ZOOM Guide for Facilitators

OVERVIEW

Use this guide to create effective sessions using ZOOM, including how to set up ZOOM to schedule meetings, to send invitations to your attendees, to manage audio and video, and to end meetings. For consultations on using ZOOM in educational projects, contact iROCKET at iROCKET@ucsf.edu or 415-502-2800 to learn more.

There are two ways to manage ZOOM: the browser and the app. Our best practice recommendation is to schedule and run ZOOM meetings using the browser. To further customize your experience, use the ZOOM app to configure your computer settings for ZOOM.

GETTING PREPARED

Get Started

1. Visit ucsf.zoom.us
2. Select "sign-in"
3. For first-time users, select "Login with SSO," enter "ucsf" as domain, and enter your MyAccess username and password. After logging in, an account is created automatically. You will see your name at the top of the webpage: ucsf.zoom.us/profile
4. For returning users, enter your MyAccess username and password and access your account.
5. The ZOOM app (i.e., "Zoom Client") is downloaded automatically.
6. Now you are signed in to your ZOOM account.

Zoom App

Schedule a Meeting from Your Browser

1. From your ucsf.zoom.us/profile page, select "Schedule a Meeting."
2. Enter meeting details.
3. Under "Meeting Options," select "Enable join before host" and "Mute participants on entry."
4. Select "Save" at the bottom.
5. Select "Copy the invitation."
6. A window will open; select "Copy Meeting Invitation" button at the bottom and close the window using the X in the upper right.
7. Open your Outlook account and create a new meeting invitation.
8. Paste it into the Outlook calendar invitation.

Prepare for the Meeting

- Encourage ZOOM participants to review the ZOOM Guide for Participants [link] in advance.
- If possible, choose a space with a monitor. Some rooms have dedicated video conferencing in the rooms. To see a list of rooms, go to https://edtech.ucsf.edu/web-conferencing-venues.
- Consider the audio and video needs for your meeting in advance. See the Advanced Settings below.
  o Are all participants on ZOOM?
  o Does everyone need to see each other?
- Arrive early in the space, if possible.
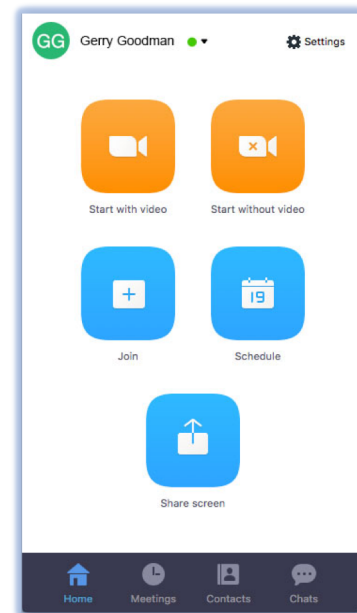
- Confirm there is a working internet connection.
- For more complex meeting needs, consider roles and responsibilities to help facilitate the meeting. It's difficult for one person to smoothly run all the parts of a large meeting:
  - Do you need someone to:
    - Setup and launch ZOOM during your session? Take notes? Manage participants in the ZOOM chat space?
  - Who will manage ZOOM participants that need help with audio?
  - Who will present the PowerPoint? Do you need more than one computer or an additional person's help to conduct the meeting smoothly?
  - Is there more than one person presenting? How will you manage this?
  - For consultations on using ZOOM in complex meetings, contact iROCKET at iROCKET@ucsf.edu or 415-502-2800 to learn more.
- Be sure to review the important tips on etiquette for ZOOM meetings in this guide.

FACILITATING THE MEETING

Start Your Meeting from Your Browser

1. Click on the ZOOM URL link in your original meeting invitation.
2. Enter the Meeting Room by selecting "Join With Computer Audio."

OR

1. Visit ucsf.zoom.us
2. Select "sign-in"
3. Select "Meetings" on the left side of the screen
4. Go to the meeting you want to start on the "Upcoming Meetings" tab and select "Start" on the right
5. Enter the Meeting Room by selecting "Join With Computer Audio."
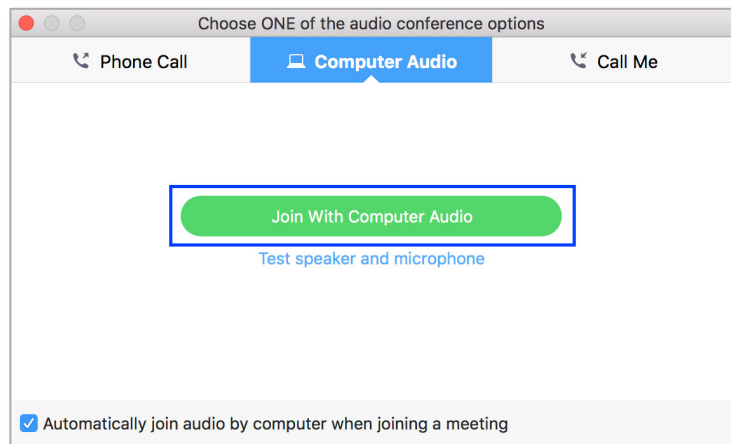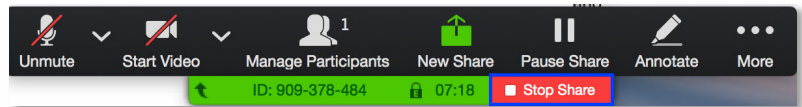

Run Your Meeting

Your meeting has launched.

- Unmute your audio and start your video when you are ready.
- If you are in Room CL-220 or CL-221, please use the ZOOM Guide for Rooms [link].
- Click on Manage Participants icon to check on your participants. View the Participant window on the right.
- Do a verbal check-in with your participants to test if they can hear you and you can hear them.
- To have a ZOOM discussion WITHOUT sharing any content, get started. You are ready!
- To have a ZOOM discussion AND share content, select the "Share your Screen" icon.

- Select the screen or software you wish to share (e.g., PowerPoint, Word, your desktop, etc.)
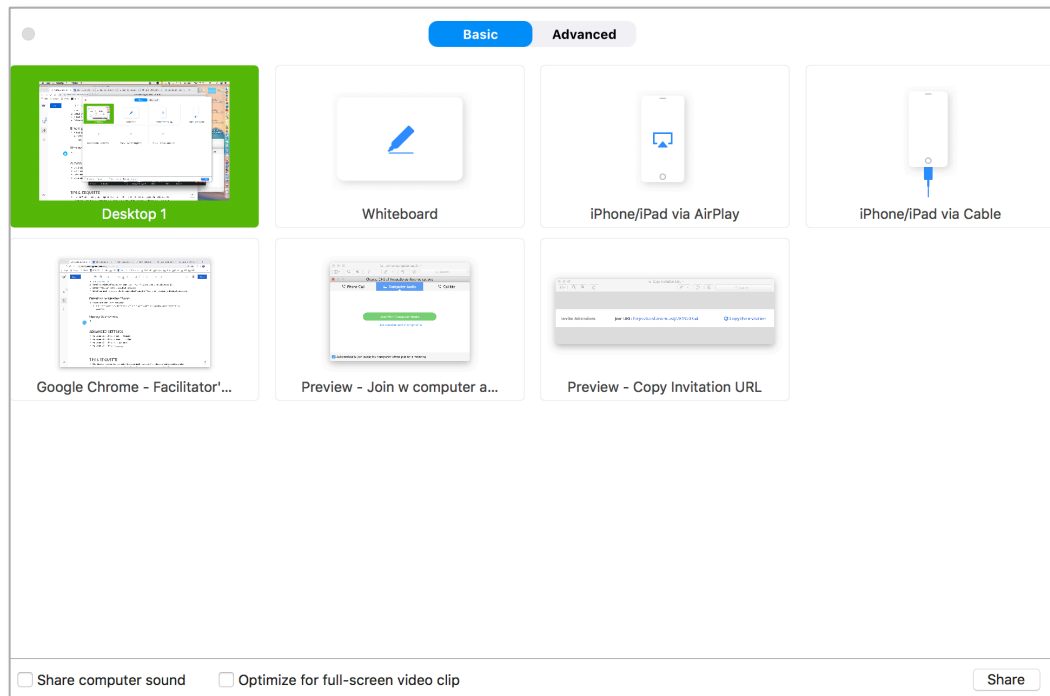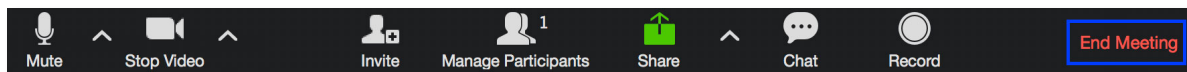

- To stop sharing content but stay in the meeting, select "Stop Share" on the ZOOM menu bar.

End Your Meeting

1. Sign off verbally with the ZOOM participants before ending the meeting.
2. Select "End Meeting" on the right side of the ZOOM toolbar.

3. Select "End Meeting for All."

AUDIO, AUDIO, AUDIO

Quality audio is essential for a successful ZOOM meeting. If participants are in different locations (including you as the facilitator) each should:

- Use a headset with a microphone. If you don't have a headset, use headphones or ear buds.
- Immediately mute your audio when entering the ZOOM meeting room.
- Use the space bar on your computer to temporarily unmute and mute your audio.

BEST PRACTICES

- If you are facilitating meetings in a conference room, use the ZOOM Guide for Rooms [link] for assistance.
- You can use ZOOM for audio-only meetings by not using video.
- For scheduling meetings, we recommend these best practices:
    - Schedule and run meetings from your browser and use the ZOOM app when you need to configure your audio and video settings:
        - Choose your camera settings
        - Test your audio
- Use a unique meeting ID for each meeting rather than your Personal Meeting ID. This way each meeting has its own ID with a distinct start and end time. Unique meeting IDs can prevent participants from a previous meeting from accidentally entering a meeting.

ETIQUETTE

ZOOM meetings have a different flow due to the remote attendees. Don't forget these important tips when facilitating:

- Introduce participants in the physical meeting room to the ZOOM participants at the beginning of the meeting.
- Alert ZOOM participants whether you will be monitoring the Chat feature in the meeting.
    - Consider having another person moderate the Chat feature; balancing the facilitation of a meeting and moderation of the Chat feature can be challenging.
- Facilitate the meeting so all physical meeting room participants speak one at a time.
- Ask participants in the physical meeting room to say their name before speaking.
- Check in with the ZOOM participants at different points for any comments or questions.
- Make sure shared content is available electronically. Don't bring paper handouts that ZOOM participants will not be able to see!
- Close the meeting verbally at the end so ZOOM participants also get closure.
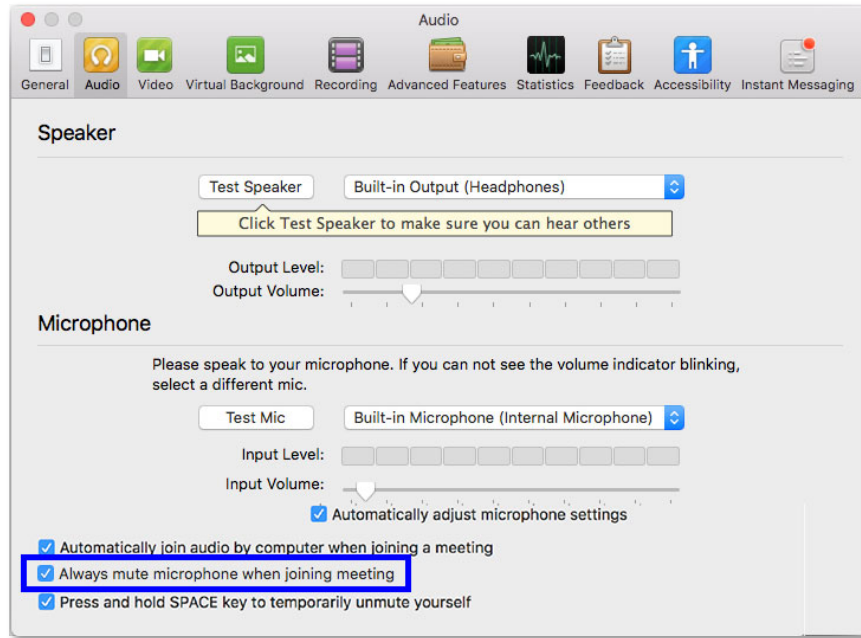
ADVANCED SETTINGS TO CUSTOMIZE YOUR EXPERIENCE

Mac Users Only

We recommend enabling the following settings to employ best practices when using ZOOM with colleagues. To access these settings:

1. Open ZOOM app
2. Click "Settings" in the upper right of the app window
3. Click on the appropriate tab (Audio, Video, General) and match all the checkboxes
4. Pay particular note to the emphasized ones

Audio tab – enable:

"Always mute microphone when joining meeting"

Video tab – enable:

"Turn off my video when joining meeting"

General tab – disable:

Scale to fit my Zoom window when viewing screen shared by others
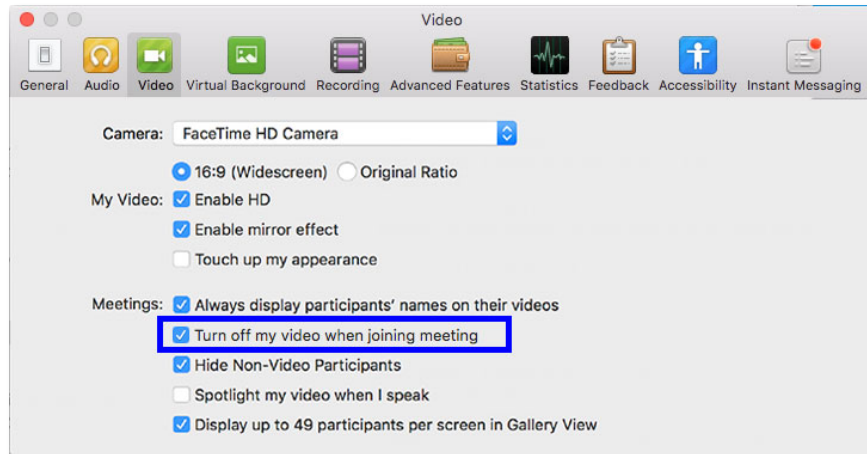
PC Users Only

We recommend enabling the following settings to employ best practices when using ZOOM with colleagues. To access these settings:

1. Open ZOOM app
2. Click "Settings" in the upper right of the app window
3. Click on the appropriate tab (Audio, Video, General) and match all the checkboxes.
4. Pay particular note to the emphasized ones.

Audio tab –
enable:

"Always mute
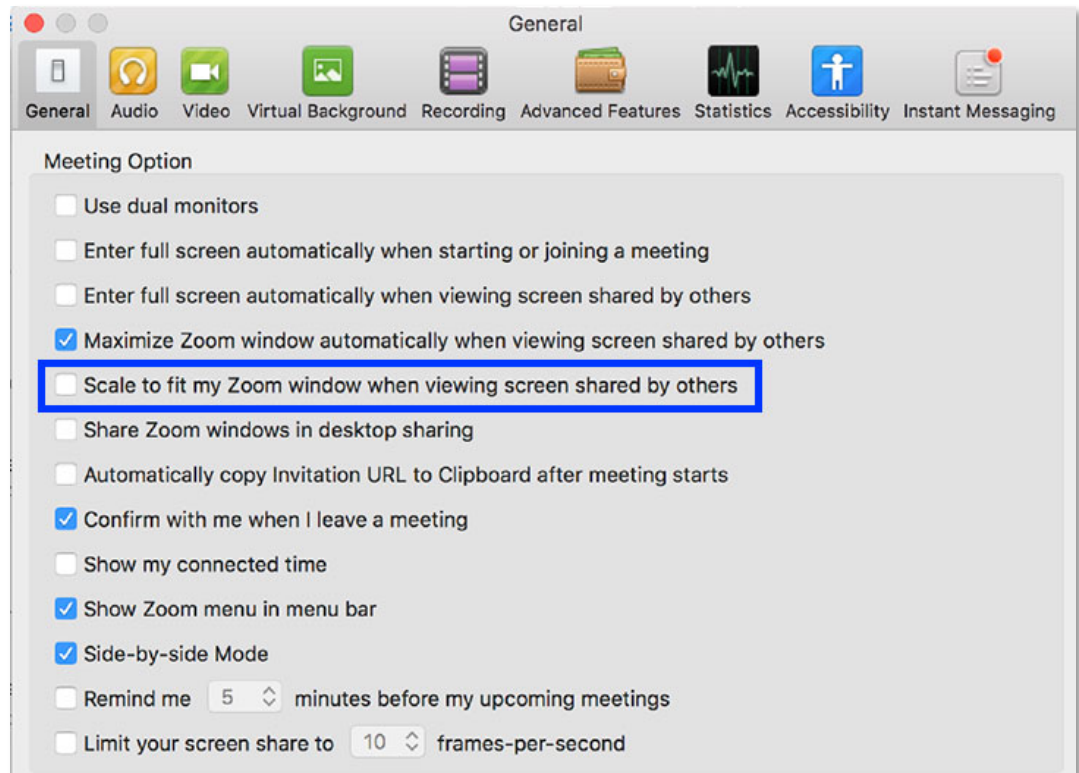microphone
when joining
meeting"

Video tab –
enable:

"Turn off my
video when
joining
meeting"

General tab –
disable:

"Scale to fit my
Zoom window
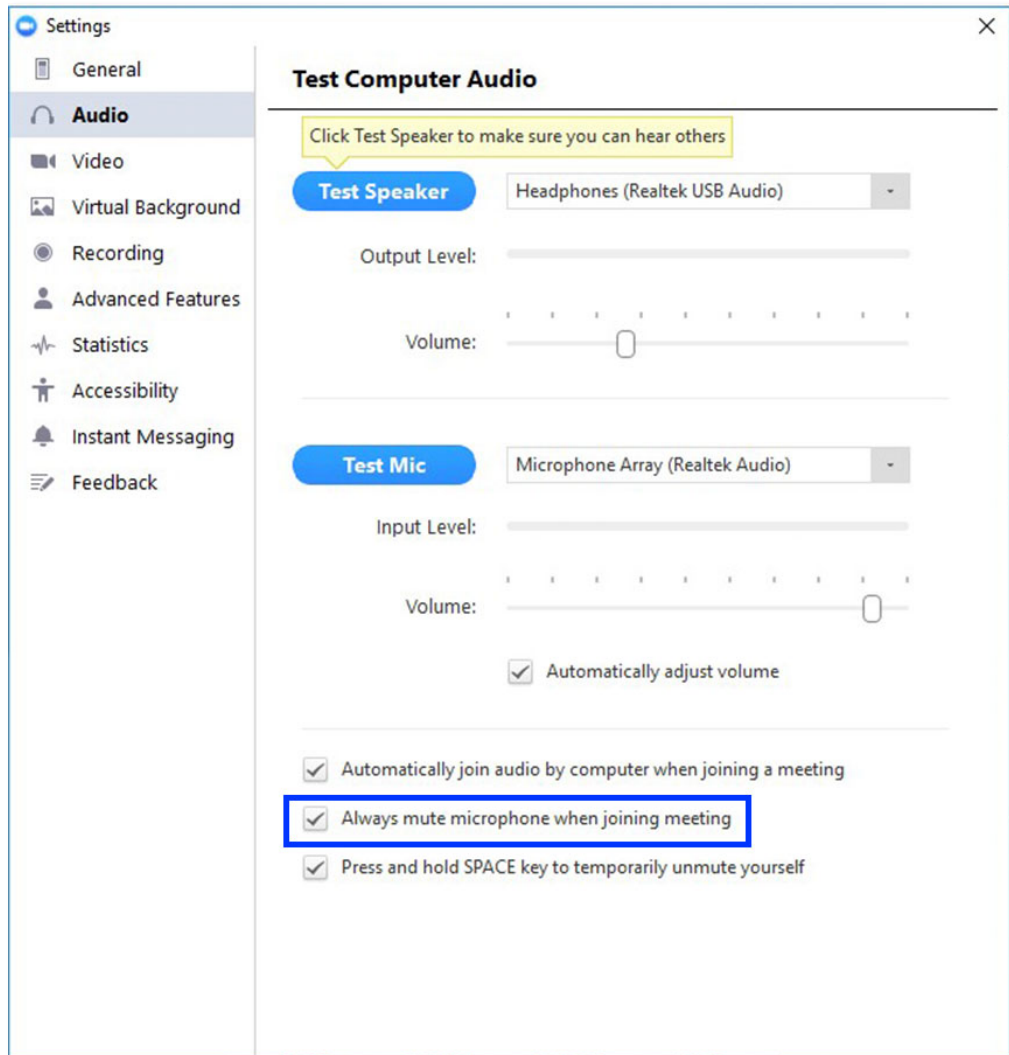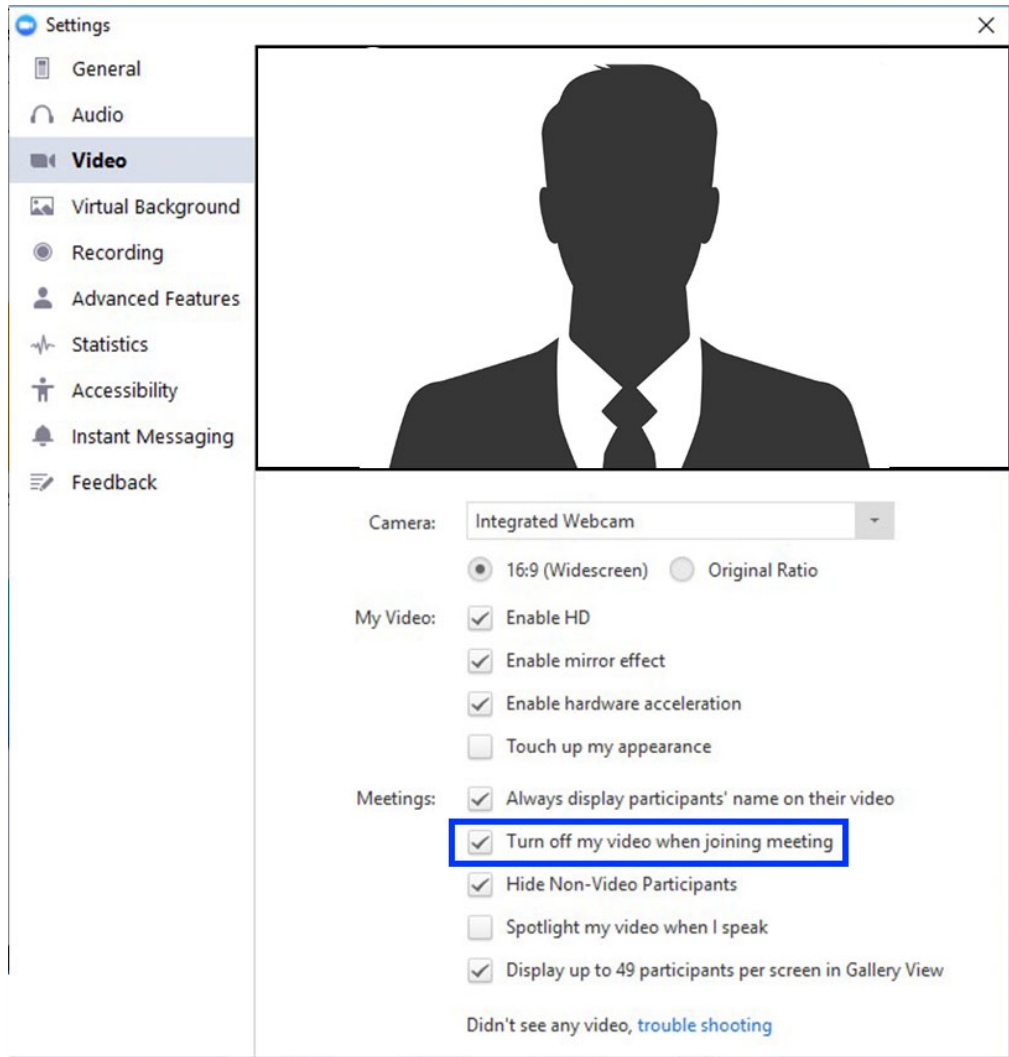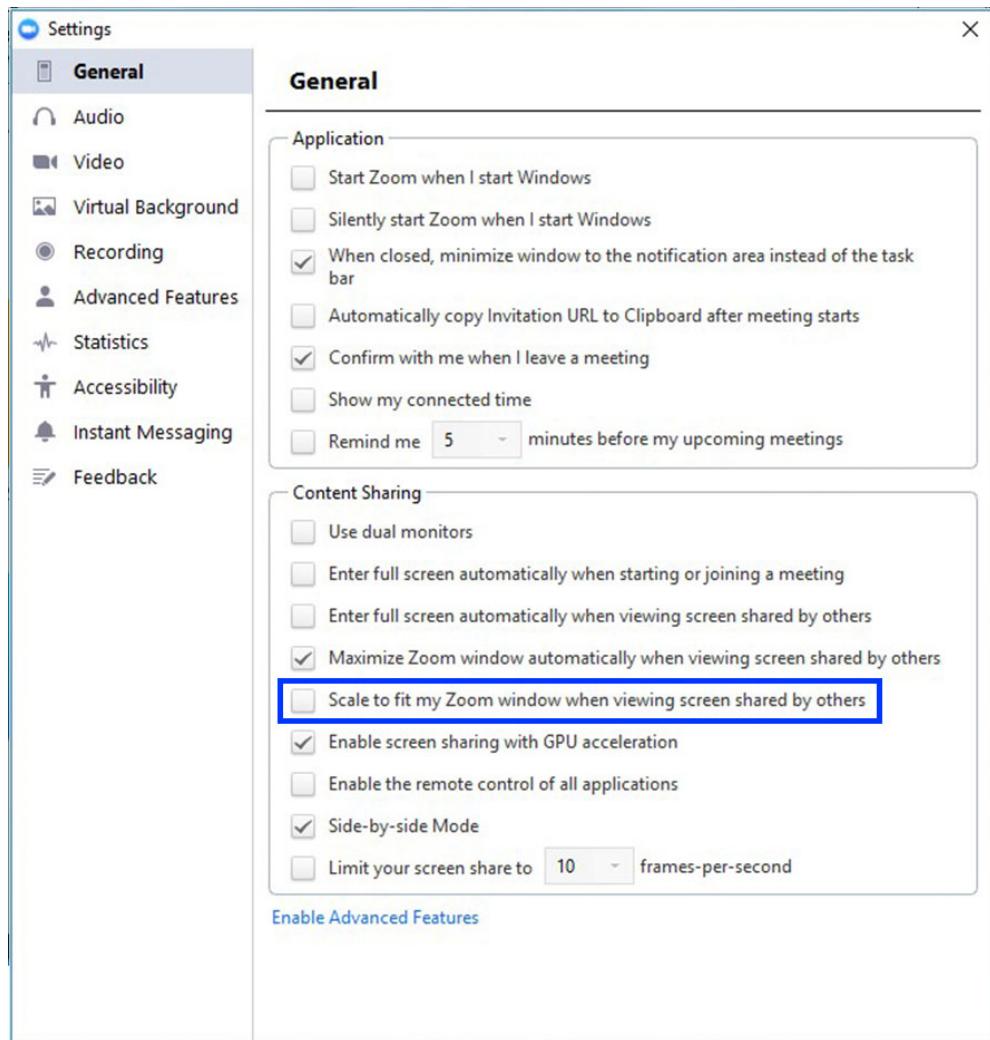when viewing
screen shared
by others"

Settings   ✕

- General
- Audio
- Video
- Virtual Background
- Recording
- Advanced Features
- Statistics
- Accessibility
- Instant Messaging
- Feedback

General

Application

- ☐ Start Zoom when I start Windows
- ☐ Silently start Zoom when I start Windows
- ☑ When closed, minimize window to the notification area instead of the task bar
- ☐ Automatically copy Invitation URL to Clipboard after meeting starts
- ☑ Confirm with me when I leave a meeting
- ☐ Show my connected time
- ☐ Remind me [5 ▾] minutes before my upcoming meetings

Content Sharing

- ☐ Use dual monitors
- ☐ Enter full screen automatically when starting or joining a meeting
- ☐ Enter full screen automatically when viewing screen shared by others
- ☑ Maximize Zoom window automatically when viewing screen shared by others
- ☐ Scale to fit my Zoom window when viewing screen shared by others
- ☑ Enable screen sharing with GPU acceleration
- ☐ Enable the remote control of all applications
- ☑ Side-by-side Mode
- ☐ Limit your screen share to [10 ▾] frames-per-second

Enable Advanced Features

TROUBLESHOOTING

I can't hear the participants at all.	• The participants might be muted. Unmute the participants. • Ask participants to unmute themselves and/or type your request in the Chat feature. • Check the ZOOM Guides by Room [link] for additional assistance.
I can't hear the participants well.	• Adjust the volume on your computer or the device controlling audio. • Check the ZOOM Guides by Room [link] for additional assistance.
There is a noisy participant who is unmuted.	• On the facilitator computer, select "Manage Participants" on the ZOOM toolbar. See the list of participants on the right and mute the one who is unmuted. You can also "Mute All" participants; if so, you should have Chat available so participants can communicate. • If you are in a room with video conferencing equipment, check the ZOOM Guides by Room [link] for additional assistance.
I am getting major audio feedback.	If you are in a room with video conferencing and you used your laptop to log into ZOOM, be sure to mute your audio. Leaving it unmuted will create feedback. As a best practice, avoid logging into ZOOM with your device in a video conferencing room.

FOR INFORMATION AND SUPPORT

For 24 hour technical support, contact Information Technology (IT) Service Desk online or by phone at 415-514-4100.

To learn more about ZOOM, contact Educational Technology Services (ETS) at edtech@ucsf.edu or 415-476-4310.

For consultations on using ZOOM in educational projects and for complex meetings, contact iROCKET at iROCKET@ucsf.edu or 415-502-2800 to learn more.

To learn more about ZOOM advanced settings, please consult ZOOM's Getting Started Guide.