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cloud and digital solutions

How to use Zoom

A TUTORIAL ON HOW TO USE ZOOM FOR YOUR MEETING

Cirrusli Ltd | created June 2020

Please also watch our You Tube tutorial by following this link:https://youtu.be/OKOlZiHWoPc

What is Zoom?

Zoom is video conferencing software to enable virtual face to face meetings to take place. This means we can provide your usual accounts meeting, business and financial planning meeting, or training session without needing to be in the same room.

What type of computer hardware do I need to be able to use Zoom?

To use all the features of Zoom on your computer you will need a camera and microphone. However, Zoom is a multi-platform software, meaning you can use it on a smart mobile phone and iPhone, android tablet or iPad as well as on and PC or laptop. Many of these have both camera and Mic built in.

Video calls such as Zoom can use a lot of data and power, so we recommend you use a good WiFi connection and have your charger handy or plugged in to the device for the meeting.

How much does Zoom cost me?

Nothing for you as the attendee, just your internet costs.

How do I join the meeting from my computer or laptop?

You will be sent an email before your meeting with the meeting ID, password and a hyperlink to the meeting.

If you are already a Zoom user:

- − log in to Zoom and go to the home page using the house icon.
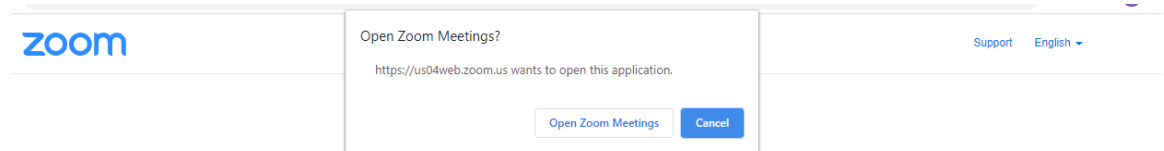
- − Click the join button

Join

- − Enter the meeting ID from the email you were sent.

- − Enter the meeting password from the email you were sent.

- Depending on your personal settings and device you will now be asked to confirm your choice of camera and speaker settings. If you change your mind part way through the meeting you alter settings and enable or disable the camera and microphone.

If you are new to Zoom;

- Follow the hyperlink you have been sent in the email. This will open your default internet browser and automatically redirect you to the meeting. You will see a screen message like this. Click "Open Zoom Meetings"
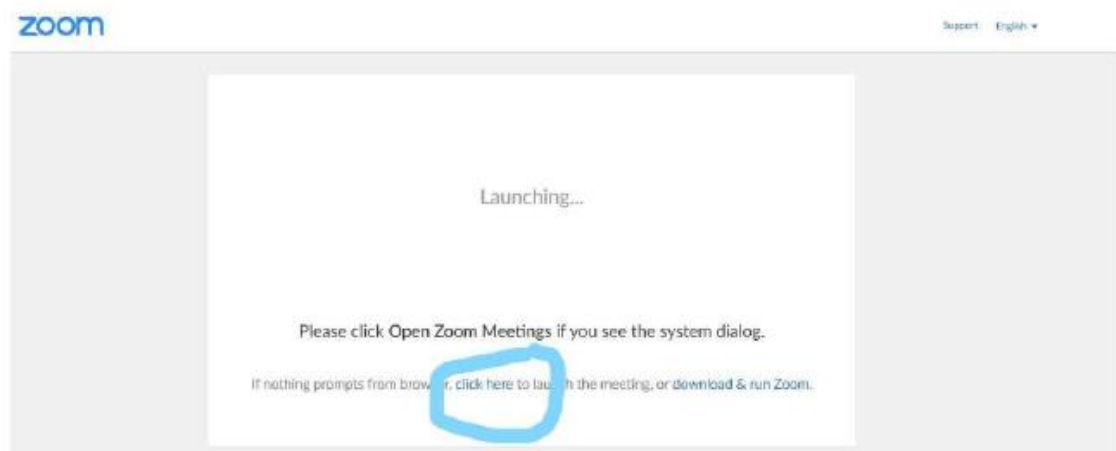

- Or this, click where it says "Click Here"

- You will now be prompted to enter your name, this will be visible by other meeting attendees. Now click the "Join Meeting" button.

- The meeting host will now be notified by Zoom that you are waiting to join the meeting. They will let you in from their meeting room on their device.

- At this stage you will be given the option to join with your computer audio, and test your speakers and microphone.

- Depending on your personal settings and device you will now be asked to confirm your choice of camera and speaker settings. If you change your mind part way through the meeting you alter settings and enable or disable the camera and microphone.

- Congratulations, you are now in your Zoom meeting!

HOW DO I ACCESS ZOOM FROM MY MOBILE PHONE, ANDROID TABLET OR IPAD?

First you will need to download the free Zoom app from either the Apple Appstore or the Google Playstore. The following images and instructions are based on an apple device, but an android device will be almost identical.

Next you will be able to sign up for a free Zoom account, this is worth doing if you will use Zoom again in the future as it makes it easy to sign in again on this or other devices with your settings preferences retained. To do this choose "Sign Up" from the bottom left.

If you would rather go straight to the meeting, click "Join a Meeting". The next image shows the screen that will follow. Enter the meeting ID from the Zoom meeting email and click join.
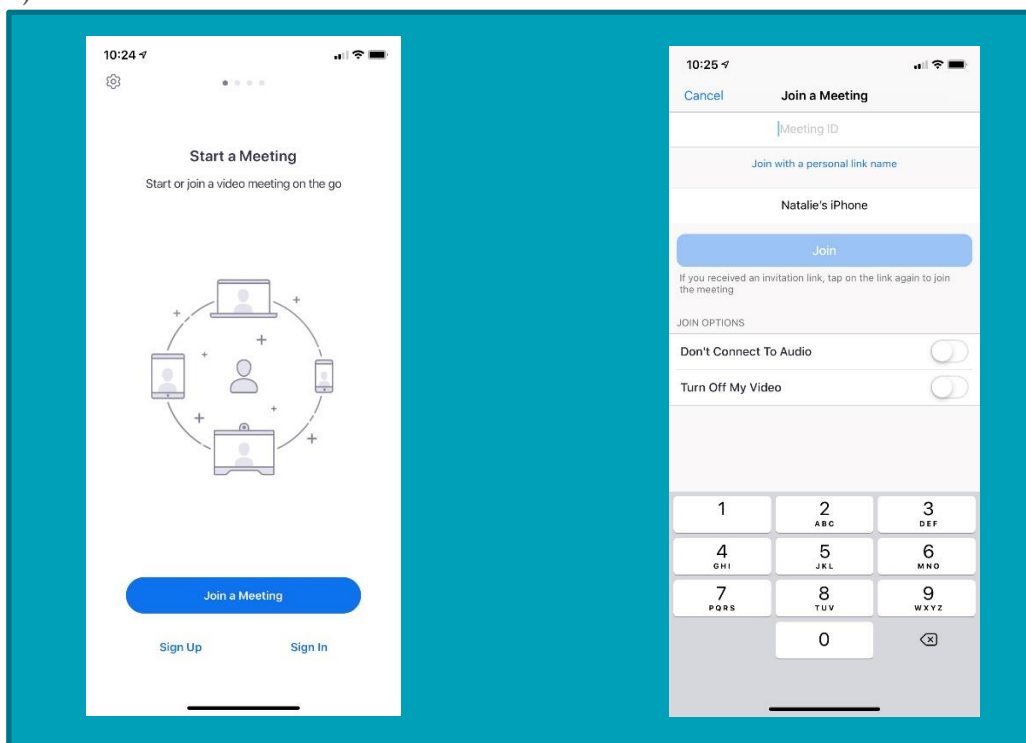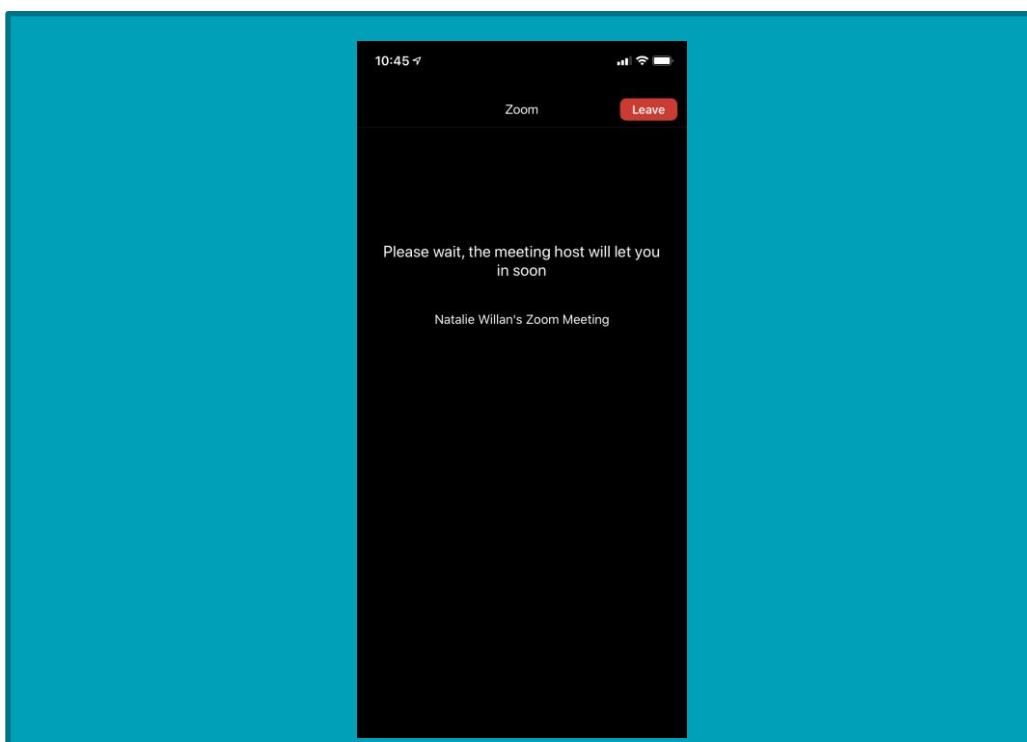
You will now be asked to enter the meeting password, this will be in the email invitation you have been sent.

Finally, choose if you would like to use the video or not.
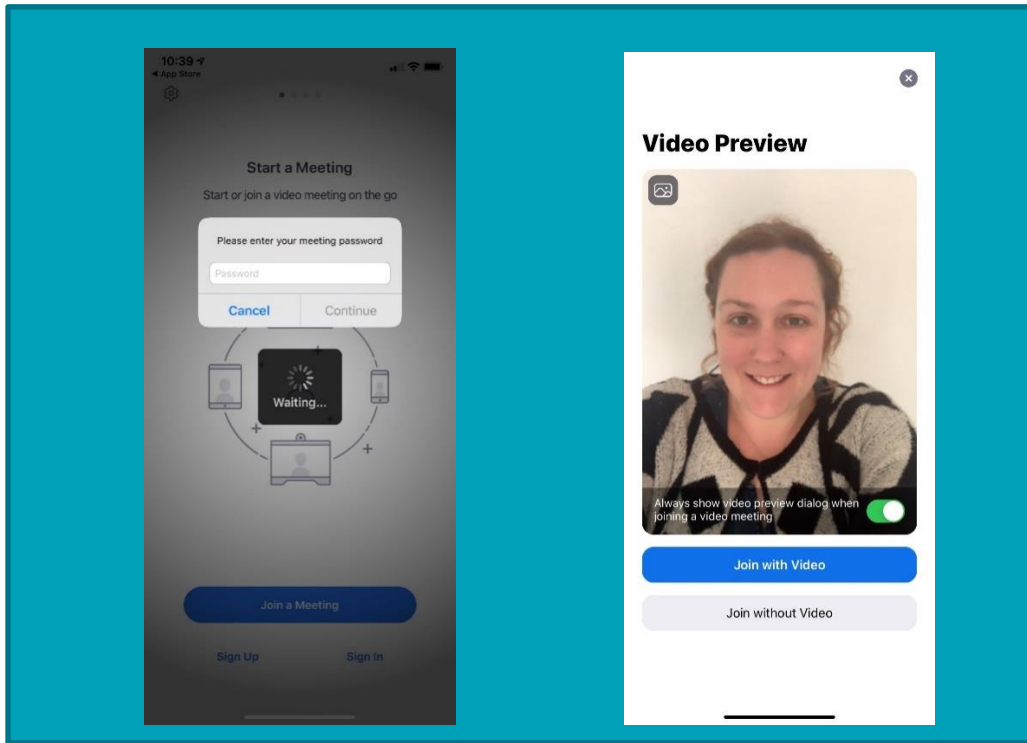

The meeting host, the person who has organized the Zoom meeting, will now get a notification that you are waiting in the virtual meeting room and will admit you to start the meeting.

HOW DO I NAVIGATE MY WAY AROUND THE FEATURES IN ZOOM?

Across the bottom of the screen is the tool bar. Your host may have disabled some features depending on the type of meeting you are attending,
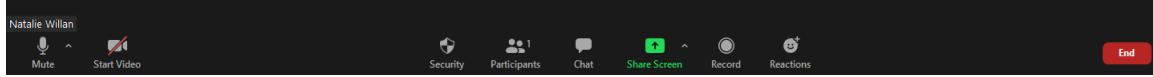

From the bottom left you will see the following;

Your name as entered by you when joining the meeting. A mute button and a video button.

The <u>mute button</u> controls your microphone. If the microphone is active the button will appear as in the image below, if you would like to mute your microphone the click button and a red line will strike through it indicating you are muted and cannot be heard by other meeting attendees. This is useful if there is background noise or you need to cough etc.

The <u>video button</u> controls your camera. If the camera has a strike through as in the image below your camera is not on and you cannot be seen by the other meeting attendees. Simply click the button to activate the camera.
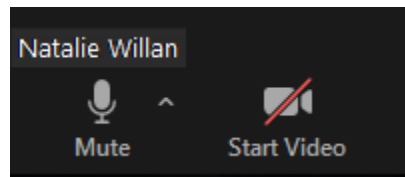

For those with limited internet connections you may prefer to leave your video off. The other attendees will see a black screen with your name, or you can upload a profile picture if you wish. To add or edit a profile picture right click on your name and choose this option from the menu. Then choose an image from your device as your profile picture.

If you do use the video, ensure you are happy that everything in your background is suitable for the other attendees to see. If you are feeling fancy you can try one of the virtual backgrounds in the advanced video menu.

The <u>security button</u>, when you click this button a menu opens displaying the options available to you.
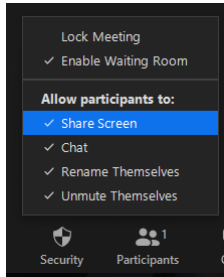
The <u>participants button</u> shows how many attendees are in the meeting, if you click the button a menu will open to the right of the screen showing further information about the attendees. You can also find the meeting details in here to invite additional attendees.
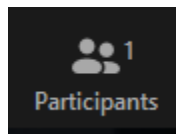
The <u>chat button</u> opens a box which allows participants to use text to communicate, either with everyone in the meeting or choose an individual from the drop down menu in the chat box. You can also use the "File" button to upload and share a file or document within the meeting.
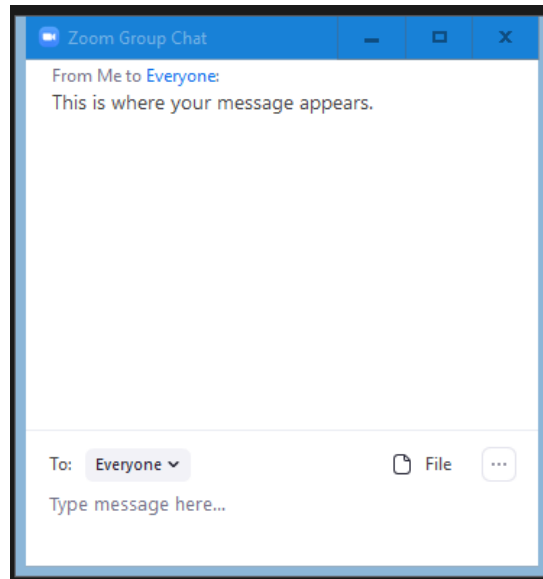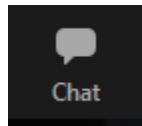

The <u>share button</u> is powerful! It allows you to share any of your screens with us, as well as just audio or a file from your device or cloud storage.

This is how we will share our reports and documents with you, to digitally replicate the way we would share paper reports with you if we were in the office together. This is also a way we can demonstrate how to do something within a piece of software, or how you can share you screen to show us something we need to see, such as a document, software error message etc.

Before sharing your screen, be sure that there are no tabs open on your device with personal information you would rather the other attendee(s) don't see. If there are, close these down before sharing your screen.

The record and reactions buttons are the final two on the toolbar. They allow you to record the meeting, or share a thumbs up or virtual round of applause.
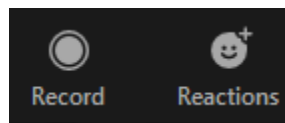
WHAT IF I DO SOMETHING WRONG?

First of all, don't panic, we all get it wrong sometimes! If you would like a quick trial run before your accounts meeting, please get in touch and Natalie, our in-house software trainer will guide you through a quick tutorial.

During the meeting, if there is anything you need help with rest assured out team can talk you through how to use any of these features to help you get the most out of our virtual meeting.

SHOULD I DO ANYTHING DIFFERENT DURING A GROUP ZOOM MEETING?

If you are joining a meeting with more than two participants you may be muted automatically by the host. This is so that the presenter can be heard more clearly.

If you are using the chat box during a Zoom meeting with multiple participants remember to check your microphone is muted. It is surprising how loud typing on a keypad can be through the microphone.

On a phone or tablet the number of participants you can have in view is limited due to the size of the screen. You can choose to have the speaker in frame, this means that as people speak the screen will flick between attendees according to who is speaking. Alternatively, you can choose to freeze the screen on a specific attendee by double tapping on the screen with them. You can always swipe the screen left and right to move between attendees.

On a computer or laptop you can choose to have speaker view or gallery view. You can change these settings in the top right of the screen. Speaker view has the speaker large on the screen with the other attendees in a row of smaller boxes at the top of the screen. Gallery view makes all attendees an even sized tile across the screen.

Happy Zooming!

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