet connection – Your line speed can make a difference, especially at the low-speed end. The Zoom people recommend a line speed of at least 1.5 Mbps (million bits per second). That’s about half what you need for video streaming. You can check your line speed for free with the utility at speedtest.net.



One last thing – whatever’s behind you when you’re in front of the camera may distract your audience when you’re online. Zoom’s “Virtual background” function is supposed to subtract out the parts of the picture that aren’t you and substitute in your choice of photo, either one of the defaults they supply or one of your own. But the function works well only if the camera and the lighting are just right. If they’re not the results are ... unsatisfactory. So, clean up the clutter and maybe take down that last-year calendar that’s still on the wall.

Registering with Zoom

Getting an account – You can attend Zoom meetings without an account in your or an organization’s name, but if you’re going to Host meetings an account is required. Getting one is straightforward – go to zoom.us and click on the orange “Sign up, it’s free” button at the top right of their webpage. They’ll ask for a few pieces of information (email address, etc.) that they promise to be careful with.

During the sign-up process you can pick any of several **account levels** depending on what you’re going to use the service for and how much you’re willing to pay. I’m using the free service, which is limited to a maximum of 100 guests and 40 minutes of meeting time. (I grew up in a corporate culture that tried not to let meetings run more than 30 minutes, so this is comfortable.) If you’re thinking of evening-long events or a many-participant webinar you might consider one of the priced offerings. Side-note – this entire document is informed by this free-service experience. Hosts and guests have more capabilities in the priced products although the Client’s screens look the same on the surface.

Oh, and you need only register once even if you’ll be using the Client on **multiple devices**.

When you register, Zoom’s “OK, you’re in” screen will display some items that in fact you’re not likely going to use (see below)

- A personal meeting ID – a 10-digit number that guests might need to access a meeting you’ve set up
- A numeric key – for phone-in guests
- A Host key – a 6-digit number for obtaining Host privileges for the meeting
- A personal link – a long string of letters and numbers starting with <https://us04web.zoom.us>, that meeting ID and a *pwd*= password field

You can recover that information online by signing on to zoom.us and navigating to the *Your* account page but you may want to copy-paste those items into a note file on your system in case you ever need them.



You need video capability for full Host functionality but suppose you want to invite people who don't have adequate line speed or access to a camera. They can still dial in by phone using any of Zoom's meeting phone numbers (in the US, toll-free 877-853-5247 or 888-788-0099; international numbers are listed on Zoom's website at zoom.us/zoomconference).

When the phone call to Zoom connects, the system asks the person to dial in the meeting number and numeric key that you'll include in your invitation (see below).

Scheduling A Meeting



When setting up a meeting, you have two options — plain and better. The simplest way is to just copy-paste your personal meeting number and guest numeric key into an email you send to your invitees. **Not recommended.**

The **better way** is to use Zoom's own SCHEDULE A MEETING function. Click on that button and you'll be taken to a page where you specify

- a topic or meeting name that your invitees will see
- an optional narrative description
- the meeting's date/time (Note: the time zone will default to the time zone you specified when you registered.)

When	08/02/2020	6:00	PM
Duration	1 hr	0 min	
Time Zone	(GMT-6:00) Mountain Time (US and Canada)		

There's also a *Recurring meeting* option for the ones that happen every other Tuesday or whatever.

Then you get to select a few optional controls.

- **Meeting ID** — In general it's best to allow Zoom generate a random ID instead of using your personal one. Why? Security. Soon after lockdowns started, hackers learned how to "zoombomb" and mess with meetings that always use the same ID. That's a lot harder to do with random 9-digit numbers.
- **Passcode** — In general, leave this option turned on and locked.
- **Waiting room** — In some situations, you may not want your guests to simply drop into a meeting in progress, or you may want to screen potential guests before admitting them. If this meeting will be one of those situations, turn on this option (see below).
- **Video** — Do you want to see faces as soon as people enter? Do you want them to see you as soon as you open the meeting? Select ON or OFF here to control that. Note, though, that guests can also control whether or not their camera is transmitting. Both have to be ON before people can see faces.
- **Join before host** — In some situations, often the social ones, you may want to allow guests to enter the meeting whether or not you, the host, are logged in. Turn on this option to make that happen.

- **Mute participants upon entry** — Will this be a large group or might dogs be barking? Turn on this option to quiet the initial hubbub as people enter and get settled. Here again, guests can also control whether or not their microphone is transmitting. Both have to be ON before people can hear voices.
- **Record the meeting automatically on the local computer** — Just what it says. If you turn on this option, be aware that in some jurisdictions you may have to make a formal announcement that the meeting is being recorded.

Click in the big blue SAVE button and you're done. The system will generate and display a random meeting number, a random password, a customized link and the bones of the invitation for you. Here's a sample ...

Rich Olcott is inviting you to a scheduled Zoom meeting.

Topic: Test meeting 1
 Time: Jul 3, 2020 04:00 PM Mountain Time (US and Canada)

Join Zoom Meeting
<https://us04web.zoom.us/j/73842715865?pwd=N1RESjhkckRoblY4NmxpRFhtRmJiZz59>

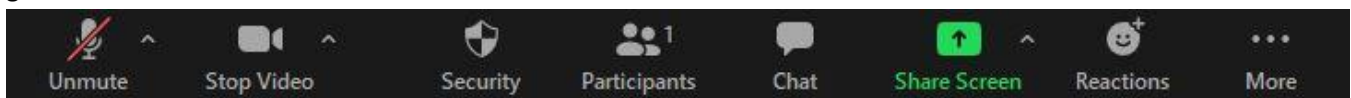
Meeting ID: 738 4271 5865
 Password: 5DbMqF

As you see, it's got all the critical information nicely formatted in plain text, ready to copy-paste into an email though you're free to mess with the top two lines.

Notice, by the way, that Zoom *doesn't* ask for email addresses. Zoom doesn't care, because they don't send out the invitations, you do. More security.

Zoom's Host functions

The person who owns the account is the **designated meeting Host**, in charge of keeping the meeting orderly if it's that sort of meeting. To that end, the Host has a few more capabilities than the other guests. The Host and guest screens look the same on the surface but the features on the Host's screen do more.



The Zoom screen has an icon-loaded black band at the bottom (or top, on an iPad). If you've attended a Zoom meeting before you'll be familiar with the two icons on the left. Click on either to control your audio and video functions. The Host's special concerns lurk behind the next four.

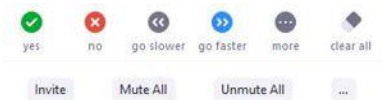
Click on the **Participants icon** and a new pane will open up on the right side of your screen. The *Participants* pane shows you a list of current or potential guests. People come to the meeting by clicking on the link you sent them. Here's where that *Waiting* room option comes into play. If you turned it on, prospective guests will see a mostly blank screen that says, "Please wait, the Host will let you in soon." Meanwhile, the Host version of the *Participants* pane will show guest names along with a pair of *Admit/Remove* buttons. These people are said to be in *The Waiting Room*.

- If you as Host recognize a name and want that person in, click on *Admit*. That person will suddenly see an active Zoom meeting screen with whatever audio and video goings-on that are going on.

- If you click *Remove* that person will be dropped from the meeting list and their Zoom connection will go away.
- If you really don't like someone you could just let them sit there...

Also in the Host's *Participants* pane to the right of each person's name you'll see buttons that let you shut down (mute) someone's microphone (though they can still hear what's going on) and/or video input (though they can still see what's going on). It's often too much work to do that for everybody, so at the bottom of the list there's a pair of *Mute All* and *Unmute All* buttons that do just what you'd think they do.

Almost at the bottom of the *Participants* pane you and the guests see a whole row of small buttons for registering yes/no votes, asking the speaker to go faster/slower, registering approval, etc. When a guest clicks on one of those buttons, an indicator flashes on the Host's screen at the top right-corner of their *Participants* pane. As Host you'll want to keep an eye on those indicators and maybe relay a hint to the speaker.



At the right-hand end of the bottom row you'll see a three-dots icon with some Host controls hiding behind it. They manage things like the Waiting Room, chimes when people enter and exit, and some global permissions.

The other black-band icon you'll want to pay attention to is **Chat**. Click on it to open yet another pane on the right side of the screen. You can have both *Chat* and *Participants* open at the same time — they'll split the right-side space.

Chat is old tech, just serves to carry text messages to you and maybe to the other guests. At the bottom of the *Chat* pane, to the far right, you'll see two icons for doing file transfers, plus another three-dots icon that hides more Host controls. *Save Chat* copies the chat text into a .txt file you'll find in the */Documents/Zoom* directory that the Client install operation created on your computer. The other options manage how widely guest messages can be broadcast.



As Host you'll want to keep an eye on the *Chat* pane because some guests use text instead of those vote buttons. Also, sometimes it's useful to be aware of text discussions going in parallel with the audible traffic.

A few observations

I've not tried Zoom on my phone, but it's my understanding that it'd be OK for a guest but not for a Host. Gallery view isn't supported and getting to the Participant and Chat panes can be tricky.

Zoom on my iPad behaves slightly differently than Zoom on my Windows system. The buttons are at the top of the screen instead of at the bottom, virtual backgrounds work better mostly, etc., but the most important difference is in Gallery view. On the iPad it's limited to only nine participants whereas on the PC the limit is much higher.

~~ Rich Olcott

Hosting a meeting – a process checklist

- Get a Zoom account
- Schedule an event
- Notify the potential guests
 - Send out a “Save the date” notice (*without* the link and password information) by email and/or social media a week or so before the event. Earlier, too, if you like and if your invitees plan that far ahead.
 - A day or two before the meeting send out a confirmation email *with* the link and password information. Security again, and besides, some people just need an imminent reminder.
 - If you’re likely to have phone-ins, make sure your invitations include the Zoom phone numbers (toll-free 877-853-5247 or 888-788-0099 within the US) and emphasize the meeting number and password that they’ll have to enter.
- At the scheduled time, click on that link yourself to logon as Host.
 - When you’re ready to be seen and heard, click on the appropriate icons to start your video and unmute your mic unless they were defaulted “on” when you scheduled the meeting.
 - Click on the *Participants* and *Chat* icons. I recommend putting yourself in Gallery view so you can see all the participants, as opposed to Speaker view which can flit around distractingly.
 - Admit your guests as they show up on the list
 - Especially if the meeting will include many first-timers you may want to lead off with a quick tour of the Zoom screen so they know about their mute/unmute buttons, the *Chat* icon, etc. It’s the Zoom equivalent of “Bathrooms are down the hall to your right.”
 - From then on it’s just a meeting so you do whatever you’d normally do at a meeting of that sort, *i.e.*, chair or facilitate or just be part of the circle, except you also should
 - Keep an eye on the *Participants* and *Chat* panes
 - Maybe mute or unmute someone, depending
 - Click on *End* to close things down. Then you have your choice of letting the party continue without you (“*Leave Meeting*”) or completely shutting it down (“*End Meeting for All*”). The second one’s the Zoom equivalent of turning off the lights and shutting the door so be sure that if you just leave, that one of the other participants will take care of that for you.