This guide provides information about essential Zoom tools that you can use in your Zoom meetings and small and large group class sessions. Some content in this guide is not covered in Zoom Essentials.

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# Look better on video

1. Your light source should shine on your face (not from a window behind you)
2. Look directly into camera, eye-level
3. Use an uncluttered or virtual background if possible
4. Choose higher quality video settings (click the A picture containing drawing

   Description automatically generated green shield in the upper-left, then click the gear icon) if needed for special video recordings (check out this TEE Zoom Guide for [Pre-Recording a Lecture Using Zoom](https://meded.ucsf.edu/sites/meded.ucsf.edu/files/2020-07/Faculty%20Guide%20for%20Pre-Recording%20a%20Lecture%20Using%20Zoom.pdf))
5. Check out this TEE Zoom Guide for [Presenting Yourself on Video](https://meded.ucsf.edu/sites/meded.ucsf.edu/files/2020-05/zoom_present_yourself_on_video.pdf)

## Manage unreliable Internet

1. If your meeting participants tell you that your audio is dropping out, or that your video is slowing down or freezing, it probably means you have an unreliable Internet connection—you might see Zoom notifications about it too
2. Here are some steps you can take if your Internet connection is unreliable:
   1. Move your computer closer to your wireless router, or plug in to the router if possible using an Ethernet cable
   2. Ask others nearby to stop using the Internet temporarily
   3. Stop sharing your video
   4. Ask someone else to **Share Screen**
   5. If your audio fails, or you’re worried you might lose your Internet connection, **Switch to Phone Audio**  
      A screenshot of a cell phone

      Description automatically generated
3. Keep in mind that quality audio is more important than quality video

## Switch audio device

1. If you have a mic but no one can hear you, click the  **Unmute** or **** **Join Audio** button at the bottom-left  
   **Note:** For the best audio, use a wired headset, earbuds, or headphones
2. Do this if your mic doesn’t work, or if you can’t hear anyone talk:
   1. Click the upward-pointing arrow at the right of the **Mute** or **Unmute** button to access the **Audio Settings** menu  
      A screenshot of a cell phone

      Description automatically generated
   2. In the menu, click **Test Speaker & Microphone**
   3. Follow the prompts and select a different speaker and microphone, if needed
3. Do this if your audio still doesn't work:
   1. Go back to the **Audio Settings** menu
   2. Click **Leave Computer Audio**
   3. Then click **Switch to Phone Audio** and call in to the meeting
4. If your audio still doesn't work, re-start your computer and re-join your meeting, or use **Chat** to communicate

## Describe the host role

1. Click the **Participants** button on the bottom to see the host/co-host roles next to participants’ names in the **Participants** window
2. There are only three roles in a Zoom meeting: host, co-host, and participant
3. There can only be one host in each meeting
4. Only the host can start and end the meeting  
   **Note:** If the host has enabled **Join before host** in the host’s personal Zoom meeting settings, any co-host or participant can join a meeting before the host starts it
5. Only the host can promote participants to co-host, or make another participant the host
6. Hosts cannot run breakout rooms on a mobile device
7. To secure the host role and capabilities, log in to Zoom through [MyAccess](https://myaccess.ucsf.edu/) before joining a meeting though the Zoom site or a Zoom meeting link in Outlook

## Join meeting as host

1. Log in to [MyAccess](https://myaccess.ucsf.edu/) then click **Zoom** near the bottom and log in to the Zoom site   
   **Note:** If you don’t see **Zoom** in your list of favorite MyAccess apps, click the **Manage Favorites** button on top
2. After logging in to Zoom through MyAccess, you can start or join your meeting in two ways (the Zoom site or Outlook). To start or join your meeting from the Zoom site:
   1. In the left menu of the Zoom site, click **Meetings**A screenshot of a cell phone

      Description automatically generated
   2. Find your meeting, then click the **Join** or **Start** button at the right
   3. Your Zoom app will launch and you will be in your meeting
3. To start or join your meeting from Outlook:
   1. Find the meeting link in Outlook and click it to join or start the meeting
   2. Or, you can copy-paste the link into a browser address bar to join or start the meeting

## Identify things co-hosts can’t do

1. Co-hosts can perform most host functions (except for starting a meeting, ending a meeting, and promoting participants to host or co-host)
2. Neither a host or co-host can turn on a participant’s video—they can only request it
3. You can have an unlimited number of co-hosts in each meeting  
   A close up of a device

   Description automatically generated

## Assign roles

1. Make sure you are a host
2. Put your cursor over a participant's name  
   A screenshot of a cell phone

   Description automatically generated
3. Click the **More** button to **Make Host** or **Make Co-host**

# Identify Poll Everywhere polls

1. Poll Everywhere provides many types of polls, far more than Zoom Polling offers
2. Poll Everywhere polls tend to be more visually appealing
3. Some types of Poll Everywhere polls can be completed both online and via text messages

# Run Poll Everywhere polls

1. Get practice using Zoom and Poll Everywhere separately
2. Insert some Poll Everywhere polls into PowerPoint
3. Start your PowerPoint in full screen view
4. In Zoom, click **Share Screen** and share your entire screen (not the PowerPoint app)
5. If participants can’t see the poll, share the polls directly from the [Poll Everywhere](https://www.polleverywhere.com/) Web site
6. Check out this TEE Zoom Guide on [Using Poll Everywhere](https://meded.ucsf.edu/sites/meded.ucsf.edu/files/2020-04/zoom_poll_everywhere_3.pdf)

# Plan Poll Everywhere alternatives

1. Share polls directly from the Poll Everywhere Web site
2. Launch a Zoom poll
3. Run a poll using Zoom’s reactions, chat, audio, or annotation tools

## Create Zoom polls

1. Zoom polls only offer 2 question types: single choice, multiple choice
2. Hosts & co-hosts can launch and re-launch the polls and share poll results
3. You can only create and edit polls for meetings that are hosted on your own Zoom account
4. Before your meeting, go to your [Zoom meetings site](https://ucsf.zoom.us/meeting/) and click your meeting topic, then scroll to the bottom
5. Find the **Poll** section and **Add** or **Edit** a poll, as needed  
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## Use default Zoom polls

1. For classes in the Bridges curriculum, create poll slides
   1. State the poll question
   2. Provide answer choices A – E or True/False
2. Default poll types:
   1. Multiple Choice - One Answer
   2. Multiple Choice - more than one answer
   3. True-False
3. During the Zoom meeting, click A picture containing drawing, food

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4. Use the drop-down menu to select the poll, then click the  button

## Prepare breakout rooms

1. For meetings hosted using your Zoom account, first enable **Breakout Rooms** in your Zoom personal meeting settings
2. If you are the host or co-host of a meeting, click the A picture containing drawing

   Description automatically generated **Breakout Rooms** button on the bottom
3. Create your rooms **Automatically**, **Manually**, or **Let participants choose room**
4. **Rename**, **Add Room**, or **Delete Room**, if needed
5. Check out this TEE Zoom Guide on [Facilitating Breakout Rooms](https://meded.ucsf.edu/sites/meded.ucsf.edu/files/2020-03/ZOOM_Guide_for_Facilitating_Breakout_Rooms_0.pdf)

## Manage breakout rooms

1. **Move** or **Exchange** breakout room participants, if needed (see the options next to a participant’s name)
2. **Assign** and **Unassign** breakout room participants, if needed (click the **Assign** or participant count next to a room’s name)
3. Click the gear icon on the bottom-left and make changes to breakout room options, if needed  
   Graphical user interface, text, application, chat or text message

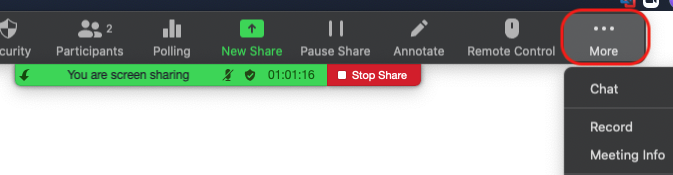
   Description automatically generated
4. Click the **Open All Rooms** button at the bottom-right to start the breakout rooms  
   **Note:** Once you **Open All Rooms**, you can’t rename, add, or delete rooms until you **Close All Rooms**

## Share computer sound

1. Click **Share Screen**
2. Select the desktop or screen you want to share
3. Select the 2 check boxes on the bottom left, then click the **Share** button  
   A screenshot of a cell phone

   Description automatically generated
4. (Macs only) Make sure **ZoomAudioDevice** stays selected as your computer speaker
5. Ask participants if they can hear your computer sound

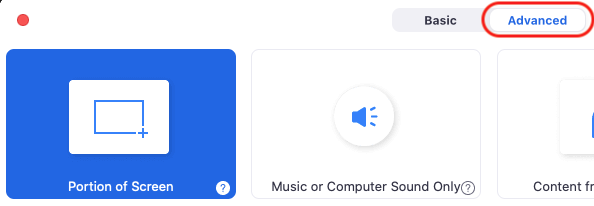
## Share PowerPoint full screen

1. To share your PowerPoint in full screen mode with meeting controls hidden:
   1. Open your PowerPoint slide
   2. In Zoom at the bottom, click the  **Share Screen** button
   3. Select the desktop or screen that has your PowerPoint running on it  
      **Note:** Although you can share specific apps, it’s easier to share the entire desktop so you can easily switch between and display different apps. You also need to share your entire desktop if you want your Poll Everywhere polls in PowerPoint to display correctly.
   4. Click the **Share** button at the bottom-right
   5. Run your PowerPoint in full screen mode
   6. To see your meeting controls, put your cursor at the top-middle of the screen  
      
   7. Some of your meeting controls will be hidden under the **More** menu at the right—open them as needed and move them around so you can still see your slides  
      **Note:** You will see the meeting controls, but your participants will not
2. To share your full screen PowerPoint with meeting controls visible:  
   **CAUTION:** Your Poll Everywhere polls in PowerPoint will not display correctly if you select the second option **Browsed by an individual (window)**. If you need to share Poll Everywhere polls in PowerPoint, share PowerPoint full screen instead.
   1. Open your PowerPoint slide
   2. In PowerPoint, click the **Slide Show** link on top
   3. In the ribbon that appears, click A picture containing object, clock

      Description automatically generated **Set Up Slide Show**
   4. In the **Show type** options, select **Browsed by an individual (window)**A screenshot of a cell phone

      Description automatically generated
   5. In Zoom, click the  **Share Screen** button at the bottom
   6. Select the desktop or screen that has PowerPoint running
   7. Click **Share**, then share your PowerPoint in full screen by maximizing the window  
      **Note:** For more flexibility, you can also make the window large without being completely full screen

Share portion of screen

1. In Zoom, click **Share Screen**,then on top, click the **Advanced** tab  
   
   1. Select **Portion of Screen**, then in the lower-right corner, click the **Share** button
   2. Move and re-size the green box to share parts of your screen

# When to share Portion of screen

1. Share **Portion of screen** when you want to:
   1. Share only your slides in PowerPoint **Presenter View**, which allows you to still see your notes and upcoming slides
   2. Quickly move between multiple open apps and windows on your desktop
   3. Only share portions of a document at a time

## Practice Zoom

1. Check in with participants to make sure they are hearing and seeing everything you’re sharing
2. Rehearse your presentations and practice Zoom with colleagues and TAs
3. Join your own practice meeting again using a second device or computer:
   1. In Zoom, click the **Invite** buttonon the bottom of the **Participants** window to get your Meeting ID and meeting passcode
   2. Start the Zoom app on your second device or computer
   3. Click **Back** or **Cancel** as needed until you see the **Join a Meeting** button
   4. Click the **Join a Meeting** button
   5. Enter your Meeting ID and Password **without** signing in  
      A screenshot of a cell phone

      Description automatically generated
   6. To prevent echo and feedback, don’t use the audio on your second device or computer

## Share your PowerPoint in Presenter View

1. **Presenter View** lets you see your notes and preview the next slide while presenting
2. To share PowerPoint in **Presenter View** if you have two screens:
   1. Open your PowerPoint slide and click **Slide Show** on top
   2. (Mac) Click A picture containing ball, man, player, holding

      Description automatically generated **Presenter View**

(PC)Check the **Use Presenter View** box in the ribbon  
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* 1. In Zoom, click the **Share Screen** button, then select the screen that has PowerPoint running full screen, not the screen with your **Presenter View**
  2. In the lower-right corner, click the **Share** button

1. To share PowerPoint in **Presenter View** if you have one screen:
   1. In Zoom, click the **Share Screen** button, then on top, click the **Advanced** tab
   2. Select **Portion of Screen**,then click **Share**
   3. Move and re-size the green box as needed to only share the current slide in your **Presenter View** so your notes and upcoming slides are not visible to participants

## Manage participants

1. Make sure you are a host or co-host
2. Put your cursor over a participant's name  
   A screenshot of a cell phone

   Description automatically generated
3. Click **More** to manage participants
4. (Optional) Ask participants to use **Nonverbal feedback** tools (at bottom of **Participants** window)  
   **Note:** You must first enable **Nonverbal feedback** in your Zoom personal settings

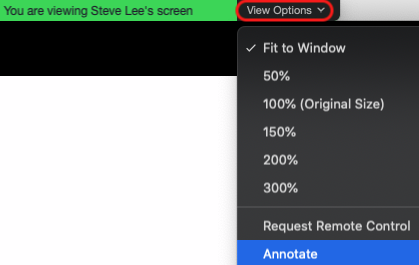
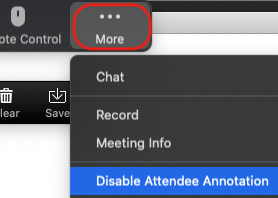
## Manage the waiting room

1. First enable **Waiting Room** in your Zoom personal settings or in a meeting’s setup page
2. You can also **Enable Waiting Room** during a meeting if you are a host or co-host
   1. Click the A picture containing drawing

      Description automatically generated **Security** button at the bottom and click **Enable Waiting Room**
3. If someone enters your waiting room, you might:
   1. Hear a chime
   2. See a notification on the **** **Participants** button
4. Click the **Participants** button to see the waiting participants
5. To admit participants:
   1. Click the **Admit** button to admit participants one-by-one  
      A screenshot of a cell phone

      Description automatically generated
   2. Click **Admit all** to admit all participants at once
   3. (Optional) Click **Message** to send a message to everyone in the waiting room  
      **Note:** Check out this TEE Zoom Guide on [Enabling, Disabling, and Managing the Waiting Room](https://meded.ucsf.edu/sites/meded.ucsf.edu/files/2020-05/zoom_manage_waiting_room_0.pdf)

## Use whiteboard annotations

1. At the bottom, click the  **Share Screen** button
2. Select **Whiteboard**, then at the bottom-right, click the **Share** button
3. Use Zoom’s annotation tools to write or draw on the whiteboard
4. To annotate, participants can click **View Options** on top and click **Annotate  
   **
5. To disable participant annotations, click **More** on top, then click **Disable Attendee Annotation**

## Use chat

1. At the bottom, click the  **Chat** button
2. At the bottom of the Chat window, find the **To:** menu  
   A close up of a logo

   Description automatically generated
3. Use the **To:** menu to select who you want to chat with
4. Enter your chat message, then click **Return** or **Enter** on your keyboard

**Note:** Hosts and co-hosts can change chat settings by clicking A picture containing mirror

Description automatically generated to the right of the **To:** menu

## Set up your video

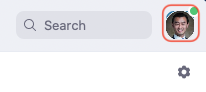
1. If you have a camera, at the bottom-left, click the  **Start Video** button
2. If your video doesn’t work, follow the steps below:
   1. Click the upward-pointing arrow at the right of the **Start Video** button
   2. In the menu, select another camera in the **Select a Camera** list  
      **Note:** To preview how you look on camera before you **Start Video**, click **Video Settings**  
      A screenshot of a cell phone

      Description automatically generated
3. Check out this TEE Zoom Guide for [Presenting Yourself on Video](https://meded.ucsf.edu/sites/meded.ucsf.edu/files/2020-05/zoom_present_yourself_on_video.pdf)  
   **Note:** If you want a **Virtual Background**, [UCSF Communications offers some](https://identity.ucsf.edu/zoom-backgrounds)

## Record your meeting and share it

1. Make sure you are a host or co-host, or ask the host to give you permission to record
2. Click the **** **Record** button on the bottom
3. Click  the **Pause** or **Stop** button as needed  
   **Note:** Every time you start and stop a recording, you will have a new recording file
4. When your meeting is over, wait for your recording to convert
5. Look in your **Documents** folder for the **Zoom** folder
6. Open the folder that contains the meeting recordings you want to share
7. The folder will contain **MP4** video files, **M4A** audio files, and sometimes **TXT** chat log files
8. To share your files, upload them to a shared Box or Microsoft Team or SharePoint folder **Note:** Check out this TEE Zoom Guide on [Pre-recording a Lecture using Zoom](https://meded.ucsf.edu/sites/meded.ucsf.edu/files/2020-07/Faculty%20Guide%20for%20Pre-Recording%20a%20Lecture%20Using%20Zoom.pdf)

## Update the Zoom app

1. Log in to Zoom, then start your Zoom app
2. In the upper-right corner of the app, click the square   
   
3. Click **Check for Updates**   
   A screenshot of a cell phone

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## Change your Zoom profile

1. The changes you make to your profile will carry over into all of your Zoom meetings:
   1. Your profile name will appear in the list of participants
   2. Your profile picture will appear whenever your camera is not on
2. Log in to MyAccess, then log in to the [Zoom site](https://ucsf.zoom.us/)
3. In the upper-left corner, click **Profile**A screenshot of a cell phone

   Description automatically generated
4. Consider editing your profile to include your:
   1. Picture
   2. Pronouns
   3. Preferred name
   4. Job title

# Get More Information and Support

* To learn more about Zoom, check out [Zoom’s Help Center](https://support.zoom.us/hc/en-us), [IT’s Zoom site](https://it.ucsf.edu/services/zoom-web-conferencing), [ETS’s Zoom site](https://edtech.ucsf.edu/zoom-conferencing), the [TEE Zoom Guides](https://meded.ucsf.edu/ZOOM), and the [TEE Poll Everywhere](https://meded.ucsf.edu/tee/poll-everywhere) site