What is Zoom?
Zoom (https://zoom.us) is a video conferencing platform that, in its simplest form, allows users to connect from computers and mobile devices. In some ways, it is similar to Skype, which many people are familiar with. Zoom accommodates video conferencing for large groups and can accommodate small groups discussions and collaboration along with the sharing of PowerPoints and other documents for presentation.

The Werklund School of Education is using the Pro version for Zoom, which allows a maximum of 100 participants for a meeting. All the participants in a Zoom session use the same access (e.g., URL) to enter their meeting room.

In WSE, Zoom can be used for synchronous sessions for courses, graduate exams, (e.g., candidacy and final), meetings with research teams and students, etc. Whenever a meeting is schedule, a URL is created to share with the participants.

Video Resources
The following videos are available as tutorials to help demonstrate features and functions of Zoom:
Use of the Zoom toolbar - https://vimeo.com/335465978/
My Meeting Settings modification - https://vimeo.com/335483603/
Breakout rooms - https://vimeo.com/338899748
Guidelines for Exam Neutral Chair - https://vimeo.com/338899619

Downloading and Installing
- Download and installation is only required the first time you join a Zoom meeting with a specific computer or mobile device.
- Joining subsequent sessions will open the application automatically and connect you to the meeting.
- It is recommended you use suitable devices for best quality video and audio.
  - Cameras and audio built into a laptop computer are effective but sound quality can be enhanced by using a headset with a microphone
    - To get the best audio results, you may need to use an external microphone, such as the ones that would be used with a smartphone.
- The Zoom app is available for all smart devices.
  - Download it from your respective app store. After installing the app, please review your device settings to ensure the Zoom app has access to your microphone and camera.
Creating a Meeting

To schedule a meeting or a synchronous class session, log into your account at https://zoom.us.

Your Zoom profile page contains information about the status and settings of your account. In the upper right corner, you will see options for scheduling, joining or creating a meeting.

As a meeting organizer/instructor, you would do the following:

- Go into your Zoom account
- Click on the **Schedule a Meeting** button
  - You will be taken to a page to set:
    - Start time of session
    - Title of session
    - Length of session
    - Access options for:
      - Video (please make available to participants)
      - Audio (please set to “Both” to allow participation via computer audio and, if necessary, Telephone)

- Once the settings are saved, a URL featuring a 9 or 10 digit access code is generated to allow access to the session.
- For your online course, post the URL for the session(s) in the Zoom folder in D2L.
- Send an email to intended participants for the meeting with the URL.
- If you wish to invite other participants after the meeting has been opened, select the **Invite** button from the Zoom session toolbar to generate the invitation email. This will *not* stop the current meeting.
Fields to Complete When Scheduling a Session:

- **Topic** - Create a session name that means something to the participants.
- **When** - Schedule sessions for slightly earlier than the actual start time to allow participants/students time to join the meeting early and test their audio and video connections or settings.
- **Duration** - Set a duration that is a bit longer than you think you will need.
- **Recurring Meeting** - Check this box and you will be given options of how often the meeting will repeat and at what interval. (e.g., for a weekly or monthly meetings use this for consistent meeting URL for all meetings.)
  - This will result in one URL to be used, rather than generating a new meeting URL.
  - **Note:** When creating your synchronous class sessions, consider using the recurring meeting option.
  - If you are scheduling meetings that do not occur at a consistent set time and day, you can locate individual sessions on the My Meetings page and edit the dates and times after sessions have been saved. This ensures the use of a consistent URL for all sessions in a course.
- **Video** - The default setting for both the Host and the Participants is “off,” but you may want to set this to “on.”
  - If you leave it “off,” all participants/students will be connected with their cameras off, but they can be turned on after the connection has been made.
  - If you set it to “on,” the participants’ cameras will be on as soon as they connect.
  - **Note:** For Mac users, you may need to manually adjust your privacy settings to allow your camera on your computer to work.
- **Audio** - The default setting is “Both,” which allows participants/students to connect to the audio stream through their computer, or by telephone.
  - It is recommended that people connect via computer or smart device, **not** by telephone. The telephone would incur long distance call costs which will not be supported.
- **Meeting Options** - Use “Enable join before host” to allow participants to join the session early and check their audio and video settings.
  - If this is not selected, please do so.
  - This may need to be set for individual meetings and under “My Meeting Settings” to ensure access.
- **Save** - Once all the information is entered, click “Save.”
  - Saving the meeting settings will bring up a page to invite the
participants/students to the meeting/session.

- **One Zoom Meeting at a Time** - With your account, you can only have 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 create a recurring session open for students, set times that would not interfere with your Zoom appointments. You might have the Zoom room open every evening and on weekends. Please consult your tech support person for further information.

**Your Participants’ Use**

**Online Course**: WSE students will receive the URL(s) to their synchronous sessions in the following manner (Please refer to the UPE or GPE protocols for this item):

- **D2L**: A Zoom folder is created in the Content section in the D2L course shell. In this folder, the instructor will create a Zoom content page where each Zoom meeting is listed (days, times and links are listed) for the course. In addition, all recordings of the sessions will be posted here.

<table>
<thead>
<tr>
<th>Date</th>
<th>Start Time</th>
<th>End Time</th>
<th>Zoom Meeting URL (Link)</th>
</tr>
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<tbody>
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</tbody>
</table>

- **Email**: The instructor *may* send an email with the Zoom invitation to students in their course. This can be sent as a calendar invitation.

- **Meeting**: A user or an invited participant should be sent an email that contains the URL to the Zoom session. To join the session, the participant would follow the URL.

**Tools in Zoom**

When entering a Zoom videoconference session, the meeting controls are located along the bottom of the window. They will appear *when the cursor is moved over them*.

The host/instructor will have exclusive features for managing participants, recording the meeting, starting breakout rooms, and ending the meeting.

Participants/students will see similar controls for video, their microphone, sharing and chat.

When sharing (documents, the Zoom whiteboard) these controls move to the top of the screen and appear only when the cursor hovers over that area.
Control Panel:

| **Audio (Mute)** – By clicking on the **microphone icon**, it will mute or unmute. The green will fluctuate to indicate audio levels. Selecting the arrow to the right of the microphone icon, will let you adjust audio controls, including volume and choice of microphone and speaker. |
| **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. |
| **Invite** – Selecting **invite** will allow you to add additional people who have not received the URL for the meeting. |
| **Manage Participants** – This will open a segment of the Zoom meeting screen to allow you to: |
  - **Mute** participants |
  - Control participants’ **video** |
  - **Chat** with individual participants privately |
  - Make participants **host** or **co-host** of the meeting |
  - **Reclaim** your role as host |
  - Identify and respond to participants who have **raised hands**. |
  - **Raise your own hand** when host duties have been delegated |
| **Share** – This will allow 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 page or website |
  - A Zoom whiteboard. |
• If you want a participant/student to give a presentation or share their document, they can do this without requiring Host privileges.
• While sharing, the toolbar will move to the top of the screen and it will add features to allow you to annotate the shared document or take remote control of the shared computer.
• If you are sharing a document from your desktop, ensure the document covers the desktop to avoid sharing personal or sensitive materials.
• While sharing, the Host video will go into picture-in-picture mode. Participants will see the shared screen, as well as video of the host.

<table>
<thead>
<tr>
<th>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.</th>
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</thead>
<tbody>
<tr>
<td>• At the top of this chat window, text chat will be displayed</td>
</tr>
<tr>
<td>• At the bottom of the window, you will see the following:</td>
</tr>
<tr>
<td>o To</td>
</tr>
<tr>
<td>▪ Everyone</td>
</tr>
<tr>
<td>▪ Individual</td>
</tr>
<tr>
<td>o More</td>
</tr>
<tr>
<td>▪ Save Chat</td>
</tr>
<tr>
<td>▪ Share File in Meeting</td>
</tr>
<tr>
<td>o Type message here...</td>
</tr>
<tr>
<td>▪ Enter your chat text in this space.</td>
</tr>
<tr>
<td>• 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.</td>
</tr>
<tr>
<td>• A saved chat session, along with other artifacts saved from Zoom sessions (whiteboards, video recordings, etc.) would appear in your Documents folder in a Zoom sub-folder.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Record – Meetings/class sessions can be recorded by the host.</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Local Recording:</td>
</tr>
<tr>
<td>o When you record locally, the video is saved in a Zoom sub-folder in your Documents folder. Please save recordings to your hard drive rather than a cloud to avoid breach of privacy and information protocols.</td>
</tr>
<tr>
<td>• Sharing Recordings in an Online Course:</td>
</tr>
<tr>
<td>o Go into to the Documents folder, double-click on the file. It will automatically convert the file to mp4 format.</td>
</tr>
<tr>
<td>o You will need to upload the mp4 file of the recording to the D2L Zoom. This can be completed right after the class session.</td>
</tr>
</tbody>
</table>
Breakout – The Breakout icon will create small group breakout sessions.

- You can randomly form groups (select Automatic) or assign members to these groups (select Manual). Set the number of groups that you need and then choose your preferred configuration.
- In Manual, you assign participants by selecting the group members from a list of available participants.
- Open All Rooms – After groups have been configured, the green open all rooms button will move people into their rooms for the breakout session. Participants/students will receive an invite to their particular breakout room. They will need to select Join.
- Features in the breakout room include:
  - Share – Participants/students can share their desktop or the Zoom whiteboard application,
    - 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 given Host privileges, they would select Share and in the share window they would see an icon for the document they saved. They would select Share Screen and select the document. All participants/students will be able to see the document in the main room.
    - 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
    - Record (their breakout group)
    - Disable Participant Annotation
    - Hide Video Panel
    - Audio Options
• Video Settings
  ▪ Leave Breakout Room.
    o 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.
    o When the host/instructor wants each group to report back, the documents created in the breakout room (Word, PowerPoint, Whiteboard etc.) can be shared.

• Instructor/Host Visiting Groups:
  o In the window where all groups are listed, the Instructor/Host will see the word Join by each group. Select Join for the group you wish to visit. There is a Leave Meeting button in the bottom right corner of the meeting window to allow the Instructor/Host to exit. This would bring you back to the list of all groups to join other breakout groups.

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

Icons Top Right Corner

Gallery View or Speaker View – This will change the view of the video on your screen.
  o Gallery view will give video “tiles” across the top of the main screen.
  o 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.
  o By moving your cursor, the tool bars on top and bottom will appear.
  o To exit, select Exit Full Screen in the top right corner, or select Escape on
My Meeting Settings

On the Profile page there is a link to a My Meeting Settings page. This will allow you to customize your meeting environment to include features that you wish to have during your sessions. In order of appearance, one you may wish to customize are:

- **Join Before Host** – this allows participants to enter the room and test audio and video settings prior to the appointed start time.
- **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 to remove a participant to be temporarily removed from a meeting. This is commonly used in exam situations
- **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

Polling Features

The polling feature is a great way to engage students/participants.

- Polling must be activated by modifying the Polling feature on the My Meeting Settings page.
Questions can be created on the meeting page prior to the meeting/class or they can be added during the session.

Multiple poll questions can be added.

When the poll is prepared, the host/instructor will select the Launch Poll button and the participants/students will have the opportunity to respond to the poll.

The participants/students will have the poll appear on their screen.

After the poll is completed, the host/instructor can share the results or relaunch the poll.

The instructor can stop the poll by selected End Poll.

Results will not be associated with individual participants. Votes will remain anonymous.

The host/instructor can share the results of the poll by selecting Share Results.

Ending/Exiting a Meeting
At the far right end of the toolbar is a button to End the Meeting. If you are host/instructor, you will have three options when selecting this:

- End meeting for all;
- Leave meeting (this allows the host/instructor to leave while participants remain and allows the host to reassign host privileges to someone remaining in the meeting);
- Cancel.

Participants in a Zoom meeting, will be asked to confirm that they want to leave.

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></th>
<th>UPE</th>
<th>GPE</th>
</tr>
</thead>
<tbody>
<tr>
<td>UPE Online Help</td>
<td></td>
<td>DistHelp</td>
</tr>
<tr>
<td>Email:</td>
<td><a href="mailto:plehoang@ucalgary.ca">plehoang@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
Phone: 403-220-5761

Resources

- Zoom website - see “Resources” button on the top right-hand corner of the landing page.
  - Types of Zoom Support Resources: Video tutorials, blog and FAQ.

- 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, somethings with a video response.

- Support Center – provides various resources to help with using Zoom - https://support.zoom.us/hc/en-us
**D2L Zoom Folder for WSE Courses**

In D2L, a Zoom folder has been created that contains the following: Student Zoom Handbook, table for you to list your Zoom class schedule with URLs, and a space for you to upload the recordings of the sessions.

### Zoom Sessions

<table>
<thead>
<tr>
<th>Class Times</th>
<th>Date</th>
<th>Start Time</th>
<th>End Time</th>
<th>Zoom Meeting URL (Link)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Class Times</td>
<td>January 10, 2019</td>
<td>5:00 pm MST</td>
<td>7:00 pm MST</td>
<td><a href="https://zoom.us/j/399097535">https://zoom.us/j/399097535</a></td>
</tr>
<tr>
<td></td>
<td>March 3, 2019</td>
<td>5:00 pm MST</td>
<td>7:00 pm MST</td>
<td><a href="https://zoom.us/j/399097535">https://zoom.us/j/399097535</a></td>
</tr>
<tr>
<td></td>
<td>April 7, 2019</td>
<td>5:00 pm MST</td>
<td>7:00 pm MST</td>
<td><a href="https://zoom.us/j/399097535">https://zoom.us/j/399097535</a></td>
</tr>
<tr>
<td>Case Sessions</td>
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<td>5:00 pm MST</td>
<td>7:00 pm MST</td>
<td><a href="https://zoom.us/j/360405733">https://zoom.us/j/360405733</a></td>
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<tr>
<td></td>
<td>February 25, 2019</td>
<td>5:00 pm MST</td>
<td>7:00 pm MST</td>
<td><a href="https://zoom.us/j/360405733">https://zoom.us/j/360405733</a></td>
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### Recordings

Recordings are listed below.

**Zoom Student Handbook**
- File: Word Document

**January 3, EDER 123, Intro to Course**
- Video

**March 14, EDER 456, Debating Critical Issues**
- Video
Appendix 1: Recommended Adjustments in “My Meeting Settings”

The My Meeting Settings page gives users the opportunity to customize the Zoom environment for the sessions that they host. The following features are the ones that we would bring you attention to for the purpose of this customization. It is recommended that you check these settings regularly to ensure they are correct and have not defaulted away from your preferences.

**Participants’ Video**
Having the video (webcam) feature defaulted to on might make some students uncomfortable. Some students, if not many, eventually turn their webcams off in sessions where the webcams are defaulted to on. If this setting is defaulted to OFF, students can relax knowing their faces will not automatically appear the moment they join a session. This still allows participants the autonomy to activate their cams during the session by clicking on the camera icon near the lower-left corner of the screen.

**Join Before Host**
Having this setting turned ON will ensure that students can enter the room before the instructor arrives.

**Mute participants upon entry**
We have found that when students enter in with their mics automatically on, there is sometimes background noise (especially if several students come in at once). So having this setting ON would prevent this.

**Private Chat**
Leaving this on allows students to send a private note to the instructor, disthelp to send a private note to the instructor, or for the instructor to send a private note to disthelp.

**Co-host**

**Polling**
Having this feature activated allows the host to create polls before or during the meeting to get feedback from meeting participants.

**Always show meeting control toolbar**
This allows you to see your controls through the meeting rather than just when your cursor is hovering over the toolbar.

**Show Zoom windows during screen share**
This allows students to see the Chat and Participants windows when screen share is taking place.
Nonverbal Feedback
This provides additional icons for participants to use to communicate during the session: the raised hand, green checkmark, red “x”, and others.

Breakout Room
This allows small private groups sessions and it does need to be set to accommodate this feature.

Virtual Background
If some students are reluctant to show their location as a result, this feature can enable students to create a background from a stock image or an image of their own. There may, however, be challenges activating this depending on the platform a participant is using.

Screen Sharing
This is another feature that can be turned off in My Meeting Settings.