



Zoom

Student 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:

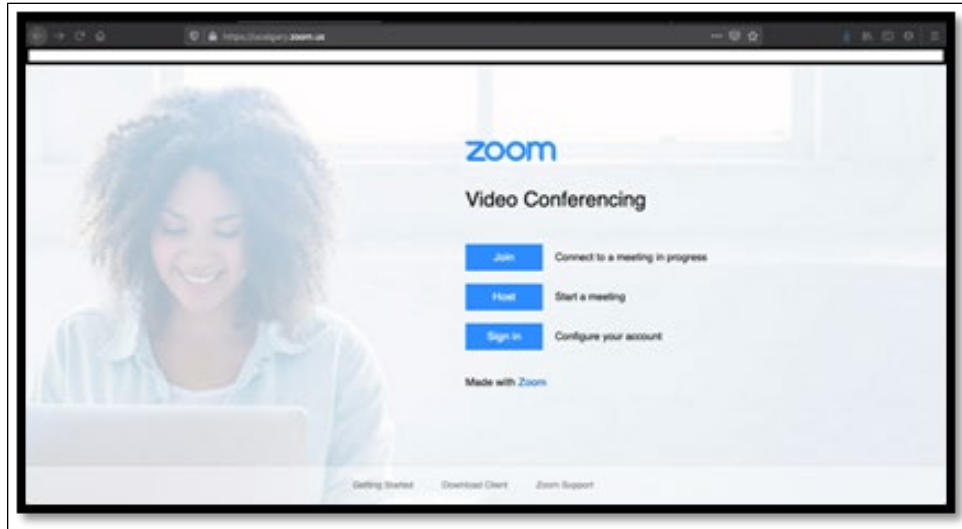
- accommodates video conferencing for groups of up to 300.
- can facilitate **breakout** room discussions, polling, collaboration via whiteboards, **screen sharing** of PowerPoints and other documents by hosts and participants.

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**.

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.

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.

Joining a meeting

Via D2L

Joining via the D2L Zoom page for your course may be the easiest way to join a Zoom session. After signing into D2L, Zoom can be found either in the Toolbar for the course or under the Communication tab. After accessing this page, you would simply click “Join” next to the meeting that is scheduled.

Via Zoom

1. Sign in at <https://ucalgary.zoom.us>
2. Click Join a Meeting and input the meeting ID to join the meeting.
3. When prompted, verify your log in with the passcode for the session.

Recently, there have been options to join by clicking an encrypted link, but please ensure you are logged into Zoom before joining the meeting.

Camera and Audio

It is recommended that you use a camera and suitable audio devices for best quality video and audio:

- Cameras and audio built into your laptop computer or smart device will be sufficient in most instances, but headphones with a built-in microphone are recommended.
- With desktop computers, peripheral video and audio equipment may be required and headphones are still recommended.

Video

- You may be broadcasting to fellow participants as soon as you are connected to the meeting. You may wish to leave video off until you are fully prepared to participate.
- If you are joining from a public space such as a café or library, you risk broadcasting your surroundings to other participants in the Zoom session. Consider leaving video off or using a virtual or blurred background in these environments.

Virtual Background

You have the option of using a virtual background while in Zoom. This allows you to put a picture behind you to hide the environment you are in. Blurring the background is also an option. Click the (^) button to the right of the Start Video icon in the toolbar to customize video settings.

Mac Users

Mac users may need to manually adjust privacy settings to allow the built-in camera to work. It may be common practice in larger groups for the host/instructor to encourage leaving video off to limit distractions and minimize use of bandwidth

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-its 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.

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.

Hosting an Instant Meeting

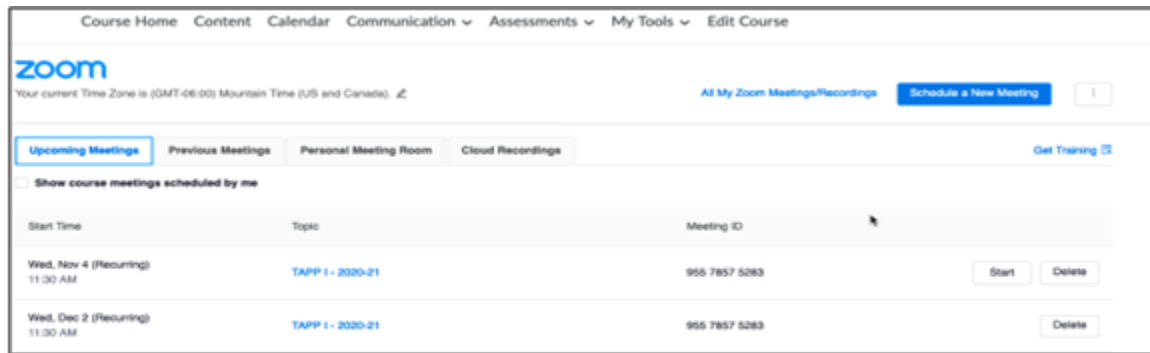
To host an instant meeting:

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 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.
4. Security settings may require the admission of a participant via the waiting room or the sharing of a passcode to join the session. The waiting room can be managed through the participant window.

Zoom in D2L

Instructors may have their Zoom meetings available for access through D2L. There is a D2L module built into D2L. If you are having issues accessing this module and receive error messages when trying to access the module, visit <https://ucalgary.zoom.us> login and that should address the issues in accessing Zoom via D2L. When accessing the Zoom module in D2L, you should see a list of Zoom meetings that are available to the class. In the student view of the available meetings, there will be a button to Join the meeting next to the each of the available meetings.



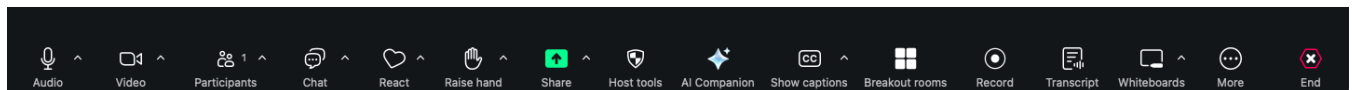
Zoom module in D2L

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>.

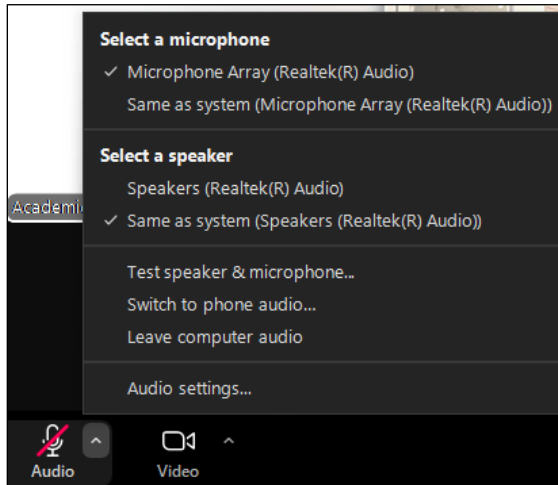
Having host privileges ensures you can share screen, launch breakout rooms, manage security settings and control other features available during the session.

Toolbar



Throughout a Zoom meeting, the toolbar appears along the bottom of the screen. When sharing your screen, the Zoom toolbar moves to the top of the screen. Moving your mouse over this tab will reveal your toolbar to participate in the session.

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 tool bar 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. The host may also allow participants to annotate during the screen share

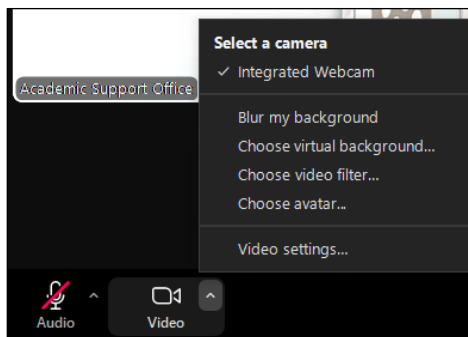


Audio/Mute

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

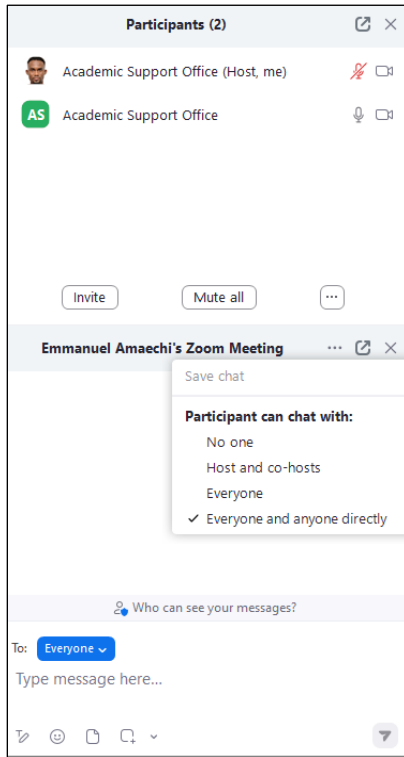


By clicking on the **video camera icon**, you can turn your camera on or off. If a participant's video is off, the user's name or avatar will appear instead.

- 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.

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

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.

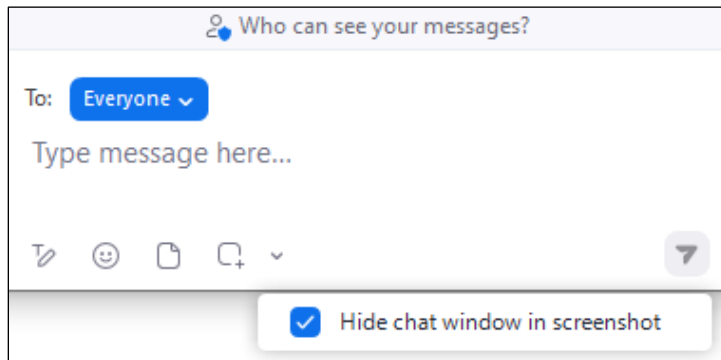
The Pin (or Spotlight) function ensures a Participant is featured on all screens while they are speaking. You can select Add Spotlight if more than one Participant is presenting or Replace Spotlight to transition to a new speaker. Participants must have their video on before you can Pin or Spotlight them.

Chat

The **chat** icon opens a text dialogue box that will allow you to follow the chat.

- 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:

- o “Everyone” - for a public post to the entire audience.
- o Individuals – done by selecting their names from a drop-down menu.
- **Type message here...**
 - o Enter your chat text in this space.
- You will also have options for formatting your response from the icons below:



- o Emoticons (2nd icon) can be added to the chat
- o Files can be uploaded (3rd icon) through the chat
- o Screengrabs can be taken whether of the whole screen or a selected area
- o ... (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

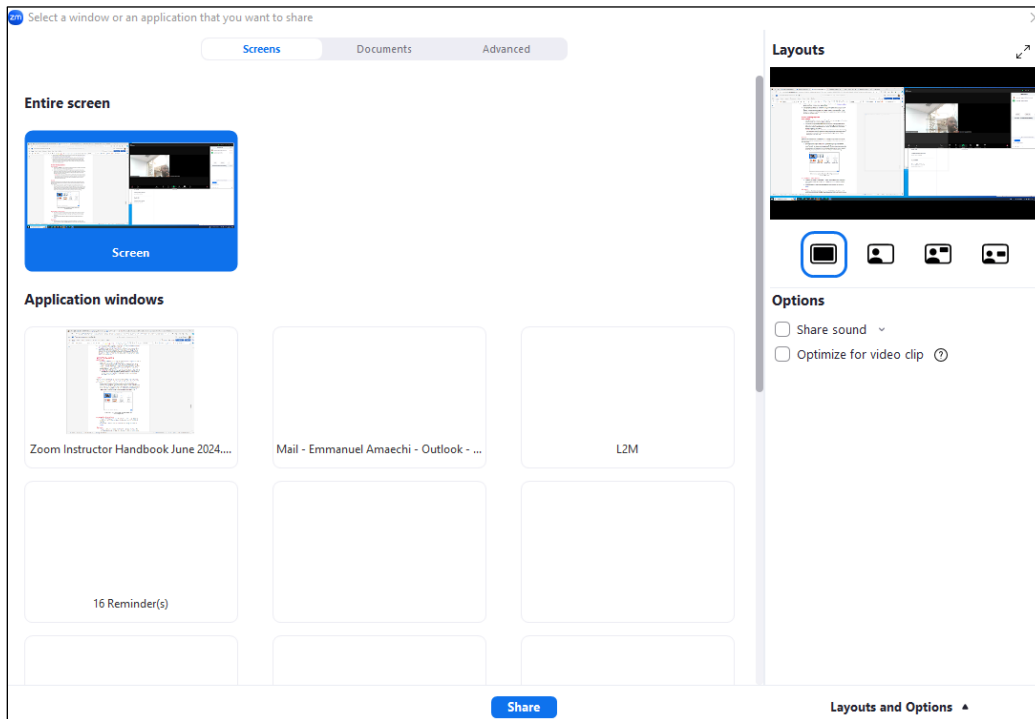
During a Zoom session, participants can share:

- 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

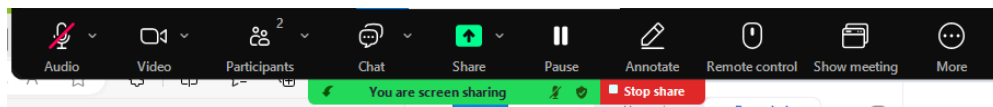
“Optimize Screen Share for Video Clip” features.

- 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.



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.

Screensharing 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, 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.

Breakout Rooms

After a breakout session has been launched, you can join the breakouts by clicking on the “Join” link next to a group or accepting to join a room if this is specified in advance. 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.

Features available to participants in the breakout room include:

Share

Participants in the breakout 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 breakouts 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 can be shared. However, it is recommended that you save your artifacts from their breakout sessions to ensure they are accessible during the balance of the session and after the session is completed.

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.

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 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.

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.

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](#).

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>