This update to the Zoom Instructors Handbook coincides with the update of Zoom to version 5.8.0.

What is Zoom?
Zoom is an enterprise videoconferencing platform available to instructors, staff and students throughout the University of Calgary. It allows users to connect with one another from computers, smart devices and, if necessary, from a telephone line. Zoom accommodates video conferencing for groups of up to 300, can facilitate breakout room discussions, polling and collaboration along with the sharing of PowerPoints and other documents for presentation by hosts and participants.

At University of Calgary, Zoom has also been integrated into D2L for scheduling of synchronous video sessions for instruction and it can be accessed using your UCID username and password. To access the Zoom module in D2L, you will need to log into https://ucalgary.zoom.us first. If you have teaching assistants you wish to make alternative hosts, they would also have to log in at https://ucalgary.zoom.us before you can assign them that role.

If you have a non-ucalgary Zoom account for personal use or access with another institution, you still must go to https://ucalgary.zoom.us and log in with your @ucalgary.ca email address to access your account and host your synchronous meetings. This will allow you to schedule Zoom sessions via D2L and ensures that cohosting, screen-sharing, polling, security controls, participant muting and other features are available to you when facilitating a session.

In Werklund School of Education, Zoom can also be used for synchronous sessions for graduate exams, (e.g., candidacy and final), meetings with research teams and students, etc. Whenever a Zoom meeting is scheduled, a URL is created to share with the participants. For recurring sessions such as classes or regular meetings a single link can be used for multiple sessions.

Video Resources
The following videos have been created by Werklund School of Education to help demonstrate features and functions of Zoom. Please note that these videos were made prior to the recent update. They demonstrate the features available but may not look exactly like the current features available.

Zoom Toolbar - https://ucalgary.yuja.com/V/Video?v=54910&node361046&a=1325632658
Breakout rooms - https://vimeo.com/338899748
Guidelines for Exam Neutral Chair - https://vimeo.com/338899619
Student screen sharing for presentations - https://ucalgary.yuja.com/V/Video?
Preassigning Participants to Zoom Breakout Rooms - https://ucalgary.yuja.com/V/Video?v=145274&node=714710&a=826717625&autoplay=1

There are further training videos provided by Zoom as well.

**Activating Your Zoom Account**
- To activate your account, visit https://ucalgary.zoom.us and click on Sign In. (Clicking the Host or Join buttons will not ensure full access to the features required when participating in or hosting a Zoom session.)
- This will generate an email to your ucalgary.ca email. Open that email and follow the directions to launch your new account or, if you already have personal account, merge it into the licensed University of Calgary account.

- After your ucalgary Zoom account has been activated, it should have Licensed as the License type on your profile page. If there are issues activating your account, please contact tandl@ucalgary.ca for guidance.

**Your Profile Page**
- You may wish to customize your profile by adding a photo that would appear as your avatar when you have your video off.
  - IF you are in a meeting and the avatar you have added to your profile does not appear when your video is off, you are not logged into your Zoom account. It is recommended that you leave the meeting, go to https://ucalgary.zoom.us and click Sign In before rejoining the meeting. You can do this by clicking Join A Meeting on your profile page and inputting the meeting ID number or by clicking on the link for the meeting.
- A new feature available in Zoom is the addition of pronouns to your profile as they would appear in a meeting and it also allows you to determine when your pronouns would be added. You have the options of sharing them at every meeting, not sharing them or determining before each meeting.
• Another feature you can customize is your Personal Meeting ID. It would be made the default Meeting ID for instant meetings. This will allow the same URL to be used for all instant meetings. Often this is done by using your name as the Personal Meeting ID as in https://ucalgary.zoom.us/j/johndoe, which would make it easier to remember and share.

• You also have the option of activating “two-factor authentication” when logging into Zoom. If this is turned on your would require a second code, received via, text message, email or the Windows Authenticator App to complete your log in. Note, however, that even if this feature is switched off, two-factor authentication will be required when logging into Zoom from a public or shared device such as a classroom computer.

Other Considerations When Setting Up

• The Zoom app is available for smart devices. Download it from your respective app store for free. After installing the app, please review your device settings to ensure the Zoom app has access to your microphone and camera.

• The first time you use Zoom on a smart device, complete the account transfer on your computer first. After that, launch the Zoom app on your device and Sign In via SSO. Add “ucalgary” in the company domain field and then log in with your UCID username and password.

• Zoom can also be linked to your email, whether Outlook, Gmail or another platform. This will help synch Zoom events into your calendar.

• Please note that for the best use of Zoom as a participant and especially as a host, log in to your account at https://ucalgary.zoom.us before joining a session and then input the meeting ID number rather than simply clicking on the link to the meeting.

Hosting an Instant Meeting

To host an instant meeting, log into your account at https://ucalgary.zoom.us and click Host a Meeting in the top right corner of the screen on your Profile page. You can select the options of With Video On, With Video Off or Screen Share Only to launch the meeting. The meeting will occur at the Personal Meeting ID that appears on your Profile Page. If you do not log into your account and simply click on a URL for the meeting you are hosting, you will NOT have hosting privileges.

Starting a Scheduled Meeting

It is recommended that you log in to Zoom at https://ucalgary.zoom.us or D2L before starting a session you have scheduled. In either instance, there will be a Start button next to the meeting. If your participants are already in the room, Start will have changed to Join in D2L and a camera icon will appear next to the meeting on your Zoom account.

Scheduling a Meeting

You can schedule a Zoom meeting through D2L or through your account at https://ucal-
Creating a Secure Zoom Environment
There are a number of considerations regarding the comfort and privacy of all participants in the Zoom sessions you host. These may include requiring participants to wear headphones so the session is heard only by the participants rather than other individuals in a room, especially if a participant is joining from a public setting. There may be further recommendations or requests that participants be as private a setting as possible to ensure privacy or minimize disruption during Zoom sessions. However, it would be difficult to implement these protocols during this period of social distancing and home-schooling. Discussion of these factors with your students and/or setting guidelines for Zoom use in the Course Outline is a valuable step toward ensuring the Zoom environment is secure and safe for all participants. Also, with respect to privacy and security, screenshots of the class participants should not be taken or distributed on social media.

Audio and Video Equipment
Remote session – All participants via Zoom
If all participants are participating remotely and you are hosting from your personal computer, your laptop should provide decent audio and video quality. If you are participating from a desktop computer, it is recommended that you have a peripheral camera and headset with microphone to ensure best sound quality.

If you wish to hide the environment you are broadcasting from, there is a virtual background feature under Video setting. (Click the arrow next to the “Stop Video” icon.) You can use one of three default images, an image from your computer or Blur the background.

Hybrid Audience – Classroom participants and participants at distance
If you are broadcasting a session while you are teaching in a classroom, ensure that you have microphones, speakers and cameras that allow those joining remotely to be able to hear the session via computer and accommodates their contributions being heard in the classroom as well.

gary.zoom.us. Scheduling through D2L will ensure scheduled meetings appear in D2L and provide students a link to join a Zoom session from D2L. If there is a Passcode required to join a meeting, post the Passcode in D2L where students can see it.

Scheduling via D2L
After logging into D2L and accessing the shell for a course, you will find “Zoom” either in your toolbar or under the drop-down menu for “Communications.” Once you go to the Zoom page in the D2L shell, you will see the meetings scheduled and a button to add new meetings to the schedule for this course. Once you schedule your meetings in D2L, they will appear in your students’ view of Zoom in D2L and it will also appear in your Zoom account. Strongly encourage students to log in to Zoom via D2L. This will ensure students have all of the features available to them in Zoom, and that they accommodate
the pre-assignment to breakout rooms if you have implemented that. Please note that the Zoom module in D2L does not have all of the features you may need when scheduling meetings, most notably breakout room pre-assignments.

**IF** you have already scheduled meetings in Zoom that you plan to host with your classes, you can click on the “three-dot” button to the right of “Schedule a New Meeting” and import the Meeting ID of sessions you had previously created in Zoom. You will find that there are more features available.

If you are scheduling Zoom meetings that are not for your classes, do it within your Zoom profile page. In the upper right corner of that page, you will see options for scheduling, joining or creating a meeting.

As a meeting organizer, you would do the following:

Click on **Schedule a Meeting.**
On the next page set the following:

**Topic** – the default is My Meeting; replace this with your course title and number. Avoid using dates or session numbers when scheduling recurring meetings as this will appear on all recurring sessions.

**When** – Choose the date for your session from the calendar icon. Select your start time from the dropdown menu and do the same to set AM or PM. For meetings with first time users, add 30 minutes prior to scheduled start to allow participants to test their audio and video on their own time.

**Duration** – please add an extra 30 minutes beyond the anticipated end of the session

Decide if this is a **Recurring Meeting** or not. You can schedule daily, weekly or monthly sessions and weekly sessions can be scheduled for multiple weekdays (e.g. Mondays and Wednesday).

If it is recurring, but not on a consistent schedule, you can indicate the number of sessions you wish to host and edit them individually or select “**No fixed time**” which would make it available to launch at any time. (You would still have to tell your participants the schedule for meetings.)

**Registration** – this is not required.
**Meeting ID** – this is can be generated automatically for scheduled meetings.

There are two security option available when scheduling:

**Meeting Passcode** – to further enhance security for the session, you may want to include this and communicate the password to participants to prevent unintended participants from joining the session. It can be customized for ease of recall.

**Waiting Room** – this will allow you to vet participants and grant permission to join a session. This improves security. It is also a valuable feature to activate when hosting virtual office hours.

**Video** – this determines whether video is on or off when the host and participants join the meeting. Everyone has the option to turn their video on or off at any time after the meeting starts. It is also valuable to reserve video for only those who are speaking or presenting. This helps minimize the demand on broadband during the session and the amount of data needed for the recording of the session.

**Audio** – please set to “Both” to allow participation via **computer audio** and, if necessary, Telephone. (Dialing, however, is not recommended due to the potential cost of long distance fees.) When using smart devices that they would select “Use Internet Audio” rather than “telephone.”

**Further Options**

- For Werklund School of Education synchronous classes, enable participants to join before the host. This will allow participants to test their audio and video before the meeting.
- Muting participants upon entry will minimize disruption from late arrivals.
- Activating the Waiting Room feature will allow you to determine if an individual is supposed to attend the session before you bring them into the session.

Once the meeting is saved, a URL featuring a 9 to 11-digit Meeting ID is generated to allow access to the session.

After a meeting is saved, you can open the meeting to add and modify sessions. The **Time** of the meeting in the listing to review the recurring meetings currently scheduled and add further meetings to the list.
**Breakout Rooms**

There are three options for assigning participants to breakout rooms:

- **automatic** - randomly assigns participants to breakout rooms
- **manual** - allows you to assign participants either synchronously or prior to the session
- **self-assignment** - allows participants to choose their breakout rooms

If manually assigning participants to breakout rooms, you can make pre-assignments when scheduling the meeting in Zoom. Selecting “Breakout Room pre-assign” from the Meeting Options will allow you to create each breakout room and assign participants before saving the meeting. Alternatively, uploading a .CSV spreadsheet with columns for Pre-assign Room Name and Email Address would create the pre-assignments for the session. It may be useful to title breakout rooms with a theme or discussion question to facilitate self-assignment. A template for the .CSV sheet can be downloaded from Zoom.

There are more details on Breakout Rooms on pages 16-17 in the section on hosting meetings.
If students have logged into the Zoom session via D2L or with their @ucalgary.ca email address, they would automatically get added to their pre-assigned rooms for breakouts when launching the breakout session. If you find that students are not be directed to their breakout rooms when you have launched the session, it is likely because they have not logged in with the email address you used when creating the breakout rooms. Titling breakout rooms to indicate discussion questions or other identifiers is an option as well to facilitate self-assignment.

If students have NOT logged into D2L or Zoom and just joined by clicking the link for the session, they would appear in a list of unassigned participants and you would manually assign them prior to launching the breakout session. Click on the room you wish to assign them to and click the check box next to their name.

Alternative Host
If you are not able to attend a meeting scheduled through your account, you can assign an alternative host, provided they have a ucalgary.ca email address and a Zoom account. They will have the ability to host the meeting if you are not attending the session. If the alternative host is in attendance during your session, they will appear as a co-host and they will be able to manage polling and breakout rooms. During the session, you can also synchronously make individual(s) Co-Host for the session.

Polling
Polls can be created on a Zoom meeting’s page or synchronously during a session. To add a poll to a meeting, save the meeting in Zoom and open it to edit the session it and create the poll. You will have the options of titling the poll and making respondents anonymous. After those steps are completed, you can add the poll questions. You will have the option of creating questions that allow participants to choose one or multiple responses for each question. Text responses are not possible, however.

Please note that the responses to the poll would be available for review in real time, but are not automatically saved. More information on Polling appears in the section of this guide describing in-meeting use of Zoom.

One Zoom Meeting at a Time - With your account, you can only host one Zoom session at a time. For example, if you want to have an open session for students to use Zoom, you will not be able to have your own meeting concurrently on the same account. If you happen to be scheduling or hosting sessions back to back, make it clear to participants that a session needs to end and that they will have to continue their discussions in a different session.
Hosting a Zoom Videoconference

To ensure access to all the features available to the host, sign into your Zoom account at [https://ucalgary.zoom.us](https://ucalgary.zoom.us) before launching your meeting. Simply visiting Zoom and clicking on the Host link will not ensure that you are fully identified as host during your Zoom session. Upon joining the meeting, launch the Participant list from the toolbar and confirm that (Host) appears next to your name. If your avatar, pronouns and name do not appear as you are accustomed to seeing them, these are indications you have not logged in. In this instance, log out of the session and sign in at the [https://ucalgary.zoom.us](https://ucalgary.zoom.us) page.

*Having host privileges ensures you can share your screen, launch breakout rooms, manage security settings and control other features available during the session.*

Throughout a Zoom meeting, the toolbar can appear when the mouse is moved along the bottom of the screen. When sharing your screen, the Zoom toolbar moves to the top of the screen and is hidden above a tab that indicates that you are sharing your screen and has a button that reads “Stop Share.” Moving your mouse over this tab will reveal your toolbar for managing the session.

![Zoom toolbar](image)

The Host’s toolbar in Zoom, with additional features for: Security, Polling and Breakout Rooms.

The host/instructor has controls for:

- Audio
- Video
- Security
- Managing participants,
- Chat
- Screen share
- Polling
- Recording the meeting
- Live Transcription
- Breakout rooms
- Reactions
- Ending the meeting

While screen sharing, the participant feeds take up a separate window that can be minimized, modified to a single tile of the speaker, two feeds or a larger collection of the participants, which would appear in either a strip or a larger grid that can expand. If you have a view of the speaker and their shared screen you can move a divider between the two images to determine which shall display more prominently.
Participants/students will see similar controls for video, audio, sharing and chat. When a screen is being shared, students may have the opportunity to annotate on the shared screen as well depending on the permission settings by the

**Control Panel/Toolbar**

**Audio/Mute** – By clicking the *microphone icon*, you can mute and unmute yourself. When the microphone is live, it will flicker in green to indicate audio levels of your input. The small chevron button next to the microphone Icon will allow you to select and test the microphone and speaker for your session. This is valuable when you are using Zoom to allow remote students to join a face-to-face session, which would benefit from the use of peripheral microphones and speakers to allow remote participants to better interact with the large group in the classroom.

**Video** – By clicking on the *video camera icon*, you can turn your camera on or off. If a participant’s video is off, the user’s name or avatar would appear while their video is off. If video is turned on, the participant’s camera image would appear with a name at the bottom of the screen. This video thumbnail would also show non-verbal communication by that participant and emojis associated with their Reactions toolbar.

**Security** – this feature gives you the option to modify permissions for participants to chat, share their screens, rename, unmute and enable the waiting room so you can screen participants before they join your session. Locking the meeting prevents people from leaving or joining the meeting at any time. You may want to modify these to increase or relax security in the session.

**Manage Participants** – Launching this from the toolbar will give you a list of the participants in the session. For the most part it will remain in alphabetical order with Host and Co-host(s) at the top of the list followed by current/recent speakers or those who have raised their hands. Next to each participant’s name you will see options to mute/unmute participants along with a More button which will activate a drop down menu with the following options:
• **Chat** - to send a private message to that individual
• **Stop Video/ Invite to Start video**
• **Pin / Spotlight** - to emphasize for your view during the meeting
• Make participants **host** or **co-host** of the meeting
• **Assign to Type Closed Captions** - This is not usually required as the Live Transcript option available under live transcript is quite accurate.
• **Remove** participants. Note that when using this, they will not be able to return to the meeting.
• **Allow to Record Local Files** - gives the participant the privilege to record the session. **WSE Guideline:** Instructors should not give participants this privilege out of consideration of FOIP policies.
• **Allow to Multi-pin** - gives the participant the option to pin or spotlight other participants in the session
• **Put in Waiting room** - this allows you to move the participant to a waiting room. This may be done in an instance where a group is deliberating confidentially or in
• **Remove** - removes participant from the room and, depending on your security settings, may not allow them back into the room.
• **Report** - this allows you to select a participant during a meeting and report their behaviour to Zoom. This would be used in extreme circumstances as Removing a participant should ensure they are unable to rejoin the session.

In Gallery View for the session, individual video “tiles” will appear for each participant. If the participants’ video is off, their names or avatars appear instead of a live video stream. You can alter the view between Speaker View and Gallery View by clicking a View button that appears in the top right corner of the Zoom window. In Gallery View, you can drag and drop the participant video feeds to arrange them in the order you want.

*If you click on the ellipsis icon (…) in the top right corner of a participant’s tile in gallery view, the same options appear as when looking at the Participant list, but you can also ask a participant to unmute themselves.*

The Pin (or Spotlight) function can ensure a Participant is featured on all screens while they are speaking. You can also opt for Add Spotlight if more than one Participant is pre-
senting or Replace Spotlight to transition to a new speaker. Participants must have their video on before you can Spotlight them.

**Chat** – The chat icon opens a text dialogue box that will allow you to follow the chat messages and moderate who the participants can communicate with

- At the top of the chat window, the ongoing text chat will be displayed
- At the bottom of the window, you will see the following:
  - To
    - “Everyone”
    - Individuals – done by selecting their names from a drop down menu
  - File – this allows documents to be uploaded and sent through the chat
  - … (three dots) – this allows you to save the chat transcript and to modify permissions for the chat
  - Type message here...
    - Enter your chat text in this space.
- If the chat window is not open, the chat icon in the toolbar will illuminate and generate a message count for unanswered messages that you have accumulated.

All participants have the option of saving the chat from a Zoom session. The transcript, along with other artifacts saved from Zoom sessions, (whiteboards, video recordings, screen grabs, etc.) would appear in the Documents folder on the user’s computer in a Zoom sub-folder. The folder will be identified by the date, time, title and meeting ID for the session in the following format “YYYY-MM-DD hh.mm.ss Meeting Title Meeting ID#”.

**Screen Share** – This will allow you to choose from a screen or open document on your computer to share with the class.

During a Zoom session, participants can share:

- An open file from your computer, i.e. PowerPoint
- An open program from your computer
- An Internet browser
- A Zoom whiteboard.
If you wish to share audio and video during your screen share click on the “share computer audio” and “Optimize Screen Share for Video Clip” features.

You also have the option of sharing computer sound without sharing your screen under the Advanced options for Screen Share.

Content from an iPad or iPhone. (Android devices are not supported at this time.)

A document does not have to be uploaded to Zoom for sharing.

A student can present or share their document but you may have to modify screen sharing privileges to allow this (see below). Click on the ^ button next to “Screen Sharing” and then click on “Advanced Sharing Options…” if you have not modified this on your profile page. You, however, should be the only person with the option to interrupt Participants’ screen sharing. If there are still issues with screen sharing for the students, check your Security settings on your Profile page.

While screen-sharing, the toolbar will move to the top of the screen. Also, it will add features to allow you and the participants to annotate the shared document or take remote control of the shared computer.

While sharing, the speaker video will go into picture-in-picture mode. Participants will see the shared screen, as well as video of the speaker.

Options to set screen share permissions for participants.

Screen Sharing Options:

Screen 1/Desktop
Sharing your desktop or screen instead of a specific document or program will provide a simple “what you see is what they get” presentation. If you are going to be sharing several documents throughout your presentation and opening hyperlinks to move from
PowerPoint to Internet and back again, desktop or screen view allows you to present without interrupting yourself to stop and restart shares as you move from program to program. However, you need to be conscious about covering your desktop to avoid sharing personal or sensitive materials. With this being the view of the *entire* screen, you will need to devote all of the screen to it, which may make it challenging to monitor Chat and Participants at the same time.

**Document:** Sharing the document you wish to share can allow you to use less of your screen space to show that document to your audience. This would allow you to view the Chat and Participants windows on the same screen. When you are sharing a document, you will see a green frame around the document you are sharing. When sharing documents, the participants will see this regardless of what is viewed on your screen. However, the Chat and Participant windows can obscure the participants’ view of these documents if you place them over the shared document on screen. Regularly survey your participants to ensure they see what you want to be sharing.

![Basic screen share options with checkboxes for sharing computer sound and optimizing for video.](image)

**Advanced Option – Portion of Screen:** This allows you to draw a frame around a portion of the screen to share. This would allow you to emphasize something in more detail, but there are risks with reduced resolution. Also, it is quite easy to drag other objects and documents through that portion of screen.

**Advanced Option – Slides as virtual background:** This requires you to open your PowerPoint or other slides into Zoom and using them as a background while a smaller video of you is superimposed on the slide. This has been in the Beta stage for several months and further testing is required before recommending this when using this your inset video will be in the bottom right corner, mirrored and will not allow you to point to the entirety of the slides you are sharing.
**Other screen share advice:**
- If you wish to have views of a) your presentation, b) the Participant window, c) the Chat and d) the Participant video feeds while screen sharing, organize the layout that you would use for your session on your own to ensure that the organization of the windows works for you. Two monitors are invaluable for this.
- If sharing video during a Zoom session, check the “Optimize Screen Share for Video Clip” box at the bottom of the Basic Share selection window.
- If sharing audio from your computer, check the “Share Computer Sound” box.
- Sharing the opening slide of a PowerPoint while streaming music before the session can set a welcoming tone and ensure participants they have come to the right session.

**Polling:** This feature allows you to create multiple choice questions to use in class. It is recommended that you create your poll questions in advance of the session. The poll questions can be created synchronously, if necessary. A recent update to this feature has been the option to make the poll anonymous. This was previously the default option but it is now possible to show the respondents to each of the options in the poll.

- When the poll is prepared, the host/instructor will select the **Launch Poll** button and the participants/students will have the opportunity to respond to the poll.
- The participants/students will see the poll question and responses on their screen.
- After the poll is completed, the host/instructor can share the results or relaunch the poll.
- The instructor can stop the poll by selected **End Poll**.

The host/instructor can share the results of the poll by selecting **Share Results**.

**Record** – Meetings/class sessions can be recorded by the host.

**Local Recording:** When you record locally, the video is saved in a Zoom sub-folder in your Documents folder. If the video file has not been converted to an MP4 file, it will be titled “Double_click_to_convert.” The conversion will create four documents including one MP4, usually titled “zoom_0”. Retitle this file, ensuring that you retain the .mp4 tag. Our suggestion is to title with the date of the session, title of the course and other key information.

For classes, you may need to upload the mp4 file of the recording to D2L. If the video of the session is less than 1 GB, go to the Content area for your D2L shell and click New to get a drop down menu that includes **Video and Audio** and select Upload. Drag and drop the video into the field for the content and after it uploads to D2L, title the content. If your video is larger than 1GB, log into your YuJa account at [https://yuja.ucalgary.ca](https://yuja.ucalgary.ca) with your UCID to upload your video there. After uploading the video to YuJa, use the Create a File option in D2L and select **YuJa Media Chooser** from the options linked to the Insert Stuff menu that appears when you select the “play” icon in the Create a File window.
Live Transcript: This allows a live transcript to be generated during the session. It is set up to be generated in the form of closed captioning and it can also be saved as a transcript of the entire session. There are options to have a participant in the room generate the transcript live or have a third-party transcriber do this, but the Live Transcript generated by Zoom is relatively accurate. If opting for this, it is recommended that the transcript be monitored and edited after the session if it is intended to provide a comprehensive account of the proceedings during the session.

Breakout Rooms – The Breakout icon will facilitate the creation of small group breakout sessions.

• To launch the breakout session, select the Breakout Rooms icon and set the number of groups that you need, then choose your preferred method for forming the groups.
  o Automatically: randomly assigns participants to their groups based on the number of rooms you determine for the session.
  o Manually: you assign members to rooms by selecting them from the list of available participants.
  o Let participants self-assign to room: the participants will see a list of the available rooms with a number of enrolled participants next to each room. When they click on that number of participants, the word Join will appear and clicking on it will add them to the room.

• At the bottom of the breakout rooms window is a cog icon that will allow you to determine the maximum length of breakout session, the length of the countdown after closing rooms and other features for the session.

• After groups have been configured, the open all rooms button will invite people into their rooms for the breakout session. Participants will need to select Join. You do have the option to send participants to their rooms automatically.

• After starting breakout sessions, you have the option of joining the breakouts by clicking on the “Join” link next to each group. There is a Leave Breakout Room button in the bottom right corner of the meeting window to allow the Instructor to exit. Be careful not to accidentally select the End Meeting link. You would also have the option of moving to another room.

Preassignment to breakout rooms: You have the option of creating breakout groups when scheduling a meeting. You would create a .CSV sheet in Excel with Meeting Room Name, and Student Email. However, if students do not sign in with the same email address that you use to create the groups, you would have to assign them manually and synchronously before launching the breakout session. This is not, however, too difficult or time-consuming.
**Join:** While breakout sessions are underway, you can review a list of the rooms and visit rooms by clicking **Join**. To visit other rooms, you would have to return to the Main Room and select join again from the list of breakout rooms.

**Features available to participants in the breakout room include:**

- **Share** – Students can share their desktop, documents or the Zoom whiteboard as they would in the main room.
  - Sharing accommodates small group discussion and allows recording of notes, saving of whiteboard and other artifacts from the break-out session, etc.
  - Participants/students can access their desktops to use any application they choose. This can be saved. When they return to the main room, and have share screen privileges, they can **Share Screen** to debrief to the rest of the group with the files they have collaborated on.
  - They can save the whiteboard content or share it from a folder.
- While in the breakout room, the **More** link gives participants/students access to:
  - Chat
  - Ask for Help
  - Disable Participant Annotation
  - Hide Video Panel
  - Audio Options
  - Video Settings
  - Leave Breakout Room.
- Participants/students can select **End Meeting** in the breakout session, which will return them to the main room. Or, the host/instructor can **Close All Rooms** to reconvene the groups in the main room. This will give participants 30 seconds to leave their break-outs before they are “forced” into the main room. When the host/instructor wants each group to report back, the documents created in the breakout room and saved (Word, PowerPoint, Whiteboard etc.) can be shared.

**End Meeting** – Select **Leave Meeting** to leave or end the meeting.
You will receive another window asking “Do you want to leave this meeting?” from which you can select **Leave Meeting** or **Cancel**.
If you want to allow the meeting to continue without you, designate a participant as host before you exit. if there is a co-host or alternative host, this will not be required.
Using Zoom for Virtual Office Hours

If you need to host one-to-one office hours, this can be done through Zoom as well. You would schedule office hours as you would a regular session with the additional step of enabling “Waiting Room” in the security section when scheduling. With Waiting Room enabled, incoming participants would appear on your Participants list, but not interrupt the appointment you are having. You will have the opportunity to send a private message to advise people you are aware of their arrival. (Also advise them to remain in the session.) When you have the opportunity to meet them, you can invite them into the session. For further security and privacy during office hours, refrain from using the chat feature with “everyone.” Even though there is only one participant in the room at a time, the public chat would be available to subsequent visitors to the room. You may use the waiting room for multiple participants and invite more than one individual from the waiting room into your meeting. For more information on best practices for virtual office hours, visit https://werklund.ucalgary.ca/sites/default/files/

Zoom Account Settings

Current Zoom settings require very little customization to adapt the Zoom environment to the specification you would require to teach. On the Profile page there is a link to a Settings page. This will allow you to include features that you wish to have during your sessions. The items that you would most likely modify are:

- **Screen Sharing** – the default for this is Host Only being allowed to share. If you wish to allow All Participants to share, please ensure that Host Only is allowed to share when someone else is sharing.
- **Email Notifications** when participants join before host. Deactivating this would prevent you from getting an email every time a participant joins your session before you.
- **Schedule Privilege** – if you want to assign scheduling privileges to another individual, you can add their @ucalgary.ca email address. After that, they will have the option of scheduling on your behalf.

Note that if you change settings on this page away from their default setting you will see the word Modified and the hyperlink Reset appear next to key settings you have changed.

**Security**

This is the first set of options to modify. The first of these gives you the option of requiring either a Passcode to join a meeting or establishing a Waiting Room for participants to
go through before joining your sessions. Security settings are recommended for classes but are less important for smaller meetings with close colleagues.

Other settings you may modify:

- **Audio Type** – although you set this when scheduling meetings, it is good to leave it set on **Telephone and Computer Audio**.
- **Join Before Host** – it is good to allow this on the settings page as well as with each meeting you schedule.
- **Use Personal Meeting ID when starting an instant meeting** - this allows you to use a consistent ID for instant meetings. You can communicate this to meeting participants more quickly and regular meeting participants can become familiar with or bookmark this ID or the URL.
- **Mute participants upon entry** – this minimizes disruption as participants join after the session has started.
- **Chat** – this will allow messages to be posted to the entire group
- **Private Chat** – this will allow 1:1 chat to occur
- **Co-host** – this allows the Host to confer co-host privileges to participants during a session
- **Polling** – this allows the host to build polls prior to or during a Zoom session to survey opinions during the session (see below)
- **Allow host to put attendees on hold** – this would allow a host interrupt two-way video and audio for part of the session. This is commonly used in exam situations so that a panel can deliberate on an exam candidate’s performance confidentially.
- **Annotation**: There are two settings:
  - allow saving (by participants) of shared screens with annotations
  - disallow annotations by participants who are not sharing the screen
- **Whiteboard** – choose between saving or auto-saving shared whiteboard content
- **Remote control** – allow others to control a presenter’s screen while screen sharing
- **Nonverbal feedback** – provide additional response icons for non-verbal response in the chat window
- **Virtual Background** – this allows participants to use an image on their device as a backdrop to cover a more distracting background. There are a number of UCalgary-branded backgrounds available. If they do not automatically appear in this window, visit [https://www.ucalgary.ca/brand/download-logos-and-templates](https://www.ucalgary.ca/brand/download-logos-and-templates) for templates.

**View Options**

There is a button that will appear in the top right corner of the video feed, when you bring your cursor there. This will allow you to modify the screen view during the session and during sharing sessions.
**Gallery View or Speaker View** – This will change the view of the video on your screen.
  - Gallery view will give video “tiles” across the top of the main screen.
  - Speaker view will give the video of participants tiled at the top and the person who is speaking will appear in the main screen.
  - Spotlight can be selected on individuals’ videos to give them

**Full Screen** – This will provide a full screen.
  - To exit, select **Exit Full Screen** in the top right corner, or select Escape on your keyboard.

When the screen is being shared, the shared content will fill the screen but there will be the option of having a small inset video of the main speaker and/or other participants.

**First Steps – Smart Device**

The Zoom app is available for free for smart devices. Search through the respective app store for your device to locate and download. Once it is downloaded, review the settings on your device to allow Zoom access to your microphone and camera.

If you are joining the meeting from a smart device, you only have to launch the app and type in the code for the meeting. Signing up or signing into an account is not required for joining a meeting. Meeting invites can be received via text message and you would only have to launch the app from the invite.

**Technical Support**

**Program Support Level**

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<thead>
<tr>
<th>UPE</th>
<th>GPE</th>
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<td>DistHelp</td>
</tr>
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<td>Email: <a href="mailto:DistHelp@ucalgary.ca">DistHelp@ucalgary.ca</a></td>
</tr>
</tbody>
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**Office of Teaching and Learning**

Email: tandl@ucalgary.ca
phanlon@ucalgary.ca

**University of Calgary Tech Coaches**

techcoacheduc@ucalgary.ca
Further Resources

- **Zoom website** – Getting Started will introduce you to the fundamentals whether in documents or with videos.
  - Types of Zoom Support Resources: Video tutorials, blog and FAQ.
- **University of Calgary eLearn**
- On the bottom right-hand corner of the Zoom screen, you will see a blue Help button. Type in your issue and information will be provided, sometimes with a video response.
- Support Center – provides various resources to help with using Zoom - [https://support.zoom.us/hc/en-us](https://support.zoom.us/hc/en-us)