Leeds School of Business
UNIVERSITY OF COLORADO **BOULDER**

ZOOM SET UP & ETQUETTE GUIDE

This short overview was created to give you the basics of how to use ZOOM as a communication tool with your instructor and teams.

Your Zoom presence and etiquette will be taken into account as part of your participation grade.

Feel free to ask questions if you need clarification.

The purpose of Zoom is to simplify group communication. It provides greater value than a conference phone call because you can see each other in picture windows while chatting and also share screens to view documents. Calls can be recorded as needed. And, it is super easy to use with a variety of devices and experience levels.

STEP 1 – Get Zoom on your laptop AND your cell phone (and iPad if needed).   This app can work on different types of devices and you can even log in to see pictures of teams while on your phone. As a CU student you have pro-access to Zoom when you use your CU email address to set up the account. This link gives you a thorough set of instructions to download and log in: or you can use the quick link below. https://oit.colorado.edu/tutorial/Zoom-download-and-setup

1. Download the Zoom application
2. Click **Sign In with SSO**
3. Enter "cu boulder" and click continue
4. A browser window will open prompting you for your Federated Identity Service identikey and password credentials. Click **Continue**.
5. This will automatically create your account and log you in.

STEP 2 – Create your username with your **FIRST NAME AND LAST NAME.** This is not the time to use avatar names so that the instructor can know it's you when you have group calls. You do not need to share this with others (like in Skype) as most calls come with a log-in link to which you just click the link to get into a meeting.

JOIN A MEETING

STEP 1 – To join a ZOOM call, just click the meeting link you were sent. You may be placed into a waiting room until the host arrives.   The host may also have set up the callers to have muted voice or a required picture. You can change these things once you are in the meeting.

STEP 2 – After you click the meeting link and are let in from the waiting room (if there is one) you will see other participants in thumbnail boxes on the screen. The more participants, the smaller the boxes or it will be on a scrolling screen.

AUDIO AND VIDEO SETTTING - you can change your audio and video settings by scrolling your cursor down the screen until you see the bottom menu pop up. Just tap the microphone or the video emblem to turn it on/off. See recommendations for best practices below.   TEST your audio settings before you enter a scheduled meeting to ensure you can be heard and you can hear. You can do this by clicking Zoom in your chrome bar or logging into Zoom on a browser and setting up a trial meeting with one other person. See notes below about setting up meetings.

CHAT – you can put a chat to the entire group, the meeting host or another individual by clicking chat on that same menu.   If you have a question, put it into chat.

SHARE SCREEN – the host of the meeting is able to share their screen with others in the meeting. This is a great way to share work, see information together, or even draft something together. You can, for instance, share your screen when you have Google open and everyone on the call can be working in that same document while chatting. You can share your entire screen or just one of your available programs on your computer.   You will see those choices when you select "share screen".

*RECORD – As the host, y*ou can record a Zoom session by either setting the call up for automatic record (one of the choices when you set up a call) or by selecting the red circle while on the call. You pause or stop recording by toggling over that circle. You will most likely need this feature to record a group or individual presentation for your class.

SET UP A CALL (like when you want to chat as a team)

STEP 1 – To set up your own Zoom call, click on the chrome extension or in the browser to open Zoom. The best method to set up a call is to select "meetings" on the left menu and then "schedule a new meeting. The selection "host a meeting" at the top is more for meetings you wish to host immediately.

STEP 2 – Once you select "schedule a new meeting" enter an identifier for the meeting so it doesn't just say "my meeting" as you may forget who you are meeting if they all say that name. Select the date and the duration of the call.

STEP 3 – Review the available items in the middle of the screen including whether you want everyone to have video when they log in and if you would like for callers to be on mute immediately when they join (recommended practice) and if you want them to be able to join together before you, the host, arrives. Passcodes for meetings is not necessary.

STEP 4 – Go to the bottom and click "save"

STEP 5 – Look to the right of the meeting invite and see a selection "copy meeting invitation". Once selected, go to bottom and click "copy invite" and then paste it to your message to other participants. You can also set up an outlook invite and paste that code into the invitation.   Be aware that ZOOM allows you to not only click a link to join but to dial from a phone extension.   Most of the material you cut/pasted from the meeting invitation is about calling into the call so once pasted into your note to other participants, you can delete if you do not feel it is needed.

STEP 6 – When it is time for the meeting, everyone (including the host) can just click the meeting link to join.

BEST PRACTICES

It is a learned skill to be able to work remotely and to hold meaningful conversations that advance your work. We know this skill is something you can take with you into the future.   Here are some best practices for online video conferencing:

Show up on Time: A Zoom meeting is the same as a regular class time or meeting. You should show up on time by clicking the link BEFORE the meeting starts.

Background: It does matter where you are sitting because others on the call will see what is behind you. Do not sit with your back to a bright window as it will drown out your face and may be uncomfortable for the other callers. For professional reasons, do not take Zoom calls behind unprofessional artwork or other items that may be distracting.

Sound: Be sure you test your sound on your computer before using Zoom. Microphones can be thrown off by Bluetooth on your phone or just not be configured correctly. Check to be sure you can be heard. While on a call, best practice dictates that you keep your microphone on MUTE at all times unless you want to say something. Background noise is easily picked up and can interfere with the call. Even noise from a room next door can be heard. Just keep clicking your microphone button on/off for when you want to be heard.

Attire: Think of what you look like from the waist up including your hair and glasses. Zoom presents a close up image of your face plus some of your torso so dress accordingly. For most classes you do not have to dress up but you may want to tailor what you wear depending on who you are chatting with. There are probably many Zoom callers who have a tie and shorts on which is just fine so long as you don't stand up or adjust where it can be seen.

Animals, Roommates, Babies, and other Distractions: While it may be cute for a minute, it can take time to admire or visit with animals or babies while on a Zoom call. Know your audience and keep your door closed if other elements in your house can end up in your space. For professional calls, absolutely NO distractions or personal elements should be seen in the room.

Wait your Turn: Think of a crowded phone call and everyone talking at once – Zoom can be similar if enough people are on the call. Put a note in the chat to say that you have a question and have the host moderate people in turn. It can be frustrating if everyone wants to talk over others so be polite and wait your turn using the chat feature to be heard.

Eating & Drinking: It is inevitable that you may want a drink of water or coffee while on a Zoom call. Best practice indicates that taking a drink is okay so long as you keep it to a minimum, keep the cup out of the view of the call, and do not make unnecessary noise. It goes without saying that you cannot drink alcohol or smoke while on a Zoom call as it sends the wrong message for professional reasons and can be distracting.

Posture: Even in a Zoom call, it is important to be engaged and sitting up (just like class or another meeting). Position your computer on a desk and sit in a chair for the best posture. If you want to be on a couch or bed, sit up straight as possible and try to get the computer in front of you and not down below.

Typing or other work: do NOT be typing on your computer, your phone, or any other device when on a Zoom call. You have to sit still and pay attention to whomever is talking or to the presentation on the screen. Other callers can see you typing and if you forget to mute yourself, the clicking of the keyboard is very distracting. If you need to take notes, take them in hard copy using a paper/writing instrument in front of you. Look down from time to time but spend most of the time looking at the screen so the presenter sees you are paying attention. Just like in class.

Moving with the device: It can be very distracting for someone to be moving with the video going on a Zoom call. If you feel you have to move while on the call, best practice suggests you turn off the video until you are settled again.

ADDITIONAL RESOURCES:

https://oit.colorado.edu/services/conferencing-services/web-conferencing-Zoom