



Zoom

Instructor Handbook

Werklund School of Education

January 2025

Version 13

This update to the Zoom Instructors Handbook coincides with the update of Zoom to version 6.3.1.

Key Changes – January 2025

Among the significant changes to Zoom since the last update to this guide are the following:

- The expanded use of the **AI Companion** throughout Zoom. It is featured in the toolbar and can be used for summarizing the meeting, and answering other inquiries. (p. 5-6)
- *Reactivation* of the **Host Key** to allow hosts to have someone else take over hosting duties for their meetings. (p. 4)
- Increased security on all meetings hosted on UCalgary Zoom accounts. (p. 6)
- Additional features to the collaborative tools used in zoom. The Whiteboards available include a variety of templates that can be customized for classes and meetings. (p. 4)

What is Zoom?

Zoom is a 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. Zoom has been used at Werklund School of Education for synchronous sessions for classes, graduate exams, (e.g., candidacy and final), meetings with research teams and students, etc. since 2018.

For a basic meeting, Zoom:

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

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

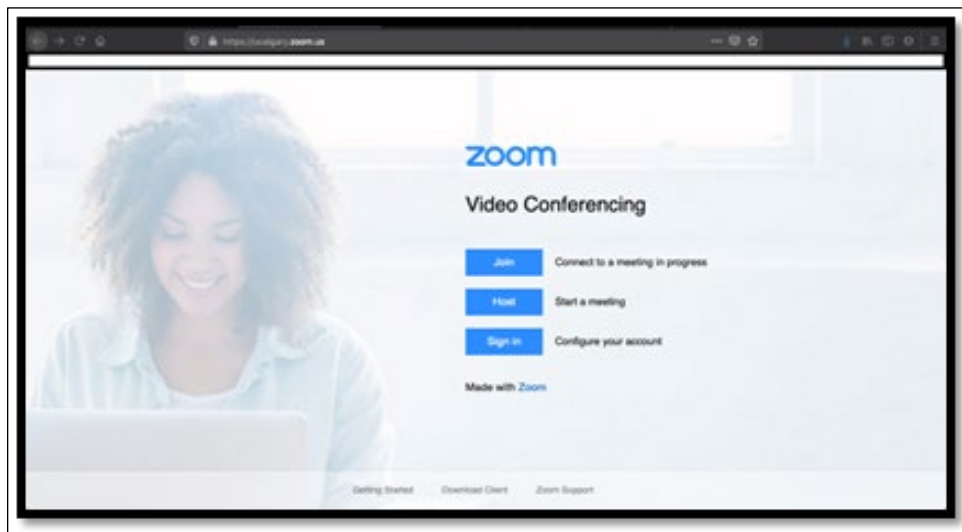
Activating Your UCalgary Zoom Account

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.

After clicking on **Sign In** for the first time, you will receive an email at your ucalgary.ca email. Follow the steps to launch your new account or, if you already have a personal Zoom account, merge it with the *licensed* University of Calgary account. If you have Zoom accounts from other institutions, you will need to keep them separate from your UCalgary account. You may find it easiest to run each account on a different internet browser. Also, if you have attempted to access the Zoom module in your UCalgary D2L

account *before* logging into Zoom you will get an error message from Zoom. This is resolved once you log in at <https://ucalgary.zoom.us> to activate your account.



If there are **issues activating your account**, revisit <https://ucalgary.zoom.us> to attempt to log in, then contact tandl@ucalgary.ca for help.

Non-UCalgary Zoom Accounts

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 Zoom meetings.. This will 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, Notes and (video) Clips can only be done for individuals with ucalgary.ca email accounts.

Profile Page

Photo

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

Note: 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. Commonly, a name is used as the Personal Meeting ID, as in <https://ucalgary.zoom.us/my/johndoe>. This also makes your personal ID easier for others to remember and share.

Host Key

This has **recently been re-activated** to let you share host privileges with another participant in your meeting. It can also be used to claim host privileges if you have not logged into the meeting properly. Use the 6-digit key or a customized one to take over or confer hosting privileges when you have not logged into your account or joined a meeting you have scheduled.

Collaborative Tools

The Collaborative Tools available in Zoom are intended for use during meetings and asynchronously. They can be accessed from the vertical tool bar on the left side of the profile page in Zoom. Upon selecting one of those collaborative tools, you (and your students) would have a view of whiteboards you have created, and that have been shared with you. You will have the option to share a collaborative document with UCalgary users, the wider public or to restrict use to only those with addresses you select. You will also be able to generate an embed code that would allow you to place the collaborative document into, for example, a content file in D2L.

Whiteboards allow participants to collaborate with a variety of annotation tools to draw, add post-it notes, upload files and images and write text on a single, asynchronous whiteboard. Zoom account holders can prepare a whiteboard in advance of a session for it to be collaborated on. There are also editable templates available to choose from for a variety of purposes or they can be prepared from scratch. Each of these features allows you to invite other users to collaborate synchronously and asynchronously on documents the whiteboards linked to your Zoom account. The whiteboards can also be organized within the environment for presentations. Other features include a timer, laser pointer

These whiteboards are infinite and can be divided up into smaller frames to assign to groups to work. When laid out in this manner, the whiteboard would be available for all individuals in a group to access and review.

Notes can also be created for participants to collaborate on synchronously or asynchronously. It can be shared and collaborated on in the same way as a whiteboard, but it is laid out like a text document.

Clips allows you to record yourself and/or your screen during a Zoom meeting for up to 2 minutes. This feature needs to be enabled on your Zoom profile to make use of it. When it is launched you will have the option of recording your screen, your video feed or both. Current UCalgary licenses allow for the creation of up to 5 clips. These clips can be shared with other users.

Surveys, polls and quizzes have been modified to allow these to be created independent from a Zoom meeting. They can now be created outside of a meeting and launched or added to a meeting later. The surveys now accommodate a wider range of question formats including multiple choice, matching, ranking, fill in the blank and long answer. New features allow surveys and quizzes to integrate imported images, a wider colour palette to create more options for surveying and quizzing.

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 may be required when logging into Zoom from a public or shared device such as a classroom computer.

Recordings & Transcripts are available for cloud recordings of Zoom sessions and transcriptions that you may have compiled from meetings that you have activated transcription for. Please note that transcriptions are only compiled from the moment that you activate the transcribing and that they need to be saved before the meeting is closed.

Reports

To generate a list of attendees at a Zoom session, select **Reports** from the vertical toolbar on the left side of your **Profile** page and then select **Usage Reports**. Use the calendar icons to select the one-month range that you wish to choose your meeting(s) from and click on the link for the number of participants. This will, in turn, give you a list of the attendees at the session. Selecting a report that shows unique users will amalgamate records for attendees who joined the same session multiple times.

Zoom for Smart Devices

The Zoom app can also be downloaded free from your respective app store for use on a smart device. After installation, please review your device settings to ensure the Zoom app has access to your microphone and camera. If you wish to use a Bluetooth device for audio, please test and practice the steps for connecting during a Zoom session.

Before using Zoom on a **smart device**, complete the account set up on a desktop 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. While this is not recommended for hosting a Zoom meeting, it will provide a connection for you as a participant.

Zoom Linked to Email

Zoom can also be linked to Outlook, Gmail or other mail 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. Please note that Outlook will often default to adding a Teams meeting to an appointment and that “add a Zoom meeting” is further to the right on the toolbar in Outlook. You can edit meeting settings in Zoom to add alternative hosts and registration options for a meeting.

The registration option in Zoom allows you to track the number of registrants you have and send them reminders before the meeting. A recent update to the Zoom registrations feature allows participants to select which meetings to attend when registering for a recurring series of meetings.

Customizing Your Settings

It is invaluable to go through the **Settings** page on your Zoom profile to customize the environment for

Zoom meetings you host. The settings you can customize include:

- AI Companion settings to pose questions to the companion and to generate a meeting summary
- security controls (password requirement, waiting room)
- waiting room for participants
- allowing participants to join before the host
- participant access to screen sharing privileges
- 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 the host can customize and save the participant order
- email notifications you would receive from Zoom
- block emails from specific domain names from registering for meetings

AI Companion

The AI Companion is available for use within meetings and while Zoom is available in the background outside of meetings as well. During meetings it can be used to summarize the session and has the capacity to do that even if you have arrived late. This summary can encompass discussion topics, action items and mentions of you during the part of the meeting you missed. If the Zoom app is open and available while you are at your computer, its AI tool can be used for a variety of inquiries.

Zoom Security

All Zoom meetings, whether scheduled or instant, now have security settings which require one security option, whether it is the use of a **waiting room, a passcode or other feature** before participants can join a session you are hosting. You may wish to review previously scheduled meetings to determine what feature has been added and to modify it to something you and your participants would find more convenient.

Hosting an Instant Meeting

To host an instant meeting:

1. Log into your account at <https://ucalgary.zoom.us> and click **Host** in the top right corner of right corner of your Profile page.
2. Select New meetings from the options, this takes you instantly to the meeting via the options of:

With Video On, With Video Off or Screen Share Only.

3. The meeting will occur at your Personal Meeting ID/Automatically Generated ID (On Default Selection), which you will have to share with participants you wish to meet.

Scheduling a Meeting

You can schedule a Zoom meeting through D2L, your account at <https://ucalgary.zoom.us> or via Outlook. When scheduling in Zoom, you will see the following page. Scheduling through D2L will ensure meetings for that course appear in D2L and provide students a link to join the 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.

The image shows a screenshot of the Zoom 'Schedule Meeting' form. The form is titled 'Schedule Meeting' and contains the following fields and options:

- Topic:** A text input field containing 'My Meeting'.
- + Add Description:** A blue link to add a description.
- When:** A date picker set to '06/11/2024', a time dropdown set to '9:00', and an AM/PM dropdown set to 'AM'.
- Duration:** Two dropdown menus for hours (set to '1') and minutes (set to '0').
- Time Zone:** A dropdown menu set to '(GMT-6:00) Mountain Time (US and Canada)'.
- Recurring meeting:** An unchecked checkbox.
- Attendees:** A text input field with the placeholder 'Enter user names or email addresses'.
- Registration:** An unchecked checkbox labeled 'Required'.
- Meeting ID:** Two radio buttons: 'Generate Automatically' (selected) and 'Personal Meeting ID 883 808 6617'.
- Template:** A dropdown menu set to 'Select a template'.
- Whiteboard:** An unchecked checkbox labeled 'Add Whiteboard'.
- Security:**
 - Passcode:** 816243. Below it, the text reads: 'Only users who have the invite link or passcode can join the meeting'.
 - Waiting Room:** Below it, the text reads: 'Only users admitted by the host can join the meeting'.
 - Require authentication to join.**
- Video:** Two sets of radio buttons:
 - Host:** 'on' (unchecked) and 'off' (selected).
 - Participant:** 'on' (unchecked) and 'off' (selected).
- Audio:** Three radio buttons: 'Telephone' (unchecked), 'Computer Audio' (unchecked), and 'Both' (selected).

At the bottom of the form are two buttons: 'Save' (in blue) and 'Cancel'.

Schedule For:

If you have more than one account that you schedule for, you will see this option when scheduling a

meeting. Select who you are scheduling for from the dropdown menu.

Topic

The default Topic is “My Meeting”; replace this with your event title, or course 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 15-30 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.).

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. This allows you to track and manage registrants for a session, generating a contact list you can use for communications prior to and after the session. Registrants receive an individualized link to access the session, which will enhance security of access. When monitoring registrations, it would be beneficial to review the domain names for unfamiliar or unusual email addresses. This would be a valuable step to follow to ensure security of the Zoom session and prevent Zoom bombing.

Meeting ID

This is generated automatically for scheduled meetings.

Security Options

There are **two** convenient security options available:

Meeting Passcode

This further enhances security by preventing unintended participants from joining a session. You may want to include this and communicate the passcode to participants. It can be customized for ease of recall.

Waiting Room

This allows you to vet participants before granting 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.

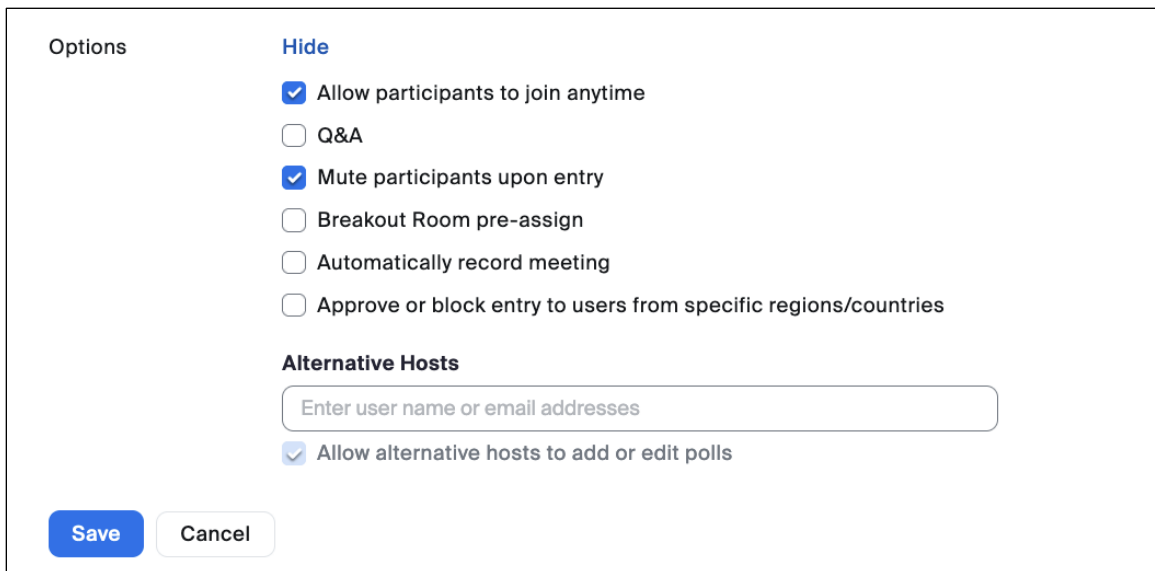
Focus mode can be used to show only video and content shared by the host, co-host, or spotlighted participants. To enable during a meeting, go to More – Start Focus Mode. You can also enable this feature to start in Focus Mode when scheduling your meeting.

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.



The image shows a screenshot of the Zoom meeting options dialog box. It has a title bar with "Options" and a "Hide" button. The main content area contains several settings:

- Allow participants to join anytime
- Q&A
- Mute participants upon entry
- Breakout Room pre-assign
- Automatically record meeting
- Approve or block entry to users from specific regions/countries

Below these is a section titled "Alternative Hosts" with a text input field containing the placeholder "Enter user name or email addresses" and a checked checkbox for "Allow alternative hosts to add or edit polls". At the bottom left are "Save" and "Cancel" buttons.

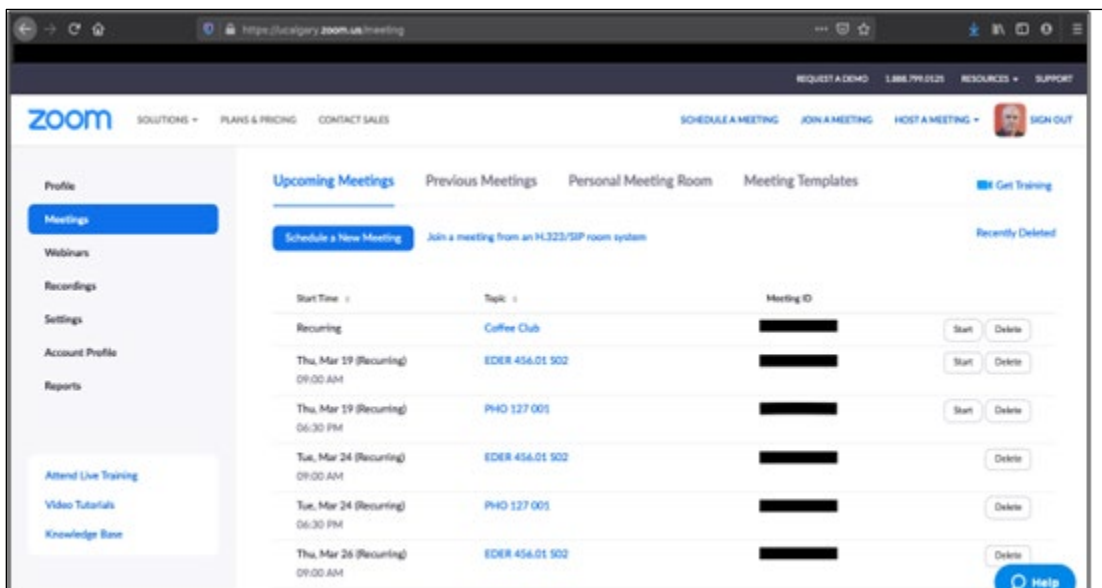
Note: Once the meeting is saved, a URL and Meeting ID are generated for the session. You can edit

sessions after you have saved them to modify alternate hosts, length, and times of the meetings in the listing or add additional sessions. You are not able to modify meetings in the Zoom module in D2L in this manner, only on your Zoom profile.

Co-Host /Alternative Host

If you are not able to host 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 and have the privileges required to manage 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. **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 the session. This does not have to be the presenter.



Upcoming Meetings page in Zoom

If the host is leaving the session early, remember to reassign hosting privileges to ensure the session remains open.

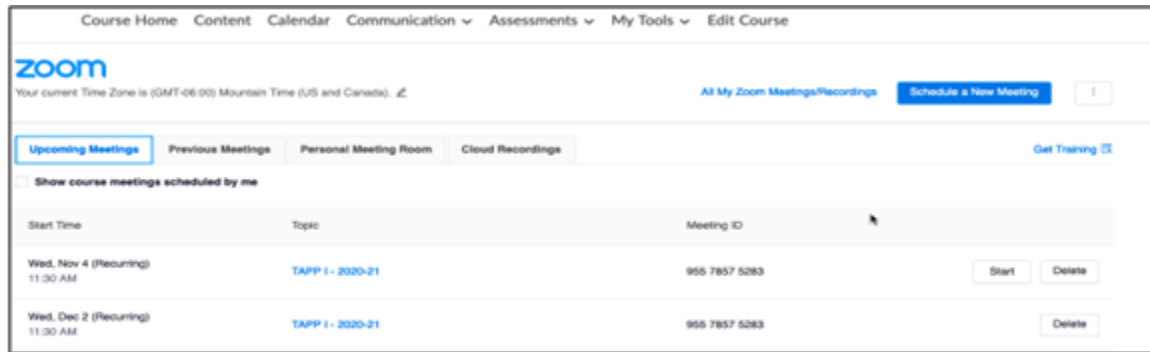
Scheduling in D2L

Scheduling through D2L will ensure scheduled meetings appear in D2L and provide students a link to join the Zoom session from 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 breakout room pre-assignments, quizzes, assignment of alternate hosts, etc. Can only be done within Zoom, not in the Zoom module in D2L.



Zoom module in D2L

Note: If you have already scheduled your classes within your Zoom account, there is a “three-dot” button to the right of “Schedule a New Meeting” in the Zoom module within D2L to allow you to import the Meeting IDs of sessions you had previously created in Zoom.

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.
- When scheduling in Outlook, participants receiving the meeting invite will receive the automatically generated Meeting ID and passcode for the session.
- If you schedule for more than one Zoom account, the meeting may appear under an account other than the one desired for a specific meeting.

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.

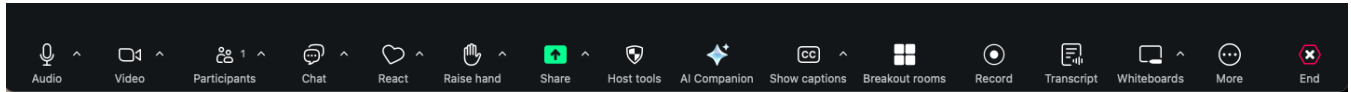
Hosting a Zoom Videoconference

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/instructor has controls for:

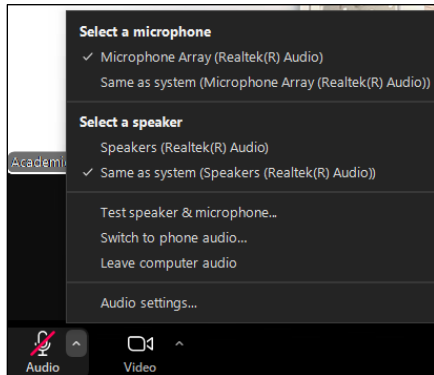
- Audio
- Video
- Participants
- Chat
- React
- Raise Hand
- Share Screen
- Host Tools
- AI Companion
- Captions
- Breakout Rooms
- Record
- Transcript
- Whiteboard
- More
- End

While screen sharing, the toolbar will move to the top of the screen along with controls for screen view and the option to interrupt another participant’s screen share if necessary. Be prepared for that toolbar to be obscured by a peripheral webcam or other content on your screen. 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 a divider between the two images to adjust the size of the displays for the speaker and shared 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.

Toolbar

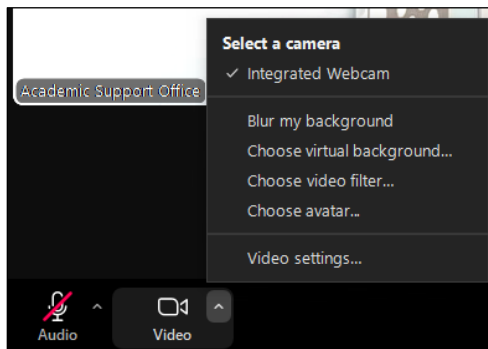


Audio/Mute

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.

Video

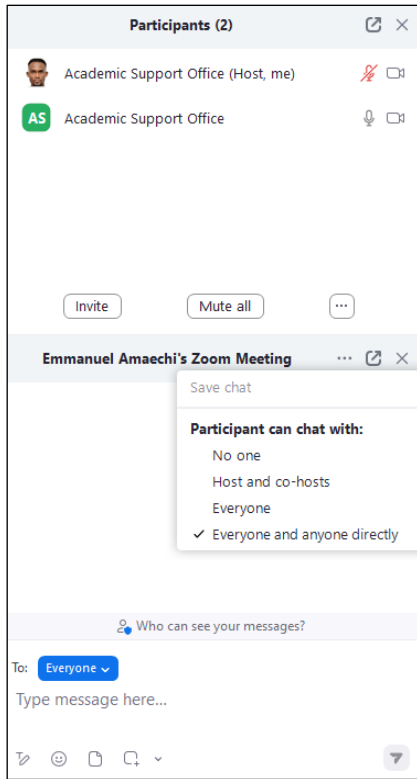


By clicking on the **video camera icon**, you can turn your camera on or off. If a participant's video is off, the user's name or avatar will appear instead.

- This video thumbnail will also show non-verbal communication (emojis) from that participant.
- Participants' avatar and video feeds move onscreen and in the participant list if they are speaking, have raised a hand or posted a non-verbal response.
- 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.

Manage participants

Launching this from the toolbar will give you a list of the 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. If you have a waiting room for your meeting, you will need to monitor this and admit participants to the meeting.



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
- **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 recording privileges to ensure compliance with FOIP protocols.
- **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.
- **Remove** - this would be used in extreme circumstances as Removing a participant should ensure they are unable to rejoin the session and recurring sessions at the same meeting ID
- 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 feed, the same options appear as when looking at the Participant list.

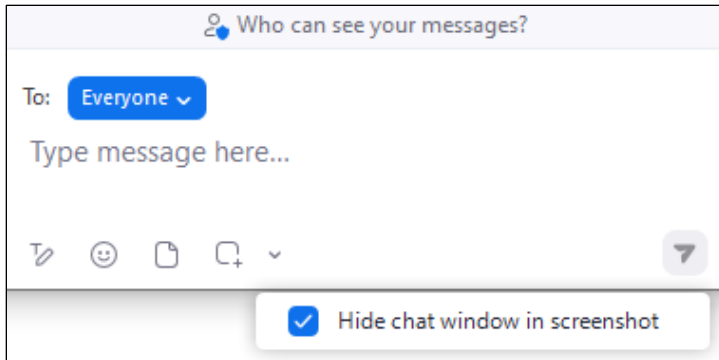
The Pin (or Spotlight) function ensures a Participant is featured on all screens while they are speaking. You can select Add Spotlight if more than one Participant is presenting or Replace Spotlight to transition to a new speaker. Participants must have their video on before you can Pin or Spotlight 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:
 - “Everyone” - for a public post to the entire audience.
 - Individuals – done by selecting their names from a drop-down menu.
- **Type message here...**
 - Enter your chat text in this space.
- You will also have options for formatting your response from the icons below:



- Emoticons (2nd icon) can be added to the chat
- Files can be uploaded (3rd icon) through the chat
- Screenshot can be taken whether of the whole screen or a selected area
- ... (three dots) – this allows you to save the chat transcript and to modify

permissions for the chat.

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 chat can be saved by clicking the icon at the top right corner of the chat window. The chat transcript and other artifacts saved from Zoom (whiteboards, video recordings, screen grabs, etc.), will appear in the **Documents** folder on the user’s computer in a Zoom sub-folder. The folder for a given meeting 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#”.

React allows participants to use emojis to express themselves non-verbally during the meeting. These reactions will appear for a few seconds.

Raise Hand allows participants to raise their hand. They will move up the participant list and change positions among the video participants while their hand is up. The hand will remain raised until they or the host lowers it.

Screensharing for Hosts and Participants

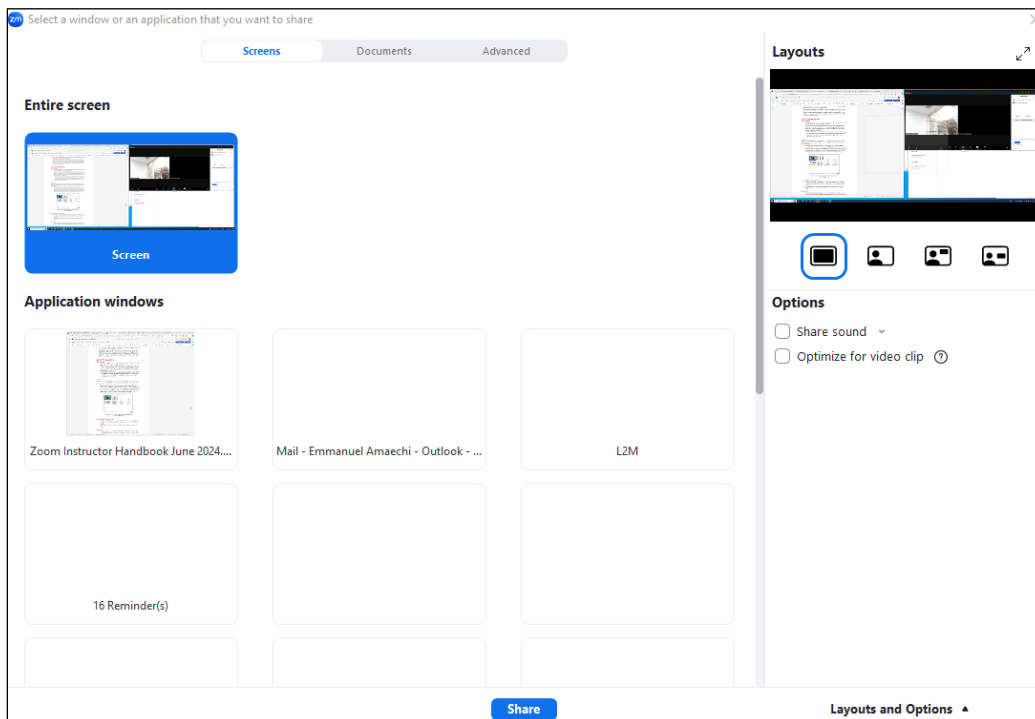
During a Zoom session, participants can share:

- An open document, i.e. PowerPoint.
- An open program.
- An Internet browser.
- A Zoom whiteboard.

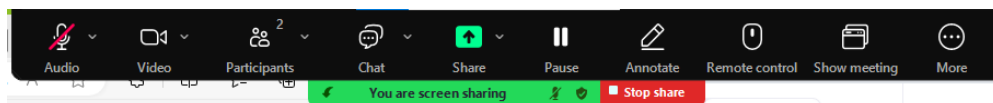
- Audio and video during your screen share. To do this, click on the “share computer audio” and “Optimize Screen Share for Video Clip” features.
- Computer sound without sharing your screen can be done under the Advanced options for Screen Share.
- Content from an iPad or iPhone (Android devices are not supported at this time.)

Note:

Participants can present or share their document without having hosting or co-hosting privileges, **but** the host may have to modify screen sharing privileges to allow this. Click on the ^ button next to “Share Screen” to access “**Advanced Sharing Options...**” in the toolbar. This will allow you, as host, to allow all participants to share their screens. However, the host 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. The annotation bar may appear vertically or horizontally.



While sharing, the speaker video can go into picture-in-picture mode. Participants will see the shared screen, as well as video of the speaker. The host will have the option of changing the view to strike a balance between the screen share and the speaker’s video.

The individual sharing a screen or document will see their shared content framed with a green border. Please note this to ensure you and your audience are viewing the same content. Zoom will not switch views if you happen to launch a pop-up window. If your document or program is not framed in green, stop or pause screen sharing to switch the share to the intended content.

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 Participant windows at the same time.

Document

Sharing the document you wish to share allows you to use less of your screen space for that document and set aside more screen space to monitor 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 that item, regardless of what is viewed on your screen or what may open if you click on a link in that shared document. Also bear in mind that the Chat and Participant windows can obscure the participants’ view of these documents if you place them over the shared document on screen. Regularly ask your participants to ensure they see what you want to be sharing when moving from one document to another or moving things on your screen.

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.

Other screen share advice:

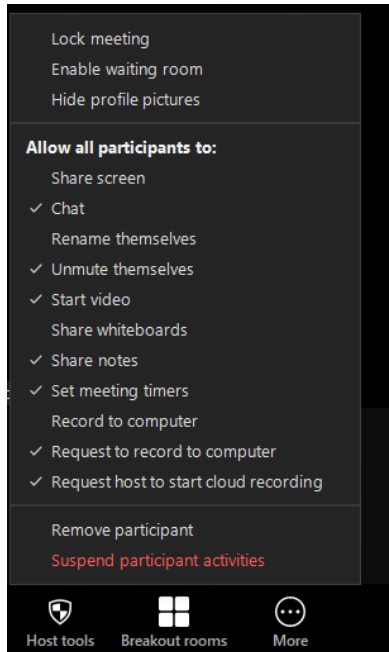
If you wish to have views of a) your presentation, b) the Participant window, c) the Chat and d) the Participant video feeds while screen sharing, organize the layout that you would use for your session prior to the session. Two monitors are invaluable for this.

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.

Host Tools

This feature allows you to modify permissions for participants to **chat, share screens, share video, 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.



Show Captions has been separated from the **Transcript** function. Captions will be shown spontaneously onscreen throughout the meeting while the transcript can appear in a separate window that will compile on the screen in a separate window. The transcript will be available to download at the end of the meeting. It can also be saved to the cloud and accessed through your Recordings & Transcriptions page on your Zoom profile.

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.

- At the bottom left of the breakout rooms window is a **cog icon** that allows you to determine the **length of breakout** session, the **length of the countdown** after closing rooms and other options for the session. Review and modify these settings, especially for the length of the session, before launching. It may default to closing the rooms after 10 minutes, which would pose an inconvenience if you are planning a longer breakout 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 have the option to forego the use of the invite and populate the rooms once the session is started.
- 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 broadcast written or audio messages to breakout rooms and can also broadcast the content on the screen in the main room to all breakout rooms. To do this, select the **Share to Breakout Rooms** option.

Pre-assignment to breakout rooms

You have the option of creating 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.

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 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 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. However, it is recommended that you have students save their artifacts from their breakout sessions to ensure they are accessible during the balance of the session and after the session is completed.

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 the video with the date of the session, title of the course and other identifying information. It can also be recorded to the cloud. If you do this, it will appear on your Zoom account in your Recordings & Transcriptions folder.

If you wish to share this video with students, you can copy the link from the recording and paste into in D2L. If you are sharing a recording that had been saved on your hard drive rather than the cloud, you can transfer the file in to D2L if it is less than 2GB in size. If it is larger, 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 provided. After accessing the YuJa Media chooser, you will be able to select the video, and a link will provide access to that recording.

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 remains 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.
- The host can share the results of the poll by selecting **Share Results**.

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**.

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 the Waiting Room in the security section when scheduling. With the 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 Zoom room until you are available for their appointment.

For further security and privacy during virtual 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 will 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 appointment.

For more information on best practices for virtual office hours, visit:

<https://werklund.ucalgary.ca/sites/default/files/teams/13/Virtual%20Office%20Hours.pdf>

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:

- **AI Companion** – this will allow you to define the settings you would like to have for the use of AI during your Zoom meetings
- **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 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 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 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 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 Devices

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>