Zoom for Newbies

Table of Contents

This document doesn't assume to be perfect and to cover all situations, but is meant to at least get those who are new to Zoom (or want to see if they are missing any features) to get their feet wet. While this was <u>written using a Mac, an iPad, and an iPhone</u>, most of the information here can be used on a Windows computer and Android products. This also assumes you DO NOT have a Zoom account. You don't need one to participate, anyway. As always, YMMV (Your Mileage May Vary).

Happy Zooming!

Zoom for Newbies

What Do You Need?

Your computer will need a webcam (built-in or separate) so we can see you and you can see us. Your computer will also need a microphone so you can be heard—it should already have a speaker built in so you can hear what is happening. Sometimes, headphones and earbuds can help if you have audio issues. Tablets and smart phones generally have those capabilities built in. For presentations and classes, a smart phone is not recommended—and the bigger your screen, the better.

For the best experience, **use the Zoom program/app**.

1) **If you are using a computer**, you can download the Zoom program here: https://zoom.us/download#client_4meeting.
   a) Click on the Download button that you see under the first listing: Zoom Client for Meetings. (If you are using a brand-new Macintosh with the new Apple chip, then you need to look at the sentence directly below the button that says, "Or, for Macs with Apple Silicon chips, click here to download," and click the word "here.")
   b) On your computer, go to your Downloads folder and find ZoomInstaller.exe (Windows) or Zoom.pkg (Macintosh) and double-click it to start the installation.
   c) Follow the on-screen instructions for installing the program.
   d) When the installation is finished, you will find the Zoom program in your Programs folder (Windows) or Applications folder (Macintosh). If the program starts up as soon as installation is finished, just quit it.
   e) You may also get a screen verifying your installation was successful, that your software is the latest, and offering to automatically keep the program up-to-date. Make sure that last box is checked. You always want the most current because of bug fixes, security improvements, and new features.

2) **If you are using a tablet or smartphone** (*e.g.* an iPad or iPhone), go to your App Store and look for ZOOM Cloud Meetings.
   a) Tap the button to install (for an iPad or iPhone, the button is labeled GET).
   b) Follow the onscreen prompts to finish the installation.
   c) When the installation is finished, leave the App Store and find where Zoom was installed. Usually, it's on a screen where there was the most space to show the icon (it will be labeled Zoom).
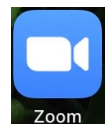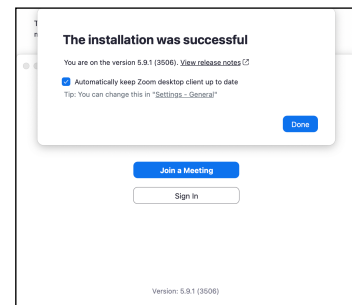
If you have trouble finding Zoom on your computer, tablet, or phone, you can go here for help:

https://bit.ly/34EFrEx

Updated 01/14/2022

Getting Connected

After you have downloaded and installed the Zoom app, you are ready to begin Zooming!

You should have received an email from the person who is acting as Host that contains a link to the meeting. There will be a lot in the emailed "invitation," but you want to look for the link that is labeled "Join Zoom Meeting," similar to the one you see below.

Join Zoom Meeting
https://us02web.zoom.us/j/123456?pwd=abcdefg

1) **On the computer:**

   a) When you click on the link in your email, you may be taken to your browser (Safari, Firefox, Chrome, etc.) and you may see a message similar to the one on the right. That's OK. Just click **Allow**.
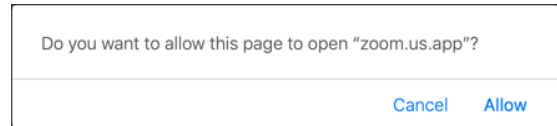

   b) <u>The first time</u> you start up Zoom, you will be asked to enter your name. A name will already be entered, but it's a name taken from the device you are using. A name like Fred, Susie's iPad, 9371234444, anyone@comcast.net; Dog Lover, *etc.*, are not suitable. You need to make sure both your First Name AND your Last Name are entered.
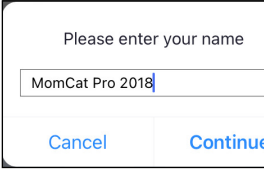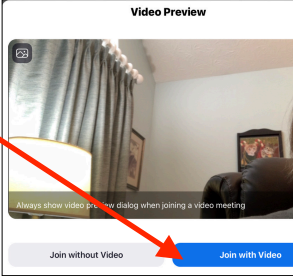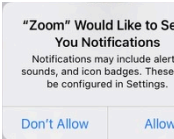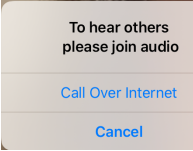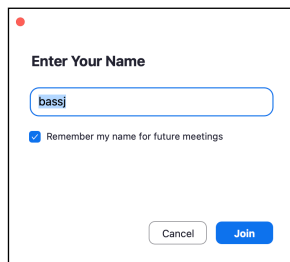

   bassj is not an appropriate name to use for Zoom (security!). Make sure you change it AND leave the box checked so it will use the name you type in for all future meetings. Then click Join.

   c) You may also be prompted to install an update. If so, just follow the on-screen prompts.

   d) The Zoom program that you installed will continue to start up and you should get a message that says, "Waiting for the host to start this meeting" (sometimes those words are different, if the Host has changed them). The "Waiting Room" is a security measure.
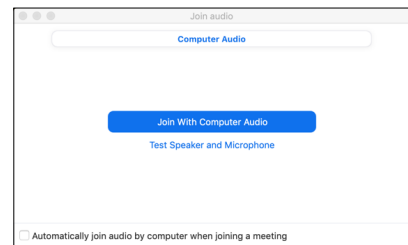
   e) When the Host admits you to the meeting, the computer will also ask you about your audio. You may see a dialog box similar to the one on the right, so make sure to click "Join with Computer Audio."

   f) You're in!

2) On a tablet or smartphone:

a) When you tap on the link in your email, The Zoom app that you installed will start up.

b) <u>The first time</u> you do this, you will be asked to enter your name. In the example on the right, the name you see will not get you into most meetings—nor will name like Fred, Susie's iPad, 9371234444, anyone@comcast.net; Dog Lover, *etc.* Please make sure you replace whatever words come up with BOTH your First Name AND your Last Name. Then tap Continue.

c) You will be asked about your video. Select Join with Video.

d) Now that the housekeeping is done, you should get a message that says, "Waiting for the host to start this meeting" (sometimes those words are different, if the Host has changed them). Using a Waiting Room is a security measure.

e) While you are waiting, you may also see a message about having Zoom send you Notifications. Most people choose "Don't Allow." This is a one-time-only thing.

f) Once you have been admitted, you will be asked to choose how to have your audio set up. The usual choice is "Wifi or Cellular Data."

g) You're IN!

Now That You Are "IN"

There are some controls/practices that you should know for good Zoom etiquette.
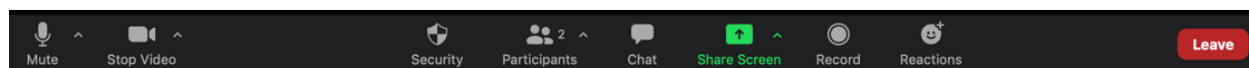
1) Your Zoom (Display) Name

If you made sure your First and Last name were entered the first time you used the computer program or tablet app, you should be set and can skip this part. Sometimes, people don't pay attention to screens on a computer and don't properly set their name up. If that's you, then the name you join the meeting with may not be your actual name. Again, it is good etiquette to use your actual name, as well as being a security issue, and many Hosts will not admit someone they cannot identify with both a First and Last Name. This can be fixed on a Windows computer during a meeting. It takes a few more steps on a Macintosh or a tablet.

a) **If you are using a Windows computer**: Move your mouse and hover over the upper right corner of where you see yourself. You should see a Mute button and three dots. You have to be in a meeting to do this. If you can't get admitted because your name isn't right, use the directions in the next section for the Macintosh. They work!
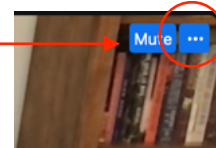
   i) Click the three dots.
   ii) From the menu that comes up, select Rename.
   iii) Enter your real name, including First AND Last names.
   iv) There should also be a checkbox to make that a permanent change. Make sure it's checked, and click OK.

b) **If you are using a Macintosh computer:** You can do the same thing as on a Windows computer, but it's only temporary—just for that meeting only. To make a permanent change:

   i) Do not use the link from the email to join the meeting. Instead, look for the Meeting ID and Passcode in that email and jot them down.
   ii) Start up Zoom from the Applications folder.
   iii) Click Join.
   iv) Enter the Meeting ID where it asks. Right below that, type in your name (First and Last!—the one shown on the right is not getting into the meeting), making sure "Remember my name for future meetings" is checked, and click Join.
   v) The next screen will ask you for the Passcode. Enter that, and click Join, one last time.
   vi) You should now be at the Waiting Room screen, waiting for the Host to admit you.
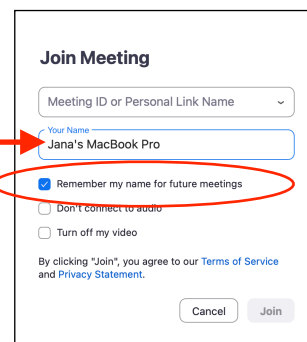

c) **If you are using a tablet (*e.g.* iPad) or a smartphone (*e.g.* iPhone)**, you can:

   i) **Temporarily** change your name: Once you are in the meeting (if you are even admitted), tap the Participants button and tap on your name in the list. Tap on Rename, then type in your name. Tap Done when you are finished and then tap anywhere outside the Participant's list to dismiss it.

   ii) To **Permanently** change your name (what you really want to do), tap on Zoom on your screen, and then follow the directions for the Macintosh above.

2) **Muting Yourself**

It is usually good etiquette to Mute yourself once you are in the meeting and have greeted everyone. This helps reduce possible background noise, distractions, and rude interruptions—dogs barking, phones ringing, kids running around, *etc.* Note that if you do not see any button bars like the one toward the bottom of page 4, you may need to move your cursor over the bottom of the computer screen or tap the top of your tablet screen first.

a) **Computer**: the quickest way to Mute is to click the Mute button in the lower left corner. To Unmute, you can either click it again or hold down the Space bar to temporarily unmute yourself.
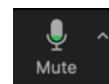

Click this button to Mute yourself.

Click this button to Unmute yourself.

Updated 01/14/2022

b) **Tablet and smartphone:** (remember, this is being done with an iPad and an iPhone), tap the Mute button on the upper right corner of the tablet screen or the bottom left of the smartphone screen. To Unmute, just tap it once again.

3) **Stopping (Turning Off) Your Video**
Many times, other participants just don't have a very good Internet connection. So it can be very helpful to turn off your video feed. You can still see and hear everything.

a) **On a computer:** click the Stop Video button in the lower left corner. Turn it back on by clicking it again.

b) **On a tablet or smartphone:** those same buttons are at the top right and lower left, respectively.
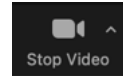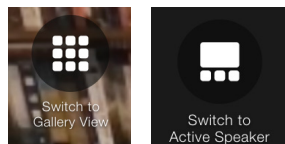
4) **Speaker View and Gallery View**

a) **Gallery View** is what you often see when you first join a meeting. It reminds you of the Brady Bunch opening screen with each person in her/his own little window or the Muppet Show.

b) **Speaker View** is when you see whoever is speaking as the largest image on the screen.

c) **To change** between Gallery View and Speaker View:
   i) **On a computer:** click View in the upper right corner of your Zoom screen. From the menu, select either Gallery View or Speaker View (in the example on the right, Gallery View is selected).
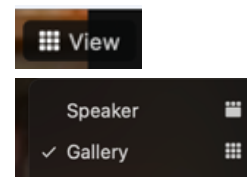
   ii) **On a tablet**: There is a single button on the left side that lets you toggle between the two views. Just tap it to change your view.

   iii) **On a smartphone:** swipe from right to left to get to the Gallery View. Swipe from left to right to return to the Speaker View.

d) **Drawback to the Speaker View**: if several people are talking, your screen will be actively flipping among those speakers. In this instance, it's better to stay in Gallery View or to Pin the Video (see #5 on the next page) if this is too distracting. **Tip:** whoever is speaking will have a green box around their video.

Updated 01/14/2022

5) Pinning a Video and Spotlight

When someone is giving a presentation or demonstrating something via Zoom, it can be useful to make sure that the presenter is the main window you see all the time. There are two ways this can happen: you, the participant, can Pin a Video for yourself or the Host can Spotlight the speaker for everyone. Since Spotlight can only be done by the Host, the following will only discuss how to Pin a Video—especially if the Host forgets to Spotlight the presenter(!).

a) **On the computer:** Click the three dots in the upper right corner of the person whose video you want to Pin and select Pin from the menu. You may see different versions of this menu, depending on who you are pinning, but selecting Pin is the important part. To take the Pin off that person, just click the Remove Pin button you see in that person's left corner. (No one knows who your are pinning, either!)
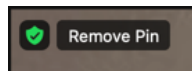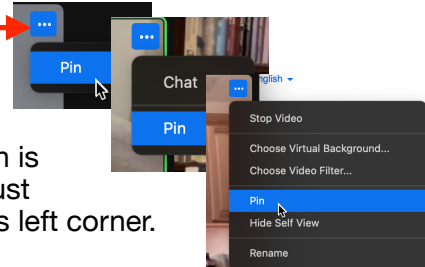
b) **On a tablet:** double-tap the window of the person whose video you want to pin and tap Pin. To remove the Pin, tap the Remove Pin button on the left side of the screen.
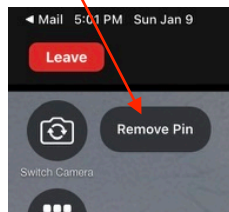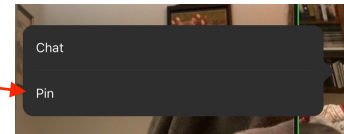
c) **On a smartphone:** make sure you are in Gallery View first, then double-tap the window of the person whose video you want to pin. To remove the Pin, double-tap the pinned video.

6) Leaving a Meeting

a) **On the computer:** click the Leave button in the lower right corner. Then click the Leave Meeting button and you are out of the meeting (or click Cancel if you change your mind).

b) **On a tablet:** the Leave button is in the upper left corner. You will see the Leave Meeting button to confirm you are leaving. Cancel is also available.

c) **On a smartphone:** the Leave button is in the upper right corner. You will see the Leave Meeting button to confirm you are leaving. Cancel is also available.

Good to Know

1) If you are using a tablet or a smart phone, you will have a **better experience** if you have your device in Landscape mode, rather than Portrait. That's because your eyes tend to track from left to right, not from top to bottom.

Landscape

2) **To look better onscreen** (the quick fix):

   a) **On the computer:** if you click the little up arrow (^) to the right of the Stop Video button at the bottom of your Zoom window, you can go to Video Settings… From there, check the box next to "Touch Up My Appearance" use the slider to adjust. There. Now you look better on camera!
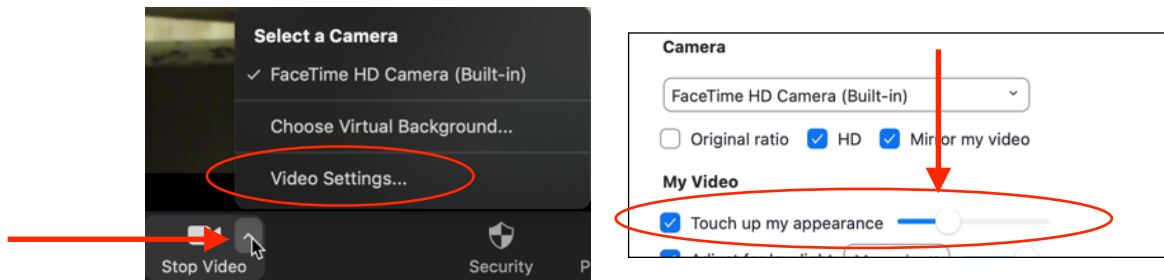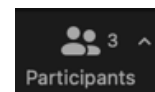

   b) **On a tablet or smartphone:** tap the three dots (…) in the upper right corner (tablet) or lower right corner (smartphone) and tap Meeting Settings. Turn on "Touch Up My Appearance," and then tap Done. Now you look good on those devices, too!
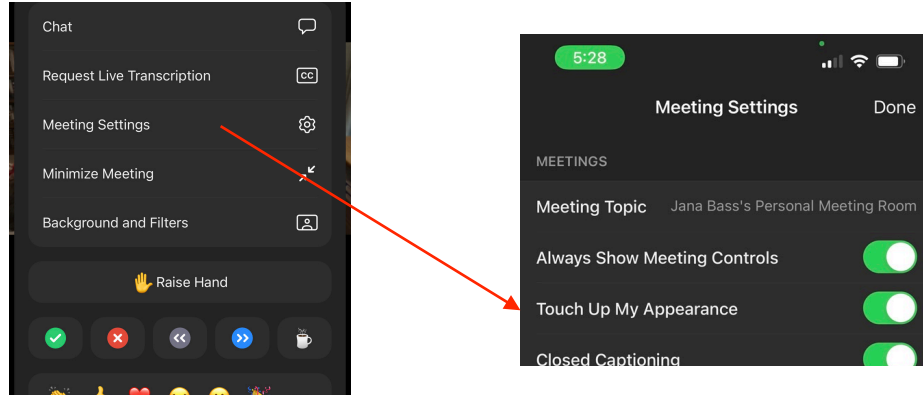
3) When you are in a meeting with a lot of people, it can be helpful to see a list of **Participants** (inquiring minds, *etc.*). You can always click or tap the right or left side of the screen to see additional people, but a list can be even better.
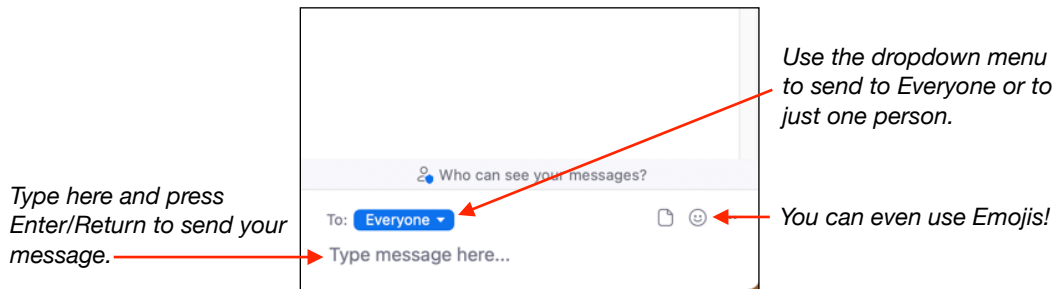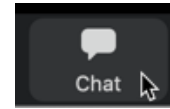
   a) **On the computer:** click the Participants button at the bottom of your Zoom window. This will bring up the list of who is there on the right side of your Zoom window. If you click the Participants button again, the list disappears. Notice the number beside the Participants button. This tells you how many are in the meeting.

   b) **On a tablet or smartphone:** tap the Participants button in the top right corner of a tablet or lower right corner on a smartphone. A list will pop up, but it will not stay up once you tap away from it. Here, too, you will see a number beside the button, telling you how many are in the meeting.

Updated 01/14/2022

4) When a meeting is in progress, a speaker will frequently ask that everyone use the **Chat** feature to ask a question during the presentation. These are sent to Everyone in the meeting. The Host usually monitors this and "feeds" the questions to the speaker. You can also use Chat to send a message to one of the participants so as to not disrupt the meeting. To use Chat:

    a) **On the computer:** click the Chat button at the bottom of your Zoom window. This will bring up a chat pane to the right of your Zoom window. If you already have the Participants List up on the right, Chat will show up directly below that list.


Use the dropdown menu to send to Everyone or to just one person.

Type here and press Enter/Return to send your message.

You can even use Emojis!

       i) Note that what you can do with Chat can be changed by the Host.
      ii) If you don't have the Chat window up, a red number next to the Chat button will show you how many new messages have been sent—either to you or to everyone in the meeting.

    b) **On a tablet or smartphone:** Chat is found under the three dots (…) in the upper or lower right corner. In the menu that appears, tap Chat.
       i) The Chat window is similar to that of the computer program, but it does not stay up when you tap away from it.
      ii) Once you type in your message, tap the little Send button.
      iii) If there are Chats sent out to you or to the group, you should see a number next to those three dots so you will know how many unread/unseen messages you have.
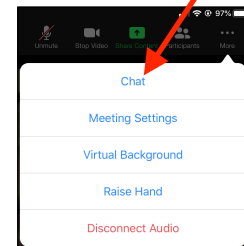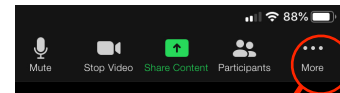
5) **Raising Your Hand** - just like in school! This is often used in larger groups and makes it easier for the host to notice you when you want to ask a question. It puts a little raised hand by your picture and by your name in the Participants List.

    a) **On a computer:** click the Reactions button at the bottom of the Zoom screen to find Raise Hand. To lower your hand, click the Reactions button again and select Lower Hand.
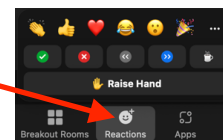
    b) **On a tablet or smartphone:** tap the three dots to find Raise Hand and Lower Hand. On a tablet, Lower Hand will be at the bottom of the screen.

     Updated 01/14/2022