Zoom for Newbies

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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 written using a Mac, an iPad, and an iPhone, 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 computer program/app**.

1) **If you are using a computer**, you can download the Zoom program here: https://bit.ly/3WuAtly.
   a) Click on the Download button that you see under the first listing: <u>Zoom Workplace for Mac</u> (or Windows, if that is what you are using).
      i) If you are using a brand-new Macintosh with the new Apple silicon chip, then you need to click "Download for Apple Silicon."
      ii) If you aren't sure, check here: https://support.apple.com/en-us/116943.
      iii) If you have an older Mac, then click the "Download for Intel.")
   b) On your computer, go to your Downloads folder and find ZoomInstaller.exe (Windows) or <u>zoomusInstallerFull.pkg</u> (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 version because of bug fixes, security improvements, and new features.
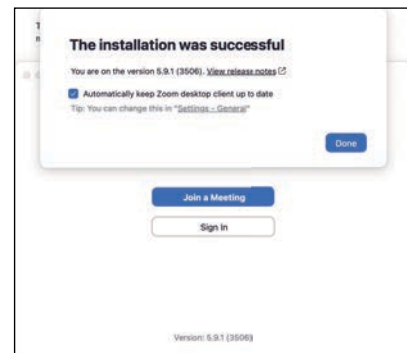
2) **If you are using a tablet or smartphone** (*e.g.* an iPad or iPhone), go to your App Store and look for <u>ZOOM Workplace</u> (it will be the one by Zoom Video Communications).
   a) Tap the button to install (for an iPad or iPhone, the button is labeled GET).
   b) Follow the onscreen prompts to 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)—or it could be in the App Library (the last screen when you swipe to the left) under Productivity.

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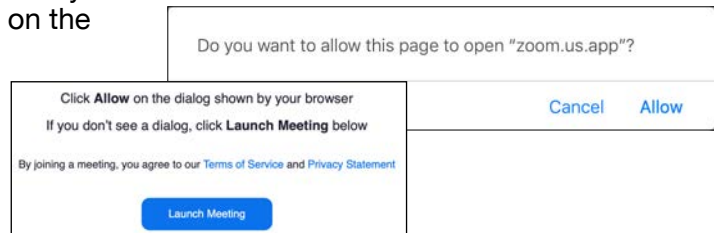
b) <u>The first time</u> you start up Zoom, you will be asked to enter your name. A name will already be entered, but it's a name taken from the device you are using. A name like Fred, Susie's iPad, 9371234444, anyone@comcast.net; Dog Lover, *etc.*, are not suitable. **You need to make sure both your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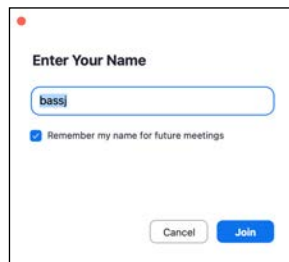

bassj is not an appropriate name to use for Zoom (security!). Make sure you change it so BOTH your First Name AND Last Name are shown. Leave the box checked so it will use the name you type in for all future meetings. Then click Join.

c) Before joining the meeting, you may get the option to enter the meeting with your audio and video already turned off or turned on. Just click to change either one or both, then click Join.

*Audio and video are both on.*
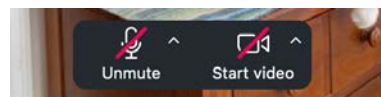
Audio and video are both off.

d) The Zoom program that you installed will continue to start up and you should get a message that says, in effect, that the Host has joined the meeting and you will be admitted soon (sometimes those words are different, if the Host has changed them). If you are too early, you may get a message that says, "Waiting for the host to start this meeting." The "Waiting Room" is a security measure.

e) You're IN!

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2) On a tablet or smartphone — the First Time using it:

    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 there will not get you into most meetings—nor will names like Fred, Susie's iPad, 9371234444, anyone@comcast.net; Dog Lover, *etc.* <u>Please make sure you replace whatever words come up with BOTH your First Name AND your Last Name.</u> Then tap **Continue**.
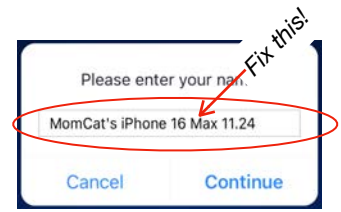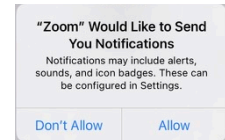
    c) You may then see a message from Zoom, asking if it could access your camera. Tap **ALLOW**, then tap **JOIN**.

    d) On newer iPhones and iPads, you will also be asked if you would like to use Zoom with Siri. Most people choose Don't Allow.
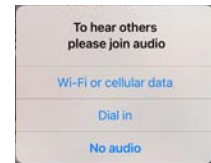
    e) While you are waiting, you may also see a message about having Zoom send you Notifications. Most people choose "Don't Allow." This is a one-time-only thing.

    f) Now that the housekeeping is done, you should get a message that says, "Host has joined. We've let them know you're here" (sometimes those words are different, if the Host has changed them). Using a Waiting Room is a security measure.

    g) When you've entered the meeting, you will be asked about your audio. Normally, you should tap "Wi-Fi or cellular data."

    h) You're IN!

Note #1: While you are waiting, you may be sent messages by the Host. These will appear in a panel to the right on the computer, and in the upper right corner on the tablet (iPad) and on the phone (iPhone).
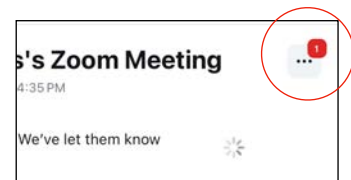
Note #2: The next time you join a meeting on a table or phone, you will probably be sent to your browser first, where you will just tell it to Launch Meeting or use the app.

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 their device (computer, tablet, phone) and don't properly set their name up. If that's you, then the name you are using to try to join the meeting with may not be your actual name.

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 should be fixed before you ever enter a meeting's Waiting Room.**

Here's how to fix or even check your Zoom name (this works on all devices):
   a) **Do not use the link** from the email to join the meeting.
   b) Instead, look for the <u>Meeting ID</u> and <u>Passcode</u> in that email and jot them down.
   c) Start up Zoom.
   d) Click Join or Join Meeting.
   e) 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.

Before   **After**
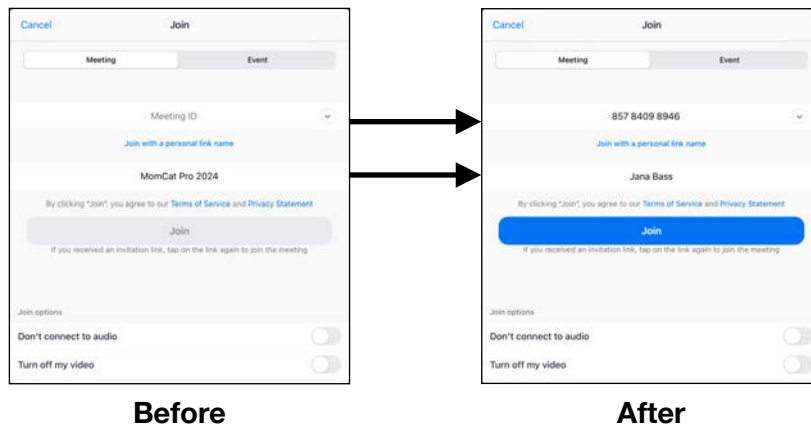
   f) The next screen will ask you for the Passcode. Enter that, and click Continue.
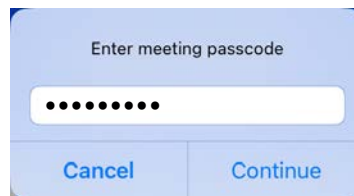

   g) You should now be at the Waiting Room screen, waiting for the Host to admit you.

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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.*

a) **Computer**: the quickest way to Mute is to click the Mute button in the lower left corner. To Unmute, you can click it again to unmute yourself.
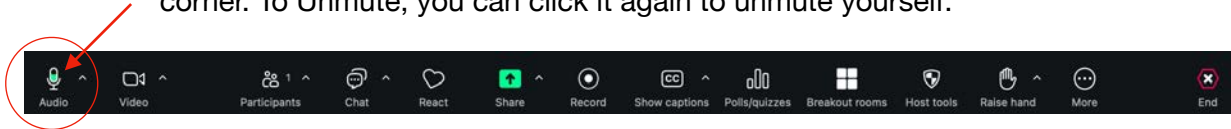
b) **Tablet and smartphone:** (remember, this is being done with an iPad and an iPhone), there is now a toolbar very similar to that found on the computer. The buttons on these toolbars may vary according to whether you are a Host or if you have made any modifications. IF YOU DO NOT SEE THE TOOLBAR, on a phone or a tablet, please turn it so it is in Landscape mode first, then tap the bottom of your screen and it should appear.
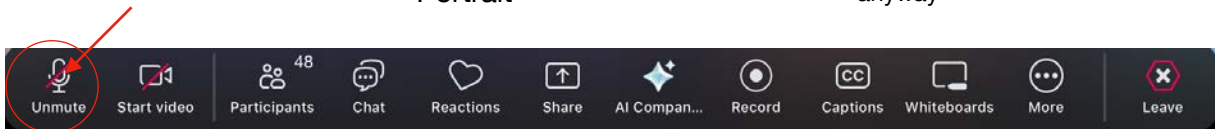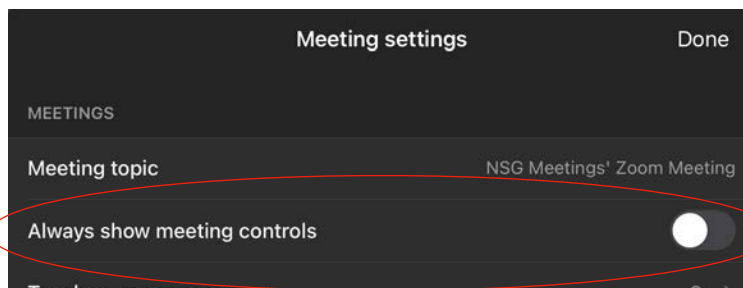

Portrait
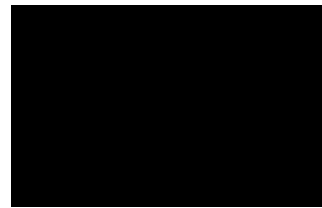
Landscape
Better to see the presentation, anyway

c) On the tablet/phone, if the toolbar doesn't disappear, it can actually cover part of the presentation. To fix that, tap More. Under *Always show meeting controls*, you can turn that off so the toolbar will disappear after a few moments. Tapping the bottom will bring it back.


Off - controls will disappear

Note: If you are attending a Virtual Lecture Series **webinar** (or any webinar, for that matter—not a Zoom **meeting**), your audio is automatically disabled. You cannot control this. The same is true of your video—it is turned off by default in a **webinar**.

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 stop your video feed, but you can still see and hear everything. To do this, click or tap the Video or Stop Video button in the lower left corner on the toolbar.
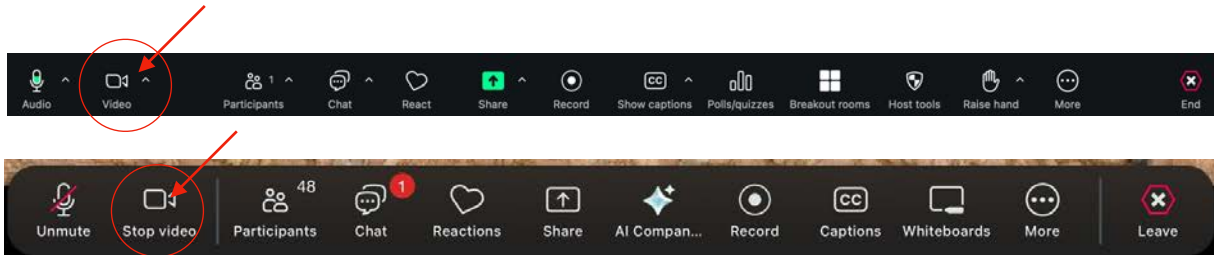
You can restart your video by clicking/tapping the same button UNLESS the Host had to stop your video for you, possibly because you did not turn it off when asked.

Note: On a tablet or phone, the video of the speaker can partially obscure the presentation. You can collapse the video by tapping the minus sign in the upper right corner of the speaker's video. You can expand it again by tapping on the camcorder icon in the lower right corner.
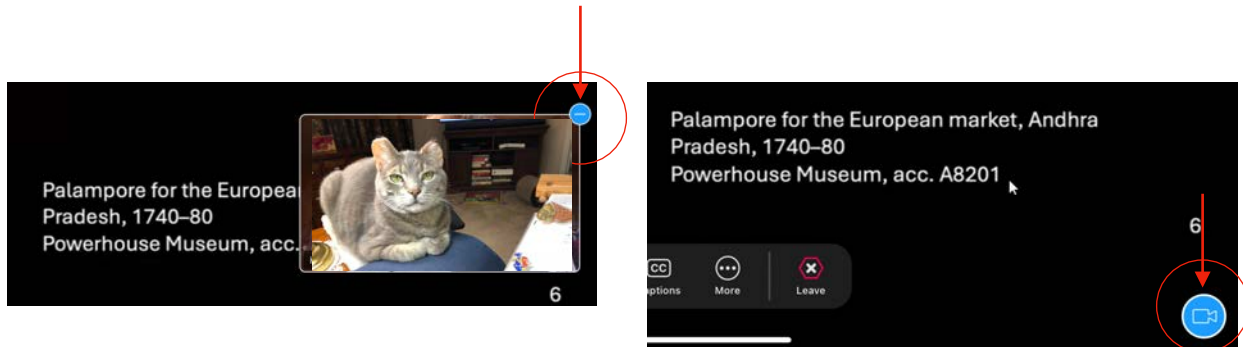
**4) Pinning a Video vs. Spotlighting**

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's video 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, not even the "pinee.")

b) On a tablet/smartphone: Long-press the video you want to pin and select Pin from the menu that comes up. To remove the Pin, long-press the video again, and select Unpin.

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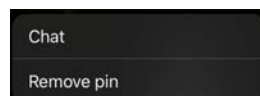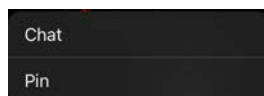
5) Leaving a Meeting

    a) Click the <u>Leave</u> icon in the lower right corner. Then click the <u>Leave Meeting</u> button and you are out of the meeting (or click <u>Cancel</u> if you change your mind).
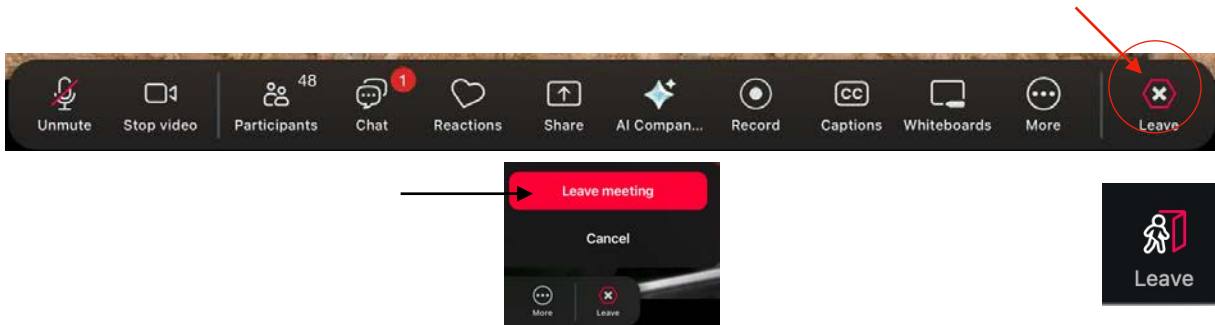

Good to Know

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.

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, click Background & effects on the list to the left. "Touch Up My Appearance" will show on the right, so just use the slider to adjust. There. Now you look better on camera!
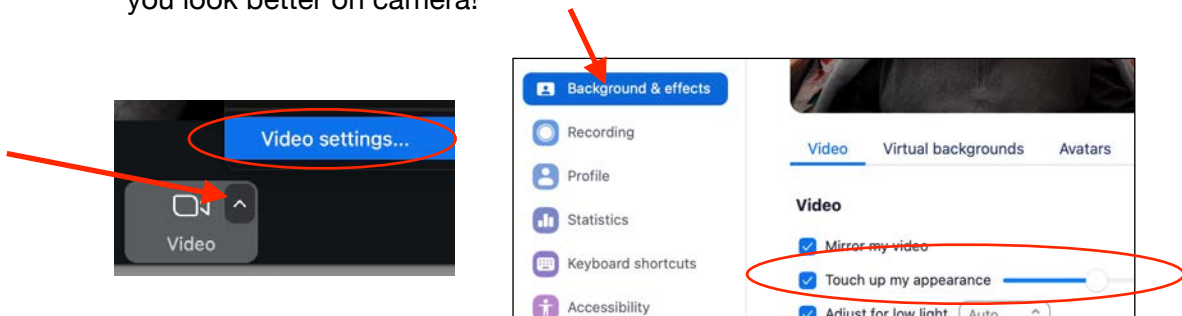
    b) **On a tablet or smartphone:** tap More... on the Toolbar and then tap Meeting Settings. Tap Touch Up My Appearance and use the slider to make yourself look good. Click the tiny x in the upper right corner, then tap Done. Now you look good on those devices, too!
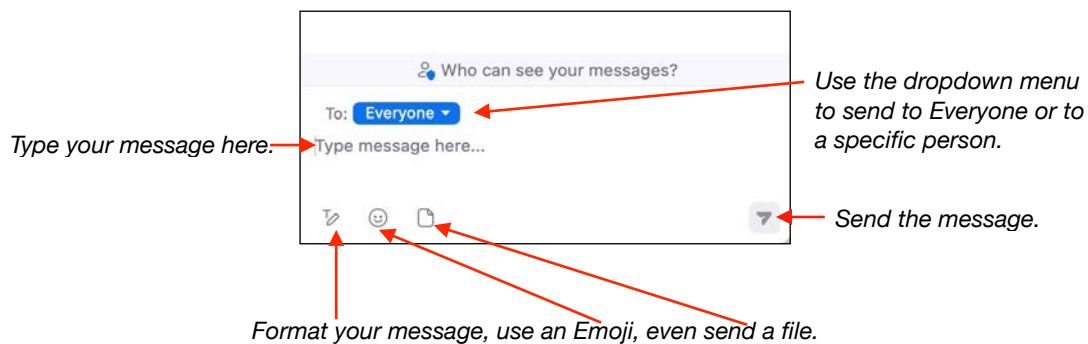

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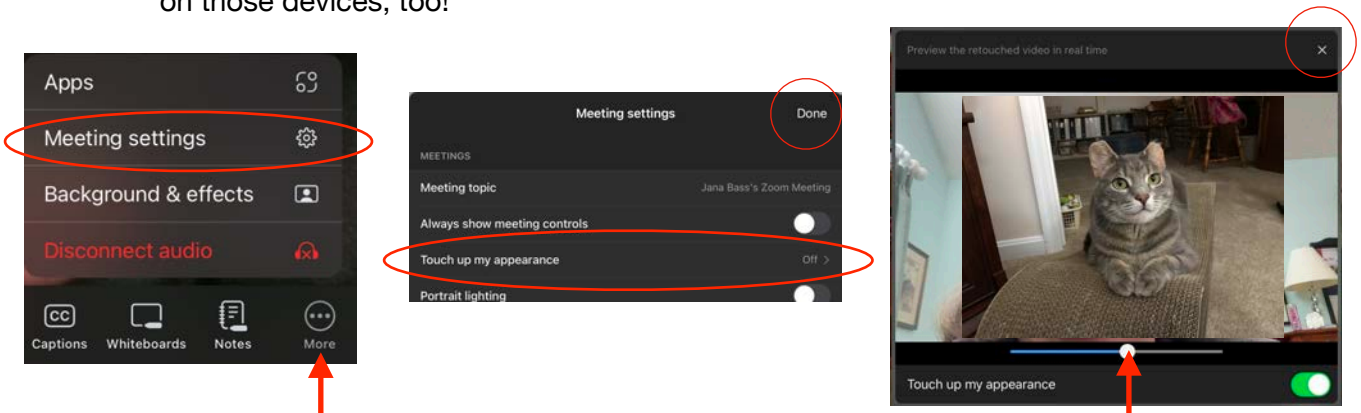
3) When you are in a meeting with a lot of people, it can be helpful to see a list of **Participants** (inquiring minds, *etc.*). You can always click or tap the right or left side of the screen to see additional people if there are a lot in the meeeting, but a list can be even better.
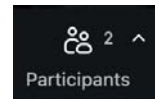
   Click/tap the Participants button at the bottom of your Zoom window. This will bring up the list of who is there on the right side of your Zoom window. If you click/tap the Participants button again, the list disappears. Notice the number beside the Participants button. This tells you how many are in the meeting.

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 normally 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 a specific participant so as to not disrupt the meeting.

   To use Chat, click/tap the Chat button on the toolbar 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 on a computer. On a tablet/phone, the Chat will replace showing the list of participants if you had that up.

   Type your message here.   *Use the dropdown menu to send to Everyone or to a specific person.*

   Send the message.

   Format your message, use an Emoji, even send a file.

   a) Note that you cannot Format or send a file on a table or phone. As of this writing, it's only available on the computer, and only on the latest version.

   b) 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 that you have not seen—either to you or to everyone in the meeting.

5) **Updating Zoom**
   On the computer, Zoom will automatically update if you have not done it yourself in about 9 months. Otherwise, you can go to the menu in the upper right corner of the main screen and select Check for Updates. You can also just go download a fresh copy and install it.

   On the tablet and phone, those should be set for automatic updates with the App Store.
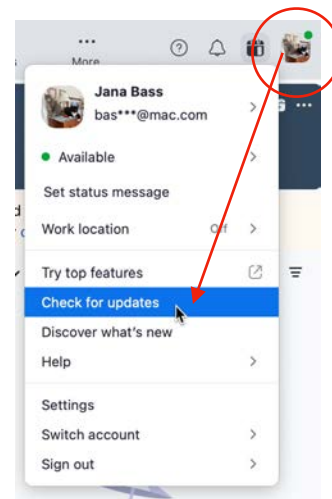
6) **Raising Your Hand** - just like in school! This is often used in larger groups and makes it easier for the host to notice you when you want to ask a question. It puts a little raised hand by your picture and by your name in the Participants list and moves your picture to the top left corner and your name to the top of the Participants list.

   a) **On a computer:** click the Raise Hand button at the bottom of the Zoom screen. To lower your hand, click the button again. Sometimes, it's under the More… menu.
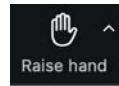
   b) **On a tablet or smartphone:** tap the Reactions button on the toolbar, then tap Raise Hand. To lower your hand, do the same thing, only Raise Hand will now say Lower Hand.
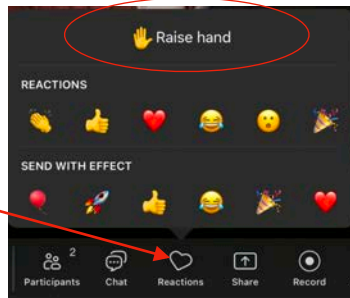
Webinar Differences

1) The toolbar in a Zoom webinar looks a bit different from the toolbar in a Zoom meeting and can even look different in different webinars, depending on the webinar settings. Even though Raise hand might be pretty obvious, it is normally not used in a webinar nor will it be answered.
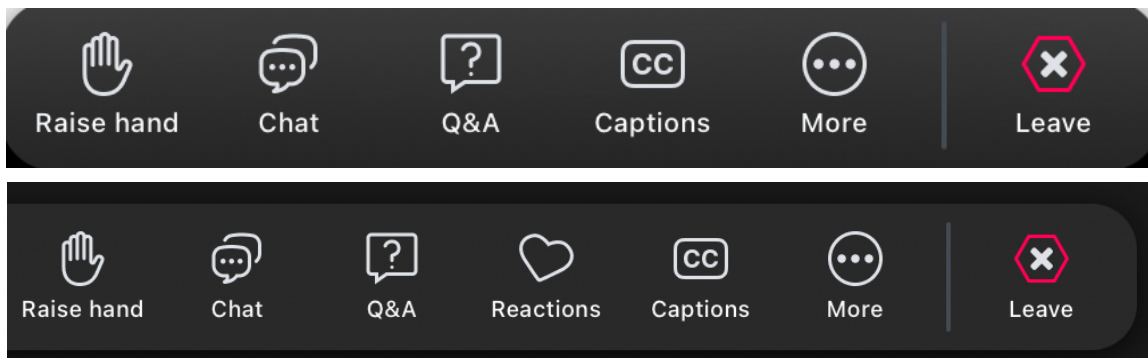
2) You cannot be seen nor heard in a typical webinar (think EGA's Virtual Lecture Series), nor can you see or hear others except for the "panelists" (those running the webinar and/or speaking). So there is no Audio or Video button to use for muting or unmuting.

3) Many webinars have Chat disabled—it cannot be used at all. The Virtual Lecture Series has Chat enabled at the beginning and at the end.

4) You generally use the **Q&A button** to ask a question. In some webinars, you cannot see the questions that others ask. The initial Q&A screen may therefore look a little different, depending on how it was set up. In the Virtual Lecture Series, you can see all questions, so refer to it to see if your question has already been asked before you ask yours.

5) You can enable Closed Captioning by clicking the Captions button. In a Zoom meeting, this is the Show Captions button.