UNIVERSITY OF
CALGARY

Zoom

Student Handbook

Werklund School of Education

July 2024

Version 13

This update to the Zoom Instructors Handbook coincides with the update of Zoom to version 6.0.2

What is Zoom?

Zoom is an enterprise videoconferencing platform available to instructors, staff and students throughout the University of Calgary. Users can connect from computers, smart devices and, if necessary, from a telephone line. In Werklund School of Education, Zoom has been used for synchronous sessions for 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, allowing the **sharing** of PowerPoints and other documents for **presentation** by hosts and participants.

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

Activating Your UCalgary Zoom Account

1. Visit https://ucalgary.zoom.us and click on **Sign In**.
   Note: Clicking the **Host** or **Join** buttons **will not** grant access to all the features available when participating in or hosting a Zoom session. You must sign in to ensure you are recognized by your instructor as a UCalgary student during a Zoom session and to access all of the hosting privileges, such as sharing screen if you are hosting a meeting.
2. After clicking on **Sign In** for the first time, you will receive an email at your ucalgary.ca email address. 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 that you will need to keep separate from your UCalgary account, you may find it easiest to run each account on a different internet browser.
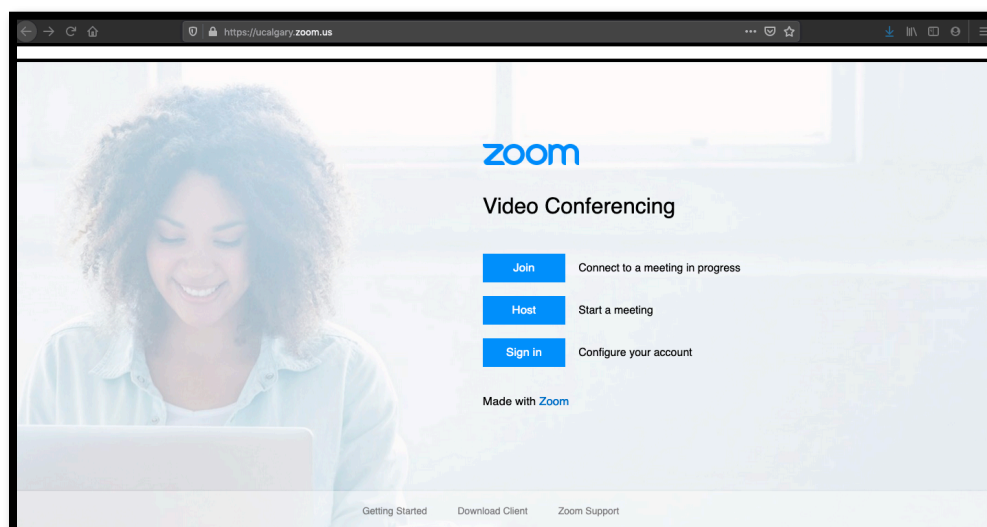
Note:
- Zoom has also been **integrated into D2L** for scheduling synchronous video sessions for instruction. To activate this module in D2L, activate your Zoom account with your University of Calgary ID (UCID login) first.

- If there are **issues activating your account**, please 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 synchronous meetings.
- Only individuals with @ucalgary.ca email accounts can be added as alternative hosts and collaborate asynchronously on Zoom Whiteboards, Notes and (video) Clips.

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

Profile Page

Photo
You may wish to customize your profile by adding a photo to appear as your avatar whenever your 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** to rejoin the meeting. After you are signed in, click **Join A Meeting** on your profile page and input the meeting ID number.

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.

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

Customizing Your Zoom Settings
It is invaluable to go through the Settings page on your Zoom account to customize your environment in Zoom. If hosting a meeting, please refer to the Instructor Zoom Manual for the settings you can customize.

Log-in for a meeting
To log into a meeting:

Joining 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.

Joining 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.

Hosting an Instant Meeting

To host an instant meeting:
1. Log into your account at https://ucalgary.zoom.us and click **Host a Meeting** in the top right corner of your Profile page.
2. Select from the options of With Video On, With Video Off or Screen Share Only to launch the meeting.
3. The meeting will occur at your Personal Meeting ID, which you will have to share with the participants you wish to meet.
4. If the host is leaving the session early, remember to reassign hosting privileges to ensure the session remains open for the remaining participants. This is the case with all Zoom meetings.

Hosting a Zoom Meeting
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 again. Having host privileges ensures you can share screen, launch breakout rooms, manage security settings and control other features available during the session.
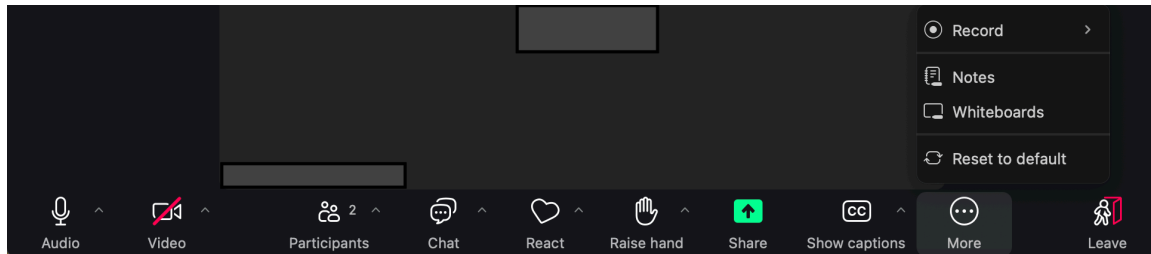
Participant's Toolbar with features appearing under the "more" button.

Participant'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:
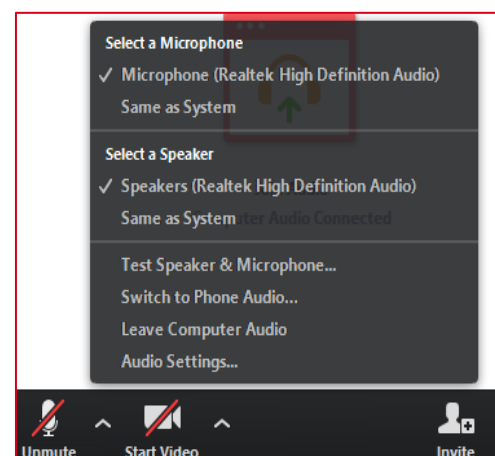
- Audio
- Video
- Participants
- Chat
- React
- Raise hand
- Share Screen
- Host tools
- Show captions
- More
- Leave (the meeting)
- A Breakout room button would appear when the host requires it.

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. If you wish to briefly unmute, this can be done by pressing the space bar.

- The small (^) button next to the microphone icon allows you to select and test your microphone and speaker. This is valuable when Using external or peripheral microphones and speakers to exchange audio with a classroom audience.
- The **audio settings** feature also allows you to set

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

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' move onscreen and in the participant list if they are speaking, have raised a hand or posted another 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 your background as well. This is recommended if you wish to hide or obscure your background in certain environments.

Participants

This feature gives you the option of creating an invitation to send people you wish to add immediately to the meeting. Launching the participant list from the toolbar will give you a list of the people in the meeting. The list 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, and allow you to modify settings for each of them and chat directly with them.   If necessary, you would also be able to launch a waiting room for participants who are joining the session. 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:
- o **Chat** - to send a private message to that individual
- o **Pin / Spotlight** - to emphasize for your view during the meeting
- 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 thumbnail, the same options appear as when looking at the Participant list, but you can also ask a participant to unmute themselves or turn on their video.
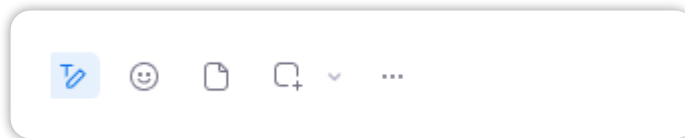
The Pin (or Spotlight) function ensures a Participant is featured on all screens while they are speaking. You can select Add Spotlight if more than one Participant is presenting or Replace Spotlight to transition to a new speaker. Participants must have their video on before you can Pin or Spotlight them.
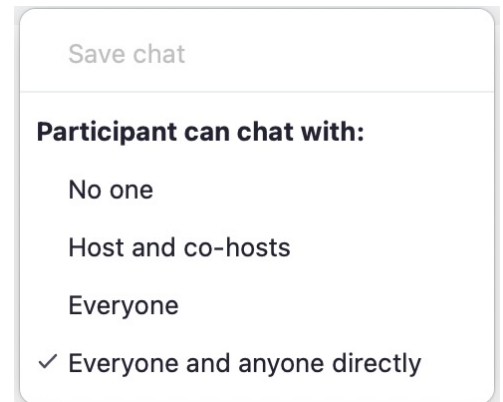
Chat

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.
- The ongoing text chat will be displayed in the chat window

- At the top of the window, you will see an ellipsis (…) icon that will open a window with the options for who participants can chat with during the session. There is also a link to save the chat transcript as well.
- At the bottom of the chat window you will see a blue dropdown menu featuring **Everyone** for messages you want to share with everyone in the session and a list of the individual participants if you want to send a direct message to one person.
- **Type message here…**
  - Enter your chat text in this space.
- You will also have options for formatting your chat entries (1st icon) and also use the following features:
  - **Add** Emoticons (2nd icon) can be added
  - Upload files to share with other participants (3rd icon) through the chat
  - Screengrabs (4th icon) can be taken whether of the whole screen or a selected area

Controls for participant chat and the "Save Chat" link.

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

Saving Zoom Chat

All participants can save the chat from a Zoom session by clicking the ellipsis (…) button at the top of the chat box. The 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 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#".

Screensharing

During a Zoom session, participants can share:
- An open document
- An active program.
- An Internet browser.
- A Zoom whiteboard or Notes document.
- 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
- Documents accessible
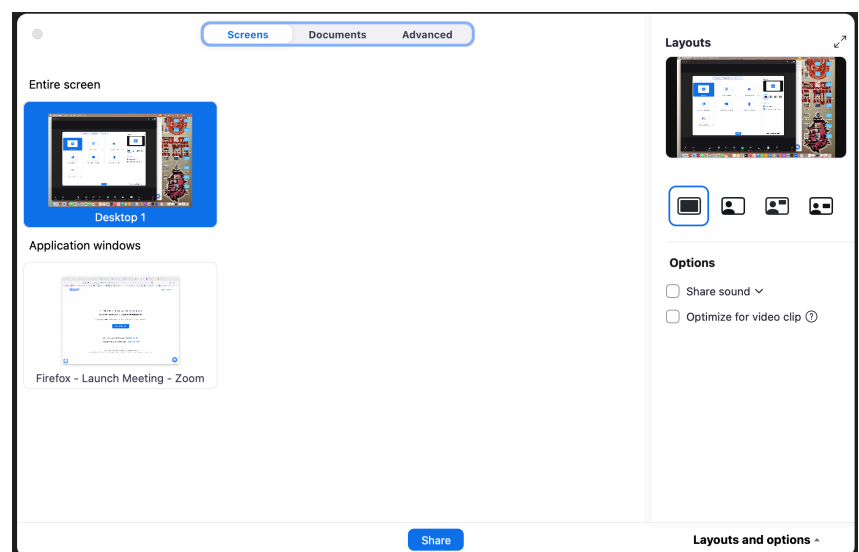
The Share Window in Zoom with options to share, options to choose Documents or Advanced Share settings along with options for layout of document and video during screen share and options to Share Sound **or** optimize for video.

from your Microsoft OneDrive or SharePoint accounts.

If you are unable to share advise the host to make you a co-host or to modify the screen share settings to allow participants to share screen.
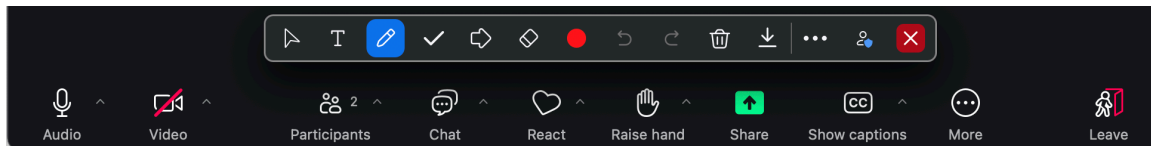
The participant's toolbar accompanied by the annotation toolbar available during screen sharing.

While screen-sharing, the toolbar will move to the top of the screen. There will also be a small round, green checkmark icon available to activate the annotation toolbar. 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. It can be moved around for convenience during the meeting as well.

o   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.
o   There is also the option for viewers to switch between views of the participants and the shared screen. Tabs will appear at the top of the Zoom window to allow participants to switch between the views.
o   The individual sharing a screen or document will see their shared content framed by 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 to another application or document during your session. 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. Please be avoid sharing personal or sensitive materials. If you are presenting from only one monitor, share the document instead as you may need to monitor Chat and Participants at the same time.

Document
Sharing the document you wish to share allows you to use less of your screen space 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 what you are sharing, regardless of what is viewed on your screen. However, the Chat and Participant windows can obscure the participants' view of these documents if you place them over the shared document on screen. Regularly check with your participants to ensure they see what you want to be sharing.
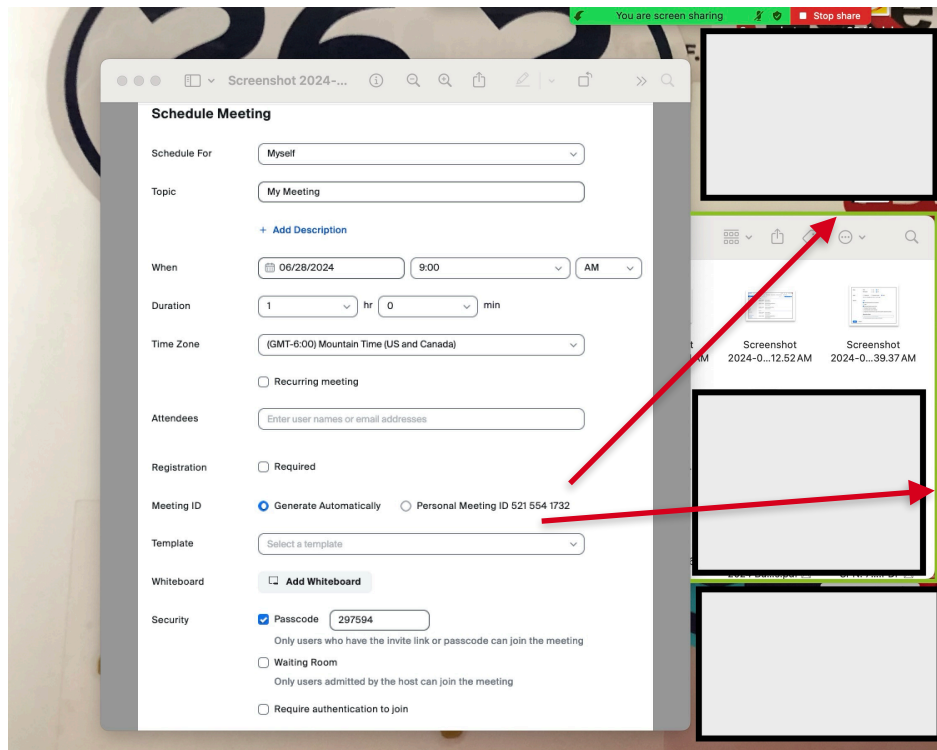
An example of a pop-up window blocking the Presenter's view of the shared document, which is still framed with a light green line. This occurs when the Presenter has opened a new window without switching to share the new item.

Documents
- This allows access to Zoom Whiteboards and Notes and Microsoft One Drive and SharePoint to launch and share documents from those collections to be accessed and shared during a Zoom meeting. Files from other sources (eg. Google Drive, etc. Would be shared via an internet browser but would not be accessible via the Zoom share. Users would use the link to the document to edit from their respective devices.

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:
- Using two monitors or a very large one will allow you views of a) your presentation, b) the Participant window, c) the Chat and d) the Participant video feeds while screen sharing.
- Sharing the opening slide of a presentation while streaming music before the session can set a welcoming tone and ensure participants they have come to the right Zoom session.

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.

Closed Captioning
Captioning allows a live transcript to be generated on-screen during the session. It is set up to be generated in the form of captioning along the bottom of the screen, but it can be modified to show the transcript in full with speakers' names included in a full text in a separate window. A full transcript can also be saved to capture the text that was generated throughout the time captioning was activated. This will only be generated after the option is activated and cannot be accessed if captioning had not been turned on.

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. The transcript can be downloaded but this must be done before the meeting is closed.

Breakout Rooms

When an instructor launches a breakout session, groups will be formed randomly, by the instructor or via self-selection. Self-selection rooms may just be numbered or they may be named with a theme or topic for the group to join and discuss. If you are being directed to the room by the instructor, there may be a pop-up window inviting you to join the room or you will be automatically moved to the breakout.

Features available to you in the breakout room include:
Share
- Participants can share their desktop, documents or the Zoom whiteboard as they would in the main room.

- o Sharing accommodates small group discussion and allows recording of notes, saving of whiteboard and other artifacts from the break-out session, etc.
- o Participants/students can access their desktops to use any application they choose. This can be saved. When they return to the main room, and have share screen privileges, they can **Share Screen** to debrief to the rest of the group with the files they have collaborated on.
- o They can save the whiteboard content or share it from a folder.

- While in the breakout room, the **More** link gives participants access to:
  - o Chat
  - o Ask for Help
  - o Disable Participant Annotation
  - o Hide Video Panel
  - o Audio Options
  - o Video Settings
  - o Leave Breakout Room
- Participants can select Leave Breakout Room in the breakout session, which will return them to the main room. Or, the host 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. Ensure that you save your content before the breakout room is closed.

Collaborative Tools

Whiteboards and **Notes** and have been made available as collaborative tools in Zoom. Each of these features allows you to invite other users to collaborate synchronously and asynchronously on documents linked to your Zoom account.

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

Clips
This 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. Current UCalgary licenses allow for the creation and use of up to 5 clips. These clips can be shared with other users.

Scheduler

There is a new scheduler module built into recent updates to Zoom, but it is not currently available with the University of Calgary's Zoom license.

Reports

If you wish to have a record of who was in attendance for a zoom meeting you hosted, you can get a list of attendees at a Zoom session. From the vertical toolbar on the left side of your **Profile** page, select **Reports** 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, generate a list of the attendees in the session. Selecting a report that shows unique users will amalgamate records for attendees who joined a session multiple times rather than displaying multiple attempts to log into the session.

Zoom for Smart Devices

- The Zoom app is available for smart devices. You can download it free from your respective app store. After installation, please review your device settings to ensure the Zoom app has access to your microphone and camera.
- Before using Zoom on a **smart device**, complete the account set up on a 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.
- 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.

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

These options allow you to require 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, less important for smaller meetings with close colleagues, but are essential when hosting a session with a larger public audience.

Other settings you may modify:
- **Audio Type** – although you set this when scheduling meetings, it is good to leave it set on **Telephone and Computer Audio.**
- **Join Before Host** – it is good to allow this on both the settings page and with each meeting you schedule.
- **Use Personal Meeting ID when starting an instant meeting** - this allows you to use a consistent ID for instant meetings. You can communicate this to 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.

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