ZOOM FUNCTIONS for Engaging Learners

WHY

- Much of our education delivery, including Faculty and Resident/Learner development, now requires the use of technology, such as Zoom, for effective teaching and learning.
- For further details, please see this background resource on how to optimize synchronous on-line learning environments (SOLE).

HOW

1. **BEST** if you have a ‘full subscription’ version of Zoom
   - The features are more expansive for licensed users, so make sure that your version of Zoom is up-to-date.
   - a. **Option 1:** Use your or your program’s paid account
   - b. **Option 2:** Use the Zoom account associated with your University of Toronto email (if applicable).
   - Everyone who has a University of Toronto email account can access a licensed version of Zoom

2. **ENABLE** Zoom Features
   - *Before trying things out,* ‘enable’ the following Zoom features to maximize the experience for you and your participants.
   - a. Sign in to your Zoom web portal by visiting utoronto.zoom.us and selecting Log in to Zoom
   - b. In the Navigation Menu on the left-hand side of your screen, select Settings
   - c. In the Meeting tab, navigate down the page and check to ensure that the following options are all enabled:
     - **In Meeting (Basic)**
       - Chat
       - Meeting Polls
       - Whiteboard
       - Annotation
       - Screen Sharing
       - Meeting reactions
       - Allow participants to rename themselves
     - **In Meeting (Advanced)**
       - Breakout room

MORE INFO ON USING Zoom associated with your U of T Account (if applicable)

Everyone with a University of Toronto email account has access to a licensed version of Zoom. The features are more expansive for licensed users, so this is what we recommend you use. To do so using the Zoom desktop application, follow the instructions below.

1. Open Zoom and select the **Sign In with SSO** button, as shown below
   - If using the Zoom desktop application, this will appear as follows.
If using the Zoom web browser, this will appear as follows.

2. Type in utoronto for the Company Domain and then select Continue

3. You will be re-directed to the University of Toronto's Shibboleth login system. Enter your UTORid and password then select Login

READY?
Follow the instructions in the table below.

NEED HELP?
Contact us at cbme.facdev@utoronto.ca
## TIPS for Using Zoom Functions for Engaging Learners

<table>
<thead>
<tr>
<th>#</th>
<th>Topic</th>
<th>Steps/Notes</th>
</tr>
</thead>
</table>
| 1  | Changing the Displayed Name | 1. Select the **Participants** icon from the meeting menu at the bottom of the screen  
  2. Hover over the name you want to change, select **More**, and choose **Rename** to change the name that will be displayed to others |
| 2  | Reactions                    | 1. Select the **Reactions** icon from the meeting menu  
  2. The menu on the right will pop up. Once selected, all Reactions will disappear after 5 seconds except for **Raise Hand** which needs to be manually lowered. This can be done by both the host or participant |
| 3  | Chat                         | 1. Select the **Chat** icon from the meeting menu to open chat window  
  2. By default, messages will be                                                                                                 |

**Screens to guide you**

![Screenshots](image1.png)
<table>
<thead>
<tr>
<th>#</th>
<th>Topic</th>
<th>Steps/Notes</th>
<th>Screens to guide you</th>
</tr>
</thead>
</table>
| Chat | sent to Everyone in meeting  
3. To send to specific participants, click To and a drop down menu will appear  
4. If the chat window is not open, and participants are sending messages, a red notification will appear next to the Chat icon | | |
| 4a | Polls Please note: To use the Poll feature, the Host must be a licensed user, have the most up to date Zoom version, and be using a Personal Meeting ID | Polls can be created both BEFORE and DURING a meeting  
Before the meeting  
1. Sign into your Zoom account  
2. Go to the Meetings page and select the scheduled meeting  
3. Scroll to the bottom of the page to find the Poll option  
4. Select Add to create a poll  
5. When the Poll window opens, enter a Poll title, the poll question, and answer options including whether: single or multiple responses and whether | |
<table>
<thead>
<tr>
<th>#</th>
<th>Topic</th>
<th>Steps/Notes</th>
<th>Screens to guide you</th>
</tr>
</thead>
<tbody>
<tr>
<td>Polls</td>
<td>responses are public or anonymous</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>6. To add additional questions, click <strong>Add a Question</strong></td>
<td></td>
<td>4b Polls</td>
</tr>
<tr>
<td></td>
<td>7. Click <strong>Save</strong> when finished</td>
<td></td>
<td>4b Polls During the Meeting 1. Select <strong>Polls</strong> from the meeting menu 2. Select <strong>Add a Question</strong> from the <strong>Polls</strong> window. You will be directed to your <strong>Meetings</strong> page in a web browser 3. In the <strong>Personal Room</strong> tab, select <strong>Poll</strong> followed by <strong>+Add Poll</strong> 4. In the <strong>+Add Poll</strong> window you can enter a <strong>Poll</strong> title, add multiple questions, allow single or multiple responses and choose to make responses public or anonymous 5. Click <strong>Save</strong> when finished and return to the meeting</td>
</tr>
<tr>
<td>4c Polls</td>
<td>Launching the Poll 1. Select <strong>Polls</strong> from the meeting menu</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

---

**Temerty Faculty of Medicine, University of Toronto**

**UT CBME/CBD**

**Centre for Faculty Development**
<table>
<thead>
<tr>
<th>#</th>
<th>Topic</th>
<th>Steps/Notes</th>
</tr>
</thead>
</table>
|   | Polls   | 2. The Poll window will pop up on the participants screens  
|   |         | 3. As host you will see live results and can end the poll at any time by clicking **End polling**  
|   |         | 4. Once closed you can **Share Results** or relaunch the poll                                                                                                                                              |
| 5a| Screen Sharing | Before the meeting  
|   |         | 1. Sign into your Zoom account  
|   |         | 2. Select **Settings** from left side navigation menu  
<p>|   |         | 3. Scroll down to <strong>Screen Sharing</strong> setting options and change as you see necessary for your session                                                                                                       |</p>
<table>
<thead>
<tr>
<th>#</th>
<th>Topic</th>
<th>Steps/Notes</th>
</tr>
</thead>
</table>
| 5b | Screen Sharing | **During the Meeting**  
1. Select Share Screen from the meeting menu  
2. Select Screen followed by Share for participants to view your screen  
3. If you have multiple programs open and would like to limit what your participants can see, you can select a specific Screen  
4. Once your screen share is launched, a green and red bar will appear. To end screen share, select Stop Share |
| 6  | Whiteboard and Annotation | **1. Select Share Screen from the meeting menu**  
2. Select Whiteboard followed by Share to launch a Whiteboard and the accompanying Annotation Tools Menu  
3. Annotation tools allow you to insert text, images and shapes  
4. To enable or disable the participants’ |
<table>
<thead>
<tr>
<th>#</th>
<th>Topic</th>
<th>Steps/Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Whiteboard and Annotation</strong></td>
<td>ability to annotate, select More from the meeting menu and select Enable Annotations for Others 5. You can add additional pages to your whiteboard by selecting the “square +” icon located in the bottom right of the screen. You can scroll between the various Whiteboard pages you have created</td>
<td><img src="image1" alt="Whiteboard and Annotation screen" /></td>
</tr>
<tr>
<td><strong>Breakout Rooms</strong> Allow you to split your meeting participants into separate sessions</td>
<td>1. Select Breakout Rooms from the meeting menu 2. Select the number of rooms to create, whether participants are assigned automatically, manually or by choice 3. Select Create when finished 4. Once the Breakout Rooms have been created, you can set meeting parameters, by selecting Options or you can launch by</td>
<td><img src="image2" alt="Breakout Rooms screen" /></td>
</tr>
<tr>
<td>#</td>
<td>Topic</td>
<td>Steps/Notes</td>
</tr>
<tr>
<td>---</td>
<td>----------------</td>
<td>-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td></td>
<td></td>
<td>selecting <strong>Open All Rooms</strong>                                                                 Workflows shown are for illustrative purposes.</td>
</tr>
<tr>
<td>5.</td>
<td>Breakout Rooms</td>
<td>Once the Breakout Rooms are launched, you will still have the flexibility to move participants between rooms, by selecting their name and then pressing “Move to”.</td>
</tr>
<tr>
<td>6.</td>
<td></td>
<td>As host you can move between rooms, by selecting <strong>Join</strong></td>
</tr>
<tr>
<td>7.</td>
<td></td>
<td>Breakout Room participants have the ability to use the <strong>Screen Share, Whiteboard and Annotation</strong> features mentioned above. It’s important that participants save the whiteboard if they want to keep the results before exiting the Breakout Room.</td>
</tr>
</tbody>
</table>

**Notes for Participants:**

1. Learners/Participants must select **Join** when prompted
2. Learners/Participants have an **Ask for Help** button within breakout room and

You can invite the host to this Breakout Room for assistance.

---

**Screens to guide you**
<table>
<thead>
<tr>
<th>#</th>
<th>Topic</th>
<th>Steps/Notes</th>
<th>Screens to guide you</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>can use this to invite host to provide assistance</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>