



UNIVERSITY OF  
CALGARY

# Zoom

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USER HANDBOOK



Werklund School of Education  
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*For Zoom version 6.5.4*

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## 1. 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 a telephone line. Zoom has been used at Werklund School of Education for synchronous sessions for classes, graduate exams (e.g., candidacy and defense), 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 to [UCalgary ComMedia](#).

### 1.1 How do I access Zoom?

To access Zoom, sign in at [ucalgary.zoom.us](https://ucalgary.zoom.us) using your UCalgary credentials. If you're new to Zoom, scroll down for guidance about [activating your UCalgary Zoom](#) account.



### 1.2 Using the Zoom App

You can use Zoom on your smartphone or tablet by downloading the free app from your app store. After installing, give Zoom permission to use your **microphone**, **camera**, and any **Bluetooth devices** you plan to use. Before signing in on your device, first set up your Zoom account on a desktop. Then open the app, choose **Single Sign-On (SSO)**, enter “**ucalgary**” as the company domain, and log in with your UCID and password.

### 1.3 Types of Zoom Meetings

Zoom offers **scheduled meetings**, which are planned with set times and invitations, and **instant meetings**, which start immediately without setup. Scheduled meetings are ideal for organized sessions, while instant meetings are great for quick, informal chats. We provide guidance about **scheduling Zoom Meetings** in [section 5.2](#) of this guide.

#### *Scheduled Meetings Versus Instant Meetings*

SCHEDULED MEETINGS 	INSTANT MEETINGS 
Ideal for organized sessions or regularly occurring events	Great for quick, informal chats

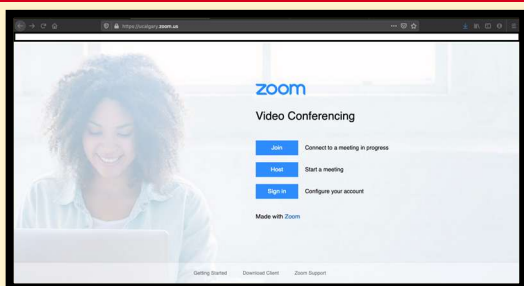
## 1.4 Linking Zoom to Calendar

Zoom can be linked to Outlook, Gmail, or other email platforms to sync meetings with your calendar. In Outlook, use the “**Add Zoom Meeting**” button in the toolbar—note that it may default to Teams. You can also edit Zoom meeting settings to add alternative hosts and enable registration, which lets you track attendees and send reminders, including flexible options for recurring meetings.

## 2. Getting Started

### 2.1 Activating Your UCalgary Zoom Account (First Time Users)

To activate your Zoom account for the first time, follow these steps.



#### STEP 1: SIGN IN

Visit <https://ucalgary.zoom.us> and click on **Sign In**.

**Important:** Simply clicking the **Host** or **Join** buttons does not give you full access to Zoom features. To share your screen, manage participants, and use host controls, you **must sign in to your Zoom account first**.



#### STEP 2: LAUNCH YOUR ACCOUNT

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.

### 2.2 Troubleshooting Login and Merging Zoom Accounts

Here are some common issues related to logging into Zoom.

<p><b>I already have a personal Zoom account.</b></p>	<p>Log in at <a href="https://ucalgary.zoom.us">ucalgary.zoom.us</a> with your @ucalgary.ca email to access full Zoom features like co-hosting, screen sharing, polling, and participant management. If you want to use your personal account, then it must be merged with the UCalgary license to host effectively. Features like adding alternative hosts and sharing Whiteboards, Notes and (video) Clips can only be done for individuals with ucalgary.ca email accounts.</p>
<p><b>I have Zoom accounts with different institutions.</b></p>	<p>Log in at <a href="https://ucalgary.zoom.us">ucalgary.zoom.us</a> with your @ucalgary.ca email to access full Zoom features like co-hosting, screen sharing, polling, and participant management. If you have Zoom accounts from other institutions that you will need to keep them separate from your UCalgary account. We suggest running each account on a different internet browser.</p>
<p><b>I have already attempted to login to Zoom through my UCalgary D2L and now</b></p>	<p>If you have attempted to access the Zoom module in your UCalgary D2L account before logging into Zoom you may get an error message from Zoom. This can be</p>

I'm getting an error message.	resolved by logging in at <a href="https://ucalgary.zoom.us">https://ucalgary.zoom.us</a> to activate your account. After that, the D2L and Zoom accounts will be "linked" to one another.
I'm still having issues logging into Zoom.	If there are persistent <b>issues activating your account</b> , revisit <a href="https://ucalgary.zoom.us">https://ucalgary.zoom.us</a> to attempt to log in, then contact <a href="mailto:tandl@ucalgary.ca">tandl@ucalgary.ca</a> for help.

### 3. Setting up your Zoom Profile

Customize your Zoom experience with these profile settings to ensure smoother meetings and better visibility.

#### Profile Photo



Customize your Zoom profile by adding a photo—this will appear when your video is off.

If your avatar doesn't show during a meeting, you're likely not signed in. To fix this:

1. Leave the meeting
2. Go to [ucalgary.zoom.us](https://ucalgary.zoom.us) and Sign In
3. Rejoin using Join a Meeting and enter the Meeting ID  
Note: Clicking a meeting link won't sign you into your Zoom account.

#### Pronouns



Zoom lets you add pronouns to your profile and choose when to display them:

- Always
- Never
- Decide before each meeting

#### Meeting ID



You can personalize your Meeting ID (e.g., [ucalgary.zoom.us/my/johndoe](https://ucalgary.zoom.us/my/johndoe)) to make it easier to remember and share.

#### Host Keys



Use your 6-digit (or custom-made) Host Key to:

- Share host privileges with others
- Claim host role if you didn't sign in properly. This is helpful when joining a meeting you scheduled but aren't recognized as host.

## 3.1 Customizing Your Zoom Settings

Take a few minutes to review the **Settings page** in your Zoom profile to tailor your meeting experience. You can adjust features like:

- AI Companion tools
- Security options (e.g., waiting room, passcodes)
- Screen sharing permissions
- Whiteboard saving
- Live transcription
- Virtual backgrounds—including UCalgary-branded ones.



You can also manage email notifications, control participant visibility, and block registrations from specific domains.

## 3.2 Zoom Virtual Backgrounds

Zoom allows set up a **virtual background** or **blur your background**. These features are useful for privacy, especially if you are joining a session from a public place.

### How to Set a Virtual Background

1. Open the **Zoom desktop app**.
2. Click your **profile picture** → **Settings** → **Background & Effects**.
3. Under **Virtual Backgrounds**, click the **+** icon to upload a new image.
4. Select a background from your library or upload a UCalgary-branded one.

✅ **Tip:** Use a solid-colored wall and good lighting for best results. A green screen is optional but improves quality.



1: Example of a virtual background available for download from UCalgary brand assets (link below).

### How to Blur Your Zoom Background

In the same menu, you can select **Blur** to softly obscure your background while keeping you in focus.

## 3.3 Download UCalgary-Branded Backgrounds

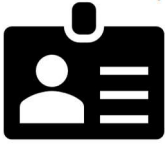
You can download official University of Calgary virtual backgrounds and other assets, like PowerPoint templates:

👉 <https://www.ucalgary.ca/brand/download-logos-and-templates>

## 3.4 Zoom Security Features

Zoom offers robust security tools to protect user accounts and meetings.

### Hosting Security Features



All Zoom meetings — scheduled or instant — require at least one security feature, such as a **waiting room**, **passcode**, or **authenticated access**. You may want to review your scheduled meetings to see which option has been applied and adjust it to suit your needs and participants' convenience.

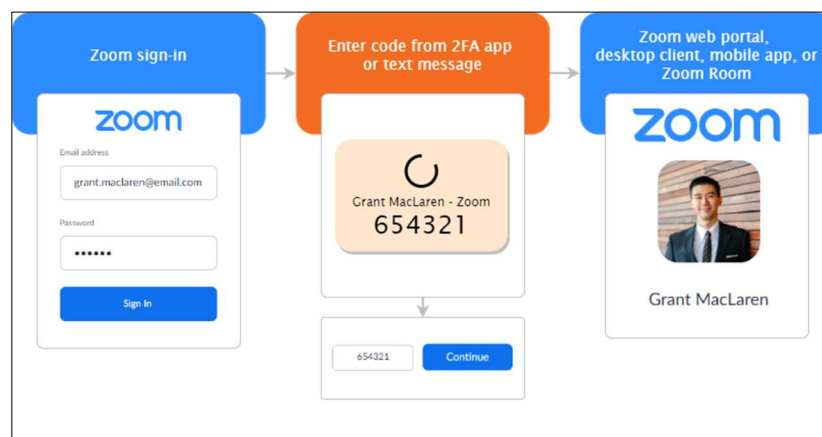
## 3.5 Security Features for You

### Two-Factor Authentication

You can turn on two-factor authentication for Zoom to add extra security. When enabled, you'll need a second code—sent by text, email, or the Authenticator app—to log in. For troubleshooting, visit the [UCalgary Zoom guide](#).



**Note:** Zoom may still require a code on shared devices, even if 2FA is turned off.



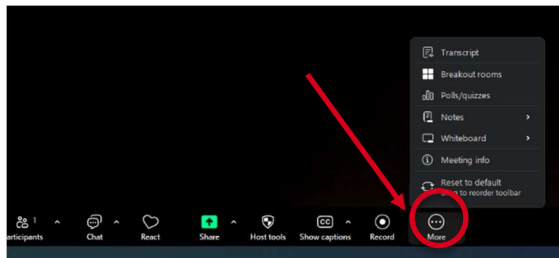
2: Zoom 2 Factor Authentication (2FA) Menu

### Activate Two-Factor Authentication

1. Go to [ucalgary.zoom.us](https://ucalgary.zoom.us) and click **Sign In**.
2. In the left-hand menu, click **Profile**.
3. Scroll down to **Two-Factor Authentication**.
4. Click **Turn On**.
5. Choose your method:
  - **SMS** (text message)
  - **Email**
  - **Authenticator App** (e.g., Microsoft Authenticator)
6. Follow the prompts to verify and complete setup.
7. Save your **recovery codes** in case you lose access to your device.



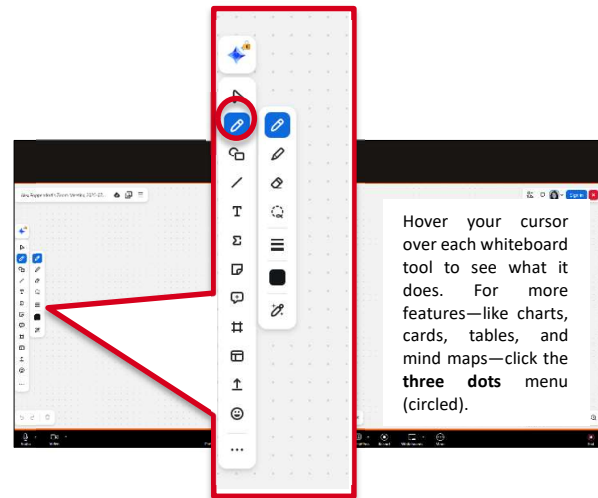
## 4. Collaborative Zoom Tools



3: Use the **More** button to access additional collaborative Zoom tools.

### 4.1 Whiteboards

Use **Zoom Whiteboards** to draw, write, and add sticky notes—live or asynchronously. Create boards in advance, use templates or start from scratch, and divide into frames for group work. Share links to collaborate anytime, and access or edit whiteboards during meetings through your Zoom account.



4: Use **Whiteboard** to create collaborative charts, mind maps, tables, and more.

#### Accessing Zoom Whiteboards

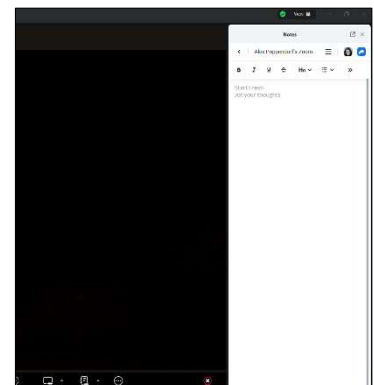
1. **Sign in** at [ucalgary.zoom.us](https://ucalgary.zoom.us) using your @ucalgary.ca email.
2. Click on the [Whiteboards](#) tab in the Zoom toolbar or access whiteboards by clicking **More**.
3. Select **Create** to start a new whiteboard.
4. Choose a **template** or begin with a blank board.
5. Click **Share** to invite others to collaborate.
6. To access during a meeting, click **Whiteboards** in the Zoom toolbar.

### 4.2 Notes

**Zoom Notes** is a built-in feature that allows users to create, edit, and share notes directly within the Zoom platform, before, during, and after meetings. It's designed to streamline collaboration and eliminate the need for third-party note-taking tools.

#### Accessing Zoom Notes

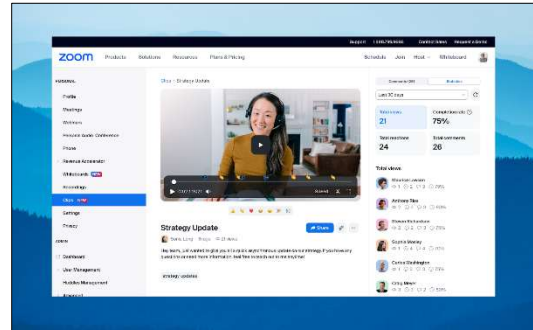
1. In a meeting, click **Notes** in the toolbar.
2. Select or create a note.
3. Share and edit with participants.
4. Outside meetings, go to the **Notes** tab in **Zoom desktop** or web to manage notes.



5: Use **Zoom notes** to collect and share thoughts during a Zoom session.

### 4.3 Clips

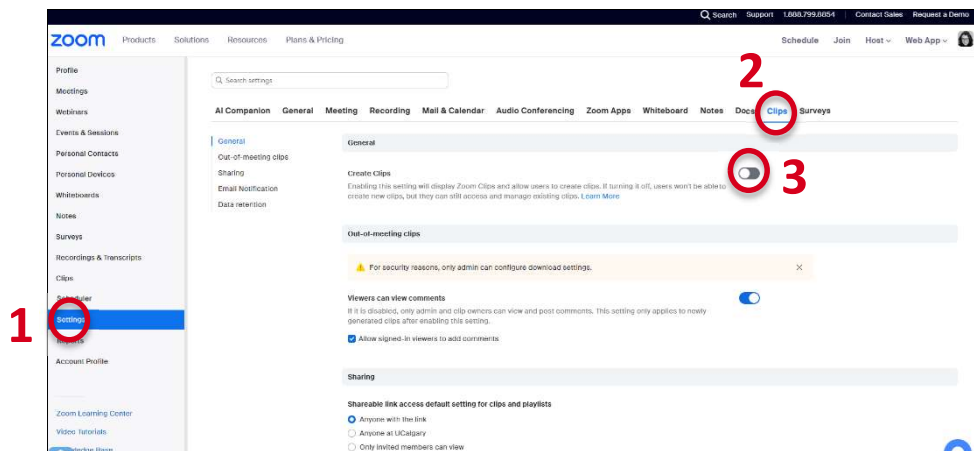
**Zoom Clips** lets users record, edit, and share short-form video messages of up to 2 minutes without needing a live meeting. You can capture your screen, webcam, or both, making it ideal for quick updates, instructional videos, or asynchronous communication. Clips are stored in a centralized library, can be tagged for easy search, and shared internally or externally with view permissions.



#### Enabling Zoom Clips

You must enable Zoom Clips in your UCalgary Zoom account before you can use it. To activate Zoom Clips:

- **Go to** [ucalgary.zoom.us](https://ucalgary.zoom.us) and click **Sign In**.
- Once logged in, click **Settings** in the left-hand menu.
- Navigate to the **Clips** tab.
- Toggle the **Zoom Clips** feature to **Enable**.
- If prompted, confirm the change.
- You can now record up to **5 clips**, each up to **2 minutes**, and share them with others.



6: Toggle “Clips” to enable the Zoom Clips features.

#### Using Zoom Clips

Once enabled, you can use Zoom Clips in your Zoom account.

1. Open **Zoom** (desktop app or web portal) and sign in.
2. Click the **Clips** tab (or find it under “**More**”).
3. Click **New Clip**.
4. Choose what to record:
  - a. Screen only
  - b. Video only
  - c. Screen + Video
5. Adjust settings (audio, video source, resolution, background).
6. Click **Start Recording** (you’ll get a countdown).
7. Use the floating toolbar to pause, mute, annotate, or stop.
8. Click **Stop** to finish and save your clip.

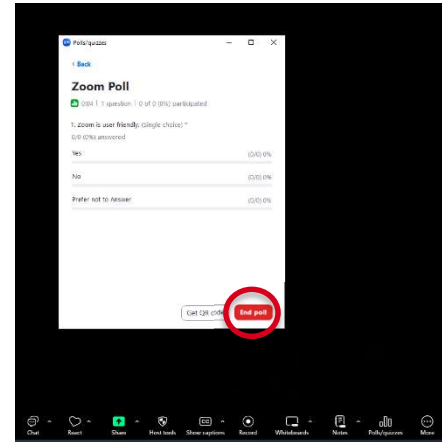
9. Review, trim, and add a title or tags.
10. Share via link or email and manage clips in your library.

## 4.4 Polls, Quizzes, and Surveys

Zoom allows **surveys, polls, and quizzes** to be created outside of meetings, making it easier to prepare in advance and reuse content. These tools can be launched during a meeting or added later. Find more details in [section 6.6](#) of this Zoom guide.

### Create a Zoom Poll, Quiz, or Survey Before a Meeting

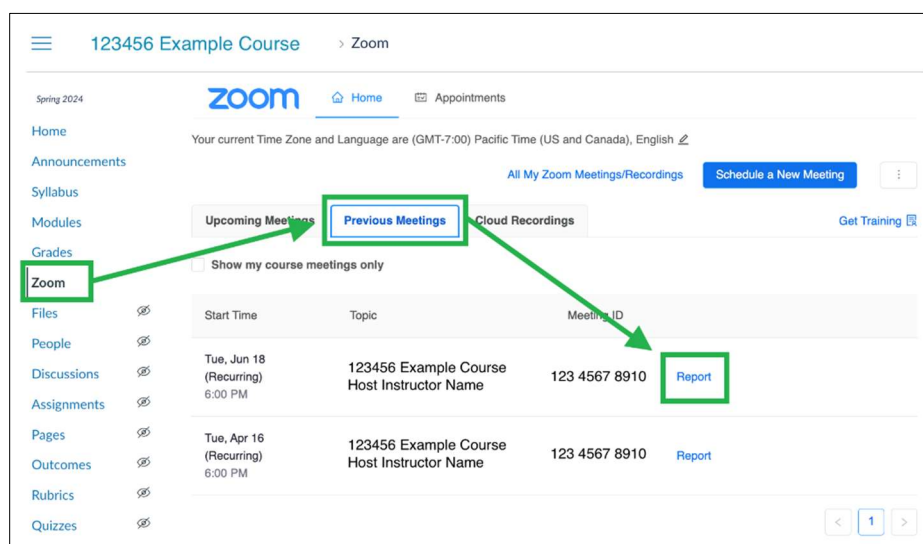
1. **Sign in** at [ucalgary.zoom.us](https://ucalgary.zoom.us).
2. In the left menu, click **Surveys**.
3. Click **+ Create** and choose **Survey, Poll, or Quiz**.
4. Enter a title and select your question types (e.g., multiple choice, ranking, fill-in-the-blank).
5. Use the **gear icon** to adjust settings (anonymous responses, feedback, etc.).
6. Customize visuals with the **color palette** or add images.
7. Click **Save** to store it in your survey library.
8. Later, attach it to a meeting or share via link. Activate the poll, quiz, or survey in the Zoom by pressing **Launch**.
9. When you're ready to close the poll, click **End poll** (image).



7: Use the Zoom Poll feature to create polls, quizzes, and surveys in your Zoom.

## 4.5 Attendance Reports

To view who attended your Zoom meeting, sign in at [ucalgary.zoom.us](https://ucalgary.zoom.us), go to **Reports**, then select **Usage Reports**. Choose a **date range**, find your meeting, and click the participant count to see a list of attendees, including join/leave times. You can also choose to show unique users to merge duplicate entries from participants who joined multiple times.



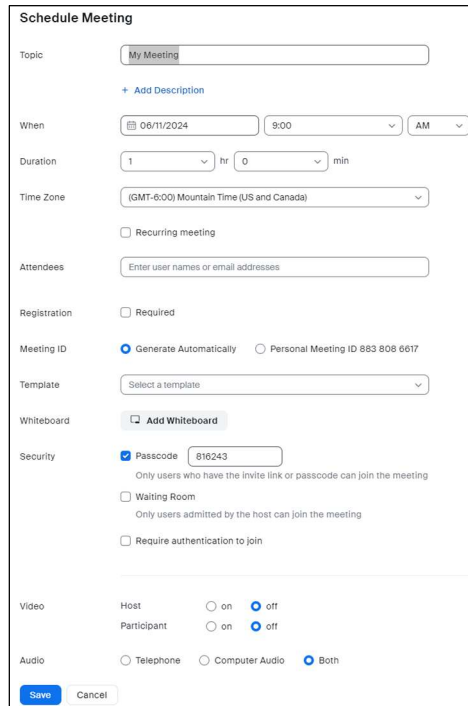
8: Generate Zoom attendance reports to see who joined your Zoom.

## 5. Hosting Zoom Meetings: Step-by-Step

### 5.1 Hosting an Instant Meeting

To host an instant Zoom meeting, log into [ucalgary.zoom.us](https://ucalgary.zoom.us) and click **Host** in the top right corner. Choose **Video On**, **Video Off**, or **Screen Share Only** to start. The meeting will use your **Personal Meeting ID** or, if you choose, a randomly generated ID, which you'll need to share with participants.

### 5.2 Hosting a Scheduled Meeting

The image shows the 'Schedule Meeting' form in the Zoom web interface. The form is titled 'Schedule Meeting' and contains several sections: 'Topic' with a text box containing 'My Meeting' and a '+ Add Description' link; 'When' with a date picker set to '06/11/2024', a time picker set to '9:00', and a dropdown for 'AM'; 'Duration' with a dropdown for '1' hour and '0' minutes; 'Time Zone' with a dropdown set to '(GMT-6:00) Mountain Time (US and Canada)'; a checkbox for 'Recurring meeting'; 'Attendees' with a text box 'Enter user names or email addresses'; 'Registration' with a checkbox for 'Required'; 'Meeting ID' with radio buttons for 'Generate Automatically' (selected) and 'Personal Meeting ID 883 808 6617'; 'Template' with a dropdown 'Select a template'; 'Whiteboard' with a button 'Add Whiteboard'; 'Security' with a checked checkbox for 'Passcode' (with a text box '816243') and two unchecked checkboxes for 'Waiting Room' and 'Require authentication to join'; and 'Video' and 'Audio' settings. Under 'Video', 'Host' has 'on' and 'off' (selected) radio buttons, and 'Participant' has 'on' and 'off' (selected) radio buttons. Under 'Audio', there are radio buttons for 'Telephone', 'Computer Audio', and 'Both' (selected). At the bottom are 'Save' and 'Cancel' buttons.

You can schedule a Zoom meeting through your account at <https://ucalgary.zoom.us>, D2L or via Outlook.

#### Scheduling for More than One Account

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.

#### Completing the Scheduling Form

Tips for how to complete each section of the scheduling form (image to the left) are on the next page.

*9: Fill out your meeting's information to schedule a Zoom.*

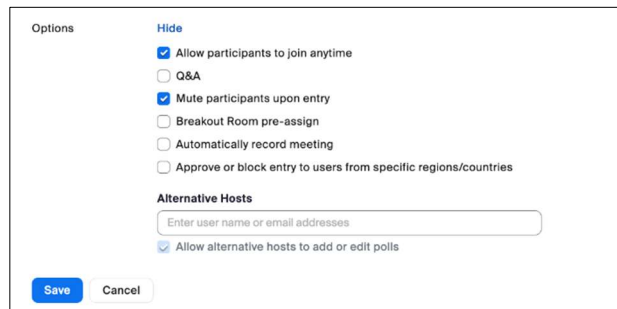
**Completing the Zoom Meeting Scheduling Form**

<b>Topic</b>	The default Topic is “My Meeting”; replace this with your course title and number or another title. Avoid using dates or session numbers when scheduling recurring meetings as this will appear on all recurring sessions.
<b>When</b>	When scheduling a Zoom meeting, choose your date and time using the calendar and dropdown menus. If the meeting <b>is recurring</b> , you can schedule it <b>daily, weekly, monthly</b> , or choose “ <b>No Fixed Time</b> ” to launch it anytime—just be sure to communicate the schedule to participants. For first-time users, consider scheduling the start 15–30 minutes early to allow time for setup.
<b>Duration</b>	Consider adding an extra 30 minutes beyond your planned end time to allow for unexpected delays or extended discussions. Also, confirm that your <b>time zone</b> is correct.
<b>Registration</b>	While not required for classes, enabling <b>Zoom registration</b> is helpful for public events. It lets you <b>track attendees, send reminders, and enhance security</b> by providing each registrant with a unique access link. Reviewing unfamiliar email domains during registration can help prevent disruptions like <a href="#">Zoom bombing</a> .
<b>Meeting ID</b>	This is generated automatically for scheduled meetings. Avoid circulating this through public channels prior to the meeting. Sending this through a mailing list to intended participants will limit the chance of unintended visitors joining and disrupting.
<b>Security</b>	There are <b>two</b> security options available when scheduling: <b>Meeting Passcode</b> – This enhances security by preventing unintended participants from joining the session. You may want to include this and communicate the password to participants. It can be customized for ease of recall. <b>Waiting Room</b> – The Zoom Waiting Room lets you screen participants before they join a session, making it especially useful for public events or virtual office hours. You can customize the waiting room by adding a message, logo, or video—just go to Settings > <b>Security &gt; Waiting Room &gt; Customize Waiting Room</b> in the Zoom web portal. This helps protect privacy, prevent interruptions, and enhance the overall experience.
<b>Video</b>	You can adjust Zoom’s video settings to control whether host and participant cameras are on when joining a meeting—video can still be toggled during the session. Limiting video to speakers or presenters helps reduce bandwidth and recording size. <b>Focus Mode</b> hides participant videos from each other while allowing the host and co-hosts to see everyone; it can be enabled during a meeting via <b>More &gt; Start Focus Mode</b> , or set to activate automatically when scheduling.
<b>Audio</b>	Always set Zoom’s audio option to “Both” so participants can join using either computer audio or telephone—though dialing in may incur long-distance fees. On smart devices, users should select “Use Internet Audio” to join a meeting.
<b>Further Options</b>	For Werklund School of Education synchronous classes, enable participants to <b>join anytime</b> . This allows participants to test their audio and video before the meeting.  Muting participants upon entry will minimize disruption from late arrivals.  There is an option to turn off the tone indicating arrival and departure of participants.

**Note:** Once a Zoom meeting is saved, a **Meeting ID** and **URL** are generated. You can edit details like time, duration, and alternate hosts from your Zoom profile, but not through the Zoom module in D2L. To make changes, go directly to [ucalgary.zoom.us](https://ucalgary.zoom.us).

### Setting up an Alternative Host

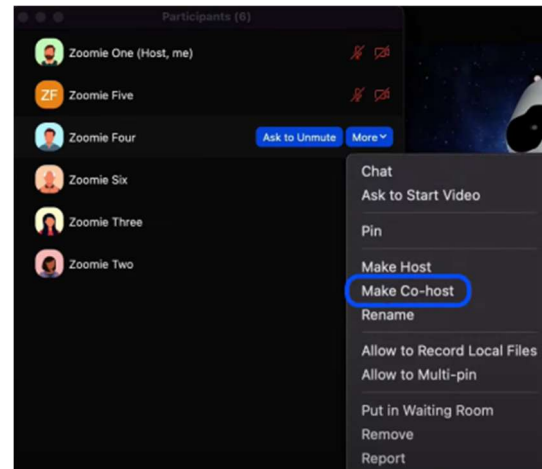
If you can't host a Zoom meeting yourself or you know you might be late, you can designate someone with a UCalgary email as **alternative host**. They'll have full host privileges, **including managing polls and breakout rooms, and will appear as a co-host during the session**. You can also assign co-hosts during the meeting, but note that the first person to join—host, co-host, or alternative host—will take on hosting duties. If necessary, hosting privileges can be switched during the meeting.



The screenshot shows the 'Options' dialog box in Zoom. Under the 'Alternative Hosts' section, there is a text input field labeled 'Enter user name or email addresses' and a checked checkbox labeled 'Allow alternative hosts to add or edit polls'. At the bottom of the dialog are 'Save' and 'Cancel' buttons.

*10: Options for scheduling and Alternative Hosts.*

**All Zoom sessions must have a Host!** If the host needs to leave a Zoom session early, they must reassign hosting privileges to keep the meeting running. To do this, click **Participants**, hover over the name of the person you want to make host, click **More**, then select **Make Host** and confirm. *If you don't do this, the Zoom will end!*







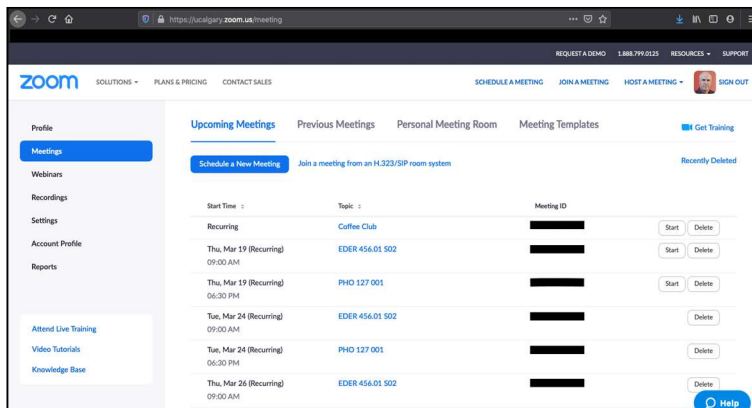
*11: Make a co-host by going to participants and hovering over the person you would like to make a co-host.*

### Scheduling in D2L

Scheduling Zoom meetings through D2L ensures they appear in your course shell and gives students a direct link to join. After accessing Zoom in D2L, you can schedule new meetings or import existing ones using the three-dot icon in the top right corner of the D2L Zoom page. While students should log in via D2L to access full features like breakout room pre-assignments, note that advanced settings—such as assigning alternate hosts or creating quizzes—must be done in your Zoom account, not within D2L. If you are getting an error message when accessing the Zoom module within D2L, go to <https://ucalgary.zoom.us> and log in with your UCID and password. That will allow your D2L access to Zoom to be recognized and validated.

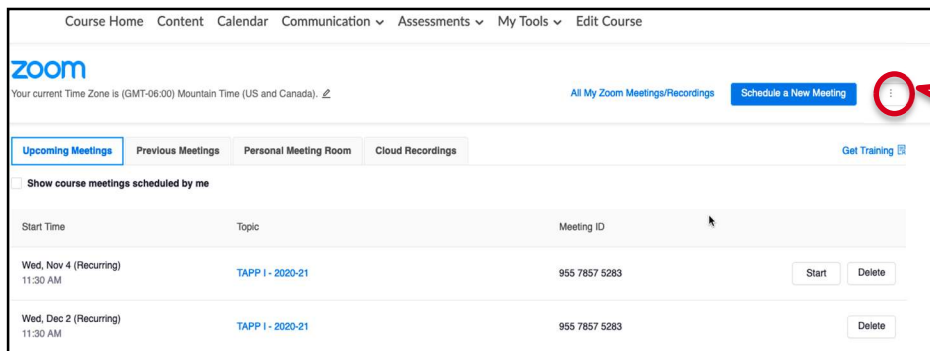
**Step-by-Step Guide to Scheduling Recurring Meetings and Including them In D2L**

<b>Step 1: Access Zoom in D2L</b> 	<b>Step 2: Schedule Your Meeting</b> 	<b>Step 3: Enable Breakout Room Pre-Assignment</b> 	<b>Step 4: Finalize and Communicate</b> 
<p>Log into D2L and open your course shell.</p> <p>Click <b>Zoom</b> from the toolbar or under Communications.</p> <p>Click <a href="#">Schedule a New Meeting</a> or use the three-dot menu to import an existing Zoom meeting.</p>	<p>Set the date, time, and recurrence as needed (Refer to the <a href="#">Hosting a Scheduled Meeting</a> section for more guidance).</p> <p>Ensure students are encouraged to log in via D2L to support breakout room pre-assignments.</p>	<p>Go to <a href="https://ucalgary.zoom.us">ucalgary.zoom.us</a> and sign in.</p> <p>Click <b>Meetings</b>, then <b>Schedule a Meeting</b> or edit an existing one. Under <b>Meeting Options</b>, check <b>Breakout Room pre-assign</b>.</p> <p>Click <b>Create Rooms</b> to manually assign participants or <b>Import from CSV</b> to upload a list.</p>	<p>Save your meeting.</p> <p>Ensure participants are signed into Zoom with their UCalgary account to be correctly assigned.</p> <p>Share the meeting link and confirm breakout room setup before the session.</p>



**Note:** Breakout room pre-assignments, quizzes, assignment of alternate hosts, etc. cannot be done **in the Zoom module in D2L**. These edits can be made on your Zoom account page.

12: How meetings appear when scheduled in the Zoom account.



To import meetings you've already created into the D2L Zoom module, click on these three dots.

13: Zoom as seen in D2L. To import recurring meetings you've already created, click the three dots.



## Scheduling in Outlook

When scheduling a Zoom meeting through Outlook, invitees will automatically receive the Meeting ID and passcode.

- Click **Add a Zoom Meeting** on the Outlook toolbar to insert Zoom details into your invite. The meeting will also sync to your Zoom account, where you can adjust its settings.
  - If managing multiple Zoom accounts, the meeting may save under a different account than intended.

**Note:** You don't need to be logged into Zoom to schedule via Outlook. If you want to assign the meeting to a specific Zoom account, edit it afterward. If syncing issues occur, cancel and retry.

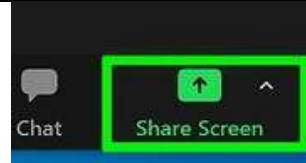

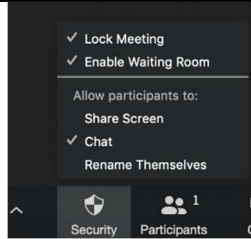
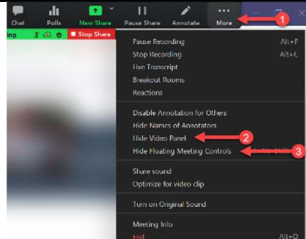


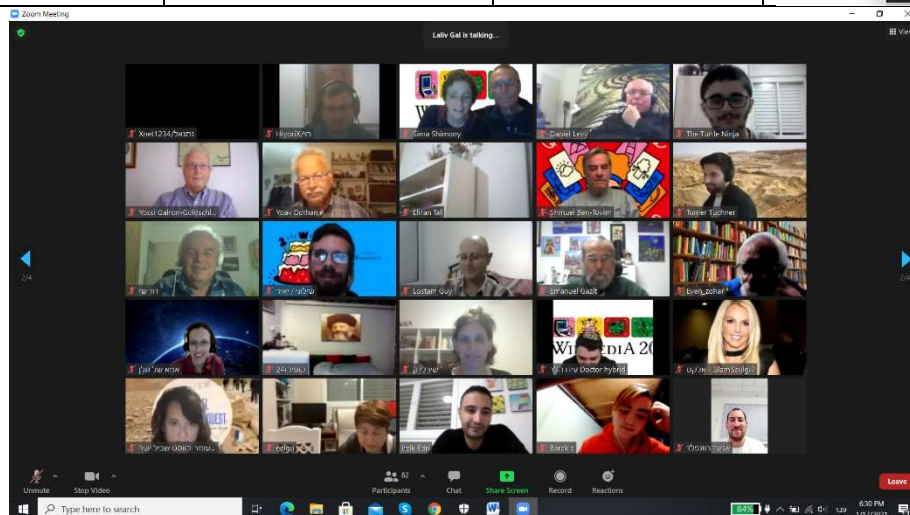
## 5.3 Hosting a Zoom Videoconference

To access full host features, sign in at <https://ucalgary.zoom.us> before starting your meeting.

- When the session begins, open the **Participant List** and confirm that *(Host)* appears beside your name.
- If your Zoom profile (avatar, name, pronouns) is not visible, you're not signed in. Leave the meeting, sign in at the Zoom link above, and rejoin.

**Videoconference host privileges allow you to:**

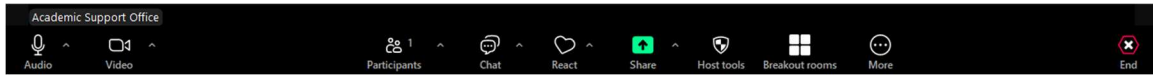
Share your screen	Launch breakout rooms	Manage security settings	Control other session features
			



14: The layout of a Zoom Videoconference - Wikimedia






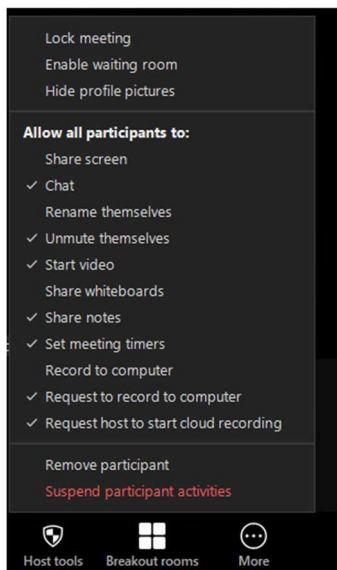
## When you're hosting: Layout of the host's toolbar



During a Zoom meeting, the toolbar appears when you move your mouse along the bottom of the screen. If you're sharing your screen, the toolbar shifts to the top and hides behind a tab labeled "You are sharing your screen," with a **Stop Share** button. Hovering over this tab reveals your controls.

As host/instructor, you have access to the following features:

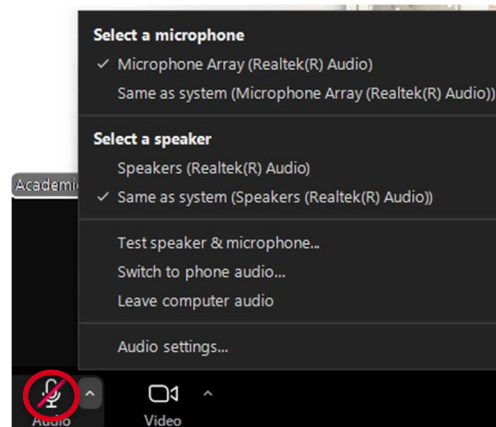
 GENERAL CONTROLS	 HOST TOOLS	 PARTICIPANT PERMISSIONS
<ul style="list-style-type: none"> <li>• Audio</li> <li>• Video</li> <li>• Participants               <ul style="list-style-type: none"> <li>○ Invite</li> <li>○ Copy Invite Link</li> </ul> </li> <li>• Chat               <ul style="list-style-type: none"> <li>○ Show Chat Previews</li> </ul> </li> <li>• Reactions               <ul style="list-style-type: none"> <li>○ Send with Effect</li> <li>○ Emoji Reactions</li> </ul> </li> <li>• Share Screen</li> <li>• Breakout Rooms</li> <li>• More</li> <li>• End Meeting</li> </ul>	<ul style="list-style-type: none"> <li>• Lock Meeting</li> <li>• Enable Waiting Room</li> <li>• Remove Participants</li> <li>• Suspend Participant Activities</li> <li>• Set Meeting Timers</li> <li>• Recording Options:               <ul style="list-style-type: none"> <li>○ Record to Computer</li> <li>○ Request to Record Locally</li> <li>○ Request Host to Start Cloud Recording</li> </ul> </li> </ul>	<p>These can be enabled or restricted by the host:</p> <ul style="list-style-type: none"> <li>• Share Screen</li> <li>• Use Chat</li> <li>• Rename Themselves</li> <li>• Unmute Themselves</li> <li>• Start Video</li> <li>• Use Whiteboards</li> <li>• Share Notes</li> <li>• Collaborate via Zoom Apps</li> </ul>



When sharing your screen in Zoom, the toolbar shifts to the top and may be partially hidden by other windows. It includes controls for screen view and the option to stop another participant's share. The Participant List opens in a separate, resizable window showing one or more speakers. You can adjust the layout between the speaker and shared screen.

Participants have similar controls and, if allowed by the host, can annotate shared content.

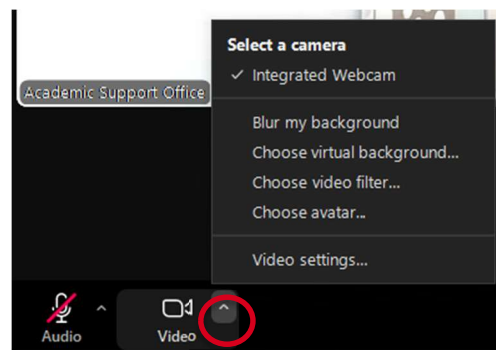
## 6. Zoom Control Panel and Toolbar



16: Zoom microphone and audio settings.

### 6.1 Microphone & Audio Settings

- Click the **microphone icon** to mute or unmute yourself. When active, the icon flickers green to indicate your audio input levels.
- Use the small **caret (^)** next to the icon to select and test your microphone and speakers—helpful when connecting remote students to an in-person session.
- The **Audio Settings** menu lets you apply noise-reduction filters and customize sound preferences.
- On smart devices with peripheral mics, a **Bluetooth icon** will appear. Tap it to select your external audio device—even if it's not connected via Bluetooth.



15: Zoom video controls

### 6.2 Video Controls

Click the video camera icon to turn your camera on or off. If a participant's video is off, their name or avatar will appear instead.

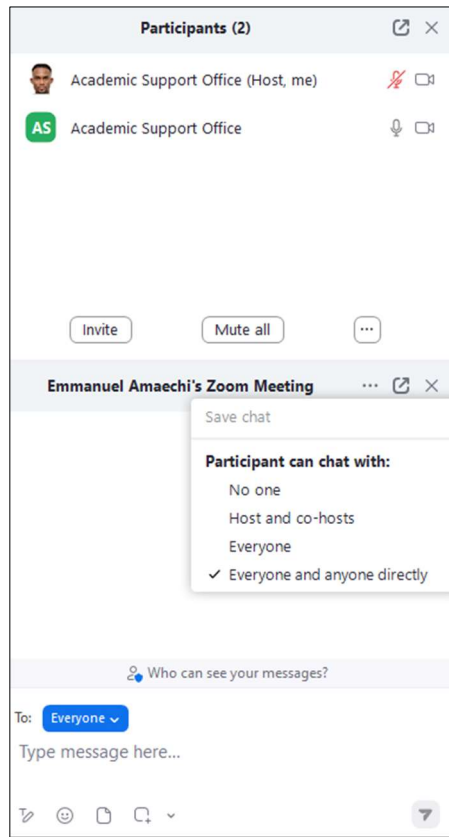
- Video thumbnails can display non-verbal reactions such as emojis.
- Participants automatically shift position onscreen and in the participant list when speaking, raising a hand, or submitting a non-verbal response.
- As host, you can access additional settings from the top-right corner of any participant's thumbnail under the "More" menu.

- The Video Settings allow customization, including virtual backgrounds or blurring your background.

### 6.3 Host Tools

Use **Host Tools** to manage participant permissions, including:

- Chat access
- Screen sharing
- Meeting timers
- Starting video
- Renaming themselves
- Unmuting
- You can also enable the **Waiting Room** to screen participants before they enter.
- **Lock Meeting** prevents anyone from joining or leaving once the session begins.



16: Managing participants

## Manage Participants

Open the Participants List from the toolbar to view all attendees. Hosts and co-hosts appear at the top, followed by active speakers or those with raised hands.

Next to each name, click **More** for options:

- **Chat** – Send a private message
- **Stop/Start Video**
- **Pin/Spotlight** – Highlight a participant's video
- **Make Host/Co-host**
- **Remove** – Prevents rejoining with the same Meeting ID
- **Allow to Record** – *Not recommended per WSE FOIP guidelines*

- **Multi-pin** – Let participants pin multiple videos
- **Put in Waiting Room** – Useful for private discussions
- **Report** – For serious disruptions
- In **Gallery View**, video tiles show all participants. If video is off, names or avatars appear instead.
- Use the **View** button (top right) to switch between **Speaker** and **Gallery View**. In **Gallery View**, you can drag and reorder video tiles.

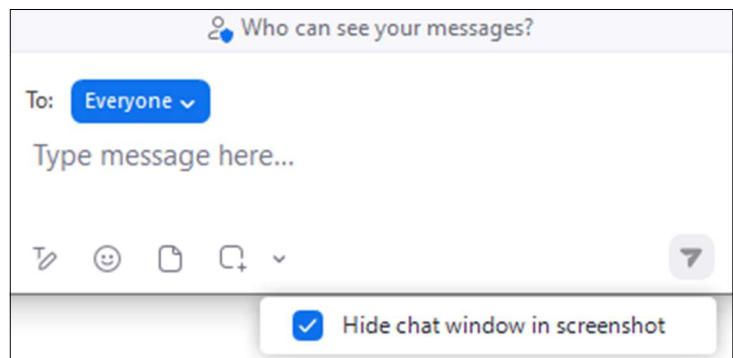
**Note:** Clicking the ellipsis (...) in the top right corner of a participant's video tile opens the same menu as the Participant List, with additional options to request they unmute or start their video.

**Pin/Spotlight:** Use this feature to highlight a participant's video for everyone. Select **Add Spotlight** to feature multiple speakers or **Replace Spotlight** to switch to a new one. Participants must have their video on to be pinned or spotlighted.

## Managing the Chat

Click the **Chat** icon to open the text window and manage participant messaging.

- At the top, you'll see the ongoing conversation.
- At the bottom:
  - **Everyone** – Send a message to all participants.
  - **Individual names** – Select from the dropdown to send a private message.
  - **Message box** – Type your message here.
  - **Icons** below the box let you:



17: Managing the chat

- Add **emoticons**
- **Upload files**
- Take and share **screenshots**
- Format text in the chat
- Click ... to save the chat or adjust chat permissions

**Tip:** If the chat window is closed, the Chat icon will highlight and show a message count for unread messages.

Also note that one-on-one chats can now appear under a different tab from the chat with the entire room.

### Saving the Chat

All participants can save the chat by clicking the save icon in the top-right corner of the chat window. Saved chats, along with other Zoom artifacts (e.g., whiteboards, recordings, screenshots), are stored in your computer's Documents > Zoom folder. Each session folder is labeled with the date, time, meeting title, and Meeting ID in this format:

**YYYY-MM-DD hh.mm.ss Meeting Title Meeting ID#.**

## 6.4 Screensharing for Hosts and Participants

Participants can share:

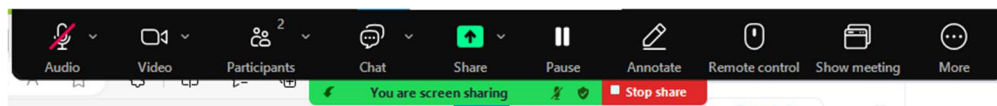
- Open documents (e.g., PowerPoint)
- Programs or browsers
- Zoom whiteboards
- Audio/video (enable Share Computer Audio and Optimize for Video Clip)
- Computer sound only (via Advanced options)
- iPad/iPhone content (Android not supported)

**Note:** Hosts may need to enable sharing for participants. Click the ^ next to **Share Screen > Advanced Sharing Options**.

### Host Controls & Best Practices

Only the host should be able to interrupt screen sharing.

If issues arise, check Security settings in your Zoom profile and meeting setup




### While Sharing

- The toolbar moves to the top and includes annotation and remote control tools.
- Speaker video appears in picture-in-picture mode.
- Shared content is outlined in green—if not your preferred program, stop and restart sharing.
- Pop-ups won't automatically share to the audience—switch manually if needed.

## Screen Sharing Options

### Screen 1/Desktop

Use **desktop sharing** for a seamless “what you see is what they get” experience—this is an ideal set-up when switching between documents, apps, or websites.

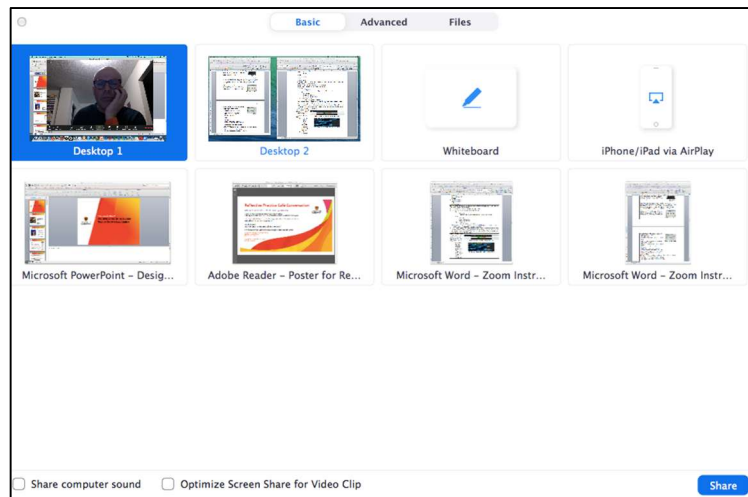
 **Caution:** This shares your *entire* screen. Hide personal or sensitive content and be mindful of layout, as it may be harder to monitor **Chat** and **Participants** simultaneously.

### Sharing a Specific Document or Application

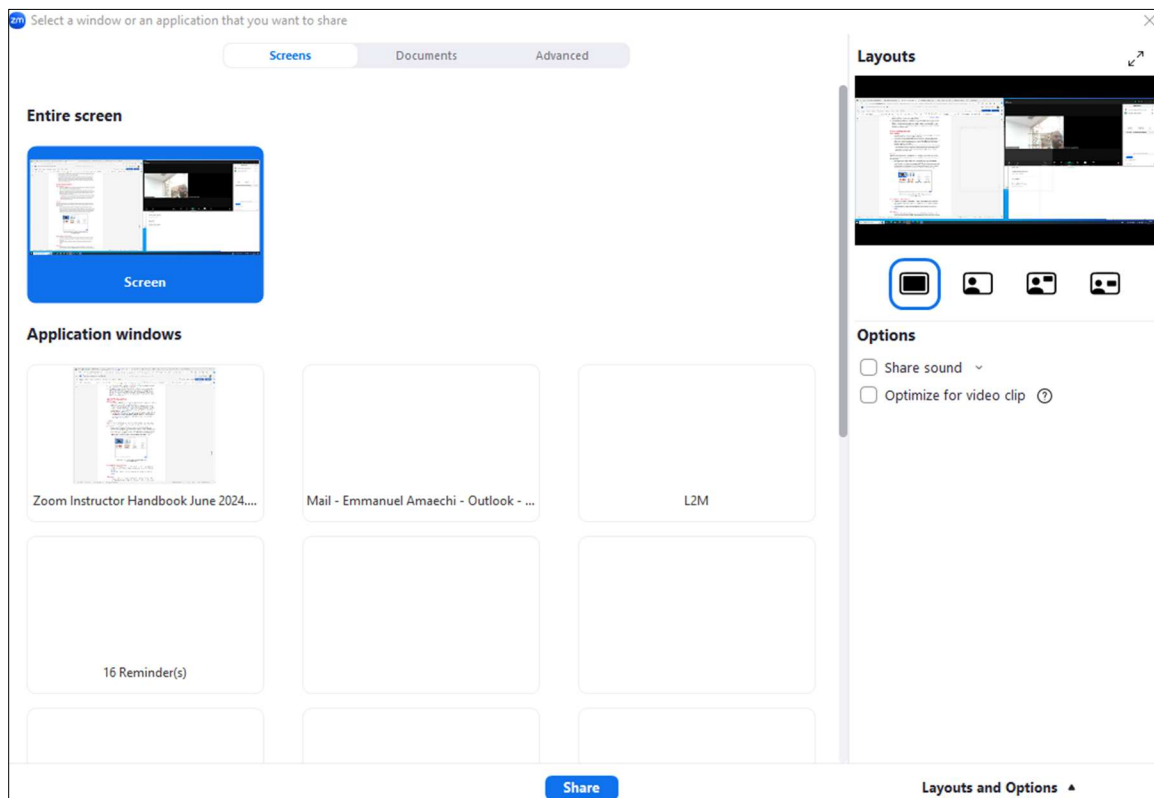
Use this option when sharing a single, **specific document** (e.g., PowerPoint). It uses less screen space, making it easier to monitor **Chat** and **Participants**.

- A green border will appear around the shared item—this is what participants will see.
- Avoid placing other windows (like **Chat** or **Participants**) over the shared content, as this may block the view for the audience.
- Be conscious of what is shared if you launch any pop-up windows. You may need to stop and re-launch share to ensure participants see what you want to share

 **Tip:** Check in with participants to confirm they’re seeing the intended content.



Basic screen share options with checkboxes for sharing computer sound and optimizing for video.



### **Advanced Option – Sharing a Portion of Screen**

Share only a selected area of your screen by drawing a frame around it.


- This is useful for focusing attention but may reduce resolution.

⚠ Be cautious—other windows or content can accidentally move into the shared area.

### Slide Control

This allows participants to control a **Keynote** or **PowerPoint** presentation.

- Enable this in **Full-Screen Presentation Mode** by clicking **Slide Control** on the toolbar and assigning control to a participant.

 Only works in full-screen mode.

### Other screen share advice:

1. Prepare your layout in advance to ensure you can view:
  - a. Your presentation
  - b. Participant list
  - c. Chat window
  - d. Video feeds
2. Using two monitors is highly recommended.
3. Start with a welcome slide with the title of your session and background music to set the tone and let participants know they are in the right session.


## 6.6 Polls, Quizzes, and Surveys in Zoom

Zoom allows you to create **multiple choice polls and quizzes** to engage participants during a session. While you can build them live, it's best to prepare them in advance as outlined in **section 4.4**.

### Key Features

- Polls can now display **who selected each option** (optional; anonymity is still the default).
- Quizzes can include **correct answers** for automatic scoring.
- Polls and quizzes can be reused across meetings.

### How to Use

1. **Prepare** your poll or quiz in advance or during the session.
  2. Click **Launch Poll** to begin.
  3. Participants respond directly on their screens.
  4. Click **Share Results** to display responses.
  5. Use **End Poll/Quiz** to close it.
  6. You can **relaunch** the same poll if needed.
-  **Tip:** Use polls to check understanding, gather feedback, or spark discussion.

## 6.7 Recording a Zoom Meeting

Hosts can record meetings. Recordings are saved in a **Zoom folder** inside your **Documents** directory or saved to the cloud if you select this option.

### File Details if You Save to Your Computer

- If not yet converted, the file will be named **zoom\_0**.
- Rename the file with a clear title, such as:  
2025-01-15\_EDUC\_605\_Lecture1.mp4  
(Keep the .mp4 extension.)

### Uploading Recordings to D2L or YuJa

If the video is under 1 GB:

1. Go to the **Content** area in your D2L course shell.
2. Click **New** → **Video and Audio**.
3. Upload the .mp4 file and give it a clear title.

**If the video is over 1 GB:**

1. Log into **YuJa** with your UCID.
2. Upload the video.
3. In D2L, use **Create a File** → **Insert Stuff** → **YuJa Media Chooser** to embed the video.
4. Select the video from the options you have available in YuJa and add it to D2L


## 7. Breakout Rooms

Breakout Rooms allow you to split participants into smaller groups for discussion or activities.


### 7.1 How to Launch Breakout Rooms

1. Click the **Breakout Rooms** icon.
2. In the subsequent pop-up window, set the number of rooms.
3. Select a group assignment method:
  - **Automatically** – Randomly assigns participants.
  - **Manually** – You assign participants to rooms.
  - **Self-assign** – Participants choose their own room. (*Tip: Rename rooms to reflect topics or group names.*)

### 7.2 Customize Breakout Room Settings

Click the  (**gear icon**) in the bottom-left corner of the Breakout Rooms window to:

- Set session duration
- Adjust countdown timer after closing rooms
- Enable options like allowing participants to return to the main session at any time


 **Tip:** Default session time is 10 minutes—adjust this if you need more.

### 7.3 Managing the Breakout Session

Click **Open All Rooms** to invite participants. They must click **Join** to enter. You can skip the invite and assign participants after the session starts.

As host, you can:

- **Join** any breakout room
- **Move** between rooms
- **Broadcast** text or audio messages to all rooms
- **Share your screen** from the main room to all breakout rooms


 Be careful not to click **End Meeting** when leaving a breakout room—use **Leave Breakout Room** instead.

### 7.4 How to Pre-Assign Breakout Rooms

Create a **.CSV file** in Excel with two columns:

- **Room Name**
- **Student Email** (must match the email they use to log into Zoom)

Breakout rooms can also be **created, renamed, or deleted** after the meeting has started.

 If students join without logging into with their ucalgary email, they'll need to be assigned manually during the session. Fortunately, manual assignment is quick and easy.



## 7.5 What can participants do in breakout rooms? – Participant Features

Participants have access to many of the same tools as in the main session:

### Breakout Room Sharing Tools

- Share desktop, documents, or Zoom whiteboard
- Save whiteboard content or share it later in the main room
- Use any application on their device and present it when back in the main room

### Additional Breakout Room Options (via More menu)

- Chat
- Ask for Help
- Disable Participant Annotation
- Hide Video Panel
- Audio/Video Settings
- Leave Breakout Room

✓ Participants can return to the main room anytime, or the host can click **Close All Rooms** to bring everyone back. A 30-second countdown will appear before rooms close.

## 7.6 Debriefing after Breakout Sessions

Encourage groups to save and share their work (e.g., Word docs, PowerPoints, whiteboards) when reporting back to the main room.

## 7.7 Leaving a Zoom Meeting

To exit a session, click **Leave Meeting**. A confirmation window will appear asking:

- “Do you want to leave this meeting?”
- Choose **Leave Meeting** to exit or **Cancel** to stay.

## 8. Using Zoom for Virtual Office Hours

You can host **one-on-one office hours** using Zoom, similar to a regular meeting setup.

### 8.1 Office Hours Setup Tips


- Enable the **Waiting Room** when scheduling to keep incoming participants from interrupting ongoing appointments.
- Use private messages to acknowledge participants in the waiting room and let them know you'll be with them shortly.



### 8.2 Privacy & Security for Office Hours Zoom Meetings

- Avoid using the “**Everyone**” chat option—even if only one person is present, messages sent publicly can be seen by future participants.
- You can admit **multiple people** from the waiting room if needed but be mindful of privacy during discussions.

✓ **Tip:** The Waiting Room feature helps maintain confidentiality and manage flow during back-to-back appointments.

 For more best practices on virtual office hours, visit <https://werkland.ucalgary.ca/sites/default/files/teams/13/Virtual%20Office%20Hours.pdf>

## Customizing how you view participants in Zoom

Zoom offers several ways to adjust how participants and shared content appear on your screen during a session.

### Accessing Zoom View Options

Move your cursor over the video feed. A **View** button will appear in the top-right corner. Click it to switch between different display modes.

## 8.3 Zoom View Modes

### Gallery View

- Displays all participants in a grid layout.
- Ideal for group discussions or when you want to see everyone at once.

### Speaker View

- Highlights the active speaker in a large window.
- Other participants appear in smaller tiles above or beside the main view.
- Risks putting participants on screen if there is loud incidental background noise

### Multi-speaker View

- **Spotlights lead and most recent speakers in a display of 3-5 people**
- **Participants will shift out of the view after they have been silent for a while**
- **A dynamic view of the conversation with less required administration by the host**

### Spotlight

- Hosts can spotlight one or more participants to keep them visible for everyone.
- Useful for presentations or panel discussions.

### Immersive View

- Places participants in a shared virtual background (e.g., classroom, boardroom).
- Supports up to **25 participants** (or up to **49** with settings adjusted).
- Great for creating a more cohesive, engaging visual experience.

### Full Screen

- Expands Zoom to fill your entire screen.
- When screen sharing, the shared content fills the screen, with optional picture-in-picture video of the speaker.
- To exit, click **Exit Full Screen** in the top-right corner or press **Esc**.

## 9. Zoom Keyboard Shortcuts

Zoom offers a variety of keyboard shortcuts.

### 9.1 How to Access Shortcuts

1. Open the **Zoom desktop app**.
2. Click your **profile picture** → **Settings** → **Keyboard Shortcuts**.
3. View, customize, or enable shortcuts as global (usable even when Zoom isn't in focus).

## 9.2 Common Shortcuts (Windows)

- **Alt + A** – Mute/unmute audio
- **Alt + V** – Start/stop video
- **Alt + S** – Start/stop screen sharing
- **Alt + R** – Start/stop local recording
- **Alt + H** – Show/hide chat
- **Alt + U** – Show/hide participants
- **Alt + Y** – Raise/lower hand
- **Alt + F1 / F2** – Switch between Speaker and Gallery view
- **Alt + Q** – Leave or end meeting

✓ **Tip:** You can edit most shortcuts to suit your preferences.

■ **Full list of Zoom keyboard shortcuts:** [Zoom Keyboard Shortcuts](#).

## 10. Zoom AI Features – AI Companion Overview

The **Zoom AI Companion** is a built-in, generative AI assistant designed to enhance productivity, communication, and collaboration across the Zoom platform. It integrates seamlessly into tools like **Meetings**, **Team Chat**, **Phone**, **Mail**, and more.

### 10.1 Key Capabilities of the Zoom AI Companion

#### In Meetings

- **AI Meeting Summary:** Automatically generates a concise summary and action items after a meeting. This will be emailed to the host after the meeting.
- **Smart Recording:** Breaks down cloud recordings into highlights, chapters, and summaries for quick review.
- **In-Meeting Questions:** Ask the AI Companion what you missed without interrupting the session.

#### Team Chat

- **Chat Compose:** Drafts messages based on your prompt or tone.
- **Thread Summaries:** Summarizes long chat threads so you can catch up quickly.

#### Zoom Phone

- **Call Summaries:** Provides a recap of phone conversations.
- **Voicemail Tasks:** Extracts action items from voicemails.

#### Zoom Mail & Docs

- **Email Drafting:** Helps write and revise emails.
- **Document Assistance:** Offers content generation, sentence completion, and revision suggestions.

### How to Use the Zoom AI Companion

1. **Enable AI Companion** in your Zoom settings (under AI Companion or Meeting settings).
2. During a session, click the **AI Companion** button in the toolbar.
3. Choose from available features like **Start Summary**, **Ask AI**, or **Smart Recording**.

### Privacy & Access with the Zoom AI Companion

AI Companion uses meeting content, transcripts, and user prompts to generate responses. Users can review and edit outputs before sharing.

## 10.2 Live Transcript of Zoom Sessions

Zoom can generate a **live transcript** during your session, displayed as **closed captions** on-screen. This transcript is generally accurate and can be saved after the meeting.

### Key Features

- Transcripts appear in real time and can be shown in full throughout the session.
- After the meeting, you can **download the full transcript** for reference or sharing.

✓ **Tip:** If you plan to use the transcript as a detailed record, it's best to **review and edit** it afterward for clarity and accuracy.

## 10.3 AI Meeting Summaries in Zoom

Zoom's **AI Companion** can generate automatic summaries of your meetings or class sessions, helping participants review key points without needing to rewatch the entire recording.

### Key Features of AI Zoom Summaries

- **Automatic Summaries:** AI generates a concise overview of the meeting's main topics and action items.
- **Real-Time or Post-Meeting:** Summaries can be created during or after the session, depending on your settings.
- **Shareable:** Hosts can choose to share the summary with participants via email or Zoom chat.
- **Editable:** You can review and edit the summary before sharing to ensure accuracy and clarity.

## 10.4 How to Enable AI Zoom Summaries

1. Go to your Zoom **Settings**.
2. Under **AI Companion**, enable **Meeting Summary**.
3. During a meeting, click **AI Companion** in the toolbar and select **Start Summary**.

✓ **Tip:** Let participants know when AI summaries are active. This promotes transparency and helps manage expectations.

# 11. Contact Information for Support and Resources

## 11.1 Technical Support

Office of Teaching and Learning

Email: [tandl@ucalgary.ca](mailto:tandl@ucalgary.ca)

University of Calgary Tech Coaches

[techcoaches@ucalgary.ca](mailto:techcoaches@ucalgary.ca)

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

## 12. 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.