

Zoom Skills Checklist

As campuses implement strategies to migrate in-person classes to the online environment, many faculty will need help becoming familiar with the Zoom virtual meeting platform.

This interactive PDF can be downloaded and used as a self-paced diagnostic tool to help familiarize you with using Zoom to facilitate live class sessions or meetings.

Directions:

Click on the phrase to view the steps for that skill.

Click in the check box once you've mastered that skill.

“Survive” After mastering these skills, you'll be ready to start your class.

Level 1 = L1 = Basic

Level 2 = L2 = Advanced

Level 3 = L3 = Expert

Settings

L1: Sign into Zoom

L1: Access “My Meeting Settings”

L2: Customize profile settings

L3: Use keyboard shortcuts

Audio

L1: Test mic and set audio options

L2: Select “Join by Phone”

L2: Choose to mute or unmute

L3: Enable stereo option

Video

L1: Test camera

L2: Change video layout

L2: Choose active speaker

L3: Pin video

Appearance

L1: Touch up my appearance

L2: Manually rotate camera

L2: Turn video or mic off

L3: Use a virtual background

Recording

L1: Choose recording format

L1: Confirm active recording

L2: Find recordings

L3: Play cloud recording

Sharing

L1: Share screen

L2: Go to side-by-side view

L2: Adjust layout when sharing

L3: Share a video

Zoom Skills Checklist

“Thrive” After mastering these skills, you’ll be ready to vary your interactions.

Level 1 = L1 = Basic

Level 2 = L2 = Advanced

Level 3 = L3 = Expert

Breakout Rooms - Starting

L1: Create rooms

L1: Select options for rooms

L2: Assign people to rooms

L3: Prepare rooms

Polling

L1: Confirm polling settings

L2: Create a poll

L2: Launch a poll

L3: Download a poll report

Breakout Rooms - Managing

L1: Join or leave a room

L2: Stop all rooms

L2: Ask for help

L3: Broadcast a message

Chat

L1: Start a chat

L2: Select ALL or specific people

L2: Auto save chats

L3: Transfer files using chat

“Deep Dive” After mastering these skills, you’ll be ready to amaze your students!

Level 1 = L1 = Basic

Level 2 = L2 = Advanced

Level 3 = L3 = Expert

Whiteboard

L1: Share a whiteboard

L1: Use annotation tools

L2: Save a whiteboard session

L3: Share multiple screens

Participating

L1: Manage participants

L2: Use nonverbal cues

L2: Add a co-host

L3: Use a dual-monitor setup

Personal Meeting ID

L1: Create a personal meeting room

L2: Set up a custom room

L2: Set up a personal link

L3: Edit personal room settings

Scheduling

L1: Schedule a meeting

L2: Meet now

L2: Use calendar integrations

L3: Use Zoom Chrome extension