Zoom

A Best Practices Guide

About this Document

A common platform being used by the university is Zoom. Here are some tips and resources to maximize your Zoom experience and make your meetings run smoothly. We strongly recommend testing out Zoom with your team prior to hosting Orientation events!

Scheduling Meetings

Here are the steps you should follow when scheduling a meeting:

1. Name your meeting
2. Provide a meeting description (optional)
3. Schedule your meeting
4. Set your meeting duration
5. Provide the time zone so that meeting attendees can schedule appropriately if they are in a different time zone
6. Check 'recurring meeting' (if applicable)
    a. You can schedule recurring meetings (daily, weekly, monthly) so that each occurrence uses the same meeting ID and settings
    b. How to Schedule Recurring Meetings: https://support.zoom.us/hc/en-us/articles/214973206-Scheduling-Recurring-Meetings

7. Decide if you want to make registration for your meeting required
    a. This is <u>highly</u> recommended so you can monitor who will be attending your event
8. Require a meeting password
    a. We recommend using the one that is automatically generated so it is not easy to guess
9. Decide if you would like hosts and participants to have their videos on or off
10. Set the audio to 'both' so participants have the option to listen using their computer audio or phone
11. Choose your meeting options
    a. Recommendations for settings:
        i. Do not enable join before host
        ii. Participants are set to "muted" upon entry to meeting
        iii. Enable a waiting room
        iv. Enabling 'authenticated users' means that only people with Zoom accounts can join your meeting

Scheduling a Webinar

Meetings are designed to be a more collaborative, personal event where all participants can turn on their audio and video and see everyone who is in attendance. Webinars are designed so that the host and panelists can share their video, audio, and screen, and participants can view the presentation and submit questions.

NOTE: Webinars are a Pro-Zoom account feature

Here are the steps you should follow when scheduling a webinar:

1. Name your webinar
2. Provide a webinar description (optional)
3. Schedule your webinar
4. Set your webinar duration
5. Provide the time zone so that webinar attendees can schedule appropriately if they are in a different time zone
6. Check 'recurring webinar (if applicable)
7. Decide if you want to make registration for your webinar required
   a. Again, this is highly recommended so you can monitor who will be attending your webinar

8. Require a webinar password
   a. We recommend using the one that is automatically generated so it is not easy to guess
9. Decide if you would like hosts and panelists to have their videos on or off
10. Set the audio to 'both' so participants have the option to listen using their computer audio or phone
11. Choose your webinar options
    a. Recommendations for settings:
       i. Q&A is turned on
          1. You can control what attendees can view (such as questions asked and/or only questions that have been answered)
          2. Have the option to allow attendees to up-vote questions (Q's will be prioritized by number of up-votes) and comment under questions
          3. You can 'answer live' where everyone sees the question and it is answered audibly by panelist / host
          4. Typed answers can be sent to all attendees (they will see this on the Q&A) or can be answered privately to who asked the question
          5. You can also dismiss questions (e.g. they are inappropriate or repetitive)
             a. Good for repeat questions / things you are not going to address
             b. Hosts and panelists can still view what was dismissed
             c. Attendees are not notified if a question is dismissed
       ii. Enable a practice session – this allows hosts and panelists to join the webinar beforehand and practice screensharing, etc.
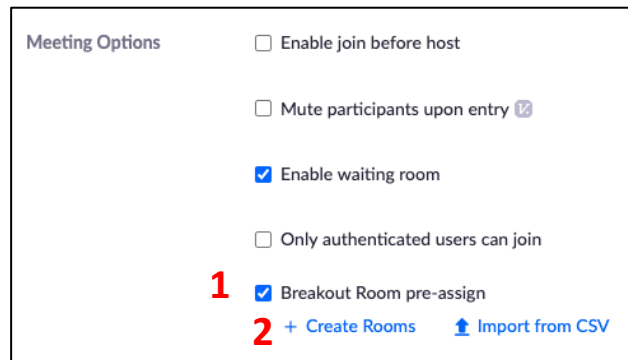
Breakout Rooms

Breakout rooms are a great way to split up a large group into smaller groups for discussion or to complete an activity during a meeting. You can have a maximum of 50 breakout rooms for one session and assign a maximum number of 200 participants.
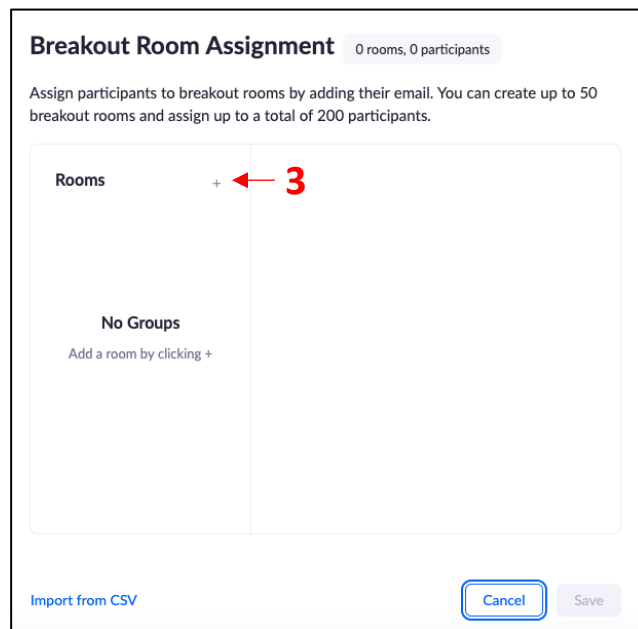
A host can pre-assign participants to be in specific breakout rooms <u>prior</u> to a meeting, or randomize who is in a room <u>during</u> a meeting. When scheduling a meeting, these are the following steps on how to pre-assign participants to breakout rooms:

1. Check 'breakout room pre-assign'
2. Either import from CSV or create rooms

3. Click on the '+' to start adding rooms

4. Rename your breakout room
5. Add participants using the email address they will use to register for your event (likely their Queen's email address)

NOTE: You can also go back and edit these rooms in your meeting settings prior to your meeting. You can also add rooms and assign participants during a meeting as well!

Below are some instructions on how to utilize breakout rooms during your meetings:

- To access the breakout rooms during your meeting as a host, click on the 'breakout rooms' button on the bottom of your screen

- Here, you can add breakout rooms, assign participants to rooms, rename rooms, delete rooms, or change the breakout room options
- Press 'open all rooms' to have all participants enter their pre-assigned breakout rooms

- Here are some of the breakout room options you can change during your meeting:
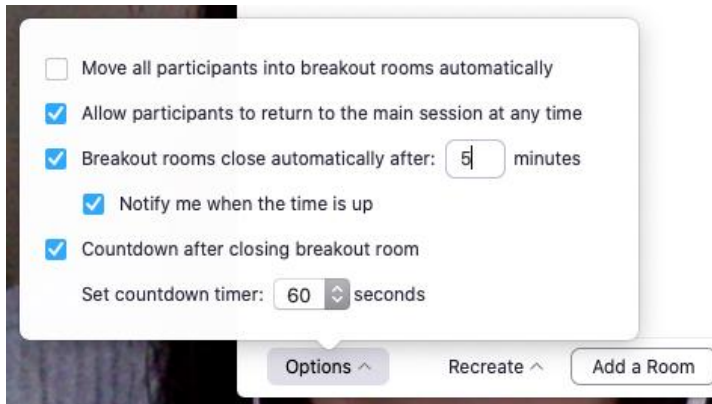
- While in breakout rooms during meetings, a host can send messages to all using the 'broadcast a message to all' button
- Hosts can also join breakout rooms by pressing the 'join' button next to each room
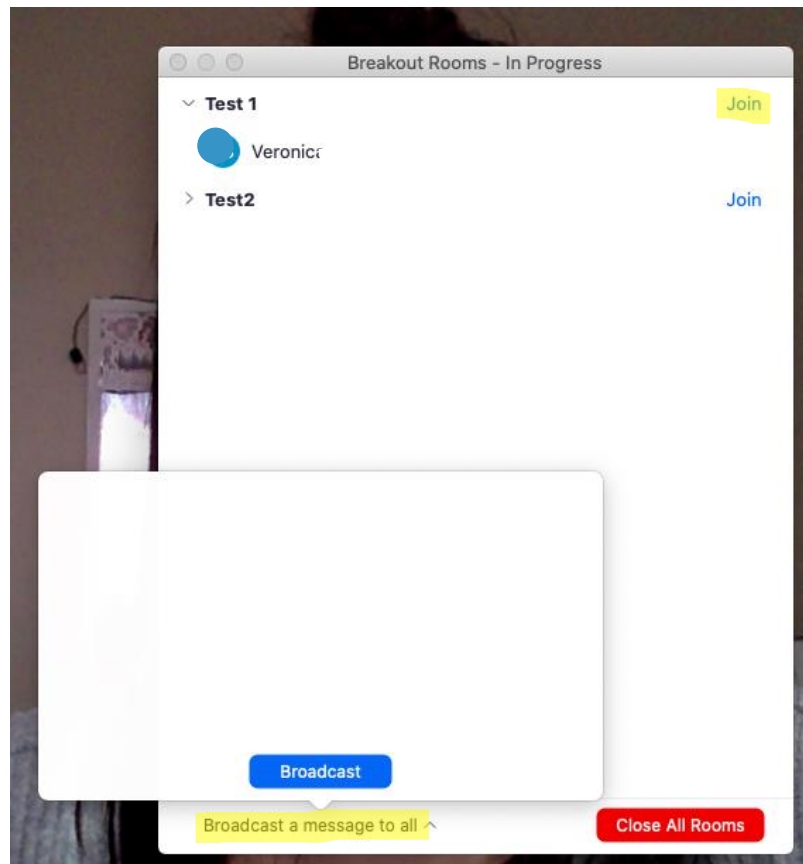
For more information on how to manage breakout rooms please visit: https://support.zoom.us/hc/en-us/articles/206476313#h_1660846b-7d2d-4a87-b8a6-efe29a61759a

Changing your Account Settings

Here are some other important setting suggestions we recommend for your account:

PERSONAL

Profile

Meetings

Webinars

Recordings

Settings

In Meeting (Basic)

Require encryption for 3rd party endpoints (SIP/H.323)
By default, Zoom requires encryption for all data transferred between the Zoom cloud, Zoom client, and Zoom Room. Turn on this setting to require encryption for 3rd party endpoints (SIP/H.323) as well.

Chat
Allow meeting participants to send a message visible to all participants

◯ Prevent participants from saving chat ☑

Private chat
Allow meeting participants to send a private 1:1 message to another participant.

- Enable chats for your meetings
  - A good way for students to interact with each other or to participate if their microphone is not working

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Co-host
Allow the host to add co-hosts. Co-hosts have the same in-meeting controls as the host.

Polling
Add 'Polls' to the meeting controls. This allows the host to survey the attendees. ☑

Always show meeting control toolbar
Always show meeting controls during a meeting ☑

Show Zoom windows during screen share ☑

Screen sharing
Allow host and participants to share their screen or content during meetings

Who can share?
⦿ Host Only   ◯ All Participants ⑦

Who can start sharing when someone else is sharing?
⦿ Host Only   ◯ All Participants ⑦

- Co-hosts
  - This feature allows the host to share hosting privileges with another user
  - The host can assign people to be co-hosts during a meeting
  - There is no limit on the number of co-hosts you can have in a meeting

- Polling
  - A great way to make your meetings and webinars more interactive
  - You can have up to 25 polls per webinar, control how many options are in each poll, and choose to share results with your audience
- Screensharing
  - Screensharing is helpful if you want to present a PowerPoint with important information during a meeting or webinar
  - Videos can also be shown during a screenshare, however, make sure to test that participants can hear the audio of the video if applicable
  - It is good habit to practice your screenshare prior to Participants entering your meeting
  - How to Share your Screen in a Meeting: https://support.zoom.us/hc/en-us/articles/201362153-Sharing-your-screen

Nonverbal feedback

Participants in a meeting can provide nonverbal feedback and express opinions by clicking on icons in the Participants panel. ⓥ

Allow removed participants to rejoin

Allows previously removed meeting participants and webinar panelists to rejoin ⓥ
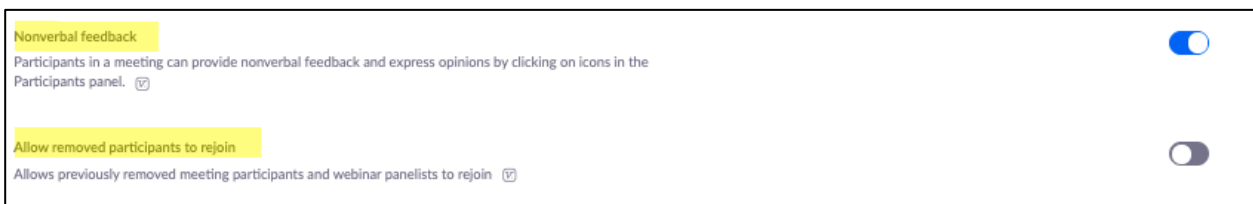
- Non-verbal feedback
  - Participants will be able to use icons during a meeting, such as 'thumbs up', 'raise hand', 'clap', etc.
- Allow removed participants to rejoin
  - Having this disabled ensures that someone cannot rejoin a meeting if you remove them for whatever reason

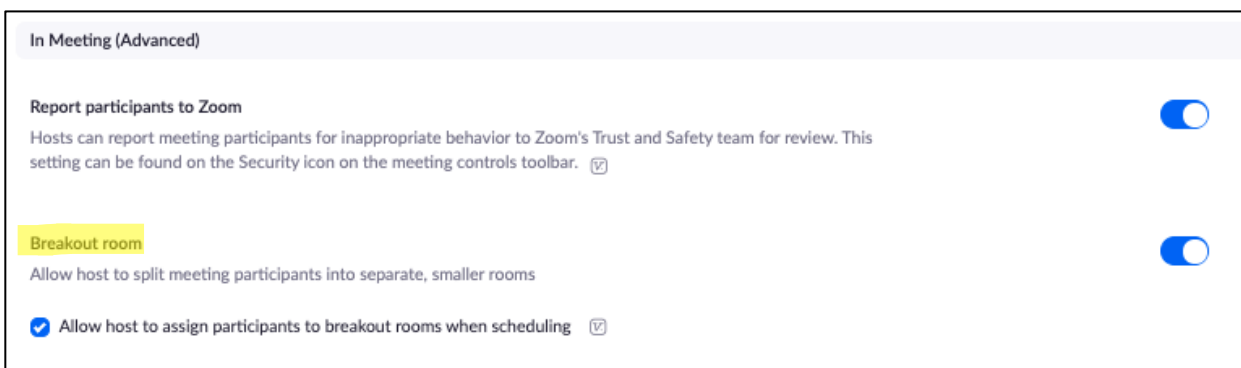In Meeting (Advanced)

Report participants to Zoom

Hosts can report meeting participants for inappropriate behavior to Zoom's Trust and Safety team for review. This setting can be found on the Security icon on the meeting controls toolbar. ⓥ

Breakout room

Allow host to split meeting participants into separate, smaller rooms

☑ Allow host to assign participants to breakout rooms when scheduling ⓥ

- Breakout rooms
  - Ensure this is turned on – it will be turned off by default
  - Once this is turned on, the option to pre-assign breakout rooms during meeting scheduling will appear

Recording your Meetings

- Local Recording
  - The default setting on Zoom only allows the Zoom meeting host to record a meeting session
    - This can be changed to authorize other meeting participants to record the meeting
    - We advise that you do <u>not</u> allow other participants to record a meeting
- When setting up a Zoom meeting and choosing to activate the "record automatically" option, you will be presented with two options: "record on this computer" and "record to the cloud"
  - <u>recording to your computer</u> means that the file will be saved locally to the hosts computer, and you can choose if it is video-audio, or audio-only
  - <u>recording to the cloud</u> means that Zoom will prepare an audio-only version, and a video-audio with an AI-generated audio transcript
    - these will be available to view at a unique URL provided by Zoom

- Establish a <u>Recording Disclaimer</u>
  - Ensure all invited speakers, panelists, or participants consent to speaking and being recorded
  - Inform the audience that:
    - You are recording the event
    - How you plan to use the recording – who will have access to the recording afterwards? Where will the recording be kept?
    - They have no obligation to appear or speak in the recording
    - They can choose to turn off their video if they do not wish to appear in the recording
    - They are <u>not</u> permitted to screen capture or record the meeting themselves

- You can choose to only record part of your meeting by stopping the recording prematurely, or pausing the recording
- Breakout rooms will <u>not</u> be recorded, unless a co-host enters one of the breakout rooms and manually presses record; this will be saved as a separate video from the general meeting video
- More information about Recording: https://support.zoom.us/hc/en-us/sections/200208179-Recording

Best Practices for Communicating with Incoming Students

Choosing the Right Communication Platform(s)

- Reach out to incoming students to ask what the best communication platform for them is
  - e.g. Facebook, Instagram, Slack, email, etc.
- Pick one method and stick to it across the board so students only need to check-in with one platform

Contacting Students Prior to the Orientation Period

- Empower your Leaders to reach out to their incoming students throughout the month of August
- This is a good time to get information about your incoming students – what communication methods they prefer, what activities they feel are most engaging, etc.

Communicating with Students During the Orientation Period

- Ensure you always put the time zone in scheduled events and deadlines – especially for students not currently in EDT time zone
- In between fixed module days, Faculties should utilize their Leaders' existing relations with incoming students and use online platforms to entertain and encourage Faculty unity through their experiences at Queen's

Best Practices for Video Conferencing

Prior to the Event

- Start meetings with co-hosts and facilitators a few minutes prior to ensure platform features are working properly (for example, screen sharing features)
- If you are going to record a video meeting, remember to let students know prior to meeting and that they are not permitted to record the event themselves – you can have students sign a form that they agree to these rules if you wish
- Utilize waiting room features so students get a chance to ensure they are connected properly, but they do not join before hosts and facilitators are ready

Online Event Etiquette

- Establish rules right at the <u>beginning</u> of your event
  - Some rules you might want to establish include using "raise hand" feature when students want to speak, use chat box to type questions, use "thumbs up" feature when students finish a certain task or activity
  - Also make sure to teach students the functionality of the platform you are using so everyone is on the same page before the event starts

- - Address if you will be recording your event and what the recording policy is again, and that they are not permitted to record the event themselves
- Mute microphones when not speaking and encourage students to do so as well
- Use less-distracting backgrounds
  - Some platforms also offer a "blur background" feature or the option to use green-screen backgrounds
- Ensure background noise is reduced to minimum
  - Use headphones
  - Let other people in your house know when you are video conferencing, so they do not disturb you
  - Turn off sound for notifications on computer or mobile device
- Turn off notifications for external apps so to not get distracted
- Ensure appropriate lighting (for example, avoid backlighting – when back is to a window or other light source)
- Encourage use of video – helps to establish a more face-to-face connection

Facilitation Tips

- Have one or more hosts be the speakers and one Leader acts as the facilitator
  - Make your facilitator a co-host
  - This facilitator student will answer chat questions, help with connectivity issues, and monitor video screens to see if students are indicating that they would like to speak
  - This student should identify themselves at the beginning of the meeting, so participants can message this person privately should issues like connectivity arise
- During video meetings, utilize interactive polls and tools like Kahoot! or Mentimeter to facilitate interaction, discussion, and to ensure that participants feel included
  - Attention-span will most likely be shorter than in-person events... a good rule of thumb to follow is have your participants touch their keyboard every 3-4 mins
  - When asking questions, alternate between having participants to type their answers and saying them out loud
- If asking participants to introduce themselves, or having everyone contribute something mandatory, have your facilitator read names and call on people to speak rather than students volunteering to speak – this eliminates any confusion for who is going next, having students speaking over each other, or not giving students the chance to speak

Safety and Security Online

It is important to consider the risks that come with conducting activities online. Safety and security should be another one of your priorities when organizing your remote Orientation events. Make sure you research platforms to ensure that what you want to use is secure.

Contingency Planning

As with planning for any event, it is important to make contingency plans should issues arise, such as safety and security issues.

Some examples of issues that may arise:

- Platform experiences an outage
- Host has sudden internet loss (power outage)

- Attendees have difficulty connecting
- Functionality does not work (such as chat feature)
- Zoombombing

Having a student Leader pre-determined as being the facilitator of a session means that they will be the person that is responsible for troubleshooting and conducting the contingency plan.

Helpful Resources for Contingency Planning:

- How to Contingency Plan for Zoom: https://oit.utk.edu/remote-it/teaching-remotely/contingency-plan-for-zoom/
- Use your event forms to establish contingency plans

There are also people that you can contact should issues arise:

- Queen's IT Services
- The platform's support team

Zoombombing Resources

- What is Zoombombing?
  - Often randomized but sometimes targeted, "Zoombombing" involves people inputting zoom codes and then taking over Zoom calls by posting racist, pornographic, sexist, homophobic content
  - More often it seems higher education zoom rooms are targeted and that many students share links and Zoom codes on online message boards and chat rooms to encourage the act
  - What is Zoombombing: https://www.insidehighered.com/news/2020/04/03/zoombombing-isn%E2%80%99t-going-away-and-it-could-get-worse
- How to protect yourself against Zoombombing
  - Avoid sharing meeting links and zoom IDs on public sites, and if you need to, share the link close to when the session is going to start
  - Don't use your Personal Meeting ID (PMI) to host public events as it's a continuous meeting and people can join it when you start any call using it
  - Take advantage of the Zoom waiting room feature where you can control who comes and goes (and use to ensure you know who is joining your Zoom session)
  - How to keep uninvited guests out of your Zoom event: https://blog.zoom.us/wordpress/2020/03/20/keep-uninvited-guests-out-of-your-zoom-event/
- What if Zoombombing happens?
  - Plan for the possibility
    - Utilize your facilitator that can monitor the chat and be available to respond should something happen
    - Know the functions for Zoom, such as how to mute a participant and how to remove them from a meeting
    - Talk about a "community agreement" that you and the participants have for this session – that this is an anti-oppressive inclusive space and that racist and oppressive acts and comments will not be tolerated
  - Have a pre-set process for what Leaders can say if it happens
    - Example: "I can see from the chat that we have some attendees who have posted a homophobic slur. Just a reminder that this will not be tolerated, and we are removing those participants from the meeting."