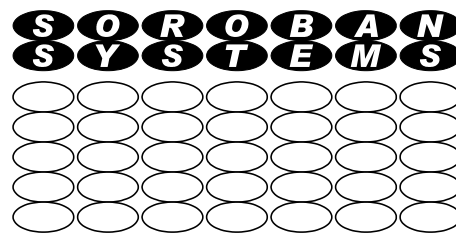


Soroban Support Guide



Zoom and Remote Support

Summary:

This document is intended mainly for users who are new to Zoom and are intending to join a Zoom meeting, or are requesting remote support from an expert. A Zoom meeting may be just a one to one call or a multiparty conference of three or many (perhaps hundreds!) participants.

This document first goes through the steps required to install Zoom (if not already installed) and then to join a Zoom meeting. It covers checking your audio (microphone and speakers) and comments on video (which can be switched off).

If you require assistance from an expert - this is also the first step towards getting direct assistance. You will first set up a one to one Zoom call and then this document explains what steps the expert will do and, then ask you to do, so that they can view your computer screen remotely and, **with your consent**, take control of your keyboard/mouse to demonstrate to you how to perform a task on your computer on your behalf or to perform some more advanced administration task.

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1 OVERVIEW

1.1 What is Zoom?

Zoom is a feature rich video conferencing system that:

- Does not actually need a video camera!
 - ◆ It will work well with the video camera switched off
 - ◆ Or even if there is no camera available!
- Enables one to one video calls to be quickly setup
 - ◆ The remote parties do NOT need to have Zoom installed when they receive an invitation to join a call. This will happen automatically if necessary.
- Provides effective multiparty video conferencing as well as one to one calls
- Is free for basic functionality (with some limitations).
 - ◆ This guide assumes that the free version is used.
 - The free version is limited to a 40 minute session, there is nothing to stop a session being opened again immediately
 - ◆ A number of paid for options exist, where this is appropriate, that remove the time limit and provide some additional features
- Enables one party to share their Desktop, or a specific program Window, with other parties in the call:
 - ◆ This is typically used for giving Presentations to a group as one would in a face ro face meeting
 - ◆ It can however be used to share any program windows for obtaining advice or help about how to use it – remote access:
 - Enables control of your desktop to be handed over to another party (e.g. the “expert”) so they can show you how to do something or for example to install some software or repair something that has gone wrong
 - This will typically only be used in a two party call comprising
 - An “Expert” who will show the “Novice” how to do something
 - A “Novice” who needs help
 - This feature requires a request over Zoom from the “Expert” an explicit consent to be given from the desktop owner requesting support
 - This will be described in detail later

In this document the term:

- **Zoom Call** refers to a two party call
 - ◆ **Zoom Support** is a special case where an expert will assist another person by creating two party Zoom Call and then the Expert taking control of the Student’s computer. **This requires explicit consent from the Student.**
- **Zoom Meeting** refers to a multiparty call

This guide covers the essentials to start using Zoom to establish contact and also to then use remote support over the Internet.

This guide does not include all the features for scheduling and managing video conferencing that are available and well described in the Zoom documentation.

- Here is the link to the comprehensive documentation on the Zoom site:
 - ◆ [Zoom Support](#)

1.2 Objectives of this guide

This guide is intended to enable a new and inexperienced Zoom user to have the confidence to join a Zoom Call or Meeting or to participate in a one to one Zoom Call with an Expert for “hands on” training or to perform a more complex task on the user’s computer. For the latter it is usually beneficial for the expert to be able to control the user’s computer directly over the Internet as if they were sitting next to the user. This is Zoom Support.

Some information is provided for the Zoom Host, perpendicularly with regard to screen sharing for providing remote assistance but this is not the primary purpose of this guide. It may however be useful for the non Host parties to have some idea as to what the Host can do.

1.3 Terminology

With Zoom video conferencing there are a number of terms that are used in this document:

- Call or Meeting
 - ◆ A Zoom session consisting of two (Zoom Call) or more participants (Zoom Meeting)
 - ◆ For remote support this would typically just the Host, assumed to be the “Expert” and another party “User” who requires help
- Host
 - ◆ The person who initiates the call:
 - They must have a Zoom account and their account credentials (user ID and password) are needed to initiate the call.
 - The Host account has a large number of features to initiate and schedule calls that are not currently included in this guide
 - ◆ The Host controls the meeting and can for example:
 - Remove any unwanted participants and mute the microphones of participants if needed
 - Enable screen sharing so that any participant can show all other participants their screen e.g. a PowerPoint or Impress presentation. This is also used for an expert to give remote support to a user
- Co-Host
 - ◆ A person who the Host delegates conference management to
 - For a one to one session, and especially for remote support to a user, this would not be needed
 - In a multiparty conference it is advisable to add a co-host in case the host session drops out
- Party
 - ◆ Any member of a Zoom Call or meeting
- Guest or User
 - ◆ A person, other than the Host, participating in the Zoom session

2 INSTALLATION

2.1 Host

Starting from scratch a person intending to Host a Zoom session needs to:

- Connect to Zoom and create an account
- Download and install Zoom
- Zoom will then appear as an installed program on their computer

Note that a Host can login to their Zoom account and change many settings to control how meetings are created and managed. This is out of scope for this Guide.

2.2 User

The user will typically receive an invitation from the meeting organiser to join a Zoom Meeting via email. This will typically contain a clickable **Link** looking something like this (some characters have been hidden e.g. XXXXX):

<https://us04web.zoom.us/j/XXXXXXXX?pwd=XXXXXXXXXX>

All that the User needs to do is to click on that link!

- If Zoom has not previously been installed on their computer this will happen automatically.
 - ◆ Similarly if there is a subsequent update to the Zoom program the update will be installed automatically
- If Zoom has been installed and is up to date, or has just been installed or updated, the Zoom will open and join the Zoom meeting

Zoom does NOT need to be installed by an Administrator.

3 USER ACTIONS

3.1 Joining a meeting including for remote support

3.1.1 Overview

The Host will typically send an email to another person containing a Hyperlink to join a meeting. This message will also typically include the scheduled time for the meeting.

All a User to do is to click the link in the email!

This will typically contain a clickable **Link** looking something like this (some characters have been hidden e.g. XXXXX):

<https://us04web.zoom.us/j/XXXXXXXX?pwd=XXXXXXXXXX>

All that the User needs to do is to click on that link!

One of three things will happen – see below for further details:

- If the recipient has never used Zoom before on the computer they are using:
 - ◆ Zoom will download and install itself
 - This can take a couple of minutes.
 - ◆ The Zoom meeting will open
- If Zoom has previously been used on that computer but is not the latest version:
 - ◆ Zoom will download and install the update
 - ◆ The Zoom meeting will open
- If Zoom is already installed and up to date:
 - ◆ The Zoom meeting will open

Note: Zoom does NOT need to be installed by an Administrator.

The User will then join the meeting/conference. Depending on their configuration they will typically see:

- A notice that they have been placed into a Waiting Room
 - ◆ This will happen if the user attempts to connect before the Host has initiated the Zoom meeting. The user will automatically join when the Host does initiate the meeting
- A Zoom Window showing the video from their own camera (if they have one) and the Host, plus video images (or placeholders) of other participants already in the conference.
 - ◆ If there are many other participants there may be several pages of images to scroll through
 - ◆ This default view can be changed

If a User (or Host) cannot see their own video image then check if their privacy shield is open at the top of the screen. This is a sliding cover which is now often fitted to new devices.

Their microphone will typically be enabled and all parties to the call can hear everything that is said. The microphone can be muted via the button on the bottom left (Windows).

It is very helpful in meetings with more than one or two people for most participants to mute their microphones. It only needs a mobile phone to ring on one of the remote participants to disturb the meeting.

If anyone wishes to speak then if they press and hold their Space Bar on their keyboard it will temporarily un-mute their microphone.

The Host can mute microphones

Each person's picture will typically be visible to all participants. This can be turned off by each participant if privacy is required. The video image or placeholder will contain the user's name. When the camera is active then there is usually an indicator light showing next to the camera lens so you are aware it is live.

Warning: It would be unwise to totally rely on this indicator light as it might be possible for malware to enable the camera without the indicator light being on.

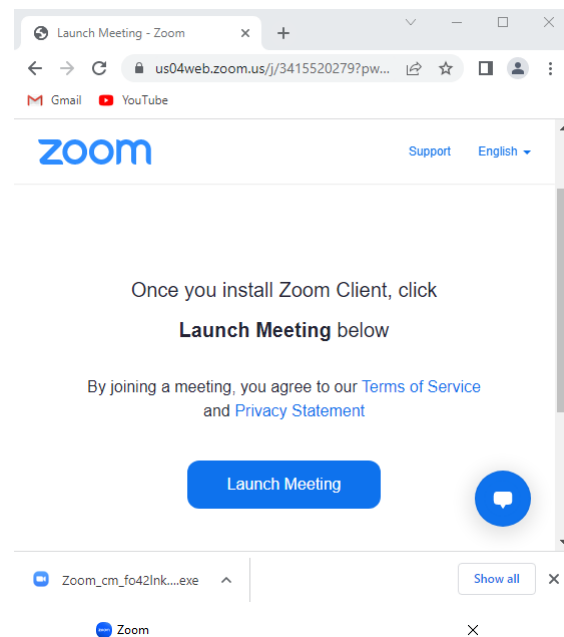
Also many computers now have camera privacy shutter to prevent the camera being turned on accidentally or by malware. If your image is not visible this is worth a check.

3.2 Installation/Using Zoom as a User

If you do not have Zoom installed when you receive a link just click on it and Zoom will automatically download the installer.

Just run the downloaded executable file and Zoom will install.

You do NOT need Administrator privileges to install it.



You will then get a request to enter your name. This is the name that will show on the Zoom session and can be used by the meeting Host to identify you as being legitimate participant. By default this will be remembered by the Zoom program unless you clear the tick mark.

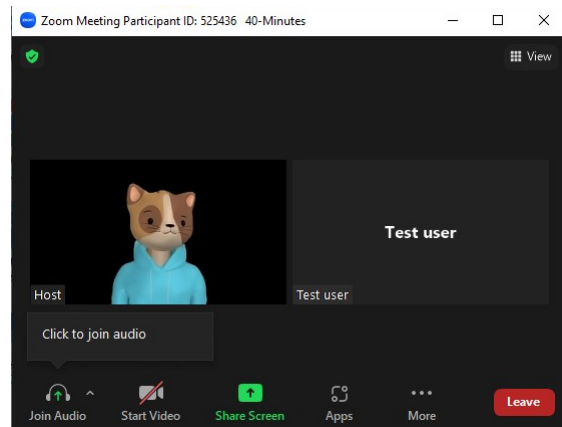
Note that the name can also be changed during the meeting.

For this guide the name "Test User" was used.

Just click Join Meeting!

A new Session will be started showing you, and any other parties, that have joined the meeting. If too many are participating to fit into a single display then you can scroll the video display to left or right.

This now shows a two party conference. If the Zoom window is wide enough then the images would appear side by side.



Notes:

- My test machine does not support video and so the image is blank. It would normally show your face. That can be controlled however with the “Start Video” button.
- My Host screen is showing an “avatar” rather than a live video image
- You can normally switch your own video on and off using the Start Video button or select a number of other effects.
- Similarly you can normally control audio with the Microphone button labelled here as Join Audio but would normally be labelled Mute Audio.

3.3 Some checks to verify that audio is working

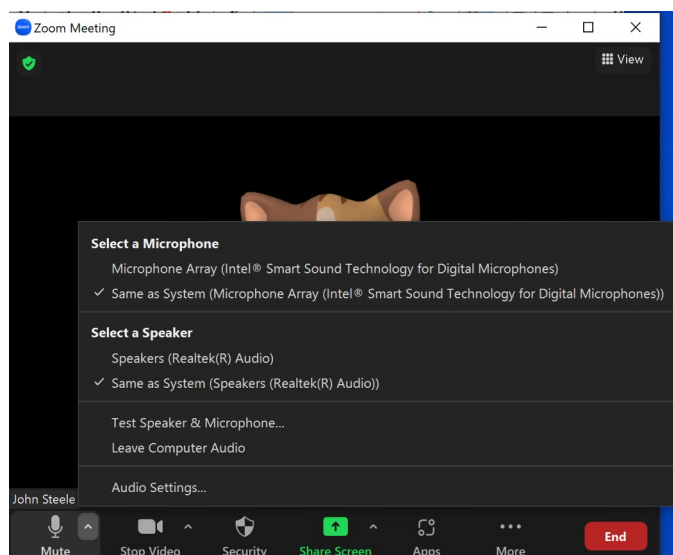
3.3.1 Audio checks

When you are connecting to a meeting you can verify that your audio is working. This is especially useful if you have a headset to ensure that it is plugged in and working.

To show the menu bar as seen here move the mouse pointer to the bottom of the Window and it will appear.

Click on the up-tick attached to the microphone symbol on the bottom left labelled Mute and this image will appear.

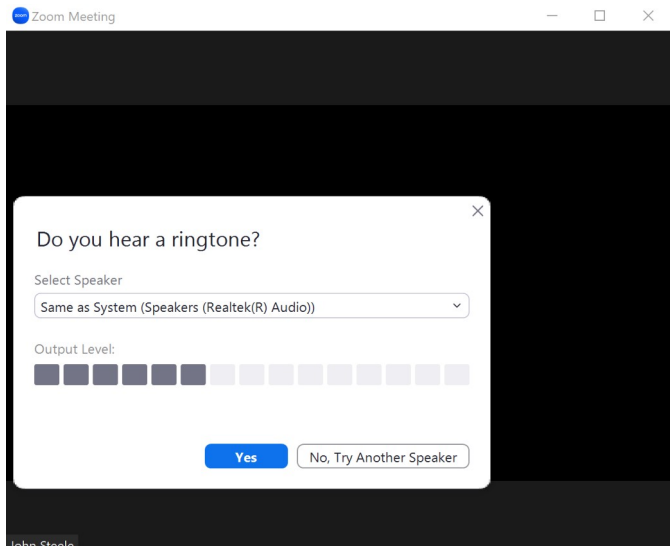
First look under **Select a Speaker**. This will normally be the “same as system”.



Click Test Speaker and Microphone should bring up this window and you should hear a tune coming out of your speaker.

- If you cannot hear the tune
 - ◆ First check whether your speakers are muted, Otherwise
 - ◆ **No, Try another Speaker**
 - ◆ This will bring up further choices depending on your system
 - ◆ Experiment!

Once you can hear the sound click **Yes**

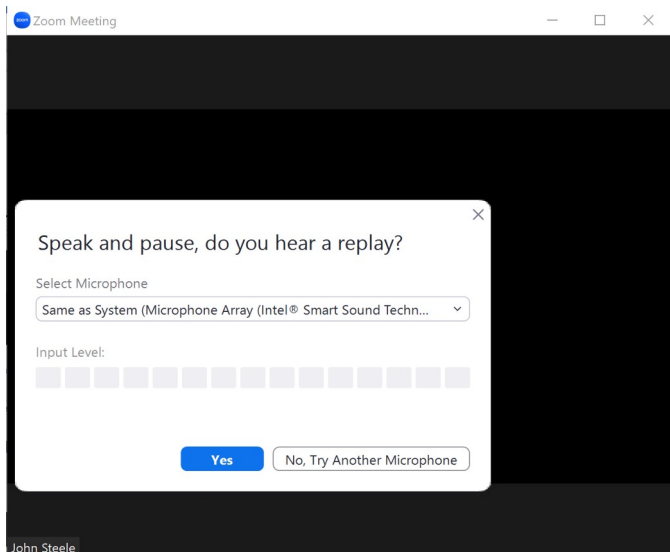


This will now check your microphone.

Speak and then pause – you should hear a replay of what you have said.

If you cannot hear anything then see if there are any other microphones available.

Obviously this does require he first test to work



3.4 Within a meeting

3.4.1 Overview

Each user can choose how the participants are displayed using the View button, located typically Top Right. This guide covers mainly Windows users and the position of the controls may vary on other platforms.

The view will typically be from a view of all participants for a purely video conference but switch to a view showing a panel at the right with the speaker visible if a PowerPoint/Impress presentation is being shown.

When a presentation is being shown to the meeting this uses a Zoom feature called Share Screen. This feature has to be enabled by the Host and the Host can permit anyone to share their screen.

Screen sharing is also the means by which a User can obtain support.

3.4.2 Screen sharing – Host

The Host must enable screen sharing. This can be enabled or disabled via the Host’s menu if it has not been enabled in the zoom account.

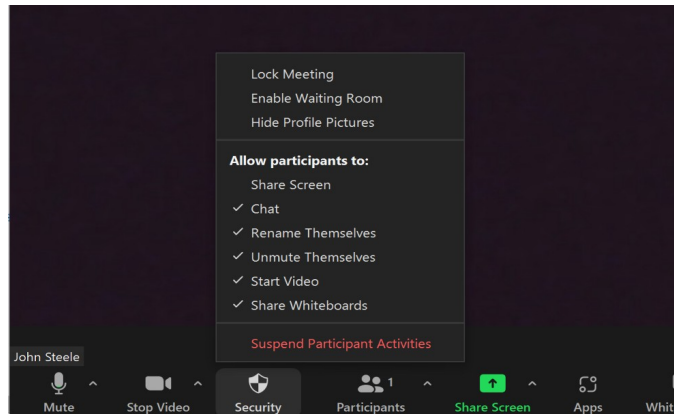
This shows a Zoom Host screen.

It contains a Security Button and in this view this has been already been clicked and shows the expanded menu.

This includes several Host management options to control the meeting.

The Host will need to click on Share Screen if there is no tick mark against it.

Once this has been enabled any of the meeting participants can share their screen with all other parties.



This only **enables** screen sharing by all parties. To obtain remote support the next action must be taken by the User!

3.4.3 Remote support – User action

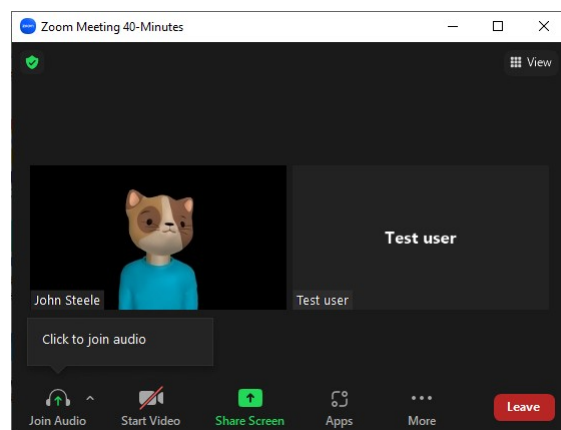
If a User wants hands on support from the Host then they must have joined a Zoom meeting with the person offering support. It is assumed here that the Host will be the person providing the support but it can also work the other way round if necessary!

It is helpful and assumed that the Host providing support, and the User requiring support are both able to speak to each other as that helps to coordinate their actions. The Host must have enabled screen sharing.

Here is a screen shot of the User screen. A call has been established. [Note that the test machine does not have video or sound!]

The host has previously enabled Screen sharing.

The green Share Screen button now enables this user to share their screen.

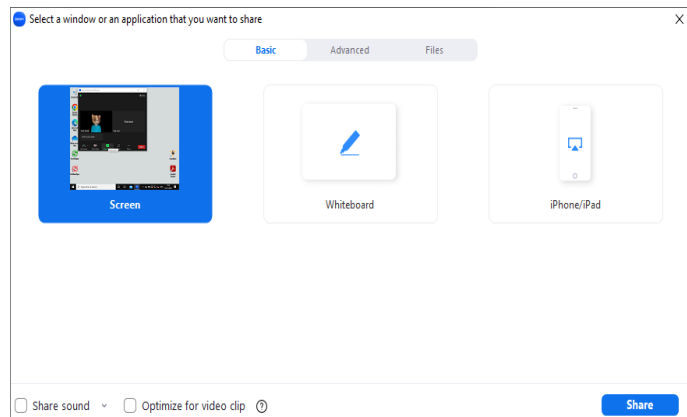


A new Window opens showing a thumbnail for each of the Windows available on the Desktop plus the one highlighted (the default) which has the tile name “Screen”.

In this case there are no other Windows open.

Screen is selected and is the one we need to select for remote support.

Then Click the Share button, bottom right.

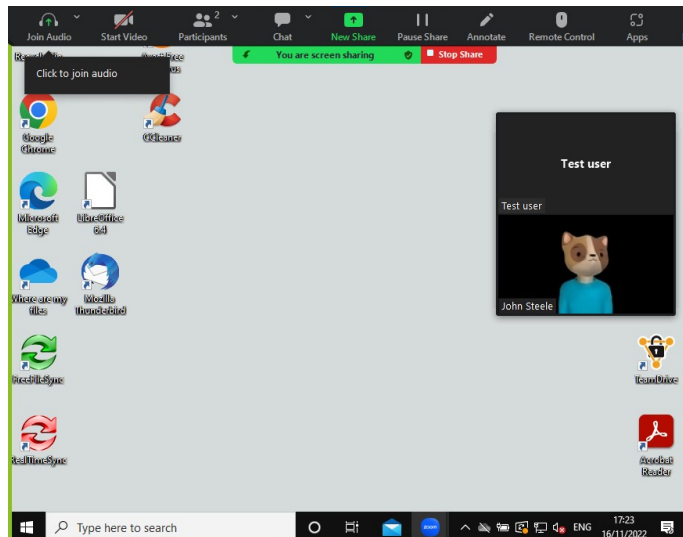


This now shows the desktop of the User.

- There is now a green border around the desktop area
 - ◆ It shows you are now sharing your screen.
- There is a Stop Share button.

There is a toolbar across the top of the screen. There is also a Stop Share button to stop sharing. You can do this at any time.

You can now show the problems you are having but there is more!



Click on the Remote Control button to allow your Expert to be able to control your computer.

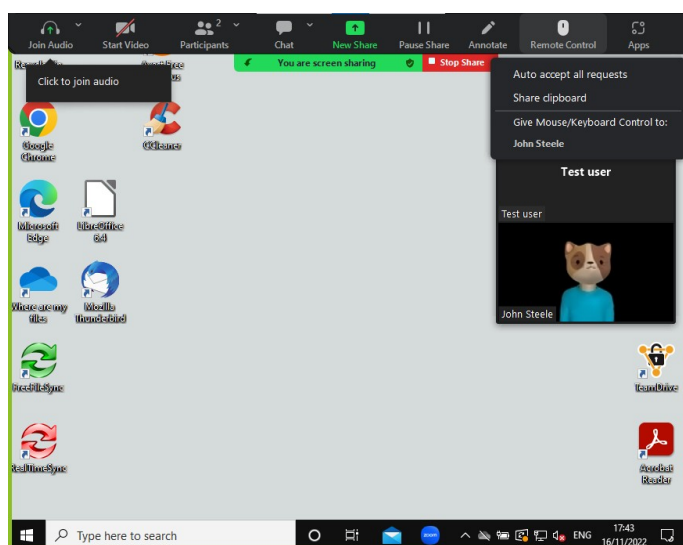
This shows a new menu that gives you several options.

- Accept all requests
- Share clipboard
- Give Mouse/Keyboard control to “name”

“name” is the name of the party you are giving control to.

Only click this name if you are expecting to get remote support from this person.

From this point the other party can type or use their mouse on your computer. You can stop sharing at any time!



At all times you can terminate the session. If your computer supports it you can see the other person in the video window and you can also talk to them.

Assuming that you have taken the appropriate best practice advice you may will probably be running as a Standard User rather than as an Administrator. If the person providing support needs the Administrator password (e.g. while installing software) then you can either tell them what it is or preferably type it in yourself.

If you do not understand the statement above you are in need of further advice and need to consult another of the guides in this series about Windows Accounts which explains why you should have both a highly privileged Administrator account and a Standard User account on any Windows computer.

4 HOST ACTIONS

4.1 Installing Zoom

If the host has never used Zoom then they will need to download Zoom from their web site. This requires creating a Zoom account and this requires a user ID and a password. Free accounts are now limited to 40 minute meeting duration but you can reconnect immediately.

Use link [Zoom link](#) to connect to the site. You will need an email address and to create a password.

The Zoom program will need to be downloaded once you have created the account.

4.2 Creating a meeting

A host will create a new meeting by logging in to Zoom with their account and that will create a link that can be used by Participants to join the meeting.

This link is typically sent to the intended participants by email.

Each Zoom meeting has a unique Meeting ID and password. It is the host's choice as to whether the same meeting ID will be used for all meetings the organise or whether a unique ID is generated for each meeting.

The meeting ID/Password is usually combined with the Zoom website URL so just a simple URL link can be shared.

Using the same ID for all regular meetings is simple and may be they most convenient choice. The potential downside is that unwanted participants could obtain the meeting credentials and it is then difficult to exclude them, particularly for large meetings.

Zoom recommend that if "gatecrashers" are a possibility then a unique meeting ID/password is created for each meeting. It just your choice!

There are many options for creating the meeting which are currently outside the scope of this document. They are all explained in the Zoom documentation.

5 OTHER GUIDES REFERENCED

Here is a link to access other Soroban Systems guides referenced in this document.

All guides (and much else besides) are hosted on the following Website

<http://soroban.co.uk/>

Use the menus to navigate to the guides page and choose “*Why have two Windows accounts*”. A direct link to the document is here (but could be changed):

<http://www.soroban.co.uk/published-guides/sg-windows-two-accounts.pdf>

Contact the author via tech-support@soroban.co.uk if any more help is needed.