![West Lothian Council logo]

HOW TO USE
ZOOM
FOR VIDEO & AUDIO CONFERENCING

Guidance for West Lothian Council Employees

Digital Transformation Team
Created: March 2020

DATA LABEL: Internal Only

Contents

Zoom Video Conferencing

This short document was created in order to provide West Lothian Council employees with a guidance on how to use a videoconferencing solution for online interaction. In the absence of other video and conference solution, Zoom Video Conferencing (free package) was perceived to offer all the basic functionality to enable teams to stay interactive and connected online.

Please note that this guide does not explore all of the ZOOM's functionality but rather the very essential feature of the software.

To supports different ways of learning preferences, this guidance's offers three options you can become familiarise with ZOOM application. These are as follow:

How to use ZOOM – Step by Step Guidance supported by prints screens – Section 2

How to use ZOOM – Video Tutorials – Section 3

How to use ZOOM – Process Map – Section 4

1. Videoconferencing made easy – What is ZOOM?

ZOOM is a High Definition video conferencing and desktop sharing software. It gives you 40 minutes of free service for each conference session with up to 25 participants (with unlimited time for One-To-One calls). Please note that other, paid packages are also available.

Moreover, Zoom is a modern enterprise video communication tool, with an easy, reliable cloud platform for video and audio conferencing, chat, and webinars across mobile, desktop, and room systems.

2. What do I need to use ZOOM?

A full list of system requirements can be found here: https://support.zoom.us/hc/en-us/articles/201362023-System-Requirements-for-PC-Mac-and-Linux

2.1. I'm using a council device

If you have a council issued Lenovo ThinkPad or HP Elitebook, as well as an internet connection then you already have the tools necessary to get started using ZOOM. Issues with the speakers on some Lenovo ThinkPads have meant that users have been unable to hear meetings. The use of earphones or headphones have resolved these issues.

Unfortunately, due to the security settings on council issued iPads, iPhones, and Samsung Galaxy smartphones, these devices are not currently able to use ZOOM.

2.2. I'm not using a council device

If you're not using a council device then you need to ensure your devices has the following things:

- An internet connection.

- Speakers and a microphone – built-in or a USB plug-in or wireless Bluetooth.

- A webcam – built-in or USB plug-in.

On top of these requirements, if you're using a laptop or desktop you need to ensure that your device is also running on one of the following Operating Systems (OS):

- Windows 10

- Windows 8 or 8.1

- Windows 7

- Windows Vista

- Windows XP

- macOS X with macOS 10.7 or later

If you prefer to use a table or mobile device, then the following devices are also compatible with ZOOM:

- iPhone 4 or later (using iOS 7.0 or later)

- iPad Pro (using iOS 7.0 or later)

- iPad Mini (using iOS 7.0 or later)

- iPad 2 or later (using iOS 7.0 or later)

- iPod touch 4th Generation (using iOS 7.0 or later)

- iPhone 3GS (using iOS 7.0 or later)

- Any Android device using Android 4.0x or later

3. How to access ZOOM? Step by Step Guidance supported by prints screens

To be able to access ZOOM you must first register an account which is an easy and straight forward process. Before you do so, you must insure that you have a connection to the Internet, a device with speakers and camera (optional for video footage).

3.1. Link to website

Please use the link to the below to access the zoom website:

https://zoom.us/

3.2. Signing up

To be able to use the free video conferencing functionalities of ZOOM please sign up for the service by following the instructions you will see once you click on the **SIGN UP, IT'S FREE** button.
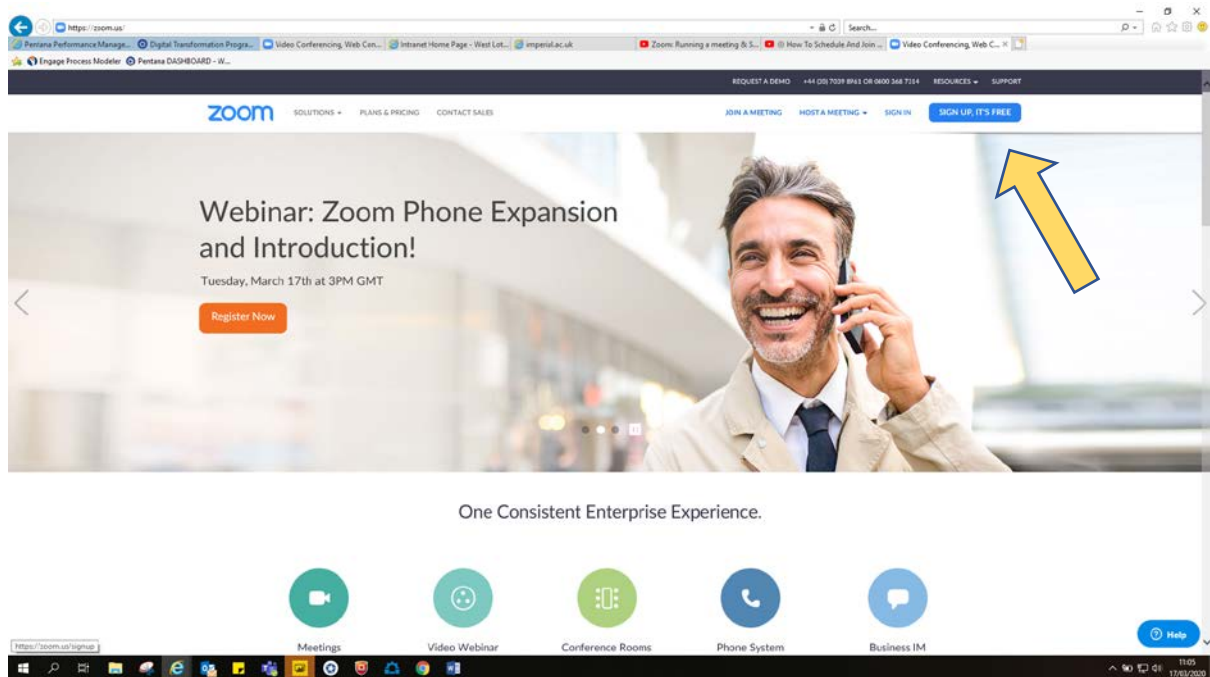
Please remember to use your work email address (do not sign up using google or Facebook) and follow the instructions as indicated by the service provider.
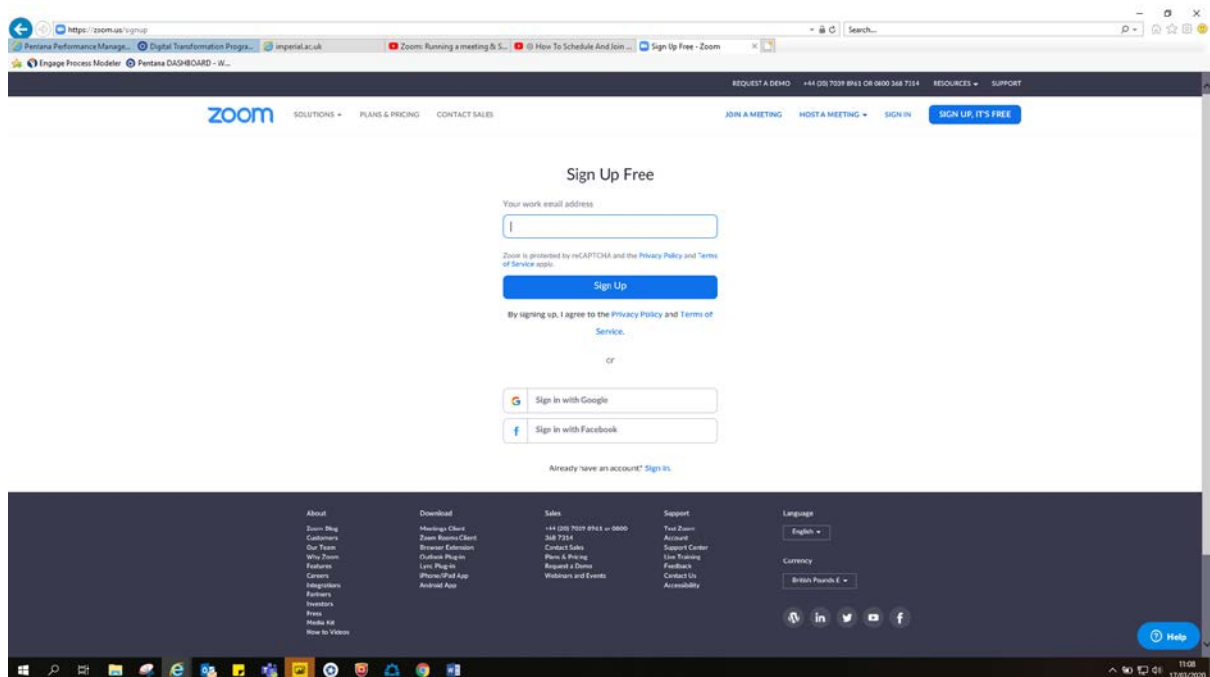
Once you a register, you will receive an email asking you to activate your account. Please follow the instructions as advised in the email.

Once your account is activated you should be able to use ZOOM!

It is optional to download the ZOOM app for your machine. If you are using a PC or a laptop please do not download the app however, if you are running ZOOM on a mobile phone or tablet you will need to download the app.

3.3. Already a ZOOM user?

If you have already signed up to use ZOOM with your work email address just simply sign in to be able to either set up a ZOOM meeting, join a ZOOM meeting or schedule a ZOOM meeting.

3.4. ZOOM Meetings

ZOOM provides with three options for meetings, namely:

- Hosting a meeting

- Joining a meeting

- Scheduling a meeting
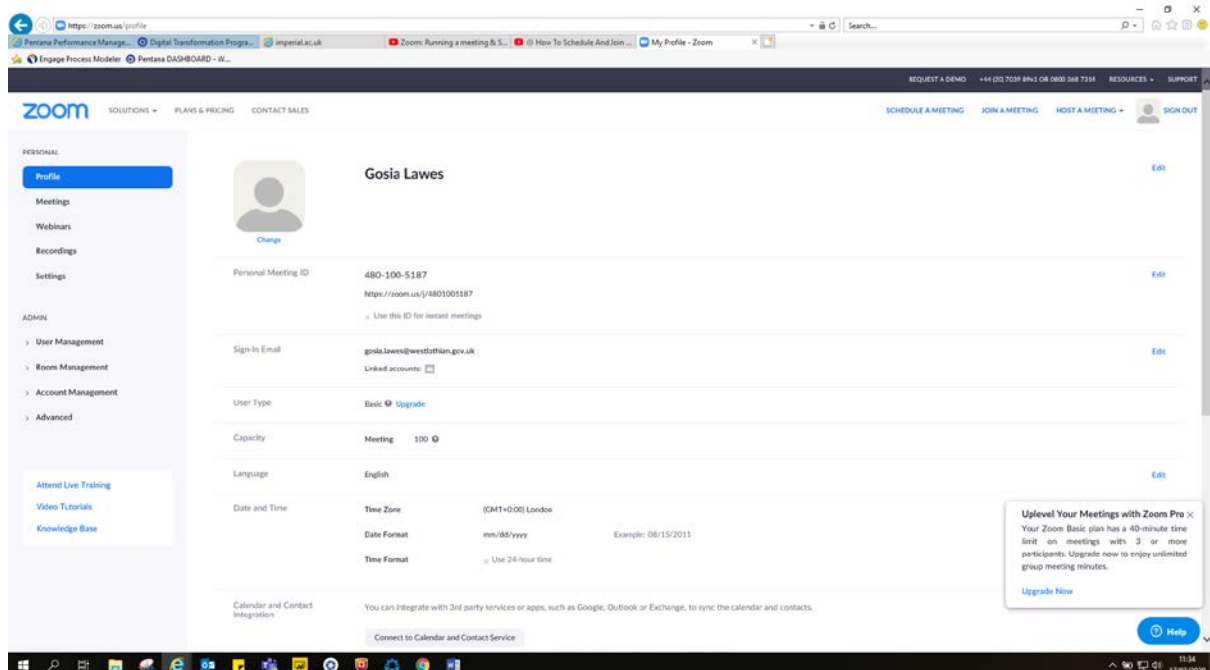
Please note that when videoconferencing by using ZOOM on your PC or laptop you may experience difficulties when using two screens therefore, it is recommended to use a single screen as it will be easier to navigate within the application.

3.5. Hosting a ZOOM meeting.

If you would like to host a ZOOM meeting please select the HOST A MEETING button which can be found at the top right corner of your screen and choose one of the three options available to you: video on, video off or screen share only. Depending on the option you select, the instruction may be slightly different, however as long as you will follow it, you should be able to host a meeting of the chosen format.

As it is most common to host a video meeting with a video, this guidance will illustrate how to do that. Please follow the steps below in order to host a videoconference.

Step 1: Click on HOST A MEETING

Step 2: Select – with Video on

Once you click on that, couple of smaller screens will appear looking similar to the print screen below. Please do not panic – this is normal!

Step 3: Test Speakers and microphone

Step 4: Select join with Computer Audio
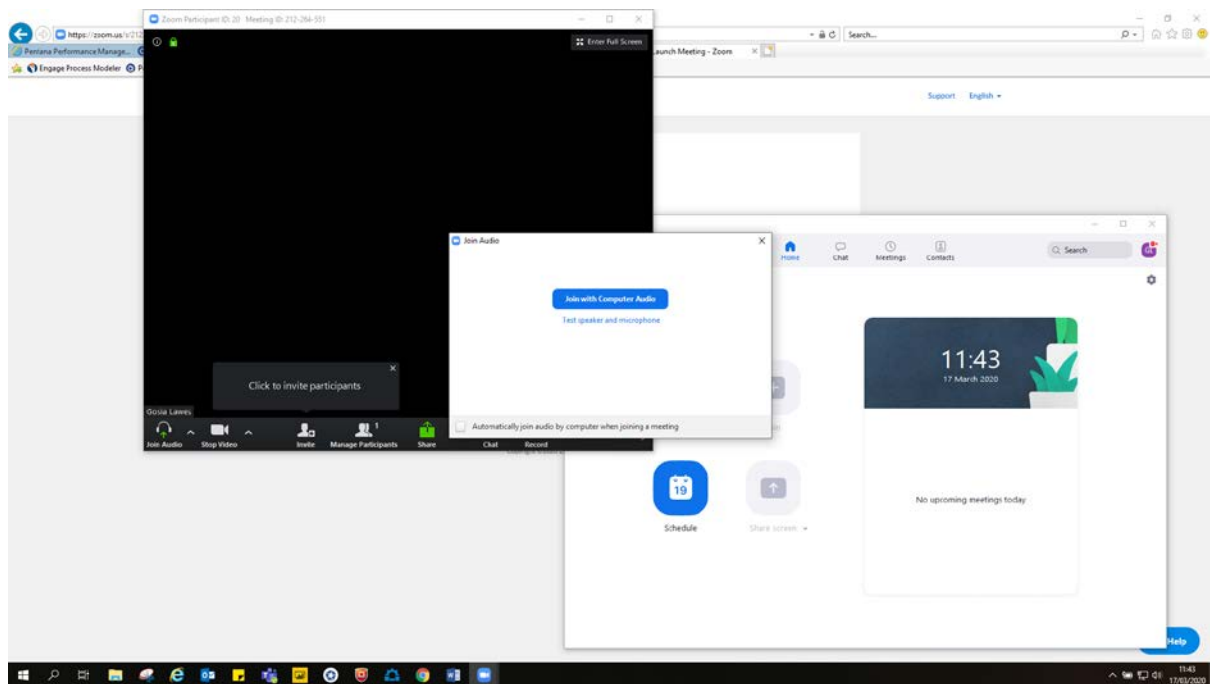
Step 5: Click on Invite in order to invite people you wish to participate in your videoconference.

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Guidance to Video and Audio Conferencing by using ZOOM
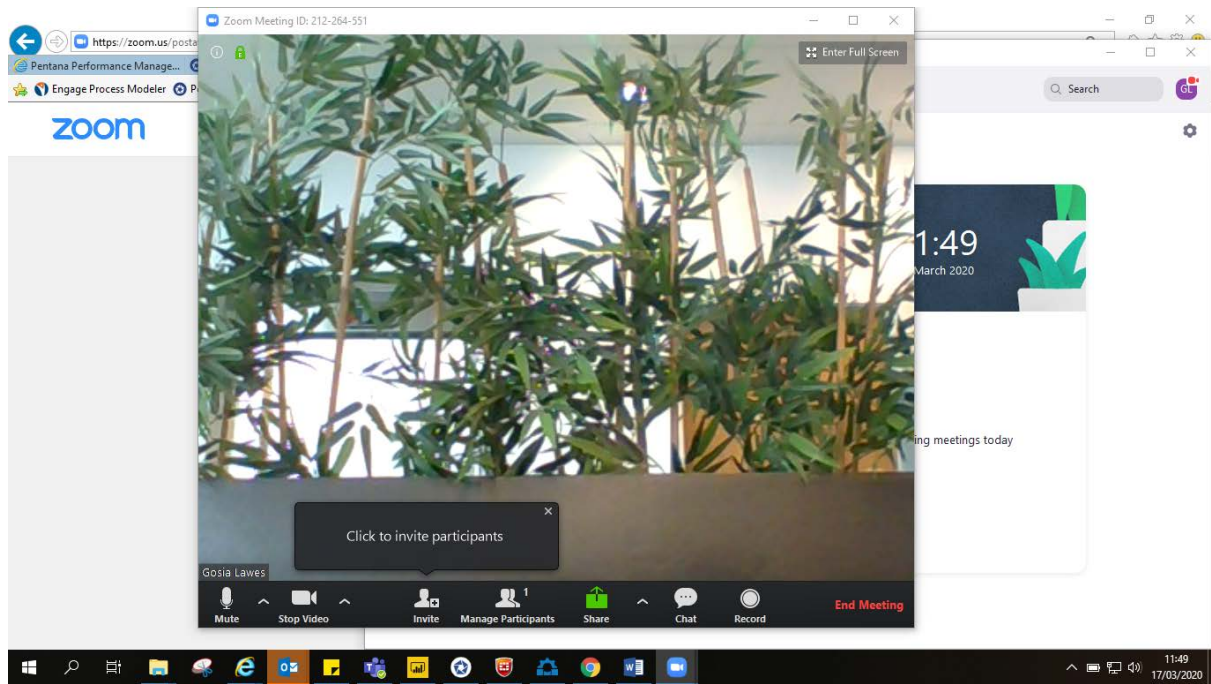
Step 6: Copy Invitation
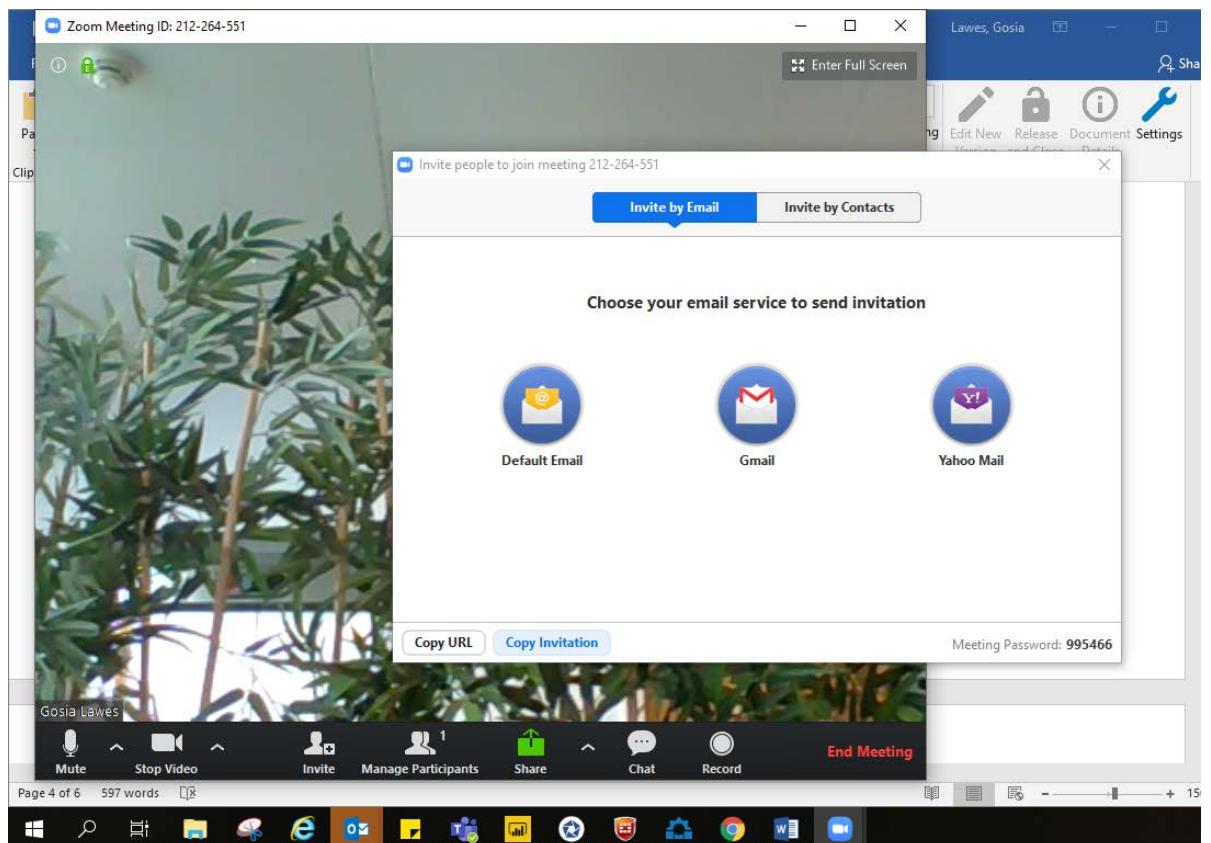
Step 7: Paste your invitation to MS Outlook and select people you wish to join. Follow the council's procedure for sending emails. Please note that there is a limited number of people you can invite and that will depend on the package you signed up for.

As a host of the meeting you have the flexibility to mute all participants at any given time, you can also share your screen with participants. There is also a chat option available for you and your participants as well as option for recording the videoconference.

Step 8: End meeting by clicking on the red End Meeting button.

3.6. How to join a ZOOM meeting when someone sends you a link.

Step 1: Receive an email sent from a meeting host

Step 2: Open link from the invitation by clicking on the link under 'Join Zoom Meeting'
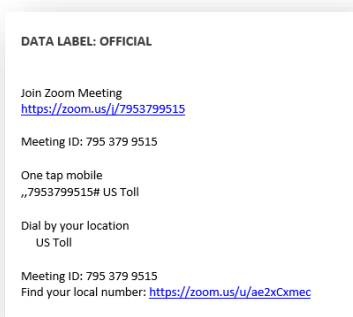
Step 3: Wait on the meeting to commence.

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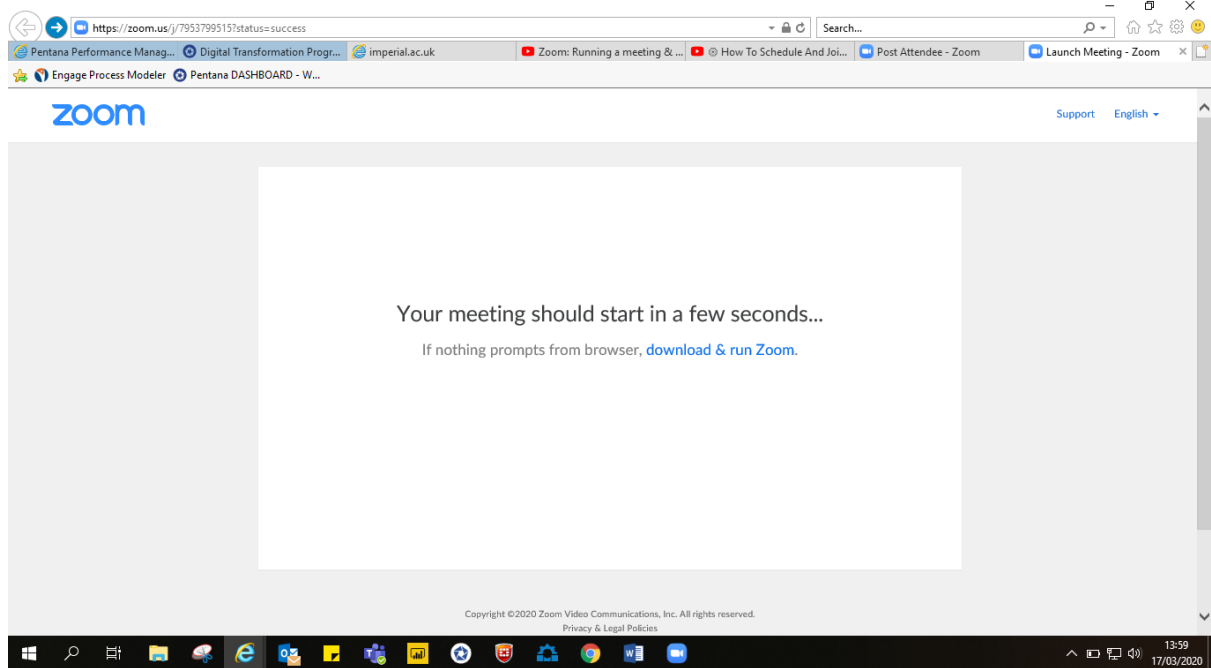
Once you join the meeting, couple of smaller screens will appear looking similar to the print screen below. Please do not panic – this is normal!
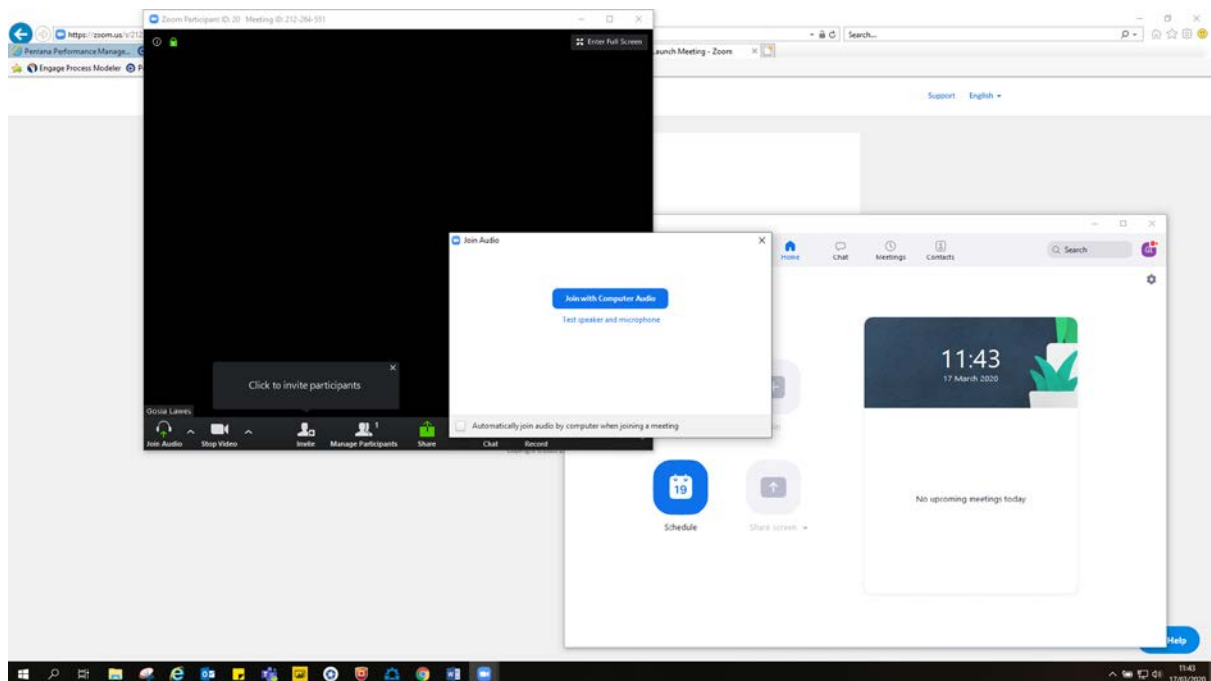
Step 4: Test Speakers and microphone

Step 5: Select join with Computer Audio

Step 6: Start video

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Once you joined the video you will have the option to write messages in the group chat, switch off your camera, mute your mic, share your screen however, some of the features may be controlled by your host. Be wary of that.

3.7. How to schedule a ZOOM meeting including scheduling reoccurring meetings
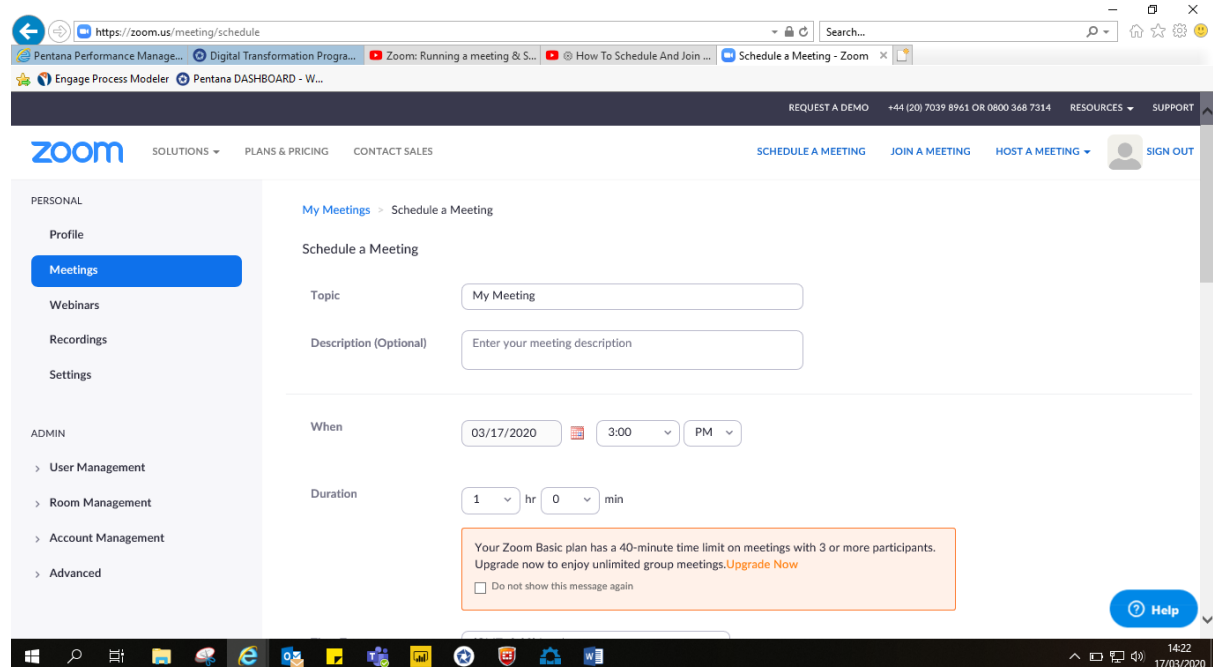
If you would like to schedule a meeting to take place in the future you could use the schedule a meeting functionality of the ZOOM product.

Step 1: Log in

Step 2: Go to your profile

Step 3: Select Schedule a meeting

Step 4: Follow the instructions on the screen by entering the required information

Step 5: Click SAVE once done

Step 6: Once saved you will be promoted to add the meeting to your chosen calendar

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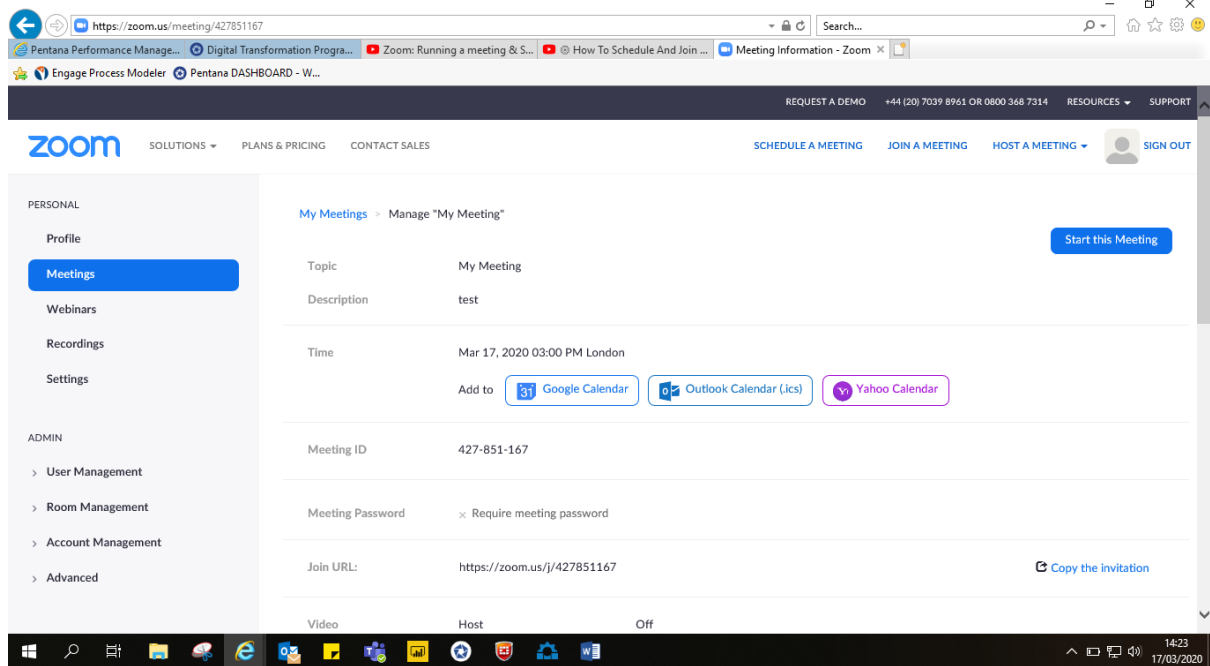
Step 7: Add participants by copying the invite details by clicking on the Copy invite button
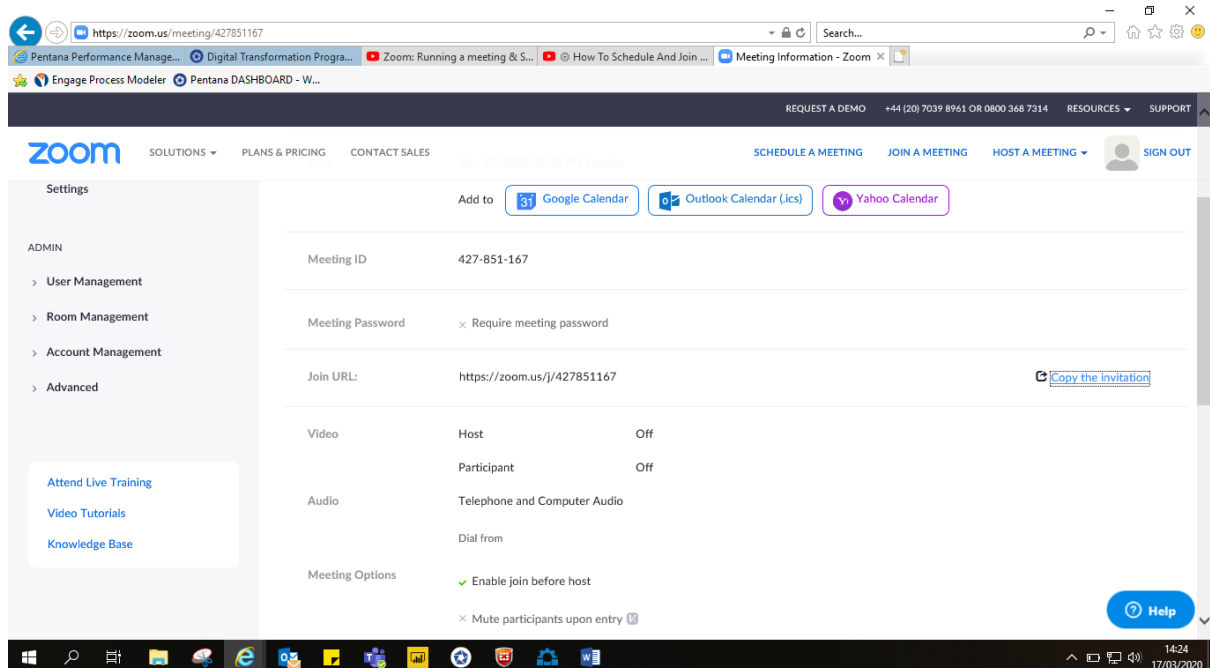
Step 8: Copy meeting invite

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Guidance to Video and Audio Conferencing by using ZOOM
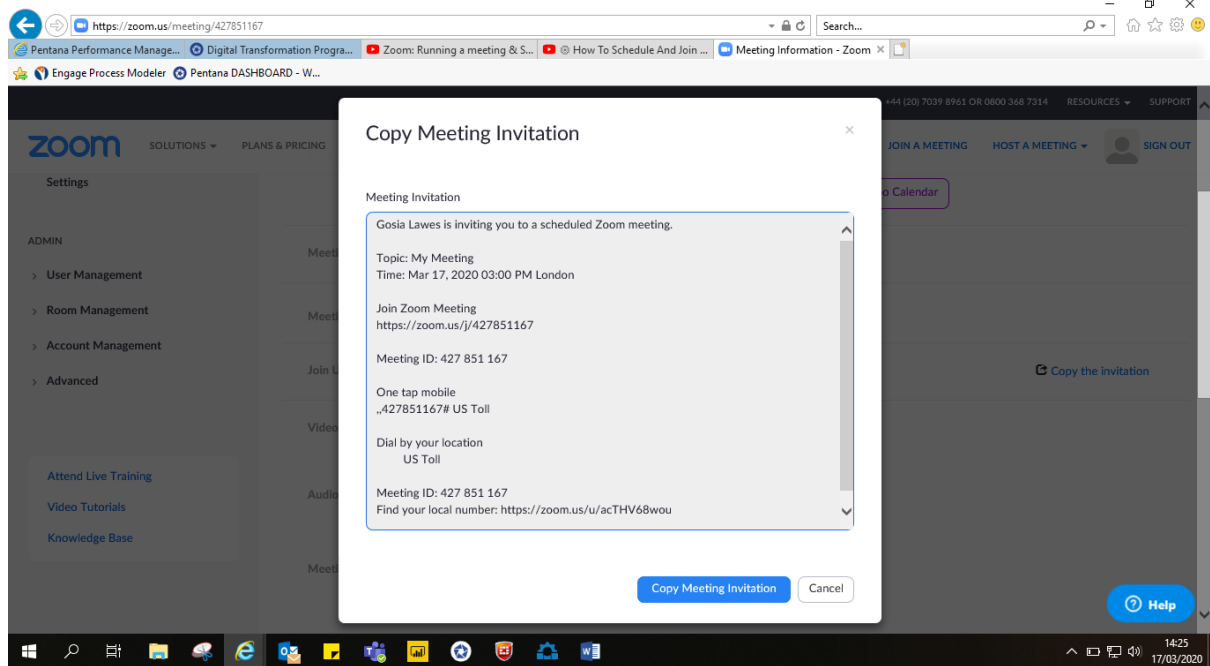
Your meeting details will automatically be copied to clipboard
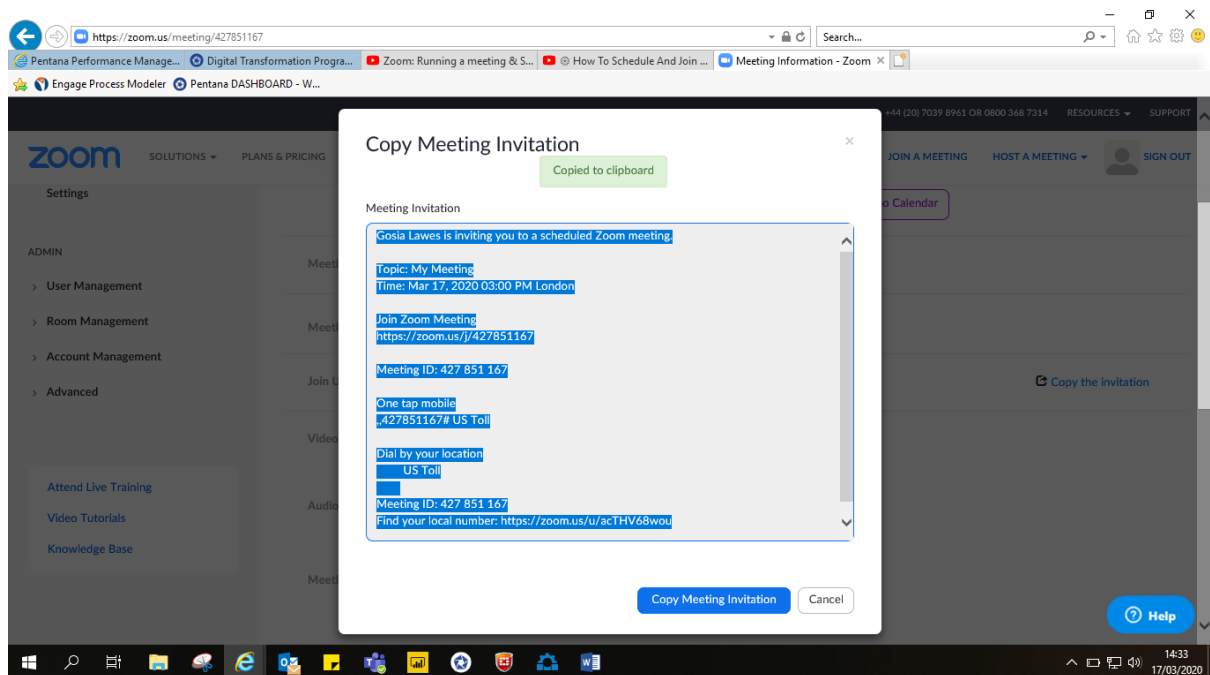
Step 9: Open new meeting / email in MS Outlook and right click your mouse to past the copied invite from a clipboard
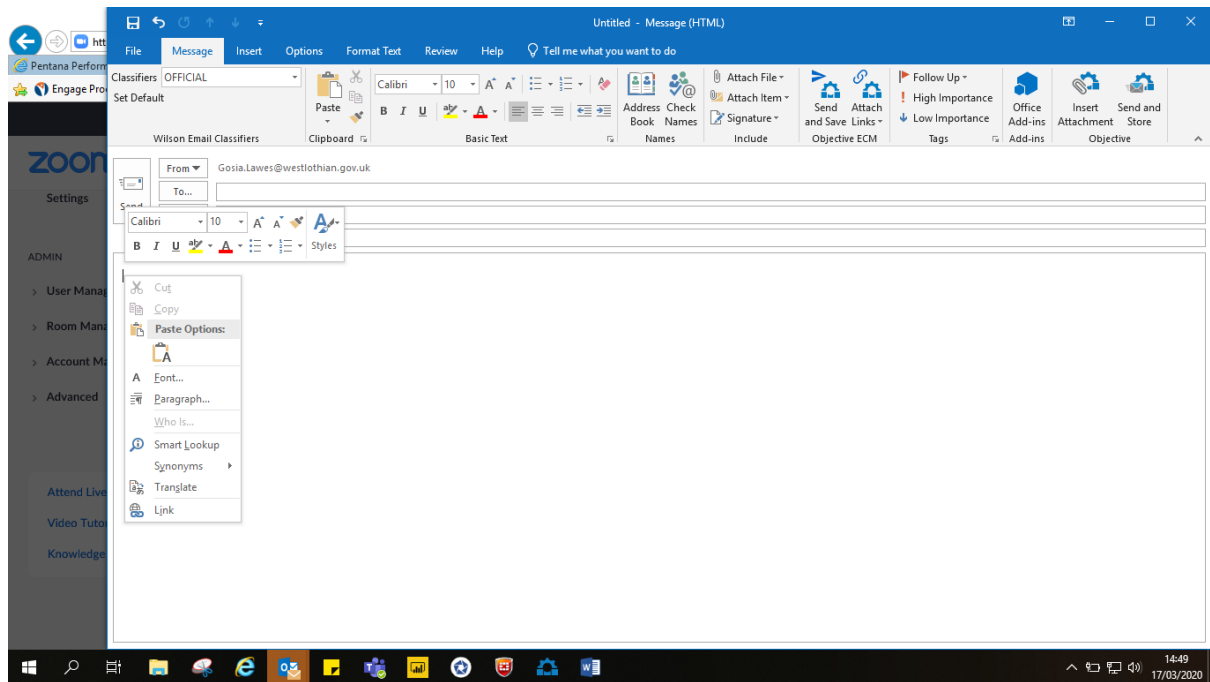
Step 10: Send your invite to selected participants

4. How to use ZOOM – Video Tutorials

In addition to the Step by Step guidance, the following short video tutorials will support you in the process of becoming familiar with and more confident when using ZOOM.

4.1. Sign up and download zoom client

 Link to online tutorial can be found below:

https://www.youtube.com/watch?v=qsy2Ph6kSf8

4.2. Joining a meeting

 Links to online tutorial can be found below:

https://www.youtube.com/watch?v=hIkCmbvAHQQ

https://www.youtube.com/watch?v=-s76QHshQnY

4.3. Screen sharing

 Link to online tutorial can be found below:

https://www.youtube.com/watch?v=YA6SGQlVmcA

4.4. Scheduling a meeting

Link to online tutorial can be found below:

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https://www.youtube.com/watch?v=XhZW3iyXV9U

5. How to use ZOOM - Process Map

Within this section graphical representation of the process for the following is presented:

- Hosting a meeting
- Joining a meeting
- Scheduling a meeting

Please use the zoom in and out button in the bottom right corner to adjust the size of the process

map.

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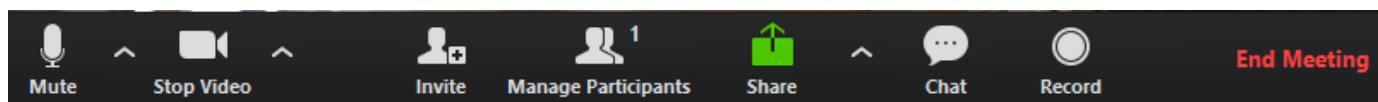Guidance to Video and Audio Conferencing by using ZOOM | How to use ZOOM: Process Map

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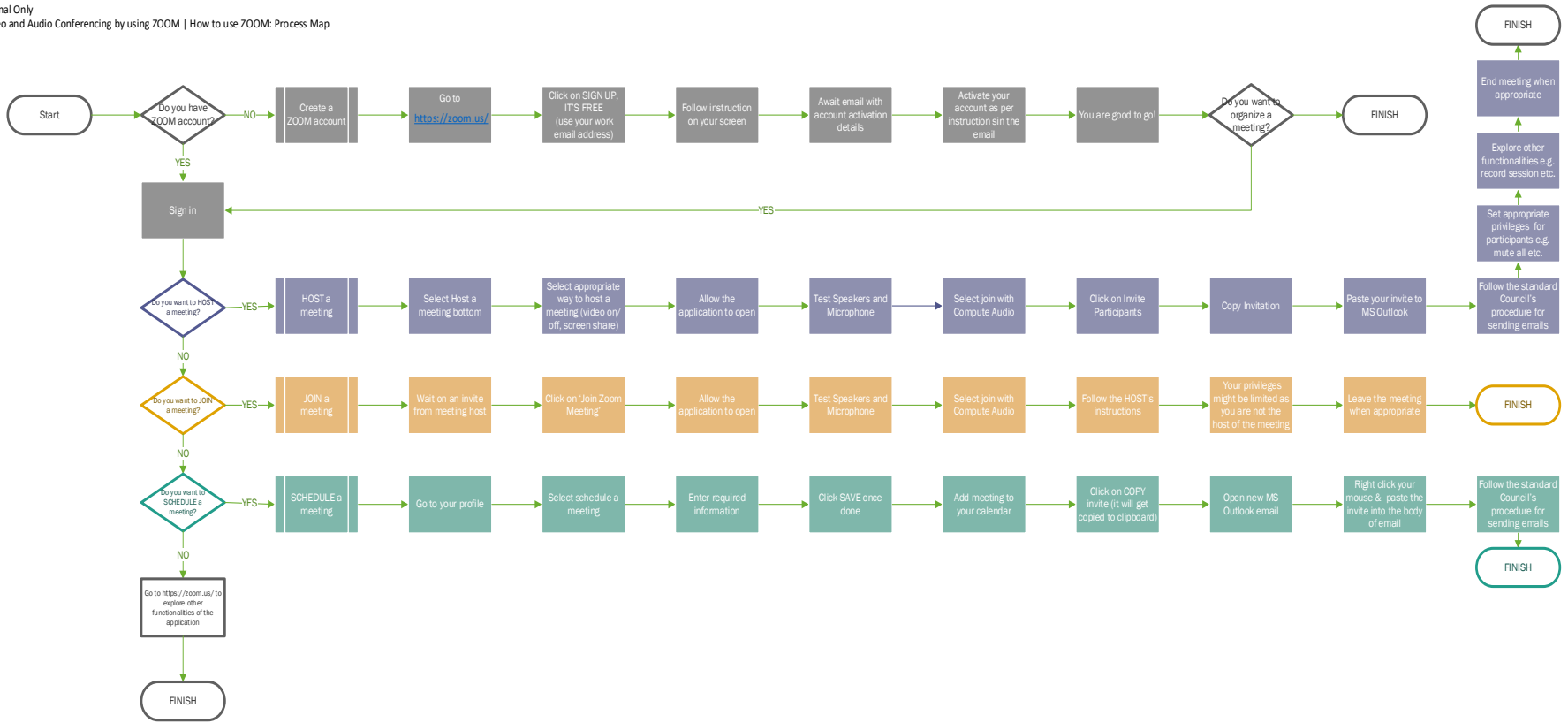
WEST LOTHIAN COUNCIL

HOW TO USE
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Guidance for West Lothian Council Employees

For more information please contact:

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