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Zoom Overview

Zoom is the main video communication platform for the LF AI & Data Foundation. It is used for running project meetings, committee meetings, virtual events, etc. As Zoom meetings are open to the general public, a Zoom host or co-host must moderate a meeting in all senses of the word from starting and stopping the meeting, to acting on any code of conduct issues. These guidelines are meant as a tool to help LF AI community members manage their Zoom resources.

Full details on meeting management can be found on the LF AI & Data Community Meetings & Calendars page.

Code of Conduct

The LF AI & Data Foundation and its projects adhere to the Code of Conduct throughout all platforms and includes all communication mediums.

Zoom Account Hosts

Zoom licenses are managed by the LF AI & Data Foundation and a list of Zoom account hosts is available here under the LF AI & Data Community Meetings & Calendars page.

Accessing Zoom Accounts

Details on how to request access to a Zoom account are available here under the LF AI & Data Community Meetings & Calendars page.

Setting Up Your Meeting and Moderation

It is very important that you do **not** share your Zoom link on social media. This will help curtail trolls and others who would intentionally attempt to disrupt your Zoom call.

To create a meeting with moderation enabled, ensure the following:

- Have the latest version of the Zoom client installed
- Be logged in as the leads Zoom account associated with the meeting **OR** use the host key to "claim host"
- Configure a meeting setup through the "Meeting" menu in the leads Zoom account.
  - **NOTE:** Do **NOT** use the "Personal Meeting ID" - This will create an "ad-hoc" meeting that is time-bounded and without moderation capability

After the meeting has started:

- Assign a co-host to help with moderation - It should never be your note taker unless it's a very small group
- Turn **off** screen sharing for everyone and indicate only host - If you have others that need to share their screen, the host can enable that on the fly via the ^ menu next to "Share Screen" or by making the presenter a Co-Host

Moderation tips:

Hosts **must** be comfortable with how to use these moderation tools and the Zoom settings in general. Make sure whoever is running your meeting is equipped with the right knowledge and skills. If you have any questions or concerns, please email operations@lfaidata.foundation.

- If you're dealing with a troll or bad actor:
    - Put the troll or bad actor on **hold** - The participant will be put into a "waiting room" and will not be able to participate in the call until the host removes the hold
        - **NOTE:** Depending on your client version this will be called "**Put in Waiting Room**" instead of on **hold**
    - Remove the participant - Please be cautious when testing or using this feature, as it is **permanent** -They will never be able to come back into that meeting ID on that particular device - Do **not** joke around with this feature; it's better to put the attendee on "hold" first and then remove if absolutely needed - LF and LF AI & Data Foundation have no ability to fix this for you
    - After an action has been taken, use the **lock meeting** feature so that no one else can come into the meeting If that fails, end the call immediately, and contact operations@lfaidata.foundation to report the issue
    - **NOTE:** You can find the actions noted above when clicking on the **more** or **"..."** options after scrolling over the participants name /information.
- Escalating/Reporting a problem:
    - Issues that cannot be handled via normal moderation should be escalated to LF AI & Data Foundation, email conduct@lfaidata.foundation.

Meeting Recordings

Designated Zoom hosts are responsible for posting all meetings to their applicable channel (wiki, GitHub, etc.) If a violation has been addressed by a host and it has been recorded by Zoom, the video should be edited before being posted on the applicable channel.

Details on recording and posting videos are available here under the LF AI & Data Community Meetings & Calendars page.

Screen Sharing Guidelines and Recommendations

Zoom has a documentation on how to use their screen sharing feature. High level recommendations include:

- Turn off notifications on your computer to prevent any interference
- Close all sensitive documents and unrelated programs before sharing the screen
- Test your presentation before hand to make sure everything goes smoothly
- Keep your desktop clean - Make sure there is no offensive or/and distracting background

Audio/Video Quality Recommendations

While video conferencing has been a real boon to productivity there are still lots of things that can go wrong during a conference/video call. There are some things that are just plain out of your control, but there are some things that you can control. Here are some tips if you're just getting into remote meetings. Keep in mind that sometimes things just break. These are not hard rules, more of a set of loose guidelines on how to tip the odds in your favor.

Recommended hardware to have:

- A dedicated microphone
    - This is the number one upgrade you can do as sound is one of those things that can immediately change the quality of your call - If you plan on being here for the long haul, something like a Blue Yeti will work great due to the simplicity of using USB audio and having a hardware mute button - Consider a pop filter as well if necessary
- A Video Camera
    - A bad image can be worked around if the audio is good - Certain models have noise cancelling dual-microphones, which are a great backup for a dedicated microphone or if you are travelling
- A decent set of headphones
    - Personal preference, these cut down on the audio feedback when in larger meetings
- What about an integrated headset and microphone?
    - This totally depends on the type - We recommend testing it with a friend or asking around for recommendations for which models work best

Hardware we don't recommend:

- Earbuds
    - Generally speaking they are not ideal, and while they might sound fine to you when 50 people are on a call the ambient noise adds up - Some people join with earbuds and it sounds excellent, others join and it sounds terrible - practicing with someone ahead of time can help you determine how well your earbuds work.

Pro-Tips:

- Join on muted audio and video in order to prevent noise to those already in a call
- If you don't have anything to say at that moment, **MUTE** - This is a common problem
    - You can help out a teammate by mentioning it on Zoom chat or asking them to mute on the call itself

        - The meeting co-host can help with muting noisy attendees before it becomes too disruptive - Don't feel bad if this happens to you, it's a common occurrence
    - Try to find a quiet meeting place to join from; some coworking spaces and coffee shops have a ton of ambient noise that won't be obvious to you but will be to other people in the meeting
        - When presenting to large groups consider delegating to another person who is in a quieter environment
    - Using your computer's built in microphone and speakers might work in a pinch, but in general won't work as well as a dedicated headset /microphone
    - Consider using visual signals to agree to points so that you don't have to mute/unmute often during a call - This can be an especially useful technique when people are asking for lazy consensus - A simple thumbs up can go a long way!
    - It is common for people to step on each other when there's an audio delay, and both parties are trying to communicate something - Don't worry, just remember to try and pause before speaking, or consider raising your hand (if your video is on) to help the host determine who should speak first

Zoom Guidelines for Events/Meetups

Please review this early in your event planning stage to ensure you have adequate time to prepare for the Zoom set up, testing, and any other items that may come up. This guide is intended to consolidate information on how to leverage the Zoom platform to host and record events or meetups. If you do not have access to a project specific Zoom account and would like to request a Zoom link for your meeting via LF AI & Data, please first review the details under the LF AI & Data Foundation - Community Meetings and Calendars for the requirements, and then if applicable, you can submit the request per the instructions provided.

If you have any questions, please email events@lfaidata.foundation.

In Person Event/Meetup Zoom Use

What you need to host an in person meeting:

- Host laptop that can sit near the room audio system and have enough storage to record the sessions
    - A typical all day recording will be around ~500MB - 750MB provided you are not recording video
- Pro Zoom account that can be leveraged with no conflicting meetings scheduled
        - See Accessing Zoom Accounts above on how to request a Zoom link for use
    - Standard LF AI & Data Zoom accounts can host meetings or webinars with unlimited minutes for up to 500 participants
- Setup the Zoom account with the applicable settings for the meeting type (see useful references below)
    - If LF AI & Data is providing the Zoom meeting link, the standard recommended settings will be included, any modifications will need to be adjusted accordingly in the meeting (not at the account level) by the host
- Presenters/Speakers may need their own laptop depending on your setup for the event or meetup

What you need for Audio:

- Conference Call System that can dial to an external Zoom Conference call number and room audio can be heard OR
- Audio Adapter to capture audio from the Microphones in the Room

Audio Setup A: If you have a Conference Call System:

- From the Host laptop, select "Switch to Phone Audio" from the Microphone option in the bottom left of your Zoom screen
- Dial an appropriate number from the available displayed numbers based on your location or audio system
- Enter your Meeting ID: XXX XXX XXX
- Enter your Participant ID: XX

Audio Setup B: If there is not a Conference Call System:

- Use Audio Adapter to connect the Host Laptop to the master out from the room audio mixer
- From the Host Laptop, select the ^ option near the microphone option in the bottom left of your Zoom screen and then select "USB Audio"

Presenting:

- You must announce that the meeting will be recorded prior to starting the recording
    - It is recommended to include the notice in a presentation slide
- Ensure that all presenters have the Zoom bridge information at least 24 hours in advance
    - Check with each presenter 10 minutes before their presentation begins to ensure they are already connected to the Zoom session and that their microphone is MUTED
- Option A (recommended)
    - Host Laptop is connected to the room projector
    - Presenter should be connected to the Zoom session before their presentation begins
    - Presenter shares their screen from Zoom and it will automatically appear on the room projector via the Host Laptop
- Option B
    - Presenter should be connected to the Zoom session before their presentations begins
    - Presenter connects directly to the Projector when their session begins
    - Presenter will still share their screen with Zoom

Recording Recommendations:

- Occasionally check the host computer to make sure that any remote viewers do not have their camera on
- Mute any participants who unmute themselves and have background noise coming in
- Pause the recording during long breaks such as lunch or record the meeting is batches if that will be helpful for posting of your meeting recording later

Virtual Event/Meetup Zoom Use

What you need to host an in person meeting:

- Host laptop that can have enough storage to record the sessions
    - A typical all day recording will be around ~500MB - 750MB provided you are not recording video
- Pro Zoom account that can be leveraged with no conflicting meetings scheduled
    - See Accessing Zoom Accounts above on how to request a Zoom link for use
    - Standard LF AI Zoom accounts can host meetings or webinars with unlimited minutes for up to 500 participants
- Setup the Zoom account with the applicable settings for the meeting type (see useful references below)
    - If LF AI is providing the Zoom meeting link, the standard recommended settings will be included, any modifications will need to be adjusted accordingly in the meeting (not at the account level) by the host
- Presenters/Speakers may need their own laptop depending on your setup for the event or meetup - You may have all content in a master deck or speakers may be sharing from their own laptops

What you need for Audio:

- If a virtual only event, ensure you are applying the Pro-Tips items noted above

Presenting:

- You must announce that the meeting will be recorded prior to starting the recording
    - It is recommended to include the notice in a presentation slide
- Ensure that all presenters have the Zoom bridge information at least 24 hours in advance
    - Check with each presenter 10 minutes before their presentation begins to ensure they are already connected to the Zoom session and that their microphone is MUTED
- Option A (recommended)
    - Presenter should be connected to the Zoom session before their presentation begins
    - Presenter shares their screen from Zoom and it will automatically appear on the room projector via the Host Laptop
- Option B
    - Presenter should be connected to the Zoom session before their presentations begins
    - Presenter will still share their screen with Zoom

Recording Recommendations:

- Occasionally check the host computer to make sure that any remote viewers do not have their camera on
- Mute any participants who unmute themselves and have background noise coming in
- Pause the recording during long breaks such as lunch or record the meeting is batches if that will be helpful for posting of your meeting recording later

Zoom Resources

Below are a few resources directly from Zoom:

- Blog Post: “Host and Co-Host Controls in a Meeting”
- Zoom Blog Post: “How to Keep the Party Crashers from Crashing Your Zoom Event”

Typical Zoom Settings

The following are typical **Zoom link settings (individual link)** used for virtual meetings such as a virtual LF AI Day. Please note that some meetings may have different settings based on their specific needs.

- Sign in to the specific Zoom account you are going to use, click on Schedule a New Meeting
- Add the meeting name under Topic, select the start time, duration, timezone - Recurring meeting is NOT selected
- Registration - NOT selected is the default - The need for this feature will vary, for an LF AI Day as an example, attendees register for attendance purposes via Cvent and thus it is not needed
- Meeting ID - Generate Automatically is the default
- Meeting Password - Require Meeting Password needs to be selected - A password will be generated for your meeting (you can change it if you would like to do so)
    - *Important for public meetings with risk of unwanted participants or actions
- Video - Host and Participant are Off by default
    - *Important for public meetings with risk of unwanted participants or actions
- Audio - Both is selected by default, enabling for both Telephone and Computer
- Meeting Options should be On/Off as follows:
    - Enable join before host - Off

        - Mute participants - On
        - Enable waiting room - Off
        - Only authenticated users can join - Off
        - Record the meeting automatically - Off
- Alternative hosts - Leave blank - Only emails with a Linux Foundation domain can be used
- Save - After you save the meeting the Zoom link and applicable details will be available to you

Each Zoom account has top-level settings for the meetings, recordings, and telephone use - Meeting hosts should not change these settings but you should ensure the following settings are set properly in case another Zoom host made a change or there is something unique to your meeting. The settings are located on the left hand tab.

- **The first tab will bring you to the Meeting portion:**
    - Host Video: Off
        - *Important for public meetings with risk of unwanted participants or actions
    - Participant Video: Off
        - *Important for public meetings with risk of unwanted participants or actions
    - Audio Type: Telephone and Audio Computer
    - Join before host: Off
    - Enable Personal Meeting ID: Off
    - Require a password for Personal Audio Conference: Off
    - Only authenticated users can join meetings: Off
    - Only authenticated users can join meetings from web client: Off
    - Require a password when scheduling new meetings: On
        - *Important for public meetings with risk of unwanted participants or actions
    - Require a password for instant meetings: On
    - Embed a password in invite for one-click join: On
        - You can make it a one click experience with On, or to require an additional security step you can set to Off and provide the password to input
    - Require a password for participants joining by phone: Off
    - Mute participants upon entry: On
    - Upcoming meeting reminder: Off
    - **In Meeting (Basic)**
        - Require encryption: On
        - Chat: On
            - This can be set to Off if you are concerned about the risk of unwanted participants or actions
        - Prevent participants from saving chat: Off
        - Private Chat: On
            - This can be set to Off if you are concerned about the risk of unwanted participants or actions
        - Auto saving chats: On
        - Sound notification when someone joins or leaves: Off
        - File transfer: Off
            - *Important for public meetings with risk of unwanted participants or actions
        - Feedback to Zoom: Off
        - Display end of meeting survey: Off
        - Co-Host: On
        - Polling: On
        - Always show meeting control toolbar: On
        - Show Zoom windows during screen share: On
        - Screen sharing: On
        - Who can share: Host Only (co-hosts can also share)
            - *Important for public meetings with risk of unwanted participants or actions
        - What can start sharing when someone else is sharing?: Host only
        - Disable desktop/screen share for users: Off
        - Annotation: Off
        - Whiteboard: On
            - Allow saving of whiteboard content selected
        - Remote control: On
        - Nonverbal feedback: On
        - Allow removed participants to rejoin: Off
        - Allow participants to rename themselves: On
        - Hide participants profile pictures: Off
    - **In Meeting (Advanced)**
        - Report participants to Zoom: On
        - Breakout room: Off
        - Remote support: Off
        - Closed captioning: On
        - Save captions: On
        - Far end camera control: Off
        - Group HH video: Off
        - Virtual background: On
        - Identify guest participants in the meeting: Off
        - Auto-answer in group chat: Off
        - Only show default email when sending email invites: Off
        - Use HTML format for Outlook plugin: On
        - Allow users to select stereo audio: Off
        - Allow users to select original sound: Off
        - Select data center regions for meetings: On - Leave all as defaulted
        - Waiting room: Off
        - Show a "join from your browser" link: On

        - Allow live streaming meetings: Off
    - **Email Notification**
        - All should be set to Off
    - **Other**
        - Blur snapshot: On
        - Invitation email: English
        - Schedule privilege: No one
        - Integration Authentication: Do not regenerate
- **The second tab will cover the Recording portion:**
    - Local recording: On - You must save the meeting recording after and then delete the file from the Zoom account - Meetings have expiration timeframe
    - Host can give participants permission to record locally: On
    - Cloud recording: On
        - Record active speaker: On
        - Record gallery view with shared screen: Off
        - Record active speaker, gallery view and shared screen separately: Of
        - Record an audio only file: On
        - Save chat messages: On
    - Advanced cloud recording settings
        - Add timestand to recording: On
        - Display participants names in recording: On
        - Record thumbnails when sharing: On
        - Optimize recordidng for 3rd party video editor: Off
        - Audio transcript: On
        - Save panelist chat to the recording: On
        - Automait recording: Off
        - IP Address access control: Off
        - Only authenticated users can view cloud recordings: Off
        - Require password to access shared cloud recordings: Off
        - Auto delete cloud recordings after days: Off
        - Host can delete cloud recordings: On
        - Recording disclaimer: On
        - Multiple audio notifications of recorded meetings: Off
- **The third tab will bring you to the Telephone portion:**
    - Show international numbers link on the invite email: On
    - Toll Call, Call Out, Require Call Me, Where Most Call From, Personal Audio Conference: All defaulted at admin level
    - Third party audio: Off
    - Mask phone numbers in participant list: Off
    - Global dial-in countries/regions: US, Canada