Zoom Helper Overview

This guide gives an overview of what will be needed to help someone install Zoom on their device and get connected to a meeting.

Three things need to be done, which can be done in several ways, to suit, there's no right or wrong way (but see the FAQs below):

1. An account needs to be created with Zoom, in the form of an email address, which Zoom will validate by sending an email to it
2. Zoom software needs to be installed and logged into the account, and
3. The individual needs to experience how to start up Zoom and join a meeting

Option 1: Send a meeting invite in an email

Start a meeting and send an invitation to join it, in the form of a link in an email. When the member clicks on the link, it will automatically

1. Check whether Zoom is installed on the device, and if not, will download and install it,
2. Guide the user through creating an account, validating it and logging in, then
3. Start the meeting

Option 2: Create an account beforehand

1. Go to the Zoom website Zoom.us and click on 'Sign Up for Free'. It will ask for details to create an account, such as a valid email address and password, then send an email to the address with a link to click to validate it. It may then offer to download and install the software. If not:
2. Download and install from the Zoom Download page Zoom.us/download
   • For Windows and Mac, click on 'Zoom Client for Meetings' and it will download the correct version for the device.
   • For Apple or Android devices, click on the appropriate button to start the download from the App Store or Google Play. Alternatively, go straight to the App Store or Google Play and find and download the app, which is called 'Zoom Cloud Meetings'
3. Start Zoom on the device and log in with the account name and password when prompted
4. Join the meeting, either by clicking on a link in an email invitation, or by entering the numeric Meeting ID (and password if prompted), which should be part of the invitation

Option 1 is a single process, which can be talked through over the phone in one go. Option 2 can be done in stages.

Option 1 in more detail

1. Make contact with the member on the phone
2. Start Zoom on your device and click 'New Meeting'. Click the Meeting Information at the top left of the screen, an 'i' in a white circle and click 'Copy URL'. Then create an email to the member's email address, paste in the link and send.
3. When the email arrives, ask the member to click on it and it will start the installation process:
   • First it will download and install the software, either from the Zoom website (for Windows or Mac), or from the App Store or Google Play for tablets
   • Second, it will start the dialogue to create a Zoom account, asking for an email address and a new password. Once the account is created, it will send an email to the address, with a link to click to validate that the address is real.
   • Third, once the link in the email has been clicked, the validation is complete, and Zoom joins the meeting.
   • Finally, it may ask for details of how to join the meeting:

- The password for the meeting,
- Whether to join with video, i.e. whether the video is to be turned on straight away or needs to be turned on.
- Whether to join with audio, or whether the sound needs to be turned on. If it asks 'join by phone or join by computer audio?', the answer is 'Computer Audio'

These settings can be altered in your account as the creator of the meeting.

Things to demonstrate and explain

Once the connection has been made, however it was achieved, talk the member through the basic controls of the meeting, including:

- Switching the screen between Active Speaker and Gallery modes, and the yellow border indicating who is speaking
- On a tablet, finding the Meeting Settings at the top of the screen and how to use the '. . .' button to find the 'Always Show Meeting Settings' option
- Turning audio off and on with the Mute button, and the courtesy of staying on mute if there is background noise
- Turning video off and on with the Stop Video button
- The 'Leave Meeting' button to leave the meeting before the end
- The Share button and (briefly) the fact that all sorts of things can be shared on the line, not just speech and video

Further Information

The Zoom support website support.zoom.us has short documents and videos explaining specific topics in more detail, including getting started, joining meetings, scheduling meetings, meeting controls, screen sharing and so on.

FAQs

- **Is it essential to install Zoom software? –** No, but it's a lot better if you do. Zoom say that if you can't install the software you can join a meeting through the Zoom Web Client, which runs in a browser**.** However, it's only really practical with one browser, Chrome, and the functionality is limited.   And you do have to create an account.
- **Is it essential to create an account?** – Not to join a meeting, only if you are going to host a meeting. When you join a meeting, you may see a login screen, but you don't have to log in. And as in the previous point, you **do** have to create an account to use the Web Client
- **Does it cost?** – No, the client software is free, and you don't have to give any payment details to register your account. With a free account you can join any meeting (including those set up from paid accounts), and you can host meetings up to 100 participants. Meetings you host are limited to 40 minutes duration, but you can start another 40-minute session straight away. Zoom have recently relaxed the 40-minute limit on some accounts, but it seems not all. A paid account with no time limit costs £11.99 / month. For more details from the Zoom website, see: zoom.us/pricing
- **Can I join a Zoom meeting from Skype, Facetime etc.?** Not as far as we are aware. Zoom and Skype can communicate between businesses, but not the free versions