This update to the Zoom Instructors Handbook coincides with the update of Zoom to version 5.10.4

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 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, allowing the sharing of PowerPoints and other documents for presentation by hosts and participants. Zoom webinars can be arranged by making a request through UCalgary ComMedia for groups of more than 300 participants.

Video Resources
Zoom has created a range of training videos demonstrating the use of various functions and features.

Activating Your Zoom Account
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. 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.

- To activate your Zoom account, visit https://ucalgary.zoom.us and click on Sign In. (Clicking the Host or Join buttons will not grant access to all of the features available when participating in or hosting a Zoom session.)
- This will generate an email to your ucalgary.ca email. Open that email and follow the steps to launch your new account or, if you already have personal account, merge it into the licensed University of Calgary account.
- At University of Calgary, Zoom has been integrated into D2L for scheduling of 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 guidance.

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.
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.

**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 your avatar 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. Please note that clicking the link will not necessarily log you into your Zoom profile for the meeting.

- Zoom also accommodates the addition of pronouns to your profile and with your name during meetings. This feature also allows you to determine when your pronouns would appear, with options of sharing them at: 1) every meeting, 2) not sharing them, or 3) determining before each meeting.

- Another feature you can customize is 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, which would make your it easier to remember and share.

- You also have the option of activating “two-factor authentication” when logging into Zoom. However, this is not commonly used. If this is turned on, you would require a second code, received via text message, email or the Windows Authenticator App to complete your log in to Zoom. Note, that 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

- 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 you use Zoom on a **smart device**, complete the account set up on your computer first. After that, 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 can also be linked to your email, whether Outlook, Gmail or another platform. This will help synch Zoom events into your calendar. Meetings scheduled in Outlook can be linked to new Zoom meetings via a button available in the Outlook toolbar when scheduling. Note that you may edit meeting settings in Zoom to add alternative hosts and registration options to a meeting.

- 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](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 screen. If you are uncertain whether you have logged in, ensure that your name, avatar and pronouns 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](https://ucalgary.zoom.us).

- It is invaluable to go through the **Settings** page on your Zoom account to customize your environment. The things you can customize include the following:
  - waiting room for participants
  - allow participants to join before you when hosting
  - control participant access to screen share features
  - disable desktop screen sharing to ensure the privacy of content on your desktop
  - allow/disallow saving of annotated shared screens
  - control who is allowed to annotate during screen share sessions
  - activate automatic saving of whiteboard content
  - hide/show participant photos when they are not streaming video
  - allow live transcription during sessions
  - allow the saving of transcripts
  - upload virtual backgrounds
  - access UCalgary-branded virtual backgrounds
  - save gallery view so that the host can customize and save the participant order in gallery view
  - you can also determine what email notifications you would receive from Zoom

Hosting an Instant Meeting

To host an instant meeting, log into your account at [https://ucalgary.zoom.us](https://ucalgary.zoom.us) and click **Host a Meeting** in the top right corner of 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 your Personal Meeting ID.
Scheduling a Meeting

You can schedule a Zoom meeting through D2L, through your account at https://ucalgary.zoom.us, or through Outlook. 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. 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 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 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 would still have to tell participants the schedule for meetings.)

Duration – please 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. This option allows you to track and manage participants. You would then have a list of attendees you can communicate with. Participants will receive individualized links to access the session, which will enhance security of access to the session. This also generates a mailing list you may wish to use later.

Meeting ID – this is generated automatically for scheduled meetings.
There are two security options 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. It is also a valuable feature to activate when hosting virtual office hours.

**Video** – the adjustments to these settings for the Host and Participant merely refer to what their video settings will be when they join the meeting. They will still be able to turn video on and off after the meeting begins. 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, 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 will allow participants to test their audio and video before the meeting.
- Muting participants upon entry will minimize disruption from late arrivals.
- There is also an option to turn off the tone indicating arrival and departure of participants.

---

**Upcoming Meetings page in Zoom**

Once the meeting is saved, a URL featuring a Meeting ID is generated to allow access to the session. After a meeting is saved, you can add and modify sessions by editing the meeting. This would allow you to modify alternate hosts, length and times of the meetings in the listing to review the recurring meetings currently scheduled. You are not able to modify meetings in this
manner in the D2L version of Zoom, 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. 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. Please note that if there are multiple hosts, co-hosts and alternative hosts, the first one into the session will have hosting privileges. Ensure that this is monitored to ensure the appropriate person is running the session. This does not have to be the presenter, especially in a session with a large audience.

**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 a) your students’ view of Zoom in D2L and b) 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 implemented 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.

![Zoom module in D2L](image.png)

**IF** you have already scheduled your classes within the Zoom app, you can, in D2L, 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.

**Scheduling in Outlook**
When scheduling a meeting in Outlook you can click the “Add a Zoom Meeting” icon that is at the right end of the Outlook toolbar for the session you are booking. Once you do that, it 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 would be able to edit setting for that meeting. However, if you schedule for more than one Zoom account the meeting may appear
under a different account. Note that you do not need to be logged into Zoom to schedule this. 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.

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 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. In this instance, leave the session and sign in at the https://ucalgary.zoom.us page.

Having host privileges ensures you can share 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.

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 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 the divider between the two images to determine which shall display 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 or presenter 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 will allow 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 will also allow you to set filters to reduce the pick-up of background noise and further customize sound.

**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 instead. This video thumbnail would also show non-verbal communication by that participant. Also, 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 are by clicking the top right corner of their video thumbnail. Video settings can be modified to add a virtual 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.
Manage Participants – Launching this from the toolbar will give you a list of the participants. It will follow 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 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** participants. 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.
- **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
- **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 a 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.

*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.*

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.
- 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#”.

During a Zoom session, participants can share:
- An open file, i.e. PowerPoint
- An open program
- 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” to access “Advanced Sharing Options...” if you have not modified this on your profile settings 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 and for the meeting.

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.

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 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 between programs or documents. 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 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.

**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.

**Other Features**

**Polls/Quizzes:** This allows you to create multiple choice questions to use during a session. The 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 has been the option to show the respondents to each of the options in the poll rather than leave them anonymous, which continues to be 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 of creating polls and quizzes that can be launched into any meeting you host.

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 “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 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
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.

  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**: 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. You may wish to modify the names of the breakout rooms so groups can identify where to go.

- At the bottom of the breakout rooms window is a cog icon that will allow you to determine the length of breakout session, the length of the countdown after closing rooms and other features for the session. Review and modify these settings, especially for the length of the session, before launching.

- 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.

Pre-assignment 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. It is not, however, too difficult or time-consuming to do manual, synchronous breakout assignments.

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/teams/13/Virtual%20Office%20Hours.pdf](https://werklund.ucalgary.ca/sites/default/files/teams/13/Virtual%20Office%20Hours.pdf)

### Whiteboards

Whiteboards are now available in Zoom for synchronous or asynchronous use. They can be launched from the toolbar during a synchronous meeting or they can be opened and shared asynchronously for ongoing collaboration by individuals you have invited to view and contribute to the board by inviting them via their @ucalgary.ca email address. Once you have started the board, it would appear among the Whiteboards available under your Zoom profile. Whiteboards would be sorted among those initiated by you, those which have been shared with you and those which have been highlighted.

### Zoom Account Settings

Current Zoom settings require very little customization to adapt the Zoom environment to the specifications you would 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 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 it 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 Speaker view will give the video of participants tiled at the top and the person who is speaking will appear in the main screen.
- video “tiles” across the top of 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.

**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