# ZOOM

Technology Support

ShortCourse Handout

Texas Tech University

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# Zoom ShortCourse Handout

## Introduction

Zoom is an easy, reliable cloud platform for video and audio conferencing, collaboration, chat, and webinars across mobile devices, desktops, telephones, and room systems.

## Getting Started

Before you can begin using Zoom, you must first download the **Zoom desktop client**, whether you are on Windows or Mac. To download the desktop client as a first-time user:

1. Go to Zoom's **Download Center** at https://zoom.us/download.
2. Under **Zoom Client for Meetings**, select **Download**.

*Note*: To download Zoom using a license from TTU, please contact itts.licensing@ttu.edu. They will walk you through the single user sign on.

## Signing in and Joining Zoom

After downloading and launching the Zoom desktop client, click **Join a Meeting** to join a meeting without signing into a Zoom account. If you want to log in and start or schedule your own meeting, click **Sign In**.

If you have not already created a Zoom account, click **Sign In** and select **Sign Up Free** in the bottom right corner of the window that pops up. Walk through the set-up process to create your account.
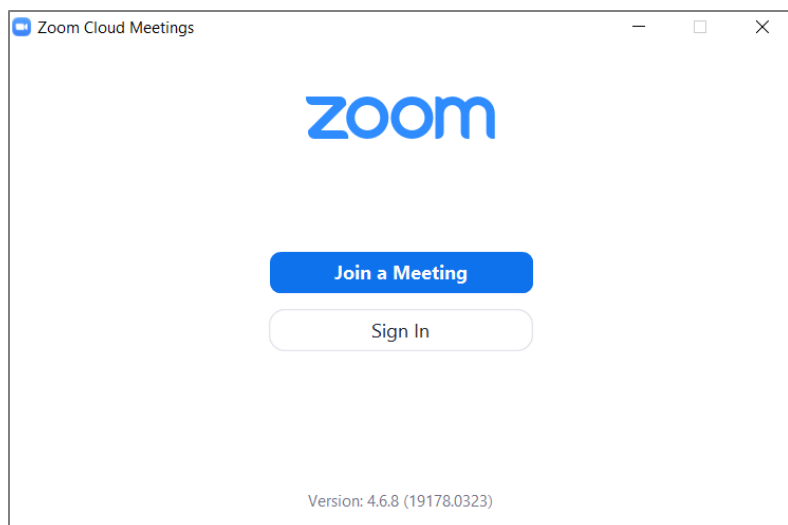
# Home Tab

After signing in, you will see the **Home** tab, where you can click these options:
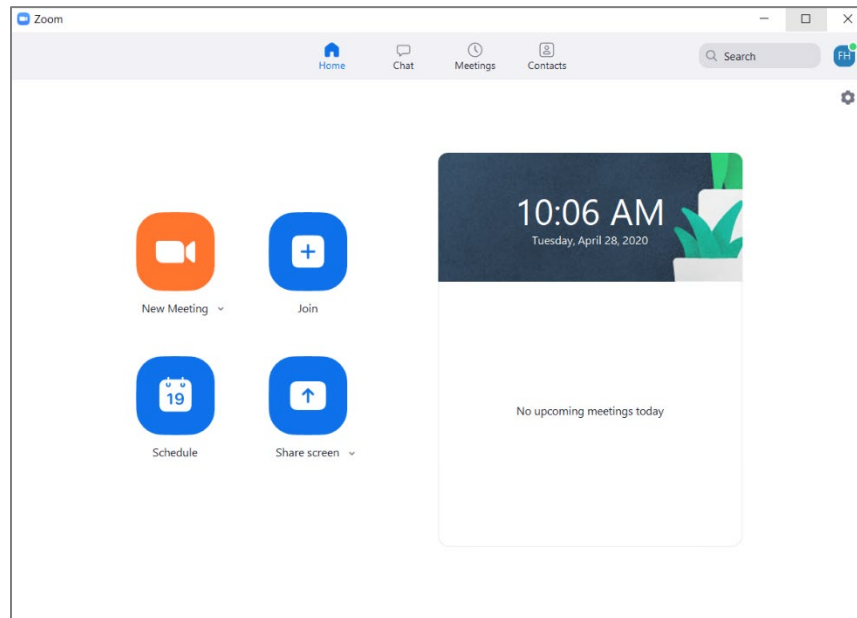


Use the options for the following purposes:

- **New Meeting**: Start an instant meeting. Click the downwards arrow to enable video or use your personal meeting ID (**PMI**) for instant meetings. The **PMI** is a virtual meeting room permanently reserved for you.
- **Join**: Join a meeting that is in progress. You will need a meeting ID to join a meeting hosted by another person.
- **Schedule**: Set up a future meeting.
- **Share Screen**: Share your screen in a Zoom Room by entering in the sharing key or meeting ID.
- **Date and time with background image**: To change the background image, hover over the picture and click the camera icon.
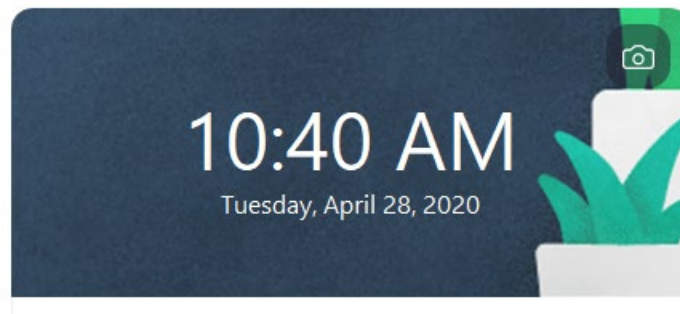
- **Upcoming meeting**: Displays the next meeting for the current day.



- Click your **profile picture** icon for these options:
  - o Add a **Personal Note**.
  - o **Settings**: Access settings you can change in the client.
  - o Change your **status** to Available, Away, or Do Not Disturb.
  - o **My Profile**: Open the Zoom web portal to edit your profile.
  - o **Help**: Open the Zoom Help Center.
  - o **Check for Updates**: Check if Zoom is up to date.
  - o **About Zoom**: View the current version.
  - o **Switch to Portrait View**: Switch the Zoom window to portrait view if you prefer a narrower window.
  - o **Sign out**
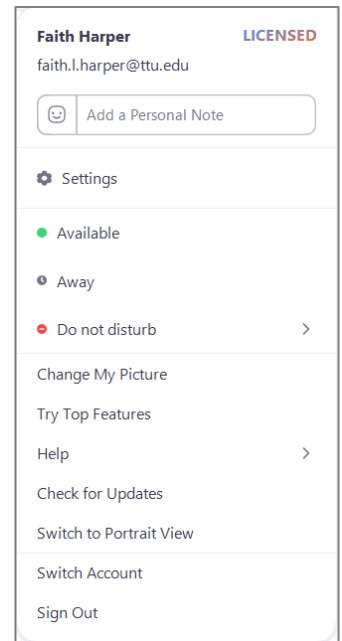


## Chat Tab

Select the **Chat** tab to view private conversations with your contacts or group conversations (**channels**). **Channels** allow you to easily create private or public groups. You can then send group chats, files, screen captures, and images to those specific groups.
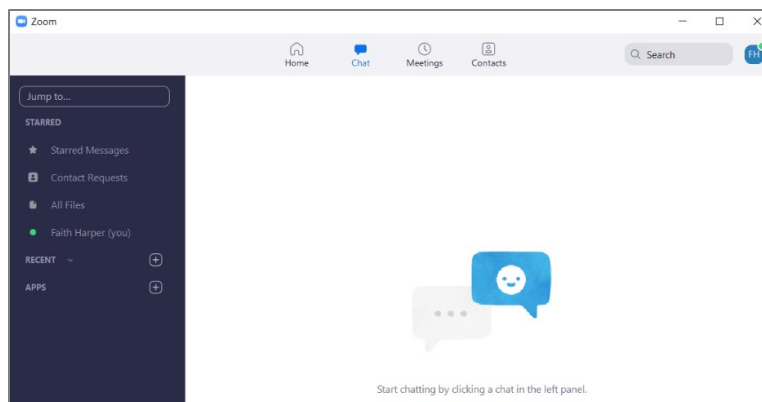
You can access these features in the left-side panel:

- Jump to **search box**—search for a contact or channel.
- **Starred messages**—view messages you have starred (marking messages as important).
- Click your name to use your personal **chat space**.
- **Add icon** ⊕ (next to Recent)—start a new chat with one of your contacts, create a channel for group chats, or join an existing channel.
- Under **Recent**, click a **contact** to view chat history and continue to chat with them. Contacts have a **status icon** before their name to tell you if they are Available, Away, or on Do Not Disturb.
- Under **Recent**, click a **channel** (indicated by the group icon before the name) to view the channel's chat history and send messages to channel members.
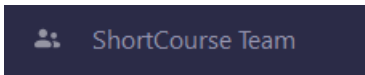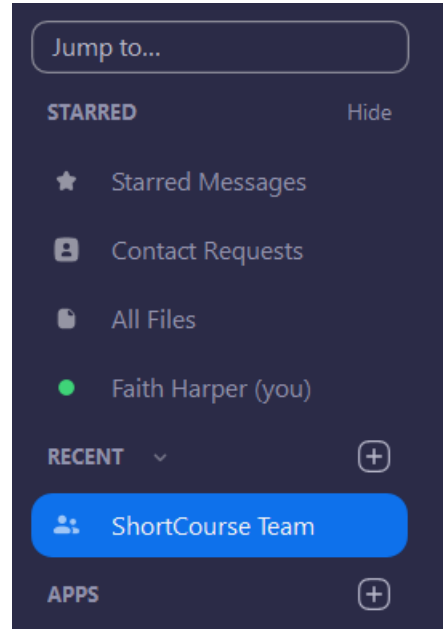
After selecting a contact or channel in the left-side panel, you can use these features in the chat window:
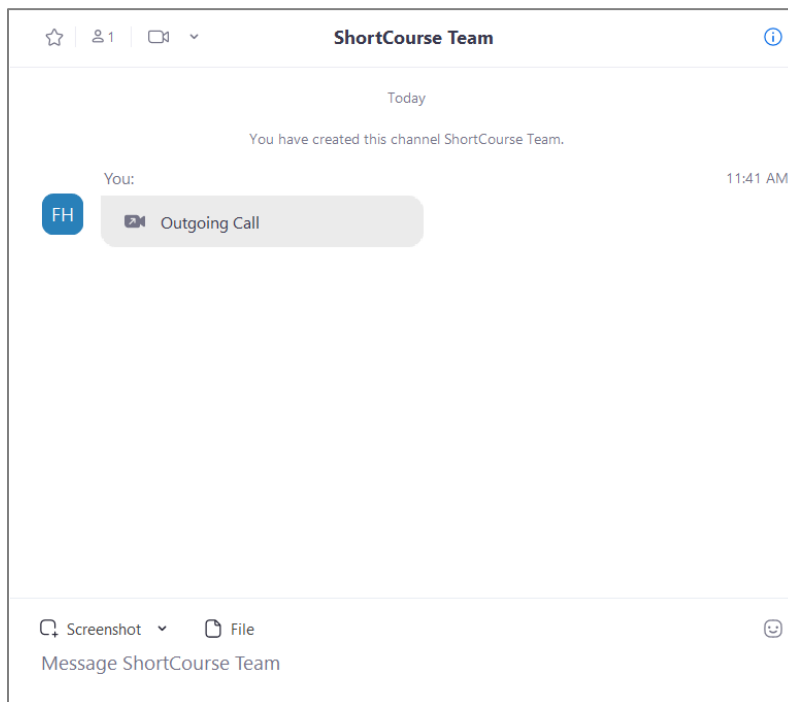
- **Star Icon** ☆—add the contact or channel to your starred list, giving you quick access to those contacts or channels.
- **Video icon** 🎥 —start a video meeting with the contact. If a channel is selected, this will start a meeting with all members of the channel.
- **New window icon** ⤢ (hover your pointer over the contact or channel name to display this icon)—open the selected chat in a new window.
- **Info icon** ⓘ —view additional options for the contact or channel. Also gives you quick access to files, images, and starred messages in the selected chat.
- **Message box**—compose and send messages to your contact or channel. You can also send screenshots, files, code, snippents, and animated GIFs.



## Meetings Tab

Select the **Meetings tab** and click **Upcoming** to view, start, edit, and delete scheduled meetings.
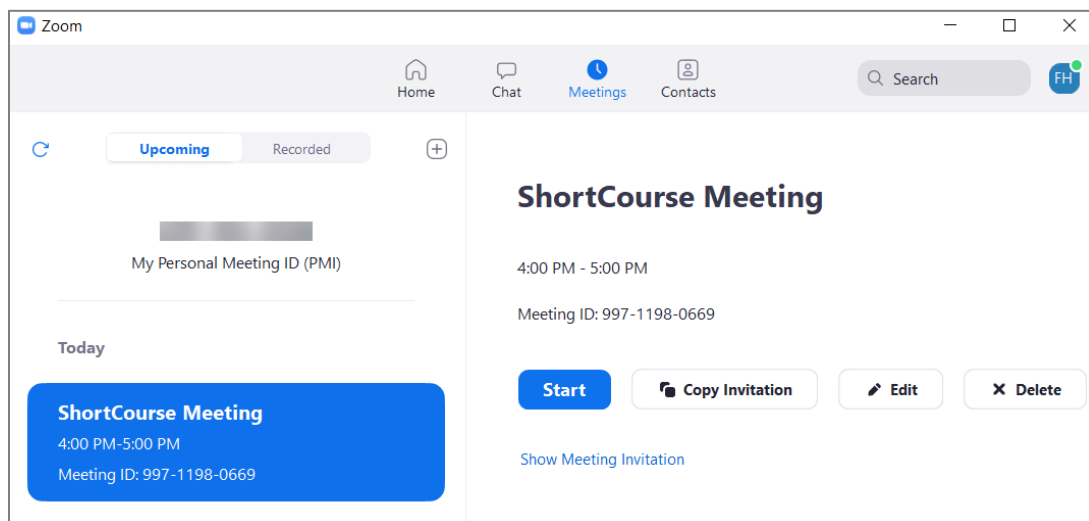


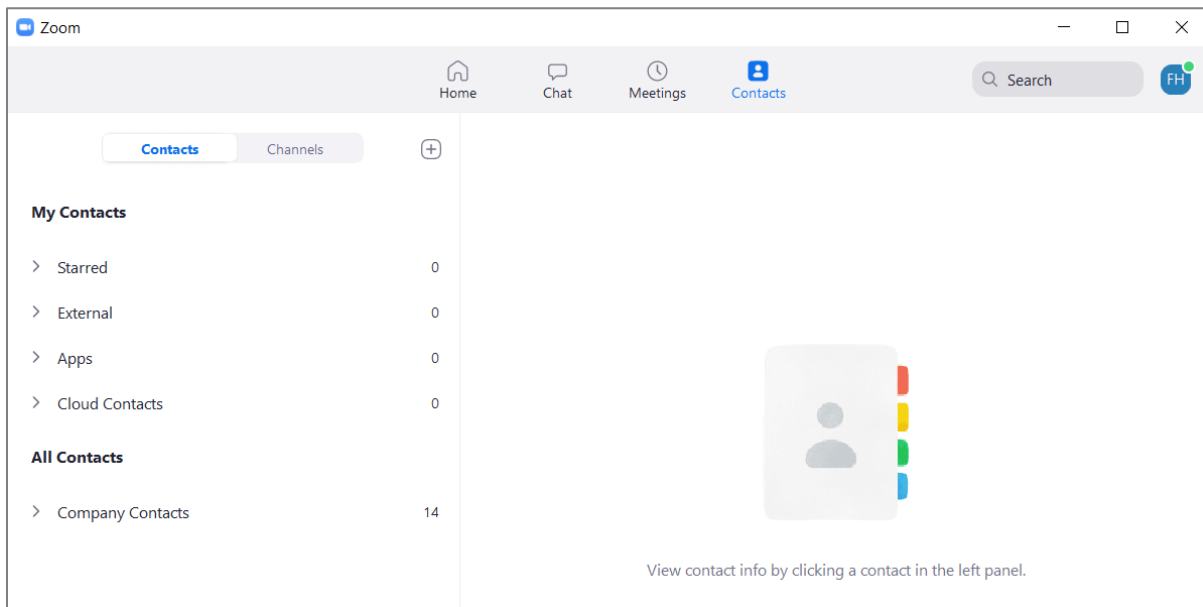You can click the following options after selecting a scheduled meeting in the left-side panel:

- **Add icon** ⊕—schedule a new meeting.
- **Refresh icon** ↻—refresh the meeting list if you do not see your scheduled meeting.
- **Start**—start the scheduled meeting that you have selected in your upcoming meetings.

- **Copy invitation**—copy the scheduled meeting's invitation text, allowing you to manually paste into an email, instant messenger, etc. Click Show Meeting Invitation if you want to view the invitation you are copying.
- **Edit**—edit the meeting options for your scheduled meeting.
- **Delete**—permanently delete your scheduled meeting.
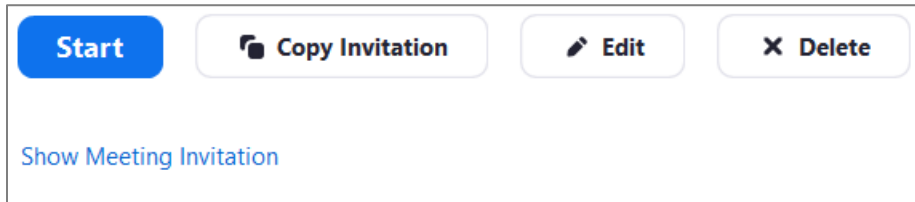


## Contacts Tab

Select the Contact tab to view and manage your contacts.



You can click the following options in the left-side panel:

- **Contacts tab**—view a directory of all your contacts, including starred, external, and auto answer contacts.
- **Channels tab**—view a directory of your channels (used for group messaging). Starred channels appear at the top of the list.

- **Add icon** ⊕—show options for contacts and channels. You can add a contact, create a contact group, create a channel, or join a channel.

## Testing Audio

If you have not enabled the setting to automatically join by computer audio, you can test your speaker and microphone **before joining a meeting**.

1. After clicking to join a meeting, you will be prompted with the box below. Select **Test Speaker and Microphone** to test your audio before you join the meeting.
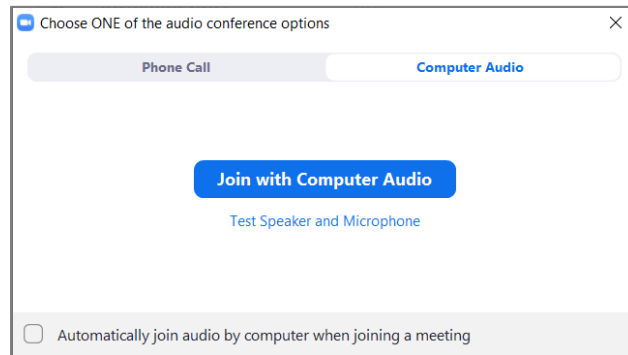
2. Once you have chosen to test your speakers, a new pop-up window will appear **to test your sound**. If you do not hear the ringtone, use the drop-down menu or click **No** to switch speakers until you hear the ringtone. Click **Yes** to continue to the microphone test.
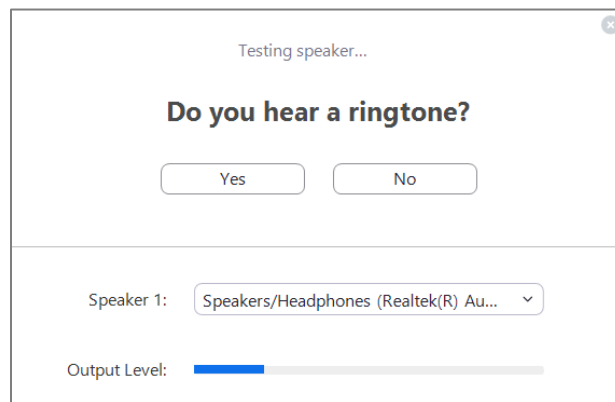
3. The microphone test pop-up will ask you to **speak**, and then **listen to a recording** of yourself. If you do not hear an audio replay, use the drop-down menu or click **No** to switch microphones until you hear the replay. Click **Yes** when you hear the replay.
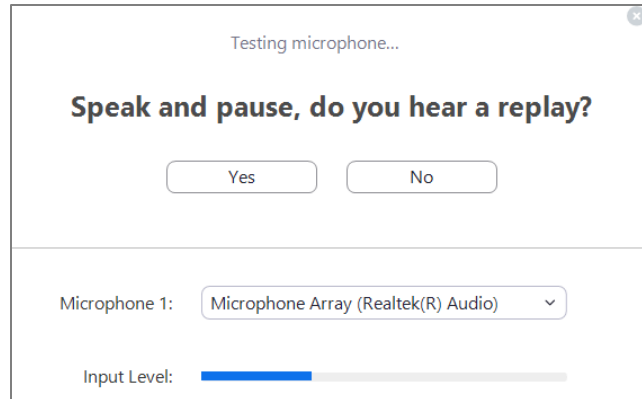
4. Once you have verified that your speaker and microphone are working, you will get a window stating your **Speaker and microphone** are working. From this window, select **Join with Computer Audio**.

To test your audio using the **Audio Settings** without having to enter a meeting:

1. Click your **profile picture/icon** and select **Settings**.
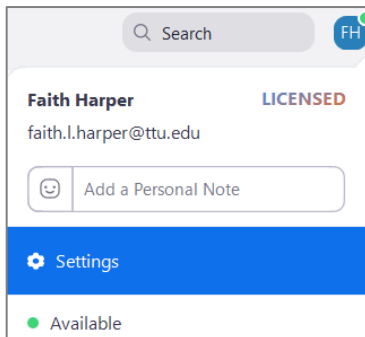


2. Click the **Audio icon**  and choose to either **Test Speaker** or **Test Mic**.

## Microphone Troubleshooting

If you are **on Mac OS 10.14 Mojave or earlier** and cannot access the microphone, check your **operating system** permissions to confirm that Zoom has access to the microphone.

If you are on **Windows 10** and cannot access the microphone, use the **Windows search box** to navigate to Microphone privacy settings. Switch on the **Allow apps** to access your microphone toggle and enable access for Zoom.
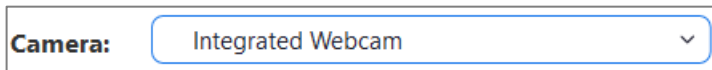
## Testing Video

To test your video **before joining** a meeting, follow the steps below.

1. Click your **profile picture/icon** then click **Settings**.
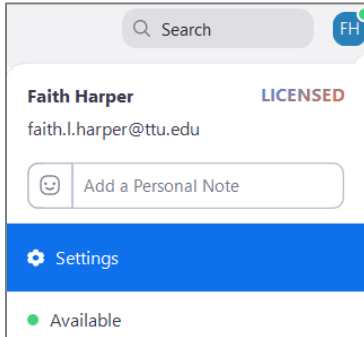


2. Click the **Video tab** .

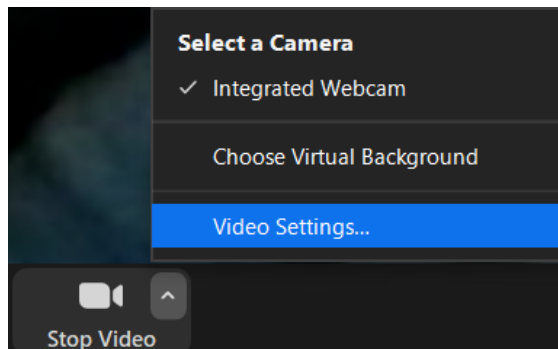3. You will see a preview of your camera, and you can **choose a different camera if needed**.



To test your video **while in a meeting**, follow the steps below:
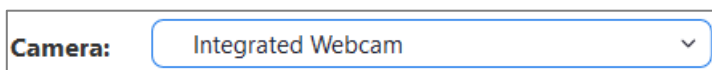
1. Click the arrow next to **Start Video/Stop Video**.



2. Select **Video Settings**.



4. You will see a preview of your camera, and you can **choose a different camera if needed**.
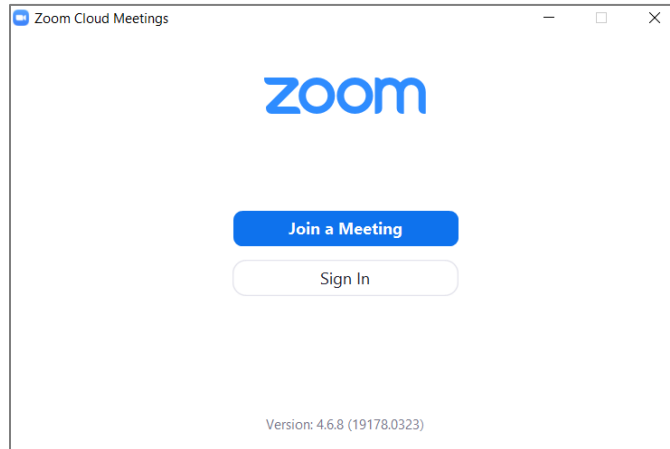
## Hosting a Zoom Meeting

**To start an immediate Zoom meeting**, without having to schedule it in advance, follow the steps below.

*Note*: these steps do not invite anyone to the meeting. To invite people once you have begun your meeting, following the steps in the next section.

1. Open the **Zoom Desktop Client** and click **Sign In**.



2. Once logged in, make sure your **Home** tab is open. Click the downward **arrow next to New Meeting** and make sure **Start with Video** is selected.

3. Select **New Meeting** to immediately start the meeting.
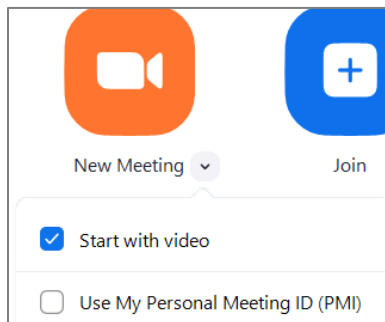


## Inviting Participants to an In-Progress Meeting

Invite Participants to an In-Progress Meeting

1. Once you have joined a meeting, **click Manage Participants** (if you are the host of the meeting) or **Participants** (if you are not the host) in the **meeting controls** (bottom of the video).
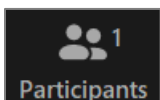
2. A **participant's panel** will pop-up on the right-hand side of your video. Select **Invite** at the bottom of the participants panel. From here, you can choose one of the following options:

   a. Email - invite via email

   b. Contact - invite by contacts

   c. URL or Invitation Text - invite via a link

### Invite Participants by Email

1. Click the **Email** tab and then select an email provider.
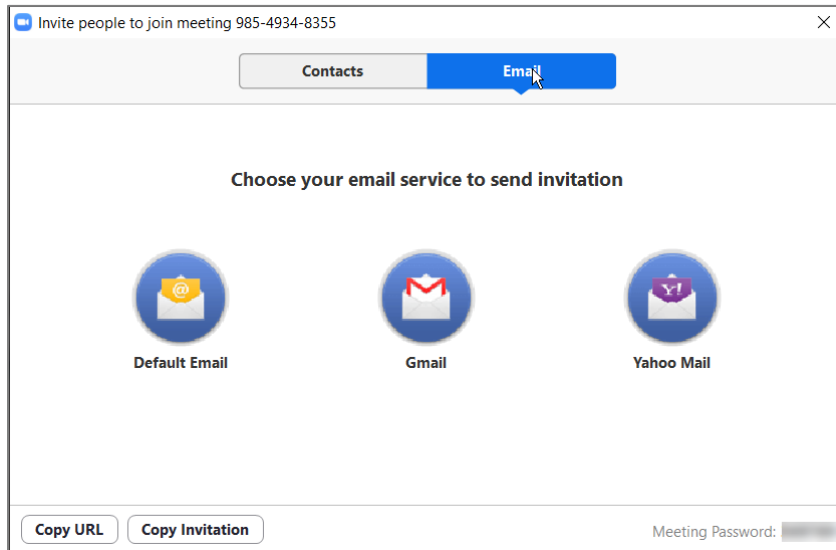


2. **Add recipients** to the email and send.

### Invite Participants from Your Contacts

1. Click the **Contacts** tab.

2. **Select the contact's name/icon** from the window or search for a contact in the search bar. You can select multiple con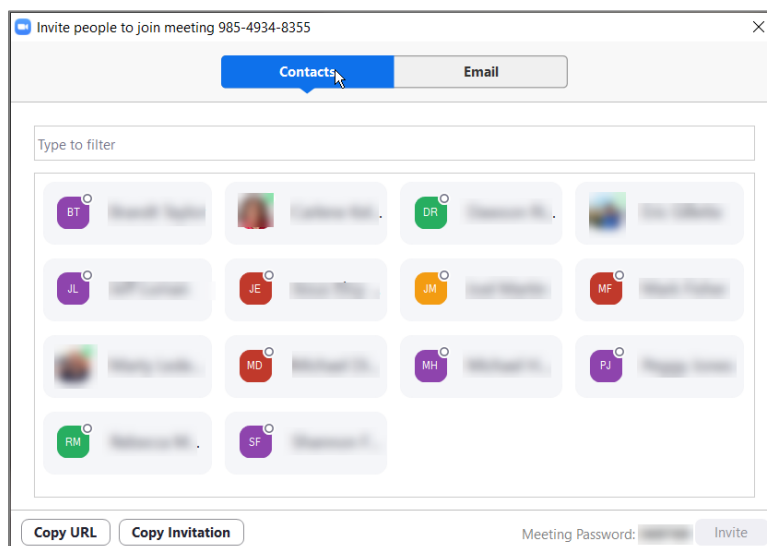tacts. Once you select your contacts, their names will have a check mark next to them and will appear in the list at the top of the window.

3. Once you have selected your contacts, choose **Invite** in the lower right-hand corner of the window.

Invite Participants Through a Copied URL or Meeting Invitation

1. Select **Copy URL** in the bottom left-hand corner of the screen to copy the meeting link.

2. OR select **Copy Invitation** in the bottom left-hand corner of the window to copy the full invitation text.



3. Paste the URL or invitation into whatever chat/messaging system you are using.

## Inviting Participants to a Scheduled Zoom Meeting

You can also invite participants to a Zoom meeting before the meeting begins through either the desktop client or the web portal.

Invite Participants Through the Desktop Client

1. Schedule a meeting.

2. Sign into the Zoom Desktop Client.

3. Click the **Meetings** tab.

4. **Select the meeting** that you want to invite others to. Click **Copy Invitation**.

5. The meeting invitation will be copied, and you can **paste it into an email** or whatever other avenue you are using to send out the meeting information.
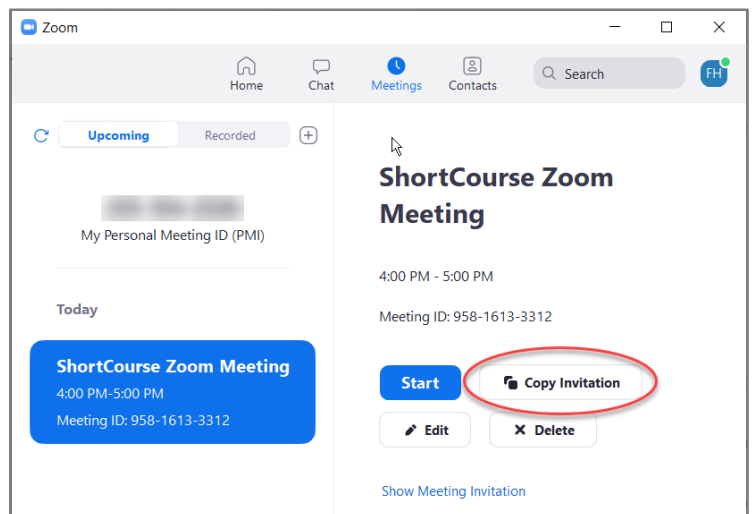
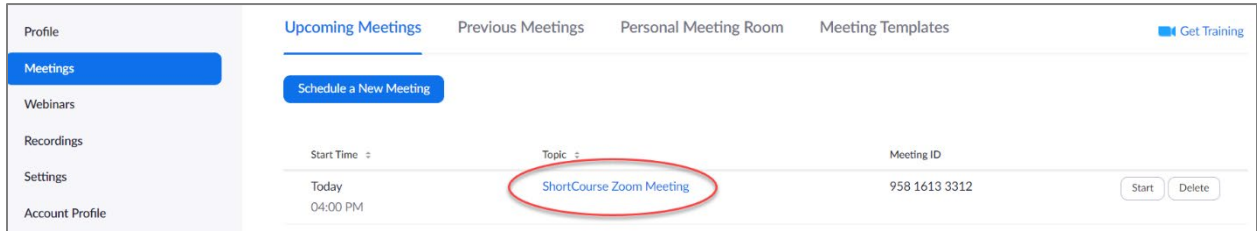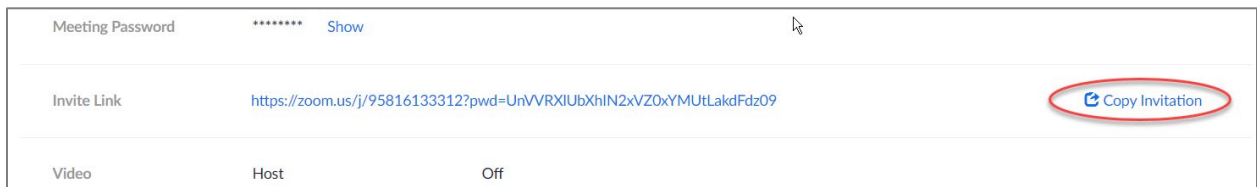Invite Individuals Through the Web Portal

1. Sign into the Zoom **web portal**.

2. In the navigation menu, click **Meetings**.

3. **Click the topic of the meeting**, this will bring up all the meeting details.



4. Under the **Time** tab, select **Copy Invitation**.



5. When the Copy Meeting Invitation window appears, select the **Copy Meeting Invitation button** in the bottom right-hand corner.
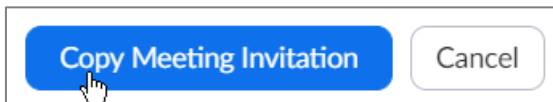


6. Once the invitation has been copied, you can **paste it into an email** or whatever other avenue you are choosing to send it through.

## Joining a Zoom Meeting

You can join a Zoom meeting through the Zoom desktop client, a web browser, an email, a message, or by telephone. These different methods are listed below.

Join a Zoom Meeting Through the Desktop Client

1. Open the Zoom desktop client.

2. Join the meeting using one of the two methods below.

    a. Click **Join a Meeting** without signing in (see image to the right).

    b. Or **sign in** to Zoom and select the **Join** icon from the Home screen.
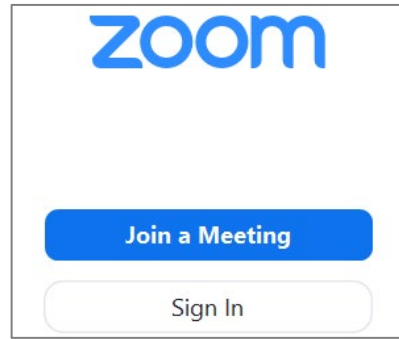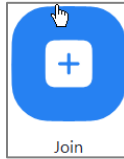
3. For both options, **you will need to enter the Meeting ID number and your display name**. If you are signed in, you can change your display name if you do not want your default name to show. If you are not signed in, you will need to enter a display name.
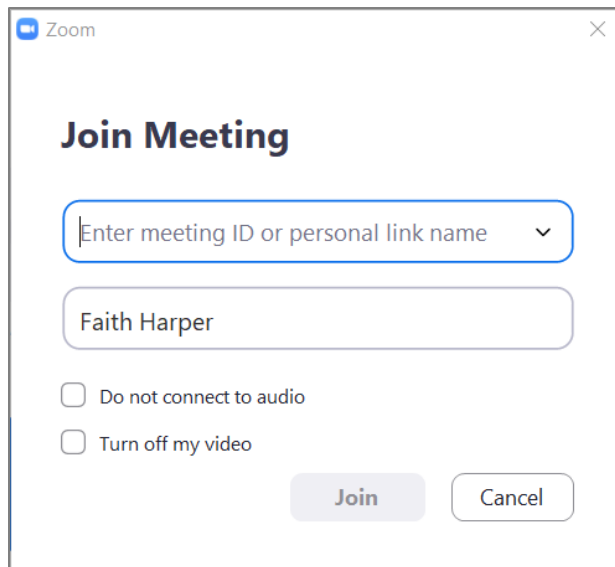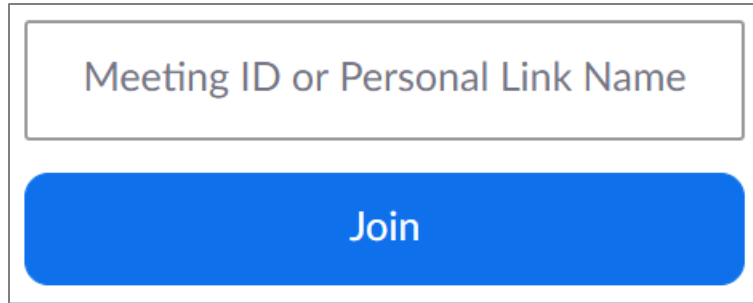
4. Select if you want to **turn off your audio or video** for the meeting and then click **Join**.

Join a Zoom Meeting Through a Web Browser

1. Open your web browser of choice.

2. Go to **join.zoom.us**.

3. **Enter your meeting ID** which should have been provided by the meeting host/organizer.



4. Select **Join**.

*Note*: You will possibly be asked some variation of "**Do you want to allow this App/page to open?**" depending on the browser you use. You can **select Yes/Allow** when you get this pop-up.

Join a Zoom Meeting Through Email

1. After you have received an email or calendar invitation for a Zoom meeting, you need to **click the Join Zoom Meeting link** within the invitation.
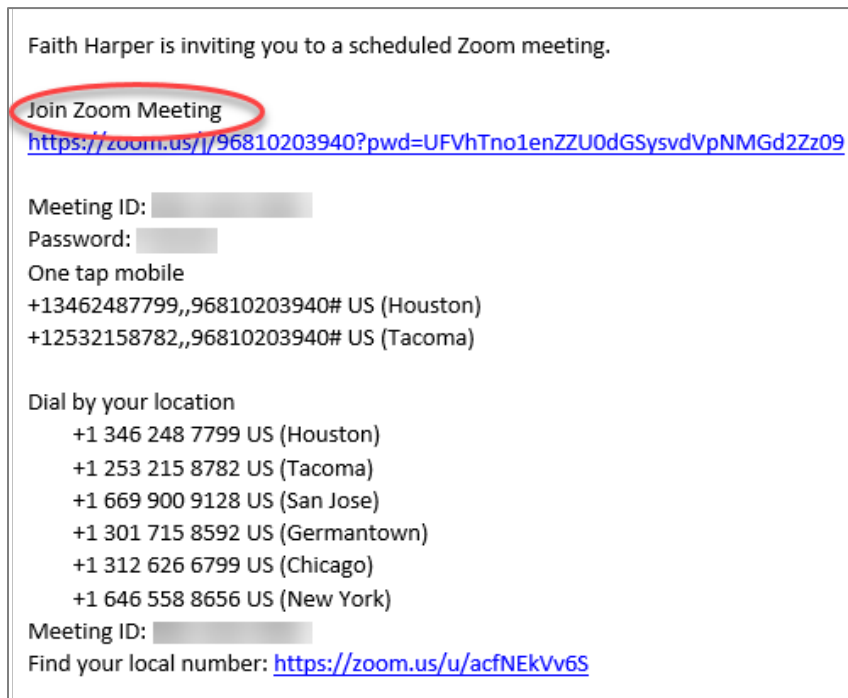


2. Depending on your default browser, you may be **prompted to open Zoom**. If this notification pops up, simply click **Yes/Allow**.

<u>Join a Zoom Meeting by Telephone</u>

1. On your phone, **dial the teleconferencing number** provided in your invitation.

Faith Harper is inviting you to a scheduled Zoom meeting.

Join Zoom Meeting
https://zoom.us/j/96810203940?pwd=UFVhTno1enZZU0dGSysvdVpNMGd2Zz09

Meeting ID: 
Password: 
One tap mobile
+13462487799,,96810203940# US (Houston)
+12532158782,,96810203940# US (Tacoma)

Dial by your location
    +1 346 248 7799 US (Houston)
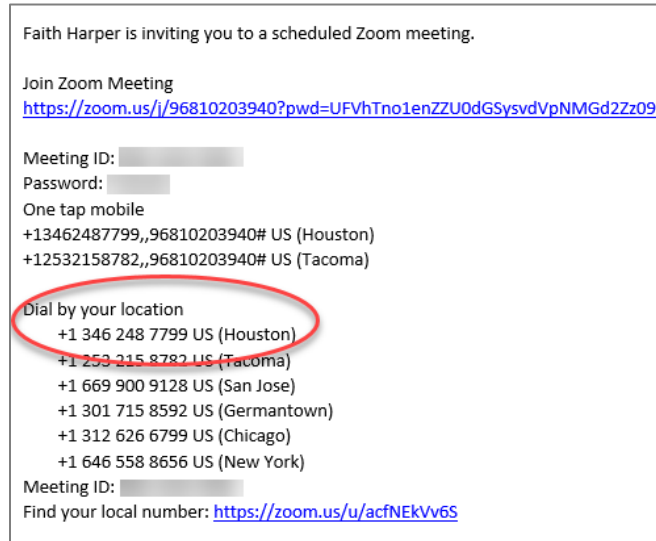    +1 253 215 8782 US (Tacoma)
    +1 669 900 9128 US (San Jose)
    +1 301 715 8592 US (Germantown)
    +1 312 626 6799 US (Chicago)
    +1 646 558 8656 US (New York)
Meeting ID: 
Find your local number: https://zoom.us/u/acfNEkVv6S

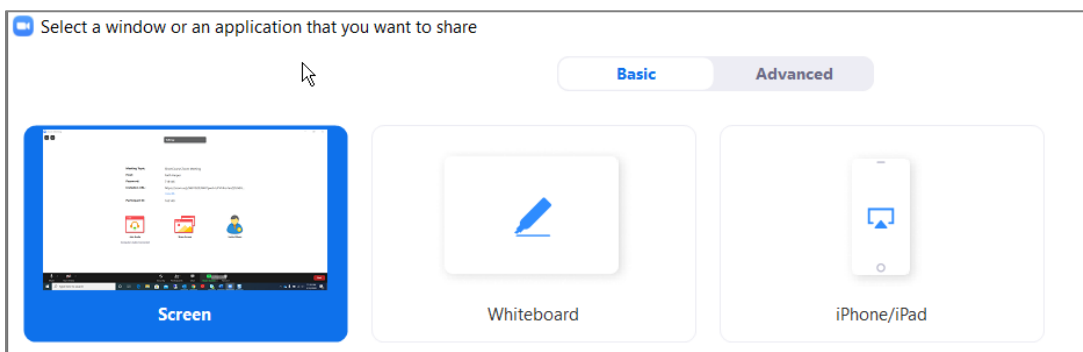2. **Enter the meeting ID** number when prompted using the dial pad on your phone.

# Screen Sharing

Zoom allows you to share your screen with other participants in the meeting. To achieve this, please follow the steps below.

1. Open your Zoom meeting through the desktop client app.

2. Click the Share Screen button located in your meeting controls.

| Security | Participants 1 | Chat | Share Screen | Record |
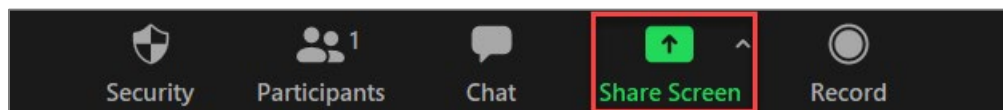
3. Select the screen you want to share. You can also choose an individual application that is already open on your computer.

Select a window or an application that you want to share

Basic        Advanced

Screen          Whiteboard          iPhone/iPad

4. (Optional) Enable the following features:

   a. **Check Share computer sound** (bottom left) - any sound played on your computer will be shared in the meeting.

   b. **Check Optimize Screen Sharing for Video Clip -** check this if you are sharing a video clip, but do not click otherwise as it may cause the shared screen to by blurry.



5. **Select Share** in the bottom right-hand corner of the screen (see image above).

Share Screen Menu

When you start sharing your screen, the meeting controls will move into a menu that you can drag around your screen.
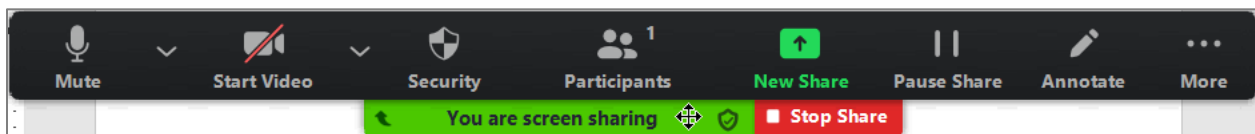


This menu has the following options:

- **Mute/Unmute**: Mute or unmute your microphone.
- **Start/Stop Video:** Start or stop your in-meeting video.
- **Participants/Manage Participants**: View or manage the participants (if the host).
- **New Share**: Start a new screen share. You will be prompted to select which screen you want to share again.
- **Pause Share**: Pause your current shared screen.
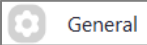- **Annotate / Whiteboard**: Display annotation tools for drawing, adding text, etc.

You can also view More options by hovering over the More button in the menu. This will show the following options:

- **Chat**: Open the chat window.
- **Invite**: Invite others to join the meeting.
- **Record**: Start recording locally or to the cloud.
- **Allow/Disable participants annotation**: Allow or prevent the participants from annotating on your shared screen.

- **Show/Hide Names of Annotators**: Show or hide the participants' name when they are annotating on a screen share. If set to show, the participant's name will briefly display beside their annotation.

- **Live on Workplace by Facebook**: Share your meeting or webinar on Workplace by Facebook.

- **End Meeting**:  Leave the meeting or end the meeting for all participants.

Screen Sharing with Dual Monitors

If you are using dual monitors, you can turn on the **Use Dual Monitors feature** to see the screen sharing on one monitor and participants on the second. You must first **enable the dual monitors feature**. Follow the steps below to achieve this.

1. Once logged into the Zoom desktop client, click your **profile picture**, then select **Settings**.
2. Within Settings, click the **General tab**. 
3. Navigate to the Use dual monitors option - be sure to check mark the box next to this option.
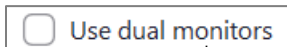

**After you have enabled the dual monitor feature in Settings** (see steps above), a Zoom window will appear on each monitor anytime you join a Zoom meeting. When you start sharing your screen, you can continue to view participants' videos on one screen while sharing your other monitor.
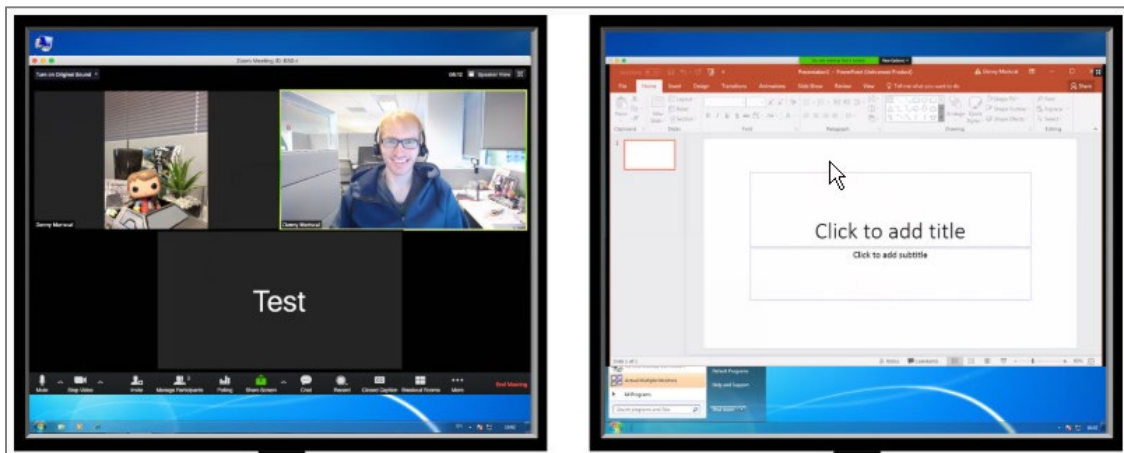


Much of the information within this handout was retrieved from Zoom's Help Center at
https://support.zoom.us/hc/en-us/categories/200101697.

Please email any questions, comments, or suggestions you may have ITEducation@ttu.edu.