



SETTINGS CHECKLIST FOR LAW FIRMS USING ZOOM FOR VIRTUAL MEETINGS

Settings in You Zoom Account		
	Schedule a Meeting	
	ON	Telephone and Computer Audio – when scheduling meeting can say computer audio only
	OFF	Join before host
	OFF	Use Personal Meeting ID when scheduling a meeting
	OFF	Only authenticated users can join meeting
	OFF	Require password when scheduling new meetings – unless your firm determines this is required
	ON	Embed password in meeting link for one-click join
	ON	Require password for participants joining by phone
	ON	Mute participants upon entry
	In Meeting (Basic)	
	ON	Require encryption for 3 rd party endpoints
	ON	Chat – allow participants to send a message visible to all participants
	ON	PREVENT participants from saving chat
	ON	Allow private chat – this is optional
	OFF	Auto saving chats
	ON	File transfer
	ON	Co-host if an assistant is helping you
	ON	Polling
	OFF	Show Zoom windows during screen share
	ON	Who can share? – all participants
	ON	Who can start sharing when someone else is sharing – Host Only
	ON	Annotation
	ON	Whiteboard – with autosave content when sharing is stopped
	ON	Remote control – good when working together on a draft document
	ON	Nonverbal feedback
	In Meeting (Advanced)	
	ON	Breakout room
	ON	Allow host to assign participants to breakout rooms when scheduling
	OFF	Allow removed participants to rejoin

	ON	Allow participants to rename themselves
	ON	Closed captioning
	ON	Save captioning
	ON	Group HD Video – only if you have good to excellent bandwidth
	ON	Virtual background
	ON	Use HTML format email for Outlook plugin
	ON	Waiting Room – for all participants
	ON	Show a “join from your browser” link
	In Your Profile	Make sure you know your Host Key – if you get kicked out of the meeting you may need it to re-enter
Booking Meetings		
	Schedule a meeting – sign in on Zoom website and then schedule a meeting	
	NO	DO NOT, if possible, require meeting registration – most won’t even look at until day of meeting if at all
	YES	Generate meeting ID automatically. Do not use your personal meeting ID.
	NO	Don’t require meeting password. It makes it more difficult to get in if someone is cutting and pasting the link. Making sure everyone enters the waiting room is better security.
	YES	Let participants use video
	Depends	Telephone, computer audio or both – ideal is computer audio only. If allowing phone option, make sure you have Dial from Canada enabled.
	NO	Enable to join before host
	YES	Mute participants on entry – you will have to unmute them initially
	YES	Enable waiting room – you will admit each participant individually to verify who they are
	YES	Breakout Rooms – you and preassign and then once the meeting is started you can rename (e.g. Plaintiff - <i>name</i> , Defendant – <i>name</i>). You will need all the emails.
	NO	Auto record – make sure this is not allowed
	Send the invitation to the parties	Need the whole URL, with the embedded password if using. Send only the telephone numbers that are ‘local’ to your area.
	Back channel for texts needed.	You will need cell numbers for counsel so that you can communicate with them when they are in a breakout room. Although you can enter any breakout room, if you

Settings in Meeting		
	Audio Settings	When in the meeting, click on up arrow next microphone icon and then click on Audio Settings.
		Test speaker – make sure you can hear.
		Test mic – should be at 1/2 to 2/3 level
	OFF	Automatically adjust volume
	ON	Automatically join audio by computer when joining a meeting
	Video Settings	These are personal choices but we recommend the following
	ON	Enable HD
	ON	Mirror my video
	ON	Always display participant names on their video
	ON	Always show video preview dialog when joining a meeting
	Share Screen	
	ON	Scale to fit shared content to Zoom window
	ON	Side by side mode
	Keyboard Shortcuts	Get to know these. Support.zoom.us – hot keys and keyboard shortcuts for zoom