



Zoom

Instructor Handbook

Werklund School of Education

November 2022

Version 10

This update to the Zoom Instructors Handbook coincides with the update of Zoom to version 5.12.8.

What is Zoom?

Zoom is an enterprise videoconferencing platform available to instructors, staff and students throughout the University of Calgary. Users can connect from computers, smart devices and, if necessary, from a telephone line. In Werklund School of Education, Zoom has been used for synchronous sessions for graduate exams, (e.g., candidacy and final), meetings with research teams and students, etc.

For a basic meeting, Zoom:

- accommodates video conferencing for groups of up to 300.
- can facilitate **breakout** room discussions, polling and collaboration, allowing the **sharing** of PowerPoints and other documents for **presentation** by hosts and participants.

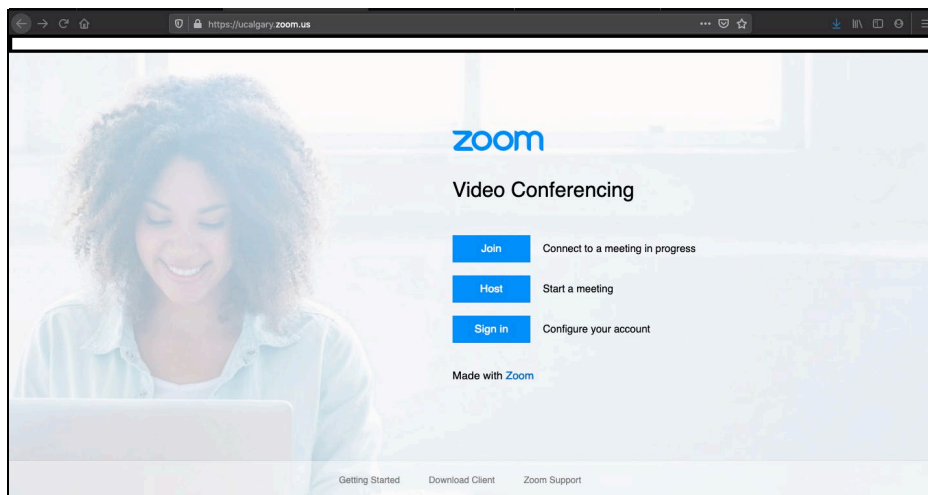
Note: For groups of **more than 300 participants** Zoom webinars can be arranged by making a request through [UCalgary ComMedia](#).

Video Resources

Zoom has created a range of [training videos](#) on the use of various functions and features.

Activating Your Zoom Account

1. Visit <https://ucalgary.zoom.us> and click on Sign In.
Note: Clicking the **Host** or **Join** buttons will not grant access to all the features available when participating in or hosting a Zoom session. You must sign in to ensure you have hosting privileges to share your screen and moderate participants.
2. After clicking on Sign In for the first time, you will receive an email to your ucalgary.ca email address. Follow the steps to launch your new account or, if you already have a personal Zoom account, merge it into the *licensed* University of Calgary account.



Note:

- Zoom has also been **integrated into D2L** for scheduling synchronous video sessions for instruction. However, this function will only be linked to D2L after you have logged into your UCalgary Zoom account.
- If there are **issues activating your account**, please contact tandl@ucalgary.ca for help.

Non-UCalgary Zoom Account

- If you have a non-UCalgary Zoom account for personal use or access with another institution, you must still go to <https://ucalgary.zoom.us> and log in with your @ucalgary.ca email address to access the account and host your synchronous meetings with other @ucalgary.ca participants. This will also allow you to schedule Zoom sessions via D2L and ensure that features for designating co-hosts, screen-sharing, polling, security, participant management, etc., are available when you facilitate a session.
- Adding alternative hosts and sharing Whiteboards can only be done for individuals with ucalgary.ca email accounts.

After your UCalgary Zoom account has been activated, it should show **Licensed** as the License type in the **Account** section of your profile page. If there are issues activating your account, contact tandl@ucalgary.ca for support.

Profile Page

Photo

You may wish to customize your profile by adding a photo to appear as your avatar when your video is off.

Attention: if you are in a meeting and your avatar does not appear when your video is off, you are NOT logged into your Zoom account. To fix this, leave the meeting, go to <https://ucalgary.zoom.us> and click Sign In before rejoining the meeting. After you are signed in, click Join A Meeting on your profile page and input the meeting ID number.

Note: Clicking the meeting link will not log you into your Zoom profile.

Pronouns

- Zoom accommodates the **addition of pronouns to your profile** and with your name during meetings. This feature gives you options to share your pronouns: 1) at every meeting, 2) not at all, or 3) as you choose before each meeting.

Meeting ID

- You can customize your Personal Meeting ID, which is also the default Meeting ID for instant meetings. A common option is using your name as the Personal Meeting ID as in <https://ucalgary.zoom.us/j/johndoe>, This makes your ID easier to remember and share.

Two-Factor Authentication

- You have the option of activating “two-factor authentication” when logging into Zoom. If this is activated, you would require a second code, received via text message, email or the Windows Authenticator App to complete your log in to Zoom.

Note: *Even if this feature is switched off, two-factor authentication can be required when logging into Zoom from a public or shared device such as a classroom computer.*

Useful to Know

Zoom for Smart Devices

- The Zoom app is available for smart devices. You can 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.
- Before using Zoom on a smart device, complete the account set up on a computer. Then launch the Zoom app on your device and sign in via Single Sign On (SSO). Add “ucalgary” in the company domain field and log in with your UCID username and password.

Zoom Linked to Email

- Zoom can also be linked to your email, whether Outlook, Gmail or other platforms. This will help synch Zoom events into your calendar. Meetings scheduled in Outlook can be linked to new Zoom meetings via a button in the Outlook toolbar when scheduling.
- Note that you may edit meeting settings in Zoom to add alternative hosts and registration options for a meeting.
- The registration option allows you to track the number of registrants you have and send them reminders before the meeting.

Log Into Your Account to Access All Features

- For access to the full range of features 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.
- If you have not logged into Zoom and you do not appear as host in your meeting, you will not be able to launch breakout rooms, share screen or allow participants to share their screens. If you are logged in, your name, avatar and pronouns will appear as they do on your UCalgary Zoom account profile. If none of these appear and, for example, you see a variation on your name or a different email address, leave the meeting and log in at <https://ucalgary.zoom.us>.

Customizing Your Settings

- It is invaluable to go through the **Settings** page on your Zoom profile to customize your environment. The settings you can customize include:
 - security controls
 - waiting room for participants
 - allowing participants to join before the host
 - participant access to screen share
 - disabling desktop screen sharing to ensure the privacy of content on your desktop
 - allowing/disallowing saving of annotated shared screens
 - permission to annotate during screen share sessions
 - automatic saving of whiteboard content
 - hide/show participant photos when they are not streaming video
 - activation of live transcription during sessions
 - allow the saving of transcripts
 - your own virtual backgrounds
 - UCalgary-branded virtual backgrounds
 - save gallery view so that the host can customize and save the participant view
 - email notifications you would receive from Zoom

Hosting an Instant Meeting

To host an instant meeting:

1. Log into your account at <https://ucalgary.zoom.us> and click **Host a Meeting** in the top right corner of your Profile page.
2. Select from the options of With Video On, With Video Off or Screen Share Only to launch the meeting.
3. The meeting will occur at your Personal Meeting ID, which you will have to share with participants you wish to meet with.

Scheduling a Meeting

- You can schedule a Zoom meeting through D2L, your account at <https://ucalgary.zoom.us>, or via Outlook. Scheduling through D2L will ensure scheduled meetings appear in D2L and provide students a link to join the Zoom session from D2L.
- If a Passcode is required for a meeting, post it in D2L where students can access it. A News posting on the Home Page of the D2L shell is easiest to locate.
- When scheduling in Outlook, participants receiving the meeting invite will receive the automatically generated Meeting ID and passcode for the session.

Topic

- The default Topic is “My Meeting”; replace this with your course title and number or another title.
- 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 before the session.
- If this is a **Recurring Meeting**, you can schedule daily, weekly or monthly sessions. Weekly sessions can be scheduled for multiple weekdays.
- 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 the meeting available to launch at any time (You still need to tell participants the schedule for meetings.)

The screenshot shows the 'Schedule a Meeting' interface in Zoom. The 'Topic' field is set to 'My Meeting'. The 'When' section shows the date as 10/16/2020 and the time as 2:00 PM. The duration is set to 1 hour and 0 minutes. The time zone is (GMT-6:00) Mountain Time (US and Canada). There are checkboxes for 'Recurring meeting', 'Registration Required', and 'Waiting Room'. The 'Meeting ID' section has 'Generate Automatically' selected, showing a personal meeting ID of 521 554 1732. The 'Security' section has 'Passcode' checked with the value 151377.

Schedule a Meeting page in Zoom

Duration

- Consider adding an extra 30 minutes beyond the anticipated end of the session.

Registration

- This is not required for classes, but it is valuable for public events to enhance security access. This generates a list of registrants that you can track and manage for a session and can be used for communication before and after the session. Registrants receive an individualized link to access the session. This also provides you a mailing list to use later.

Meeting ID

- This is generated automatically for scheduled meetings.

Security Options

There are **two** security options available when scheduling:

- **Meeting Passcode** – This further enhances security by preventing unintended participants from joining the session. You may want to include this and communicate the password to participants. It can be customized for ease of recall.
- **Waiting Room** – This allows you to vet participants and grant permission to join a session. It is also a valuable feature to activate when hosting virtual office hours as it ensures participants do not intrude on one another's sessions with the host. You can also customize the waiting room. In the Zoom Web portal, go to Settings and select Security – Waiting Room – Customize Waiting Room. From there, you can add a message to participants, and select one of three options: the default screen, a logo and description (you can upload a logo to use as a background), or a video (you can upload a video to play while participants wait).

Video

- Adjusting these settings for the Host and Participant refers to what their video settings will be when they join the meeting. They can still turn video on and off after the meeting begins. Limiting video use to only those who are speaking or presenting helps minimize the demand on broadband *and* the amount of data needed for recording the session.
- Focus mode can be used to show only video and content shared by the host, co-host, or spotlighted participants. To enable during a meeting, go to More – Start Focus Mode. You can also enable this feature to start in Focus Mode when scheduling your meeting.

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, participants 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 allows participants to test their audio and video before the meeting.
- Muting participants upon entry will minimize disruption from late arrivals.
- There is an option to turn off the tone indicating arrival and departure of participants.

Note: Once the meeting is saved, a URL featuring a Meeting ID is generated to allow access to the session. You can add and modify sessions after you have saved it to add alternate hosts, length, and times of the meetings in the listing to review all recurring meetings currently scheduled. You are not able to modify meetings in the Zoom module in D2L in this manner, only on your Zoom profile.

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. This allows them to host the meeting.

- The alternative host 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. **Note:** if there are multiple hosts, co-hosts and alternative hosts, the first one into the session will have hosting privileges.
- Ensure that the appropriate person is hosting or administering the session. This does not have to be the presenter, especially if there is a large audience.
- If the host is leaving the session, remember to assign hosting privileges to another member of the group to ensure the session remains open.

The screenshot displays the Zoom web interface for 'Upcoming Meetings'. The page includes a navigation menu on the left with options like Profile, Meetings, Webinars, Recordings, Settings, Account Profile, and Reports. The main content area shows a table of upcoming meetings:

Start Time	Topic	Meeting ID	Start	Delete
Recurring	Coffee Club	[Redacted]	Start	Delete
Thu, Mar 19 (Recurring) 09:00 AM	EDER 456.01 502	[Redacted]	Start	Delete
Thu, Mar 19 (Recurring) 06:30 PM	PHO 127 001	[Redacted]	Start	Delete
Tue, Mar 24 (Recurring) 09:00 AM	EDER 456.01 502	[Redacted]	Delete	
Tue, Mar 24 (Recurring) 06:30 PM	PHO 127 001	[Redacted]	Delete	
Thu, Mar 26 (Recurring) 09:00 AM	EDER 456.01 502	[Redacted]	Delete	

Upcoming Meetings page in Zoom

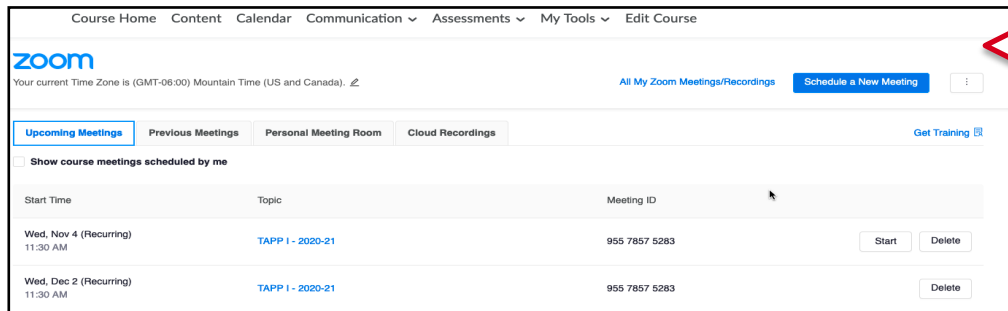
Scheduling in D2L

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

Note: If you have already scheduled your classes within the Zoom app, in D2L 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.

Button for import of meetings from Zoom into D2L.



Zoom module in D2L

Scheduling in Outlook

- When scheduling in Outlook you can click the “Add a Zoom Meeting” icon at the right end of the Outlook toolbar. This will add the details for a Zoom meeting into the description of the meeting. The meeting will also appear automatically among your Zoom meetings, and you can then edit settings for that meeting.
- If you schedule for more than one Zoom account, the meeting may appear under a different account.

Note: You do not need to be logged into Zoom to schedule through Outlook. If you want the meeting to appear on a different schedule in Zoom, you can modify it when editing the meeting. If there is a delay, cancel this and attempt it again.

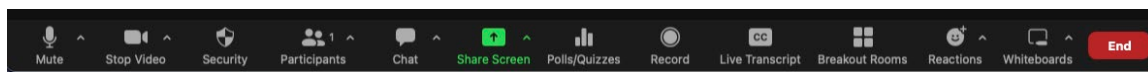
Caution: Outlook will **default** to creating a **Teams** meeting and include details for joining a Teams meeting with the invite. You must **manually deactivate** this when scheduling.

Hosting a Zoom Videoconference

Important: To ensure access to all the features available to the host, sign into your Zoom account at <https://ucalgary.zoom.us> before launching your meeting. Upon starting 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 they appear on your Zoom profile, you have not logged into Zoom. To fix this, leave the session and sign in at <https://ucalgary.zoom.us>. *Having host privileges ensures you can share screen, launch breakout rooms, manage security settings and control other features available during the session.*

Host’s Toolbar

Throughout a Zoom meeting, the toolbar appears 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 to manage the session.



The Host’s Toolbar in Zoom

The host/instructor has controls for:

- Audio
- Video
- Security
- Managing participants,
- Chat
- Screen share
- Polls/Quizzes
- Recording the meeting
- Live Transcription
- Breakout rooms
- Reactions
- Whiteboard
- Ending the meeting

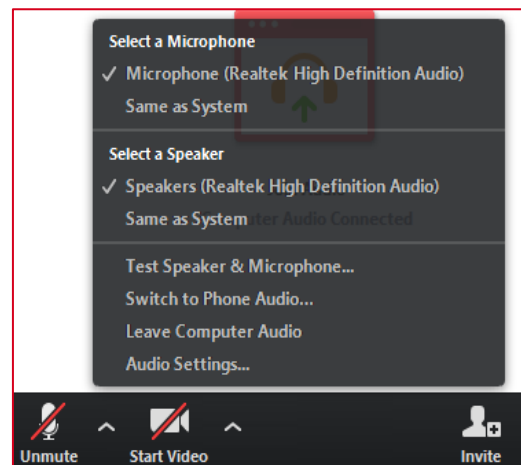
While screen sharing, the participant list appears in a separate window that can be minimized, modified to a single video feed of the speaker, two feeds, or a larger collection of the participants that appears in either a strip or a larger grid that can be expanded. If you have a view of the speaker and their shared screen, you can move the divider between the two images to determine which displays more prominently on your screen.

Participants will see similar controls for video, audio, sharing and chat. During screen share, students may have the opportunity to annotate on the shared screen if the host permits this.

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 (^) button next to the microphone icon allows you to select and test your microphone and speaker. This is valuable when you are using Zoom to allow remote students to join a face-to-face session.
- The **audio settings** feature also allows you to set filters to reduce the pick-up of background noise and further customize sound.
- If you are using Zoom on a Smart device and have a peripheral microphone, a Bluetooth icon will appear on your screen. Use that button to access and select the external audio device, even if it is not linked via Bluetooth.



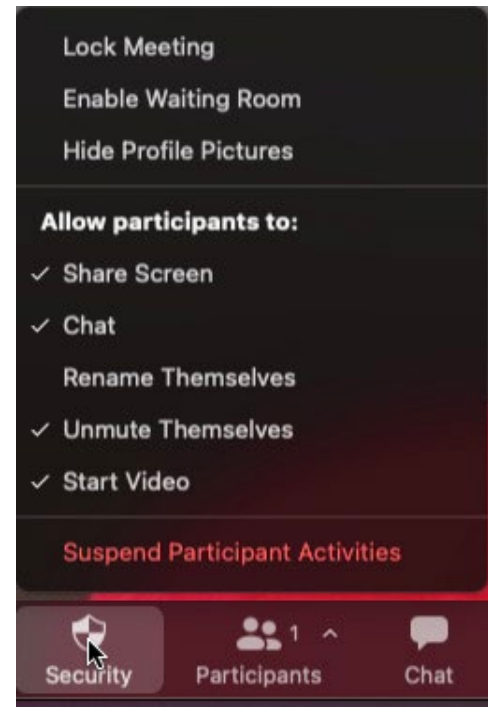
Audio options including selection of speaker and microphone and testing of audio hardware.

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 will appear instead.
- This video thumbnail will also show non-verbal communication by that participant.
- Participant windows move onscreen and in the participant list if they are speaking or have raised a hand to ask a question.
- As a host, you can also access the features that appear under **more** in the Participant list by clicking the top right corner of their video thumbnail.
- Video settings can be modified to add a virtual background or blur the background as well.

Security

- This feature allows you to modify permissions for participants to chat, share screens, rename themselves, unmute and enables 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.

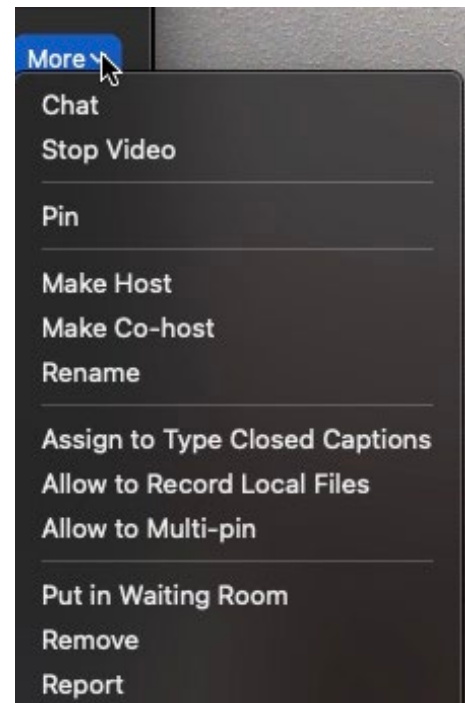


Security options

Manage Participants

Launching this from the toolbar will give you a list of participants. It will feature 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 activates a 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** participant. Note that when using this, they will not be able to return to this session or future meetings at the same Meeting ID.
 - **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.



View from Participants' List Drop Down

- **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
 - **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**, individual video tiles appear for each participant. If a participant's video is off, their names or avatars appear instead of the live video stream.
 - You can alternate between Speaker View and Gallery View by clicking the View button that appears in the top right corner of the Zoom window. In Gallery View, you can also drag and drop participant video feeds to arrange them in the order you want.

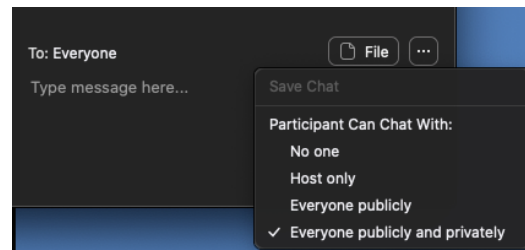
Note: *If you click on the ellipsis icon (...) in the top right corner of a participant's video tile in gallery view, the same options appear as when looking at the Participant list, but you can also ask a participant to unmute themselves and turn on their video.*

The Pin (or Spotlight) function ensures a Participant is featured on all screens while they are speaking. You can select Add Spotlight if more than one Participant is presenting 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" - for a public post to the entire audience.
 - ✓ 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.



Chat options to modify chat privileges, save chat and upload files.

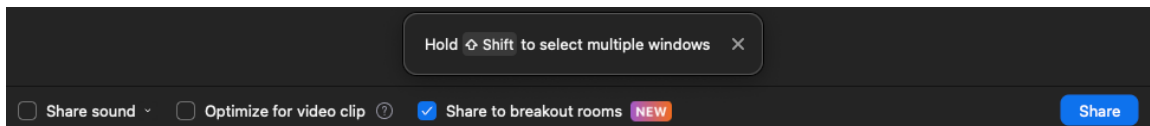
- If the chat window is not open, the **chat** icon in the toolbar will illuminate and generate a message count for unanswered messages that you have accumulated.

Saving Zoom Chat

All participants can save the chat from a Zoom session. The transcript and other artifacts saved from Zoom (whiteboards, video recordings, screen grabs, etc.), appear in the **Documents** folder on the user's computer in a Zoom sub-folder. The folder is identified by the date, time, title and meeting ID for the session in this format: "YYYY-MM-DD hh.mm.ss Meeting Title Meeting ID#".

Screen Share

You can choose from a screen or open document on your computer to **share** with the class.



Basic Screen Share options to share sound, optimize video selected, and share to breakout rooms. Click these boxes to add these before sharing when required.

During a Zoom session, participants can share:

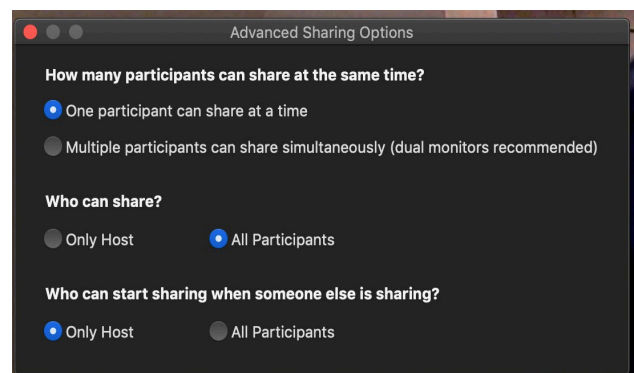
- An open file, i.e. PowerPoint.
- An open program.
- An Internet browser.
- A Zoom whiteboard.
- Audio and video during your screen share. To do this, click on the “share computer audio” and “Optimize Screen Share for Video Clip” features.
- Computer sound without sharing your screen under the Advanced options for Screen Share.
- Content from an iPad or iPhone (Android devices are not supported at this time.)

Note:

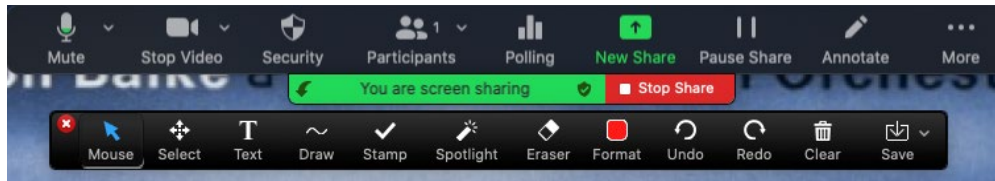
- A document does not have to be uploaded to Zoom for sharing.
- A student can present or share their document, **but** you may have to modify screen sharing privileges to allow this (see below). Click on the ^ button next to “Screen Sharing” to access “**Advanced Sharing Options...**” if you have not modified this on your profile settings page.

Important: You 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 and for the meeting.

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



Options to set screen share permissions for participants.



Meeting toolbar and annotation toolbar available during screen share.

- 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.
- The window or screen you are sharing will be framed in a green box. If your document or program is not framed in this way, your audience is not seeing what you are.

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 will be sharing several documents throughout your presentation and opening hyperlinks, moving from PowerPoint to Internet and back again, desktop or screen view allows you to present without interruptions to stop and restart shares as you move between programs or documents.

Caution: This will show your entire screen. You need to be conscious about covering your desktop to avoid sharing personal or sensitive materials. You will also need to devote all 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 allows you to use less of your screen space to show that document to your audience. This allows you to view the Chat and Participants windows on the same screen.
- When sharing a document, a green frame appears around the document you are sharing. Participants will see what you are sharing, 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.

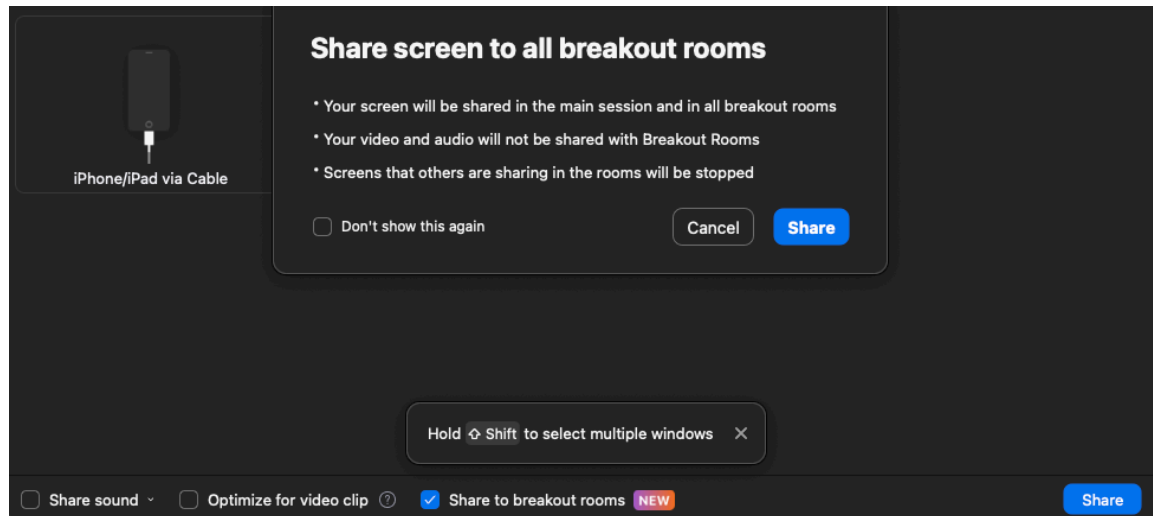
Advanced Option – Portion of Screen:

- 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.
- It is also quite easy to drag other objects and documents through that portion of screen.

Slide Control:

- This allows others to control a Keynote or PowerPoint slideshow. To do this, in Full-Screen Presentation mode, click **Slide Control** on the control bar, then assign control to a participant. **Note:** *This only works in Full-Screen Presentation mode.*

Screen Sharing in Breakout Rooms



Screen Share options: select Share to breakout rooms to share your screen in all breakout rooms.

You can share your main screen to participants in the breakout rooms. Whatever is displayed on the screen in the main room will display in the breakout rooms. To share your screen to breakout rooms:

1. Click **Share Screen**.
2. Select **Share to breakout rooms**.
3. Select **Share**.

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 prior to the session. Two monitors are invaluable for this.
- 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.

Other Features

Polls/Quizzes:

You can create multiple choice questions to use during a session. Poll questions can be created synchronously if necessary, but it is recommended that you prepare these questions in advance. A recent update to this feature is the option to show the respondents to each of the options in the poll rather than leave them anonymous, which is the default option.

- When the poll/quiz is prepared, the host/instructor will select the **Launch Poll** button and the participants/students will have the opportunity to respond to the poll.
- When creating a quiz, the instructor can also add which response(s) are correct for each question.
- The participants/students will see the questions 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/quiz by selecting **End Poll/Quiz**.
- A recent update to Zoom includes the option to create polls and quizzes that can be launched into any meeting you host.

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

Record

Meetings/class sessions can be recorded by the host. When you record to your computer, 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 “**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 identifying 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, you can go to the Content area of your D2L shell and click “New” to get a drop down menu that includes **Video and Audio**. Select Upload, then drag and drop the video into the field for the content. 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> with your UCID to upload your video there. After the video uploads to YuJa, use the Create a File option in D2L. Click on the Insert Stuff icon in the menu bar and select **YuJa Media Chooser** from the options.

Live Transcript

This allows a live transcript to be generated on-screen 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. This transcript can also be saved after the session, though it may not accurately indicate who the speakers are.

Note: 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. Also, when a session is completed, a full transcript of a session can be downloaded.

Breakout Rooms

Launching Breakout Rooms

To launch a 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**:
 - **Automatically:** randomly assigns participants to their groups based on the number of rooms you determine for the session.
 - **Manually:** you assign members to rooms by selecting them from the list of participants.
 - **Let participants self-assign:** the participants will see a list of the available rooms with the maximum number of participants per room next to each one. When they click on that number of participants, the word **Join** will appear and clicking on it will add them to the room. You may wish to modify the names of the breakout rooms so groups can identify where to go or see a topic of discussion.

- After you configure groups, the **Open All Rooms** button will invite people into their rooms for the breakout session. **Participants will need to select Join.** You have the option to forego the use of the invite and populate the rooms once the session is started.

Pre-assignment to breakout rooms:

- You have the option to create breakout groups when scheduling a meeting. To do this, create a .CSV sheet in Excel with Meeting Room Name, and Student Email.
Note: If students do not sign in with the same email address that you use to create the groups, you will have to assign them manually and synchronously before launching the breakout session. It is not, however, too difficult or time-consuming to do manual, synchronous breakout assignments.
- Breakout rooms can also be created, renamed, and deleted after a meeting has started.

Breakout Room Host Features

- The **cog icon** at the bottom left of the breakout rooms window allows you to determine the **length of breakout** session, the **length of the countdown** after closing rooms, and other options for the session. **Before launching**, review and modify these settings, particularly for the length of the session. It may default to closing the rooms after 10 minutes, which could pose an inconvenience for a longer breakout session.
- After starting breakout sessions, you can join the breakouts by clicking on the “Join” link next to each group. To exit, select the **Leave Breakout Room** button in the bottom right corner of the meeting window. Be careful not to accidentally select the **End Meeting** link. You will also have the option to move to another room.
- The host can share the main screen to display in the breakout rooms (see **Screen Sharing** section for more information).
- The host can broadcast written or audio messages to breakout rooms. When you select **Share to Breakout Rooms** you will see options to **Broadcast message** or **Broadcast voice**:
 - To broadcast a **written message**:
 - Select **Broadcast message**.
 - Type your message in the text box, then click **Share**.
 - To broadcast an **audio message**:
 - Select broadcast voice then click on the **blue icon** that pops up to record your message.
 - When you finish, click on the same button, which will turn red, to stop the recording and send the message.

Breakout Room Participant Features

- 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.

- o 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:
 - o Chat
 - o Ask for Help
 - o Disable Participant Annotation
 - o Hide Video Panel
 - o Audio Options
 - o Video Settings
 - o Leave Breakout Room
- Participants/students can select **Leave Breakout Room** 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 30-60 seconds to leave their break-outs before they are “forced” into the main room.

Note: 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

One-to-one office hours can be hosted through Zoom. To set this up, schedule office hours as you would a regular Zoom 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 currently in. You can send a private message to advise those in the waiting room you are aware of their arrival (and advise them to remain in the session.) When you are able to meet them, you can invite them into their appointment.

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 may 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://werkklund.ucalgary.ca/sites/default/files/teams/13/Virtual%20Office%20Hours.pdf>

Whiteboards

- Whiteboards are now available in Zoom for synchronous or asynchronous use. You can launch them from the toolbar during a synchronous meeting or open and share asynchronously for ongoing collaboration by individuals you have invited to view and contribute to the board. Do this by inviting them via their @ucalgary.ca email address.
- Once you have started the board, it will appear among the Whiteboards available under your Zoom profile. Whiteboards are sorted among those initiated by you, those which have been shared with you and those which have been highlighted.
- To share a board to collaborate asynchronously, you may need to copy the link and send it to people you wish to collaborate with. After those collaborators accept the link, you will receive an email confirming their role as editor or viewer of the shared white board.

Zoom Account Settings

Current Zoom settings require very little customization to adapt the Zoom environment to the specifications you will require to teach. On the **Profile** page, there is a link to a **Settings** page. This allows 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 do this by adding their @ucalgary.ca email address. After that, they will have the option of scheduling on your behalf.

Note: 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 both the settings page and 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 participants more quickly and regular participants can become familiar with or bookmark this ID or URL.
- **Mute participants upon entry** – this minimizes disruption as participants join after the session has started.

- **Chat** – this allows messages to be posted to the entire group.
- **Private Chat** – this allows 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 allows a host to 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> for templates.
- **Blur Background** – this allows participants to blur the background.

View Options

A button will appear in the top right corner of the video feed when you bring your cursor there. This allows 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 generate video “tiles” for participants across the top of the 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 move their image to the centre.

Immersive View

- This feature allows the meeting host to change the traditional meeting tiles to a single virtual background where participants appear as though together in one place.
- Options include lecture-style seating, board room table, classroom seating, and others for up to 25 participants (can be expanded up to 49 participants in settings)

Full Screen

This will provide a full screen.

- When the screen is being shared, the shared content will fill the screen but there is the option to show a small inset video of the main speaker and/or other participants.
- To exit, select **Exit Full Screen** in the top right corner, or select Escape on your keyboard.

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.

Keyboard Shortcuts

There are several keyboard shortcuts that can be used to make your Zoom session more efficient. Go to **Settings – Keyboard Shortcuts** and select the shortcuts you wish to activate. A list of keyboard shortcuts for more frequently used features can be found here: [Zoom Keyboard Shortcuts](#).

Contact Information for Support and Resources

Technical Support

Office of Teaching and Learning

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

University of Calgary Tech Coaches

techcoaches@ucalgary.ca

Book a training session at <https://taylorinstitute.ucalgary.ca/learning-technology-coaches>

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>