Zoom

Instructor Handbook

Werklund School of Education

April 2020

Version 4.2
What is Zoom?
Zoom ([https://ucalgary.zoom.us](https://ucalgary.zoom.us)) is a video conferencing platform that allows users to connect from computers and mobile devices. It is an enterprise video platform across University of Calgary. It has been integrated into D2L for the scheduling of synchronous video sessions for instruction and it can be accessed via your UCID username and password.

Zoom accommodates video conferencing for large groups, can facilitate breakout room discussions and collaboration along with the sharing of PowerPoints and other documents for presentation by instructors and students.

In Werklund School of Education, Zoom can also be used for synchronous sessions for graduate exams, (e.g., candidacy and final), meetings with research teams and students, etc. Whenever a meeting is scheduled, a URL is created to share with the participants. For recurring sessions such as classes or regular meetings a single link can be used for multiple sessions.

Video Resources
The following videos have been created by Werklund School of Education as tutorials to help demonstrate features and functions of Zoom:
Zoom Toolbar - [https://ucalgary.yuja.com/V/Video?v=54910&node361046&a=1325632658](https://ucalgary.yuja.com/V/Video?v=54910&node361046&a=1325632658)
Breakout rooms - [https://vimeo.com/338899748](https://vimeo.com/338899748)
Guidelines for Exam Neutral Chair - [https://vimeo.com/338899619](https://vimeo.com/338899619)
User screen sharing for presentations: [https://ucalgary.yuja.com/V/Video?v=38109&node=240655&a=687979056&autoplay=1](https://ucalgary.yuja.com/V/Video?v=38109&node=240655&a=687979056&autoplay=1)

There are further training videos provided by Zoom as well.

Creating a Secure, Comfortable Zoom Environment

We recommend having a conversation with students at the beginning of a course to discuss issues of conduct, safety and privacy related to Zoom. In your discussion, you may want to address matters such as the use of headphones, cameras, and the chat and recording features. We also request that you and your students refrain from posting screen shots of Zoom sessions on social media for reasons of privacy.
Activating Your Zoom Account

- When activating your account visit https://ucalgary.zoom.us and click on Sign In.
- This will generate an email to your ucalgary.ca email. Open that email and follow the directions to either launch your new account or, if you have another account, merge it into the licensed University of Calgary account.

- If there are issues with this activating your account, please contact tandl@ucalgary.ca for guidance.

On Your Profile Page

- You may wish to customize your profile by adding a photo that would appear as your avatar when you have your video off.
- ** Another feature you can customize is to make your Personal Meeting ID the default Meeting ID for instant meetings. This will allow the same URL to be used for these meetings rather than creating a new ID for each instant meeting you host. It can be shared with regular meeting participants to facilitate a quick launch of a meeting.
- Also, note the Host Key code that is at the bottom of your profile page. This will allow you to host your sessions or let others host your sessions if a) you have not logged into your session properly or b) you are absent and want another person to host.

Other Considerations When Setting Up

- If you wish to use Zoom on your smart devices, complete the account transfer on your computer first. After that, launch the Zoom app on your devices and Sign In via SSO. Add “ucalgary” in the company domain field and then log in with your UCID username and password.
- New: Zoom can also be linked to your email, whether Outlook, Gmail or another platform. This will help synch Zoom events into your calendar.
- The Zoom app is available for all smart devices.
  - Download it from your respective app store for free. After installing the app, please review your device settings to ensure the Zoom app has access to your microphone and camera.
**Please note that for the best use of Zoom as a participant and especially as a host, log in to your account at [https://ucalgary.zoom.us](https://ucalgary.zoom.us) before joining a session and then inputting the meeting ID number rather than simply clicking on the link.**

### Audio and Video Equipment Considerations

#### Remote session – All participants at distance

If all participants are participating remotely and you are hosting from your personal computer your laptop should provide decent audio and video quality. If you are participating from a desktop computer, it is recommended that you have a peripheral camera and headset with microphone to ensure best sound quality.

- If you wish to hide the background in the environment you are broadcasting from there is a **virtual background** feature under Video setting. You can select one of three default images or an image from your computer.

#### Mixed Audience – Classroom participants and participants at distance

If you are broadcasting a session while you are teaching in a classroom, ensure that you have microphones, speakers and cameras that allow those joining remotely to be able to hear the session via computer and accommodates their contributions being heard in the classroom as well.

### Creating and Scheduling a Meeting

To schedule a meeting or a synchronous class session, you have the options of scheduling through D2L or through your account at [https://ucalgary.zoom.us](https://ucalgary.zoom.us). To schedule Zoom sessions for your classes, it is recommended that you schedule your meetings through D2L. This will ensure scheduled meeting appear in D2L and provide students a link to join a Zoom session when they are logged into D2L.

#### Scheduling via D2L

After logging into D2L and accessing the Shell for a course, you will find “Zoom” under the Communications tab in your drop-down toolbar.

Once you go to the Zoom page in the D2L shell, you will see the meetings scheduled and a button to add new meetings to the schedule for this course. Once you schedule your meetings they will appear in your students’ version of the shell under Zoom and it will also appear in your Zoom account as well.

**IF** you have already scheduled meetings in Zoom that you plan to host with your classes you can click on the “three-dot” button to the right of “Schedule a New Meeting” and import the Meeting ID of sessions you had previously created in Zoom.
If you are scheduling Zoom meetings that are not for your classes, you should do it within your Zoom profile page. In the upper right corner of that page, you will see options for scheduling, joining or creating a meeting.

As a meeting organizer, you would do the following:

- Go into your Zoom account
- Click on **Schedule a Meeting**
  - You will be taken to a page to set:
    - **Topic** – the default is My Meeting; replace this with your course title and number
Schedule a Meeting page in Zoom

- Start time of session (When) – please start 30 minutes prior to scheduled start to allow participants to test their audio.
- Duration – please add an extra 30 minutes beyond the anticipated end of the session.
- Determine if this is a Recurring Meeting or not. You can schedule daily, weekly or monthly sessions and weekly sessions can be scheduled for multiple weekdays (e.g. Mondays and Wednesday).
- If it is recurring, but not on a consistent schedule, you can indicate the number of sessions you anticipate and modify them after the meetings are saved OR select “No fixed time” and it would be available to launch at your convenience. (You would still have to tell your participants the schedule for the meetings, however.)
- Registration – this is usually NOT required for classes.
- Meeting ID – this is can be generated automatically for scheduled meetings.
- **Meeting Password** – to further enhance security features for the session, you may want to include this and communicate the password to participants to further enhance the security of the session and prevent unintended participants from joining the session.
- Video – this determines whether video is on or off when the host and participants join the meeting. Everyone has the option to turn their video on or off at any time after the meeting starts. It is also valuable to reserve video for only those who are speaking or presenting. This
will minimize the demand on broadband during the session and the amount of data needed for the recording of the session.

- **Access options for Audio** - please set to “Both” to allow participation via **computer audio** and, if necessary, Telephone. (Dailing, however, is not recommended due to the potential cost of long distance fees. The Canadian dial-in number is **not** toll free and is a Toronto-area exchange.) Also, advise participants joining by their smart devices that they would still use internet audio rather than telephone.

- **Meeting Options:**
  - For WSE synchronous classes, enable participants to **join before the host**. This will allow participants to test their audio settings prior to the meeting.
  - We also recommend muting participants upon entry.
  - If you activate the Waiting Room feature, you will be allowed to determine if an individual is supposed to attend the session before you bring them into the session.

  - Once the meeting settings are saved, a URL featuring a 9 to 11 digit Meeting ID is generated to allow access to the session.
  - If you have created **recurring meetings** but need to modify some to fit your schedule, you can edit them individually. Alternatively, you can schedule a recurring meeting with “No Fixed Time.” This will appear at the top of your list of scheduled meetings and can be launched at any time.

The screen after selecting a recurring meeting.
All occurrences with options to edit and delete sessions.

- **New:** After a recurring meeting is saved, you can open the meeting to add and modify sessions. The **Time** of the meeting in the listing to review the recurring meetings currently scheduled and add further meetings to the list.

- **New:** You can assign scheduling responsibilities for another person to your account under Settings. There is a Schedule Privilege option that would allow you assign scheduling privileges to another individual with a ucalgary.ca email account. You would also see accounts that you have scheduling privileges for. If you have these privileges you would see a “Schedule for” option when scheduling new meetings.

- **Note:** When setting up a class/session, you may want to use the **Poll** feature.
  - In Zoom, you will need to modify the poll setting on the **Settings** page. After setting this, polling will be available to the account holder for all **scheduled** meetings.

- **Breakout Rooms:** if you wish to use breakout rooms during your session you can add the group assignments when scheduling. This can be done by creating each group and assigning participants by using their email addresses. Another alternative is to upload a .csv spreadsheet generated in Excel. The spreadsheet would feature three columns: Breakout Room Name; student email and student name. Please note that if students who do not log in with their ucalgary.ca email address would have to be added manually and synchronously before launching the breakout session.

- **Alternative Host:** If you are not able to attend a meeting scheduled with your account, you can assign an alternative host, provided they have a ucalgary.ca email address and Zoom account. They will have the ability to host the meeting if you are not attending the session.
Virtual Office Hours
If you need to host office hours, this can be done through Zoom as well. You would schedule office hours as you would a regular session with the additional step of clicking “Enable waiting room” under Meeting Options. With the Waiting Room enabled, incoming participants would appear on your Participants list, but not interrupt the appointment you are having. You will have the opportunity to send a private message to advise people you are aware of their arrival. (Also advise them to remain in the session.) When you have the opportunity to meet them, you can invite them into the session. You may use the waiting room for multiple participants and invite more than one individual from the waiting room into your meeting.

Bear in Mind

One Zoom Meeting at a Time - With your account, you can only host one Zoom session at a time. For example, if you want to have an open session for students to use Zoom, you will not be able to have your own meeting concurrently on the same account. If you happen to be scheduling or hosting sessions back to back, make it clear to participants that a session needs to end and that they will have to continue their discussions in a different session.

Hosting a Meeting Instantly
To host a meeting instantly, log into your account at https://ucalgary.zoom.us and click the Host a Meeting link in the top right corner of the screen. You can select the options of With Video On, With Video Off or Screen Share Only to launch with a Meeting ID. You may wish to modify your “Personal Meeting ID” on your profile page to use the same meeting ID for all instant meetings that you host. If you do not log into your account and simply click on a URL for a meeting you are hosting you will NOT have hosting privileges.

Starting a Scheduled Meeting
It is recommended that you log in to Zoom or D2L before starting a session you have scheduled. In either instance, there will be a Start button next to the meeting. If your participants are already in the room, Start will have changed to Join.

Tools for Use During a Zoom Videoconference
During a Zoom videoconference session, the meeting toolbar is located along the bottom of the screen. The toolbar will appear when the cursor is moved along the bottom of the screen. During a share session, the Zoom toolbar moves to the top of the screen and will only appear when hovered over.

The host/instructor has controls for managing participants, chatting, recording the meeting, starting breakout rooms, sharing documents and ending the meeting. When screen sharing,
additional features for annotating the document on the screen, saving screen grabs and giving remote control to another participant in the meeting will be available.

Participants/students will see similar controls for video, audio, sharing and chat. When a screen is being shared, students will have the opportunity to annotate on the shared screen as well.

**Control Panel/Toolbar**

<table>
<thead>
<tr>
<th>Audio/Mute – By clicking on 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 are doing interactive dual delivery to a face-to-face classroom and a remote audience, you will also use this feature to select and test the microphone and speaker you’re your session. Selecting the arrow to the right of the microphone icon, will let you adjust audio controls, including volume and choice of microphone and speaker.</th>
</tr>
</thead>
<tbody>
<tr>
<td>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 would appear where their video stream would appear to indicate connection to the session. If video is turned on, the participant’s camera image would appear with a name at the bottom of the screen. This video thumbnail can also indicate non-verbal...</td>
</tr>
</tbody>
</table>
communication by that participant.

**Security** – this new feature gives you the option to modify permissions to chat, share screen and enable the waiting room so you can screen participants before they join your session. You can also lock the meeting to prevent people from leaving or joining the meeting at any time. You may want to modify these to increase or relax security in the session.

<table>
<thead>
<tr>
<th>Security Pop-up Window</th>
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<tbody>
<tr>
<td>Allow participants to:</td>
</tr>
<tr>
<td>✓ Share Screen</td>
</tr>
<tr>
<td>✓ Chat</td>
</tr>
<tr>
<td>Rename Themselves</td>
</tr>
</tbody>
</table>

**Manage Participants** – This will open a segment of the Zoom meeting screen to allow you to:
- **Mute/unmute** participants
- **Turn off** participants’ video or invite them to turn it on
- **Chat** with individual participants privately
- Make participants **host** or **co-host** of the meeting
- **Reclaim** your role as host

**Manage participant options**
• Remove participants.
• Identify and respond to participants who have raised hands.
• Put a participant in the waiting room.
• Give permission to record the session. **WSE Guideline:** *Instructors should not give participants this privilege out of consideration of FOIP policies.*
• Monitor participant responses via non-verbal communications.

**Chat** – Select the chat icon to open a text dialogue box. This box will appear below the Participants window on the right side of your screen.

- At the top of this chat window, text chat will be displayed
- At the bottom of the window, you will see the following:
  - **To**
    - “Everyone”
    - Individuals – done by selecting their names from a drop down menu
  - **More**
    - Save Chat
    - Share File in Meeting
    - Modify Chat permissions
  - Type message here...
    - Enter your chat text in this space.
- If this window is not open, the chat icon in the toolbar will illuminate and generate a message count for unanswered messages that you have accumulated.
- All participants have the option of saving the chat from a Zoom session. The transcript, along with other artifacts saved from Zoom sessions, (whiteboards, video recordings, etc.) would appear in your Documents folder of your computer in a Zoom sub-folder. The folder will be
identified by the date, title and meeting ID for the session in the following format “YYYY-MM-DD hh.mm.ss Meeting Title Meeting ID#”.

**Screen Share** – This will allow you to choose from a screen or open document on your computer to share with the class. You can share:
- An open file from your computer
- An open program from your computer
- An Internet browser
- A Zoom whiteboard.
- Content from an iPad or iPhone. (Android devices are not supported at this time.)
- If you wish to share audio and video during your screen share click on the “share computer audio” and “Optimize Screen Share for Video Clip” features.
- A document **does not have to be uploaded** to Zoom for sharing.
- A student can present or share their document

### Options for items to share when doing Screen Share.
Note the options for share computer sound and optimizing video for share at the bottom of the Share window.

### Pop-up window to modify Screen Share Options
Click Advanced Sharing Options for participants
but you may have to modify screen sharing privileges to allow this. Click on the ^ button next to “Screen Sharing” and then click on “Advanced Sharing Options...” if you have not modified this on your profile page.

- While sharing, the toolbar will move to the top of the screen. Also, it will add features to allow you to annotate the shared document or take remote control of the shared computer.
- While sharing, the speaker video will go into picture-in-picture mode. Participants will see the shared screen, as well as video of the speaker.
- It is recommended that you use “Desktop” to share in Zoom to...
ensure a “what you see is what you get” presentation. For example, if sharing a PowerPoint that features URLs you intend to click on, you would see the webpage that you launch but it would not be transmitted to the rest of the participants.

- When sharing from your desktop, ensure the document covers your desktop to avoid sharing personal or sensitive materials.

<table>
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<tr>
<th>Polling:</th>
<th>This feature allows you to create multiple choice questions to use in class. It is recommended that you create your poll questions in advance of the session. The poll questions can be created synchronously, if necessary. For a lower stakes survey, encourage getting participants to use the YES/NO options for non-verbal feedback in the participants window. You will see the responses next to their names and there will be a tally of results above the Yes and No icons.</th>
</tr>
</thead>
<tbody>
<tr>
<td>- When the poll is prepared, the host/instructor will select the <strong>Launch Poll</strong> button and the participants/students will have the opportunity to respond to the poll.</td>
<td></td>
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<tr>
<td>- The participants/students will have the poll appear on their screen.</td>
<td></td>
</tr>
<tr>
<td>- After the poll is completed, the host/instructor can share the results or relaunch the poll.</td>
<td></td>
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<tr>
<td>- The instructor can stop the poll by selected <strong>End Poll</strong>.</td>
<td></td>
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<tr>
<td>- Results will not be associated with individual participants. Votes will remain anonymous.</td>
<td></td>
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<tr>
<td>- The host/instructor can share the results of the poll by selecting <strong>Share Results</strong>.</td>
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<th>Record – Meetings/class sessions can be recorded by the host.</th>
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<tr>
<td>Cloud recording is NOT recommended because the cloud servers are based in the US. Storing our files there would violate our FOIP Protocols.</td>
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</table>
• **Local Recording:**
  o When you record locally, the video is saved in a Zoom sub-folder in your Documents folder.

• **WSE Guideline: Sharing Recordings in an Online Course:**
  o Go into the Documents folder, double-click on the file. It will automatically convert the file to mp4 format. The conversion will create four documents including one mp4, usually titled “zoom_0”. **Retitle this file.** Our suggestion is to title with the date of the session, title of the course and other key information.
  o You will need to upload the mp4 file of the recording to the D2L Zoom. If the video of the session is less than 1 GB in size go to the Content area for your course and click New to get a drop down menu that includes **Video and Audio** then select Upload to drag and drop your video. If your video is larger than 1GB, you can use the YuJa tab in the D2L shell to upload your video to YuJa and then link it to D2L. Bear in mind that screen sharing and multiple video streams for participants will increase file size so limit video to only the participants who are sharing or speaking.

Breakout – The Breakout icon will facilitate the creation of small group breakout sessions.

• You can form groups randomly (select **Automatically**) or assign groups (select **Manually**). Set the number of groups that you need and then choose your preferred method for forming the groups.

• At the bottom of the breakout rooms window is an **Option** link that will allow you to determine the maximum length of
breakout session, the length of the countdown after closing rooms and other features for the breakout.

- When creating groups **Manually**, you assign members to rooms by selecting them from a list of available participants.
- After groups have been configured, the **open all rooms** button will invite people into their rooms for the breakout session. Participants will need to select **Join**. You do have the option to send participants to their rooms automatically.
- After starting breakout sessions, you have the option of joining the breakouts. There is a **Leave Breakout Room** button in the bottom right corner of the meeting window.
to allow the Instructor to exit. This would bring you back to the list of all groups to join other breakout groups.

- You will also have the option of forming breakout groups when scheduling a meeting. You would create a CSV sheet in Excel with Meeting Room Name, Student email and Student Name. However, students must sign in with the same email address that you use to create the groups. If not you would have to assign them manually and synchronously before launching the breakout session.

**Features in the breakout room include:**

- **Share** – Students can share their desktop, documents or the Zoom whiteboard just as they would in the main room.
  - Sharing accommodates small group discussion and allows recording of notes, saving of whiteboard and other artifacts from the break-out session, etc.
  - Participants/students can access their desktops to use any application they choose. This can be saved. When they return to the main room, and have share screen privileges, they can **Share Screen** to debrief to the rest of the group with the files they have collaborated on.
  - They can save the whiteboard content or share it from a folder.
While in the breakout room, the **More** link gives participants/students access to:
- Chat
- Ask for Help
- Disable Participant Annotation
- Hide Video Panel
- Audio Options
- Video Settings
- Leave Breakout Room.

Participants/students can select **End Meeting** in the breakout session, which will return them to the main room. Or, the host/instructor can **Close All Rooms** to reconvene the groups in the main room. This will give participants 30 seconds to leave their break-outs before they are “forced” into the main room. When the host/instructor wants each group to report back, the documents created in the breakout room and saved (Word, PowerPoint, Whiteboard etc.) can be shared.

<table>
<thead>
<tr>
<th><strong>End Meeting</strong> – Select <strong>Leave Meeting</strong> to leave or end the meeting.</th>
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<tbody>
<tr>
<td>• You will receive another window asking “Do you want to leave this meeting?” for which you can select <strong>Leave Meeting</strong> or <strong>Cancel</strong>.</td>
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<tr>
<td>• If you want to allow the meeting to continue without you, designate a participant as host before you exit.</td>
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</table>

**Customizing Your Zoom Session Environment**

Current Zoom settings require very little customization to adapt the Zoom environment to the specification you would require to teach. On the **Profile** page there is a link to a **Settings** page. This will allow 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 add their [@ucalgary.ca](mailto:ucalgary.ca) email address.

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

- **Mute participants upon entry** – this minimizes disruption as participants join after the session has started.
- **Chat** – this will allow messages to be posted to the entire group
- **Private Chat** – this will allow 1:1 chat to occur
- **Co-host** – this allows the Host to confer co-host privileges to participants during a session
- **Polling** – this allows the host to build polls prior to or during a Zoom session to survey opinions during the session (see below)
- **Allow host to put attendees on hold** – this would allow a host interrupt two-way video and audio for part of the session. This is commonly used in exam situations so that a panel can deliberate on an exam candidate’s performance confidentially.
- **Annotation** – allows participants to annotate on the screen during screen sharing sessions
- **Whiteboard** – allows use of the whiteboard and annotation tools
- **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.

**View Options**

There is a button that will appear in the top right corner of the video feed, when you bring your cursor there. This will allow you to modify the screen view during the session and during sharing sessions.

- **Gallery View or Speaker View** – This will change the view of the video on your screen.
  - Gallery view will give video “tiles” across the top of the main screen.
  - Speaker view will give the video of participants tiled at the top and the person who is speaking will appear in the main screen.

- **Full Screen** – This will provide a full screen.
  - To exit, select **Exit Full Screen** in the top right corner, or select Escape on your keyboard.

When the screen is being shared, the shared content will fill the screen but there will be the option of having a small inset video of the main speaker and/or other participants.
First Steps – Smart Device

The Zoom app is available for free for smart devices. Search through the respective app store for your device to locate and download. Once it is downloaded, review the settings on your device to allow Zoom access to your microphone and camera.

If you are joining the meeting from a smart device, you only have to launch the app and type in the code for the meeting. Signing up or signing into an account is not required for joining a meeting. Meeting invites can be received via text message and you would only have to launch the app from the invite.

Technical Support

Program Support Level

<table>
<thead>
<tr>
<th>UPE</th>
<th>GPE</th>
</tr>
</thead>
<tbody>
<tr>
<td>UPE Online Help</td>
<td>DistHelp</td>
</tr>
<tr>
<td>Email: <a href="mailto:jane.hanson2@ucalgary.ca">jane.hanson2@ucalgary.ca</a></td>
<td>Email: <a href="mailto:DistHelp@ucalgary.ca">DistHelp@ucalgary.ca</a></td>
</tr>
</tbody>
</table>

Office of Teaching and Learning

Email: tandl@ucalgary.ca
phanlon@ucalgary.ca
Phone: 403-220-5761

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](https://support.zoom.us/hc/en-us)