ZOOM Guide for Facilitators

Basic

OVERVIEW

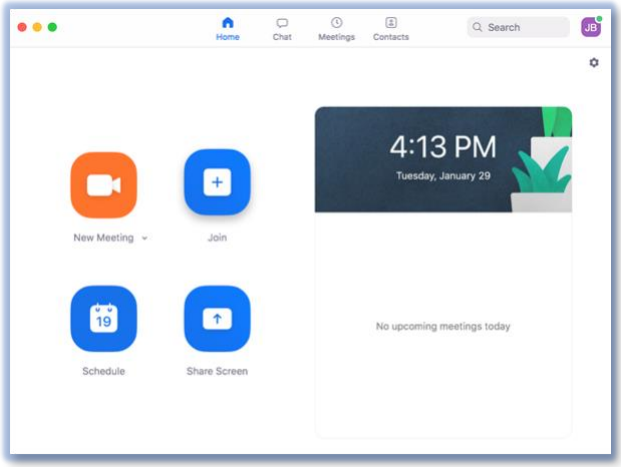
Use this guide to create effective sessions using ZOOM, including how to set up ZOOM to schedule meetings, to send invitations to your attendees, to manage audio and video, and to end meetings. For consultations on using ZOOM in educational projects, reach out to the resources listed at the end of this document.

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 Client is downloaded automatically
6. Now you are signed in to your ZOOM account



Zoom Client. If yours looks different than this, check for updates.

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”
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 and invite participants to your meeting

9. Consider simplifying the lengthy ZOOM invitation using only this key information:
    - Videoconferencing: Click https://ucsf.zoom.us/j/000000000
    - Phone conferencing: Dial (000) 000-0000 and enter meeting ID: 000 000 000
    - iPhone single-tap: Dial +10000000000, 00000000#
10. Encourage ZOOM participants to review the ZOOM Guide for Participants – Basic or Advanced by including this link in the invitation: https://meded.ucsf.edu/ZOOM

Prepare for the Meeting

1. Reserve your physical meeting room 30 minutes before the meeting start time to set up and practice.
2. 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
3. If you are in a room with video conferencing, please use the ZOOM Guide for Rooms for additional assistance at https://meded.ucsf.edu/ZOOM
4. You'll need a working internet connection
5. Consider the audio, video and general needs for your meeting in advance by answering these questions:
    - Who will collect the presentation materials in advance of the meeting so they can be placed on one computer?
    - Does everyone need to see each other?
    - Who will set up and launch the ZOOM meeting?
    - Who will moderate Chat if you use it?
    - Who will manage the ZOOM participants' audio and video?
    - Who will present the PowerPoint or other content? Is there more than one presenter?
    - Do you need more than one device to run your meeting? For example, one for presenting and one for moderating ZOOM.
    - Do you need an additional person's help to conduct the meeting smoothly?
    - Who will take notes?
    - Who will facilitate the flow of the meeting?
6. For consultations on using ZOOM in complex meetings, see the resources at the bottom of this document
7. Be sure to review the important tips section on etiquette for ZOOM meetings in this guide
8. Also refer to the ZOOM Guide for Facilitators - Advanced for specific setting recommendations at https://meded.ucsf.edu/ZOOM

FACILITATING THE MEETING

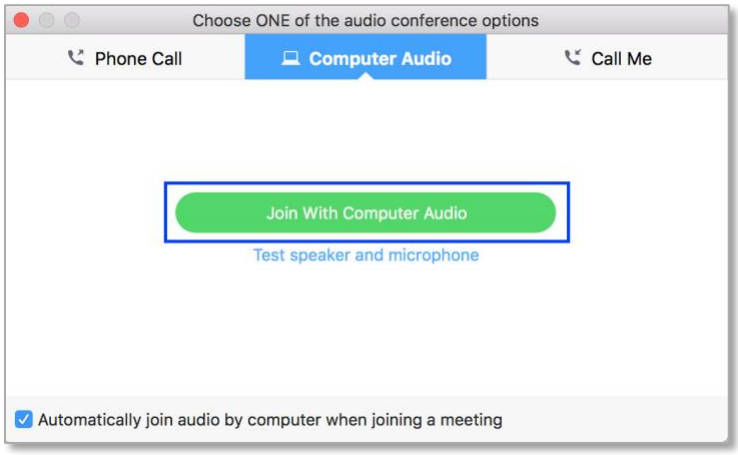
If you are in a room with video conferencing, please use the ZOOM Guide for Rooms for additional assistance at https://meded.ucsf.edu/ZOOM.

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

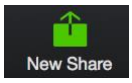
1. Visit ucsf.zoom.us
2. Select “sign-in”
3. Select “Meetings" on the left side of the screen
4. Go to the meeting you want to start on the "Upcoming Meetings" tab and select "Start" on the right
5. Enter the Meeting Room by selecting "Join With Computer Audio"



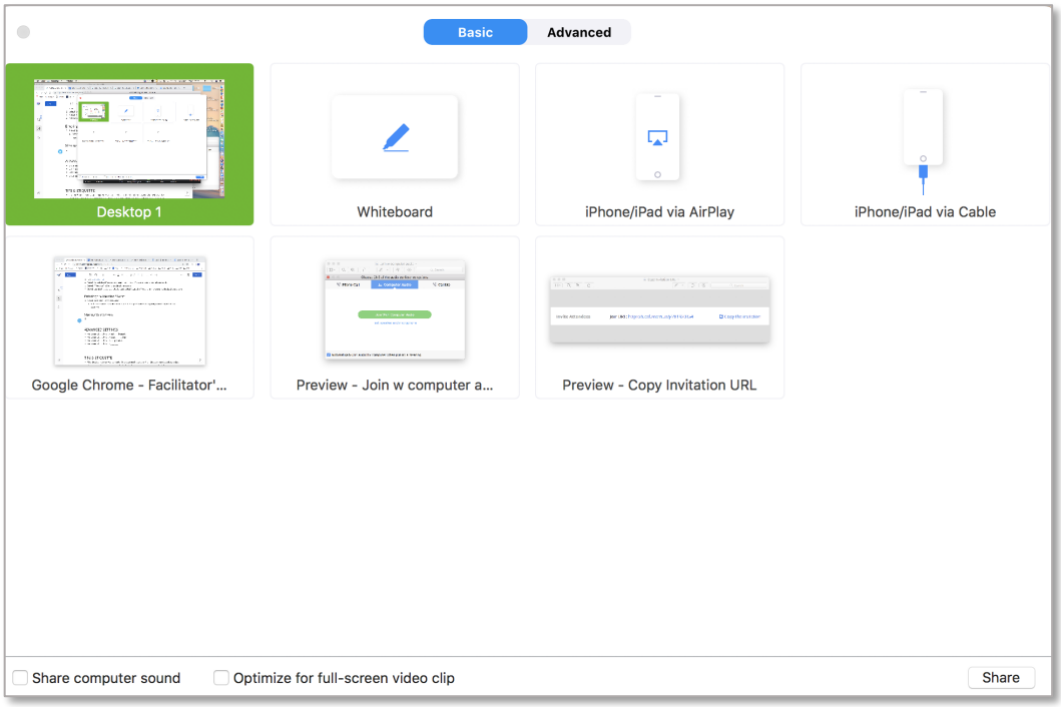
Run Your Meeting

If you are in a room with video conferencing, make sure to follow the ZOOM Guide for Rooms for additional assistance at https://meded.ucsf.edu/ZOOM.

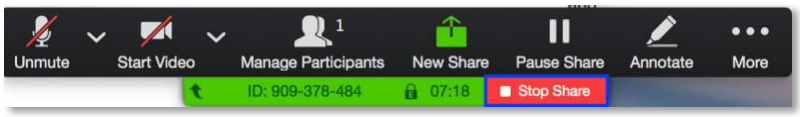
Your meeting in a room without video conferencing has launched.

1. Unmute your audio and start your video when you are ready
2. Click on “Manage Participants” icon to check on your participants. View the Participant window on the right
3. Do a verbal check-in with your participants to test if they can hear you and you can hear them
4. If you’re not sharing content, you’re all set!
5. If you’re sharing content, open up the file you want to share. Select the 

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

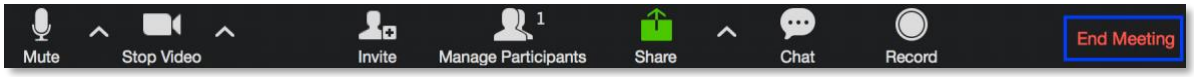


- Click “Stop Share” when you are done



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 you are in a video conference room, check the ZOOM Guide for Rooms for additional assistance at https://meded.ucsf.edu/ZOOM
- If you are alone as the facilitator, use a headset with a microphone. If you don't have a headset, use headphones or ear buds

Audio Troubleshooting

If you are currently in rooms CL-220 or CL-221, check the ZOOM Guide for Rooms for additional assistance at https://meded.ucsf.edu/ZOOM

The participants can’t hear me.	You could be muted or could be having issues with the meeting. Make sure you joined with audio. If not, leave the meeting and re-join with audio.
I can't hear the participants at all.	• Your computer system volume can be low or muted. • The participants might be muted. Unmute the participants: Click on “Manage Participants” icon, view the Participant window on the right, and manage participant audio next to each name. • Ask participants to unmute themselves and/or type your request in the Chat feature.
I can't hear the participants well.	Adjust the volume on your computer or the device controlling audio. Ask participants to check their audio connections and settings.
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.

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.

GENERAL TROUBLESHOOTING

I don't see any participants in the meeting.	Check to make sure you are using the ZOOM meeting link you sent. Click "participants" icon to see if participants have joined. Introduce yourself and ask if anyone is there. You may have to wait.
I can't share my presentation.	Make sure your document is open so it is ready for sharing. If you are concerned you're not seeing shared content, then check in verbally with other participants.
I need to moderate as the host, but it shows another person as the host.	You may not be signed in to MyAccess. Sign in using your browser. Or, you can become the host again by selecting "Claim Host" and entering your Host Key. To find your Key, go to your ucsf.zoom.us/profile in your browser, go to the bottom of the profile page, select "show" and copy the key. Go back to the waiting field in the ZOOM meeting window and paste it in.

BEST PRACTICES

- If you are facilitating meetings in a conference room, use the ZOOM Guide for Rooms for assistance at https://meded.ucsf.edu/ZOOM
- 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 ZOOM participants can hear each speaker and follow the flow of the meeting
- 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 allow paper handouts that ZOOM participants will not be able to see!
- Close the meeting verbally at the end so ZOOM participants also get closure

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.