

Video Meetings

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Overview

This document is a short guide about two meeting applications: **Zoom** and **LifeSize**.

Including images and steps this document will guide you to start any of these applications creating one time meeting from the point of view of the **Host** and **Participant**. A **Participant** is an invitee in a meeting created/scheduled by a **Host**.

The guide was made based on Microsoft Windows 10 and Android but the steps are quite similar in other platforms such as Apple or Linux. The **Basic Plan** was used in both cases, there are more plans available in each application according to your needs, but for a basic operation basic plan is enough.

General Recommendations

Before a meeting

- Look for a quiet place far away from environment noise.
- Make sure that your audio, microphone and webcam works properly, although Zoom and LifeSize has test options you can also check this before and troubleshoot any issue (figure 1, figure 2).
- If you have the chance, connect to the network via network cable you should have a better speed and you should avoid problems related with signal lost.
- If you have only access to the network via Wi-Fi, find the place with the best signal reception
- Pause or cancel any download activity that could reduce bandwidth during the meeting
- Check that your internet browser are up to date.
- If you are the host, check that you have the correct email address of the participants.
- If the meeting includes video, check that the camera is centered and focused on you.
- Connect your laptop to a power supply or check that your battery is enough for the meeting duration.

Figure 1, Sound / Microphone test.

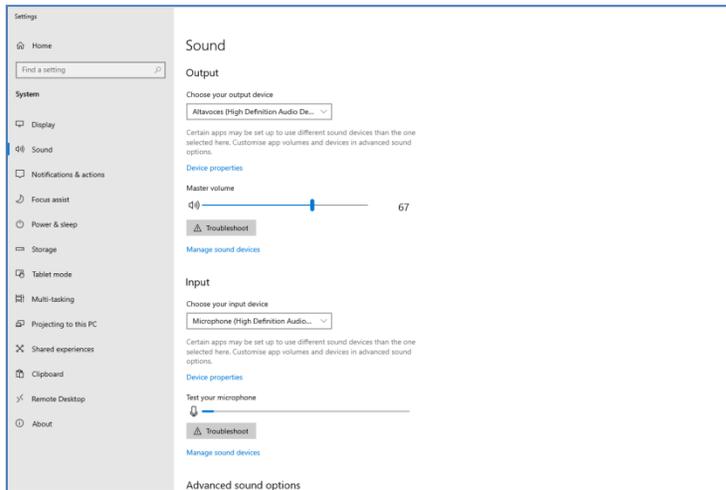
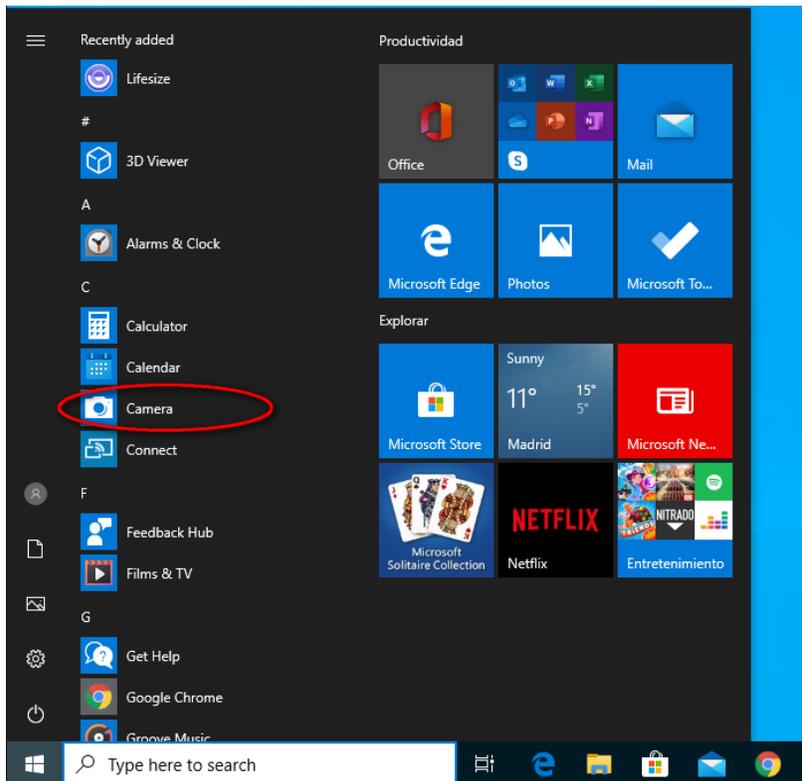


Figure 2, Webcam test.



During the meeting

- If you have the chance, use a headphones with microphone.
- Mute your microphone while you are not speaking or if number of participants are greater than five or you are in a noisy environment. This will help to reduce misunderstandings and clarify the meeting.

- If you are the host and you are sharing the screen, check with the other participants if they could see properly your screen, if not, you can change this on the display settings.
- If you are the host and you are sharing the screen, check with the other participants if they are able to see properly your screen, if not, you can change this on the display settings (figure 1 and figure 2).

Figure 1, Change Display settings. Right click on the desktop and click Display settings.

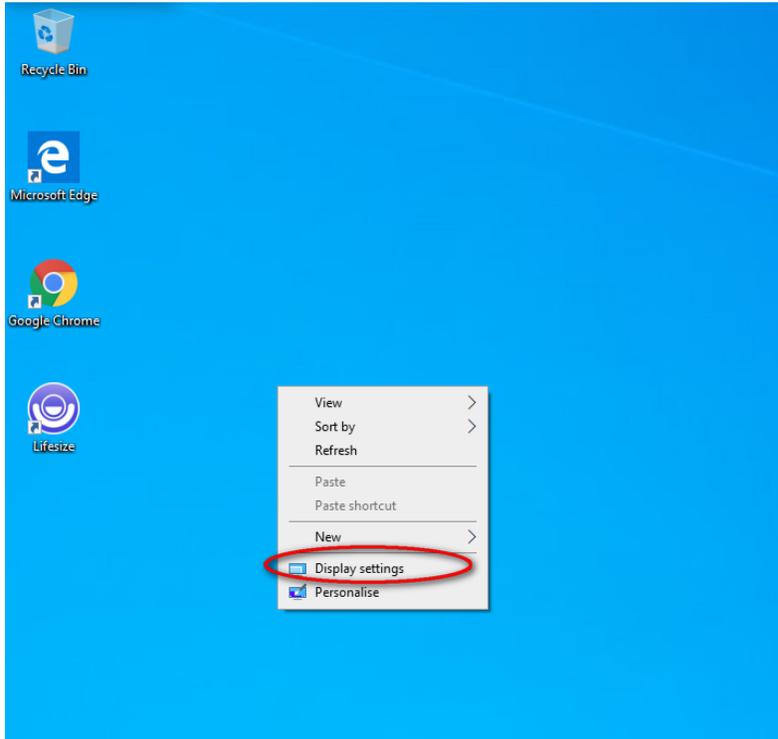
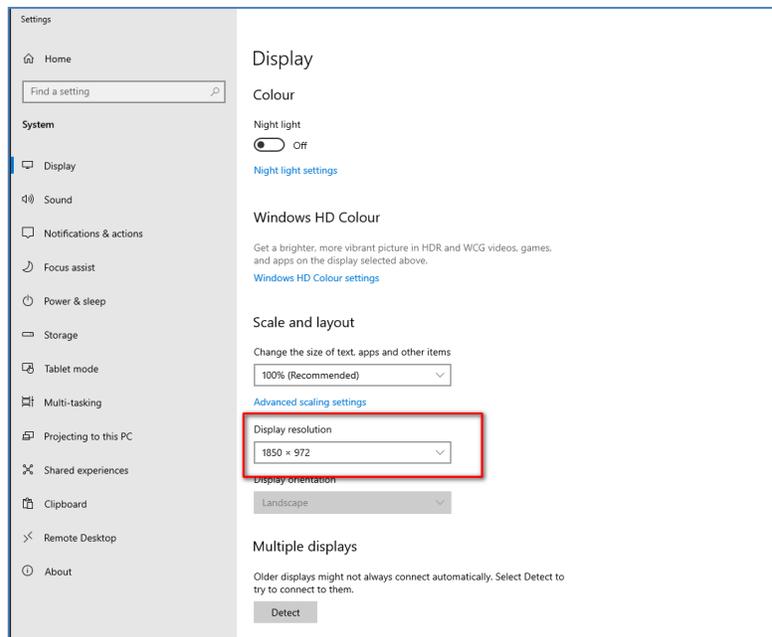


Figure 2, click on Display resolution to change.



End of meeting

- When the meeting finished, close all programs / windows / tab browsers related with Zoom or LifeSize.
- Take note of the issues arose in the meeting to improve the next time.

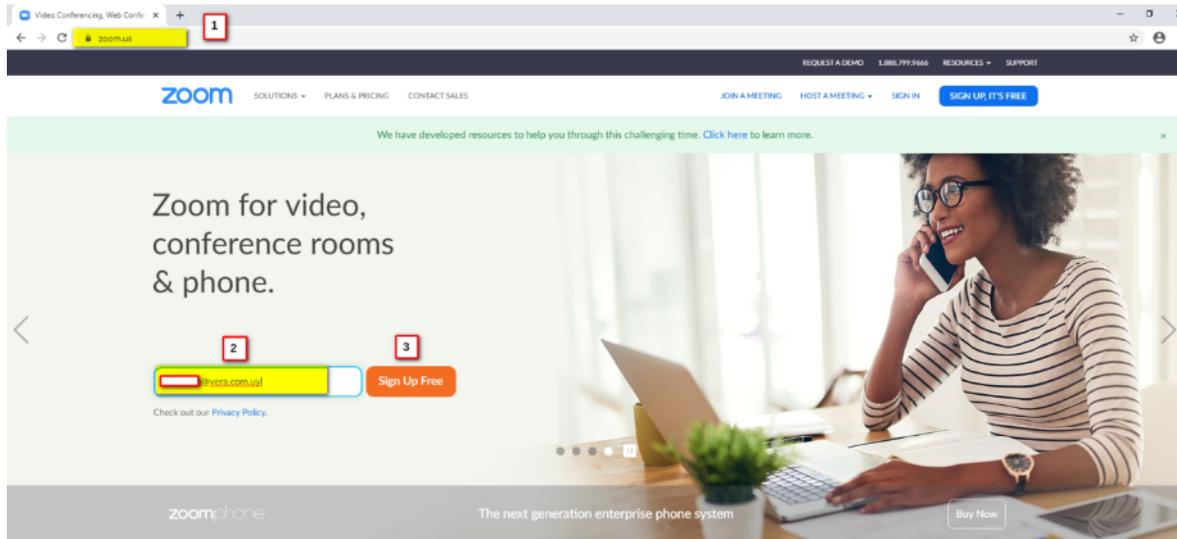
1 – Zoom

Registration and make a Test Meeting

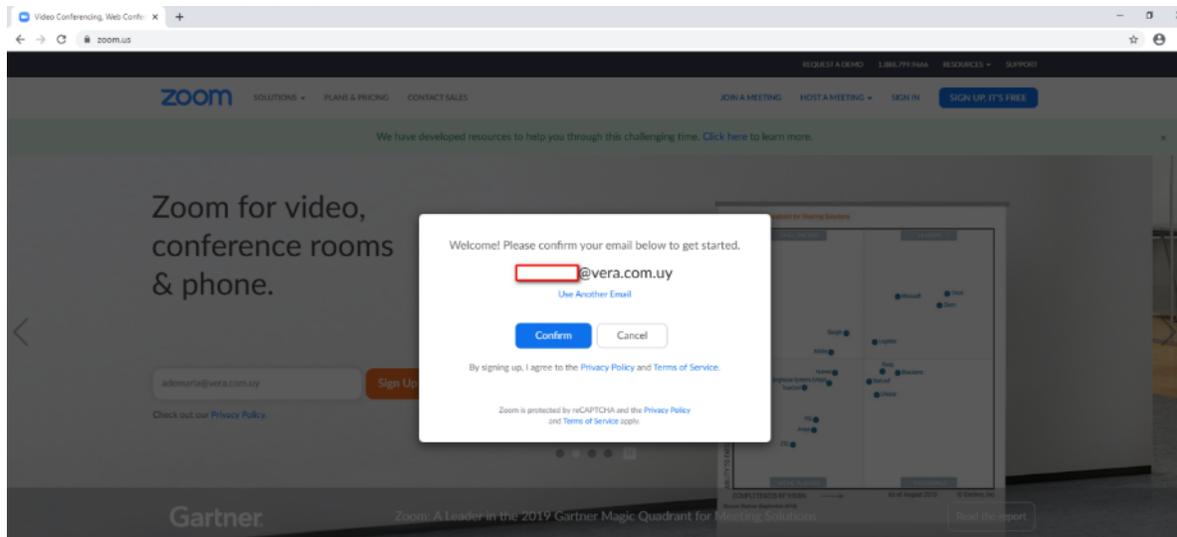
**Follow this section if you never used Zoom before and you don't have an account.
If you have a Zoom account and Zoom installed please refer to: "Start a new meeting".**

1)

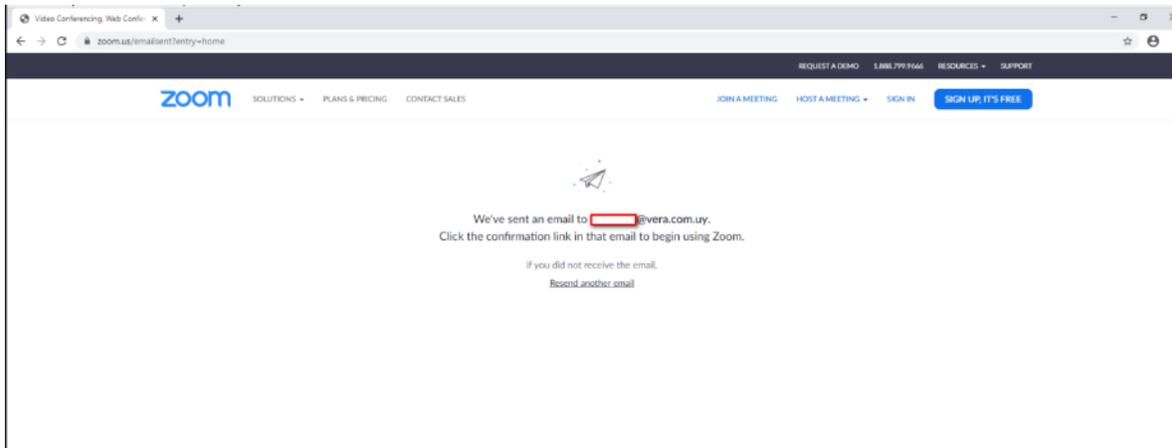
- Navigate to: <https://zoom.us> (1)
- Enter an email address to register (2)
- Click on **Sign Up Free** (3)



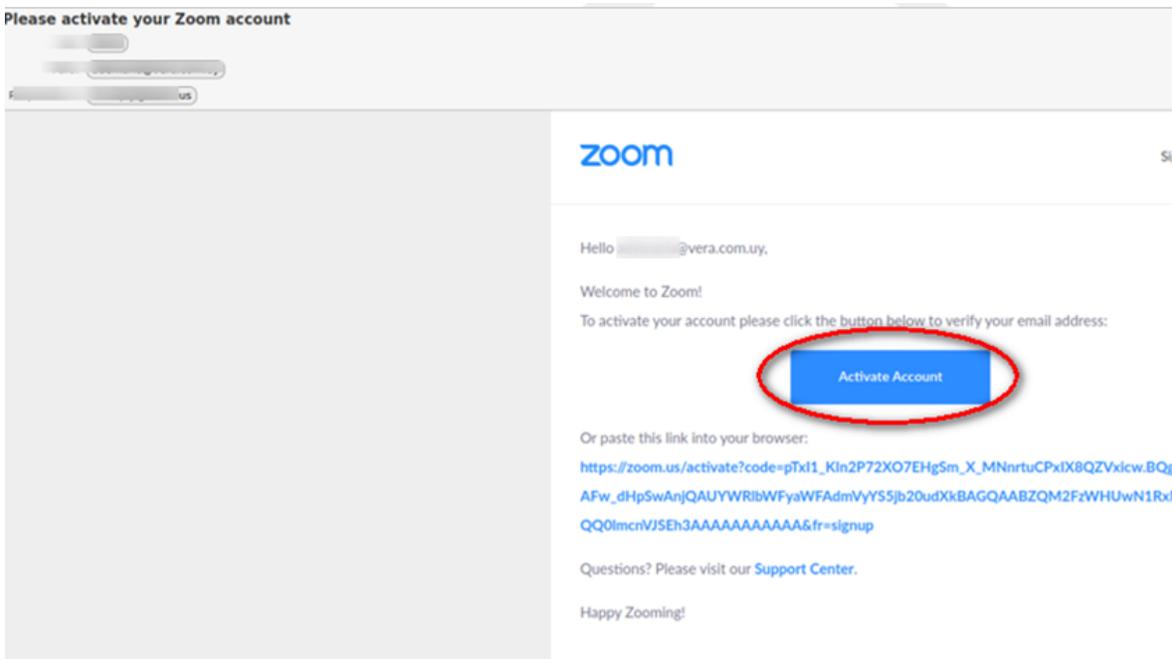
2) On the Welcome pop-up screen, check the email address and Click **Confirm**



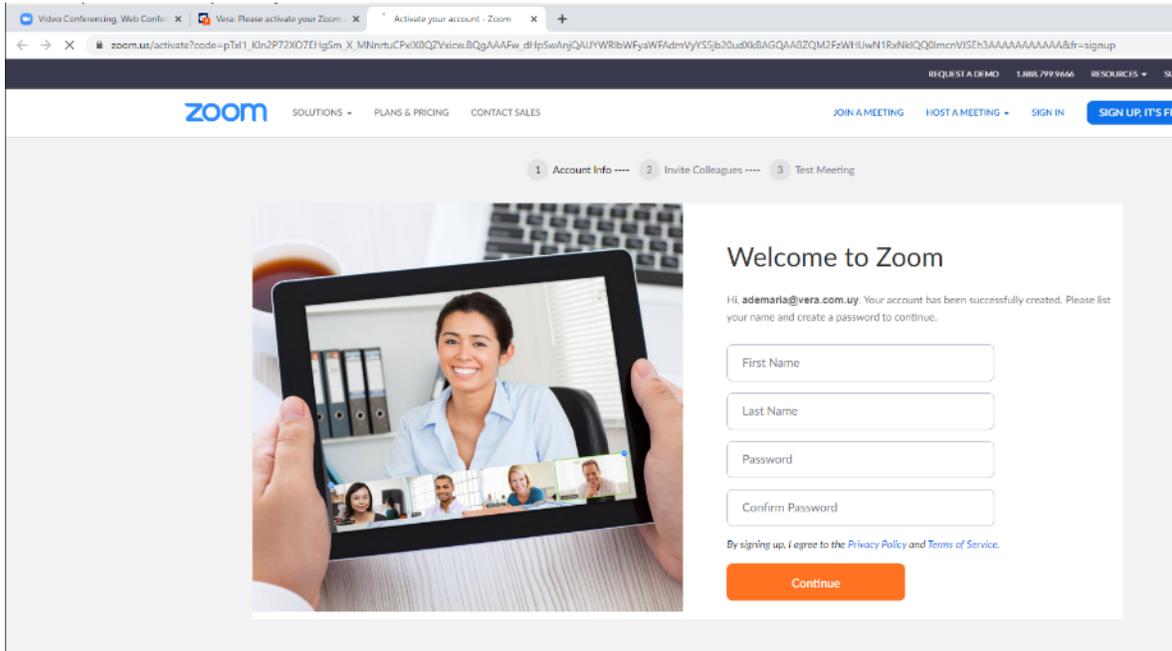
3) An email sent to the email address entered on the first page.



4) Open the email received from Zoom and click on the button: **Activate Account**

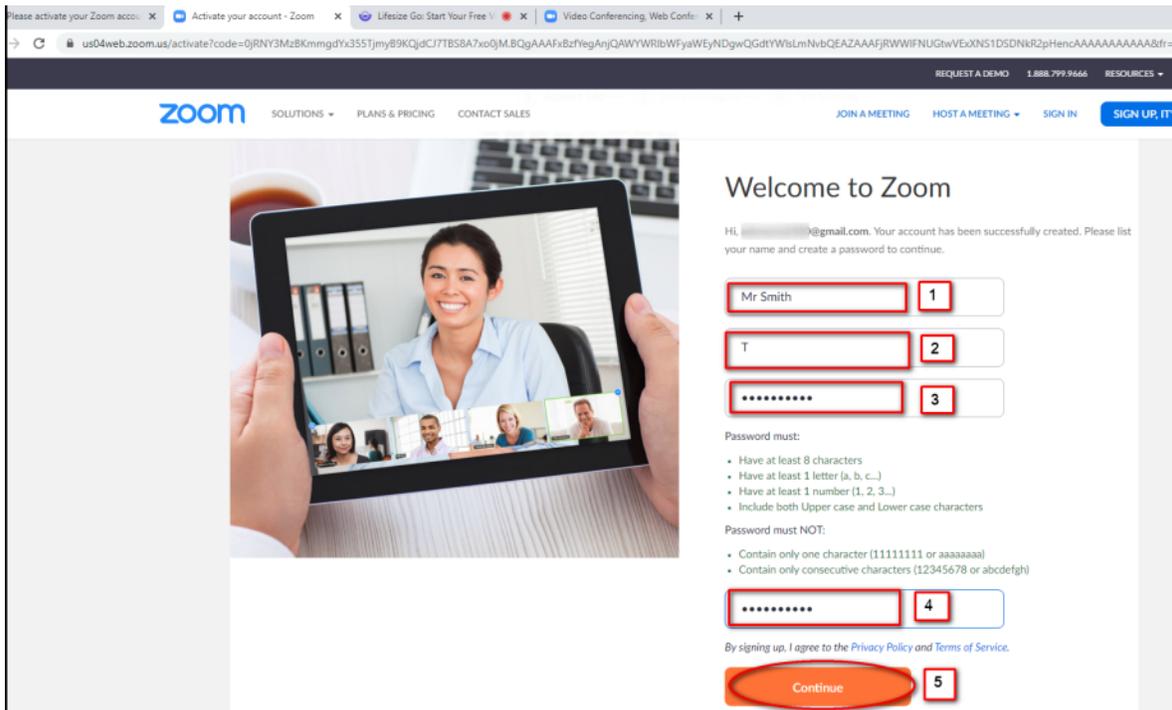


5) A new tab will be open on your browser with the welcome screen.

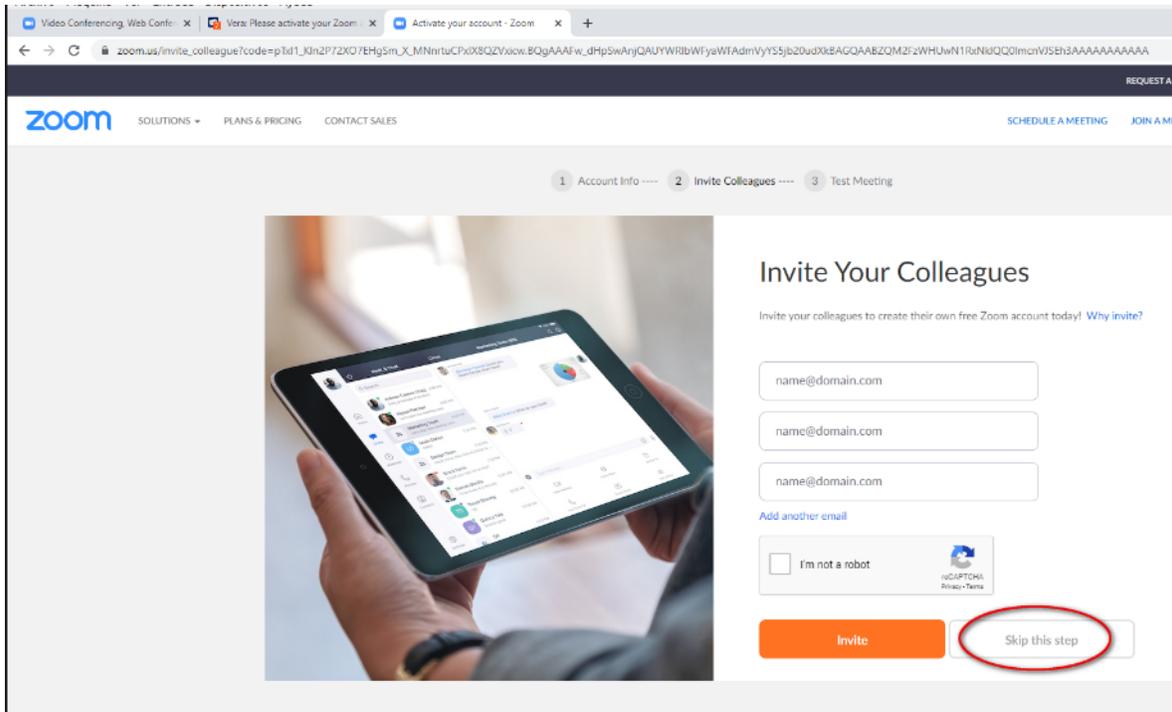


6)

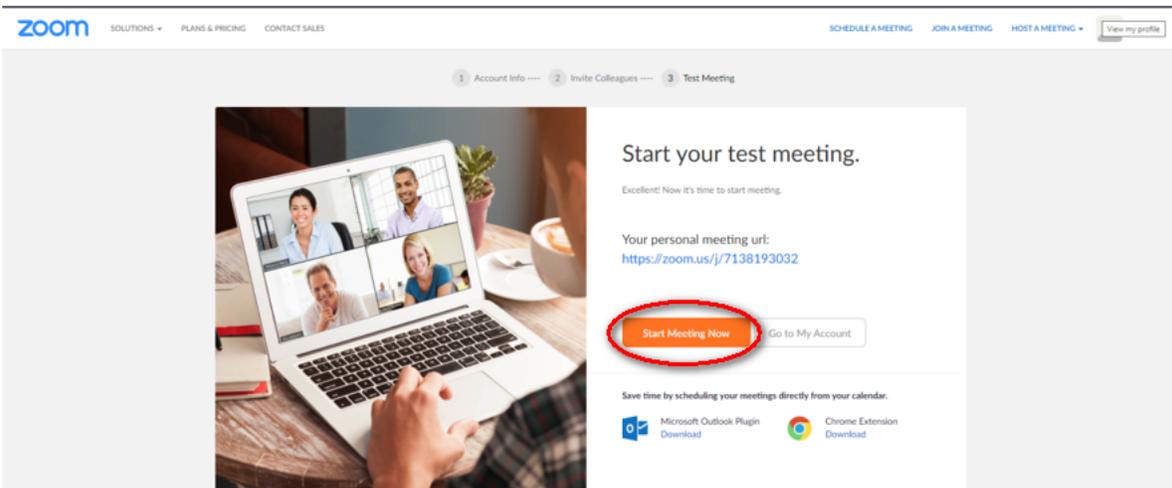
- Enter your **First Name (1)**
- Enter your **Last Name (2)**
- Enter your **Password (3)**
- **Confirm Password (4)**
- **Click Continue (5)**



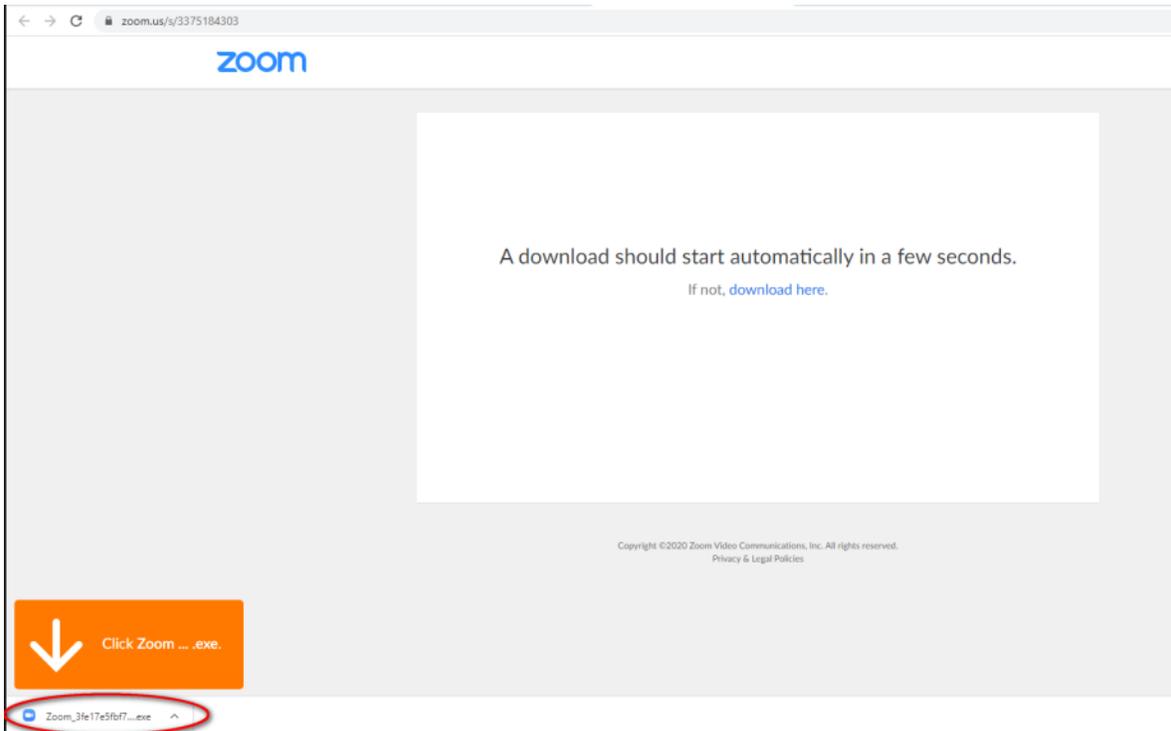
7) On the next screen click **Skip this step**



8) Click **Start Meeting Now**

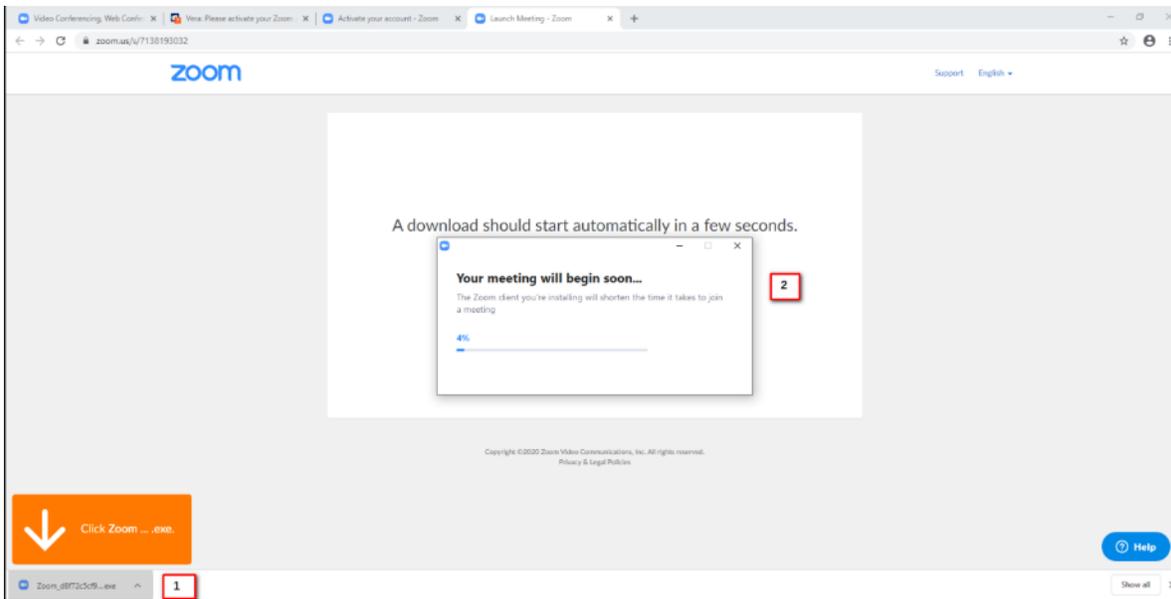


9) Zoom installer start downloading

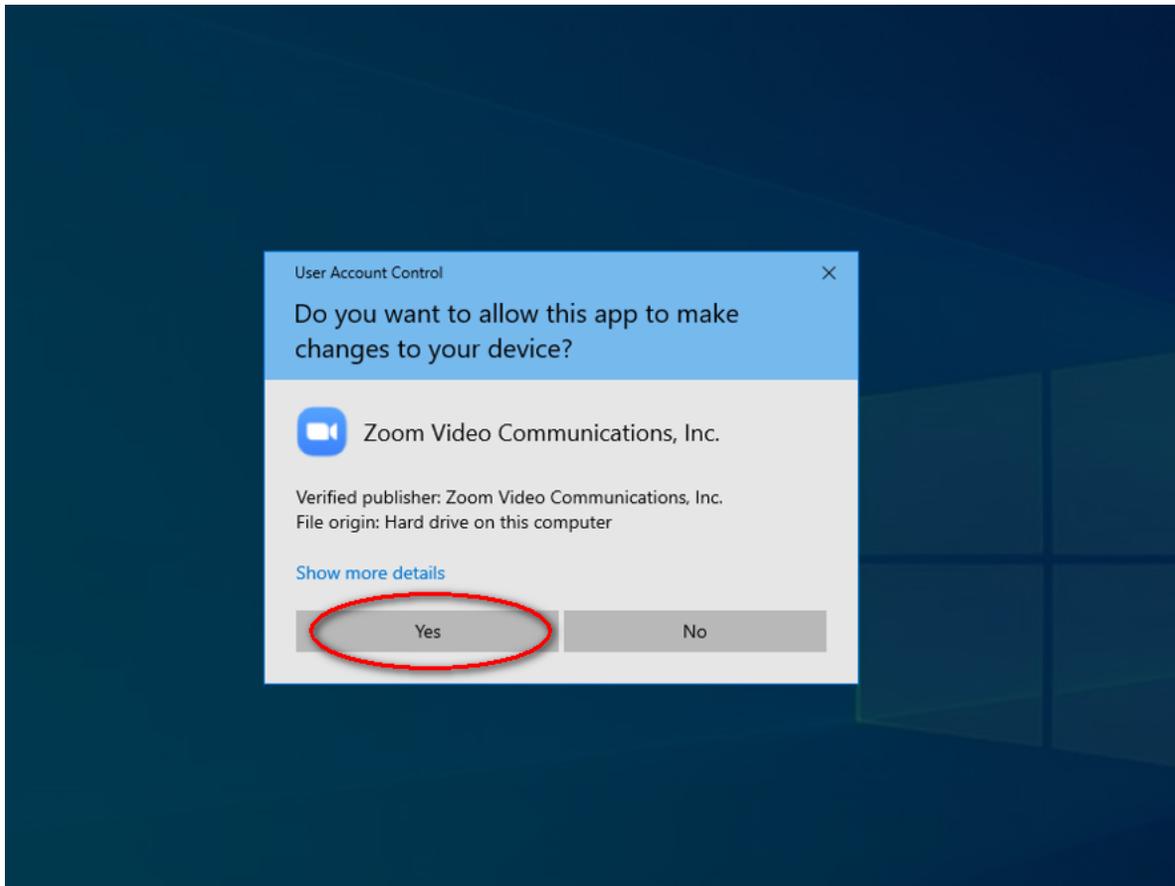


10)

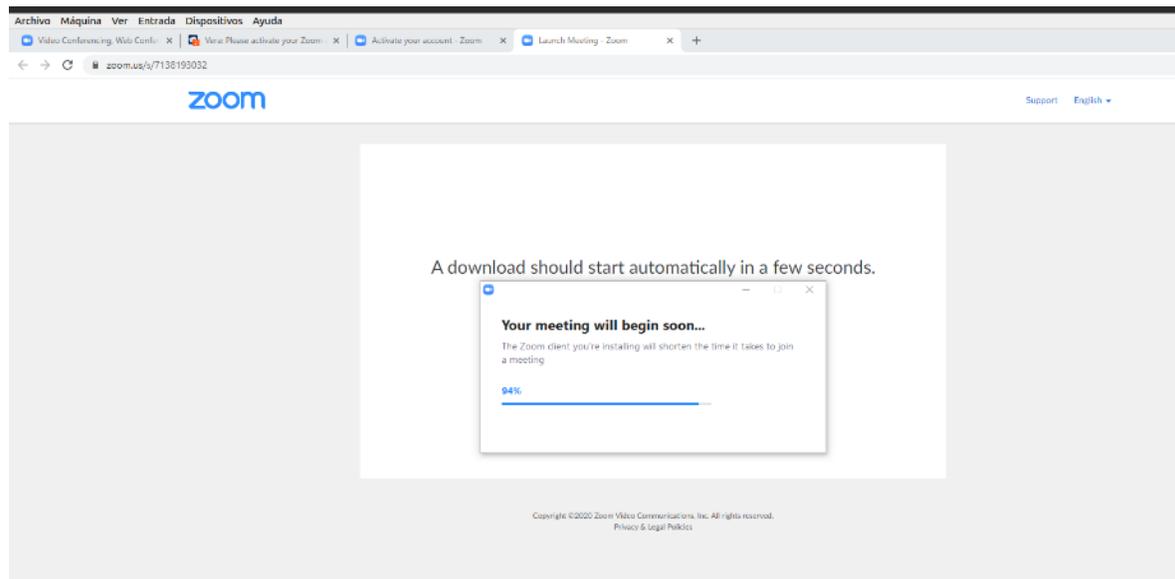
- Click on the downloaded file when finished (1)
- Wait until the installation finish (2)



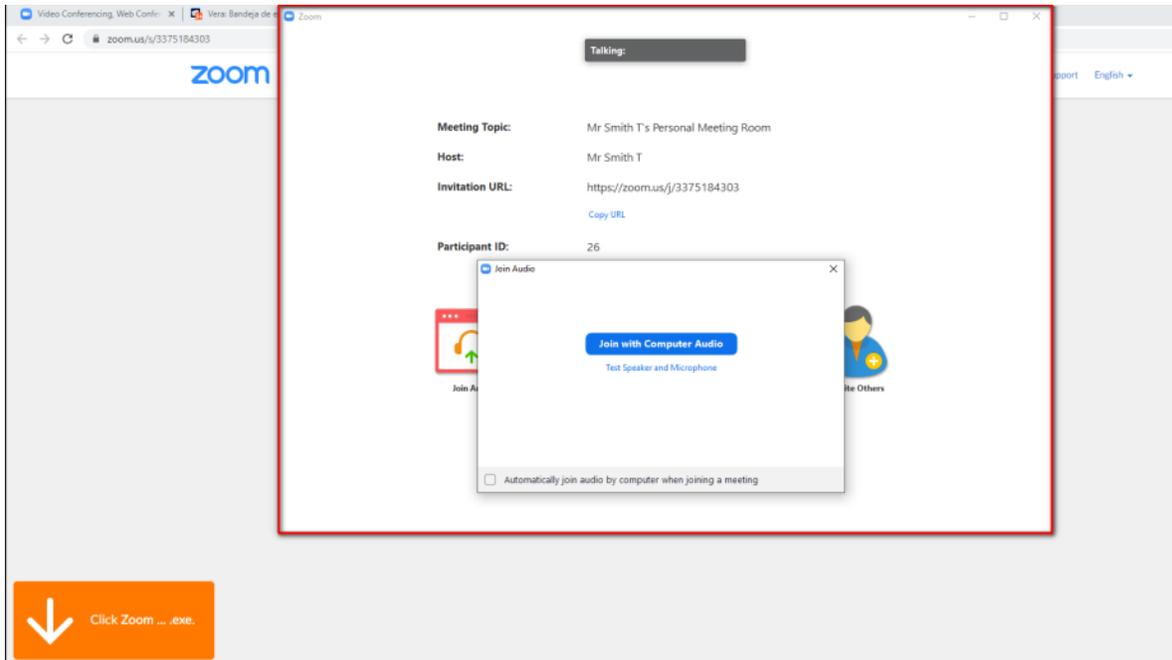
11) If a User Account Control message appears, click **Yes**



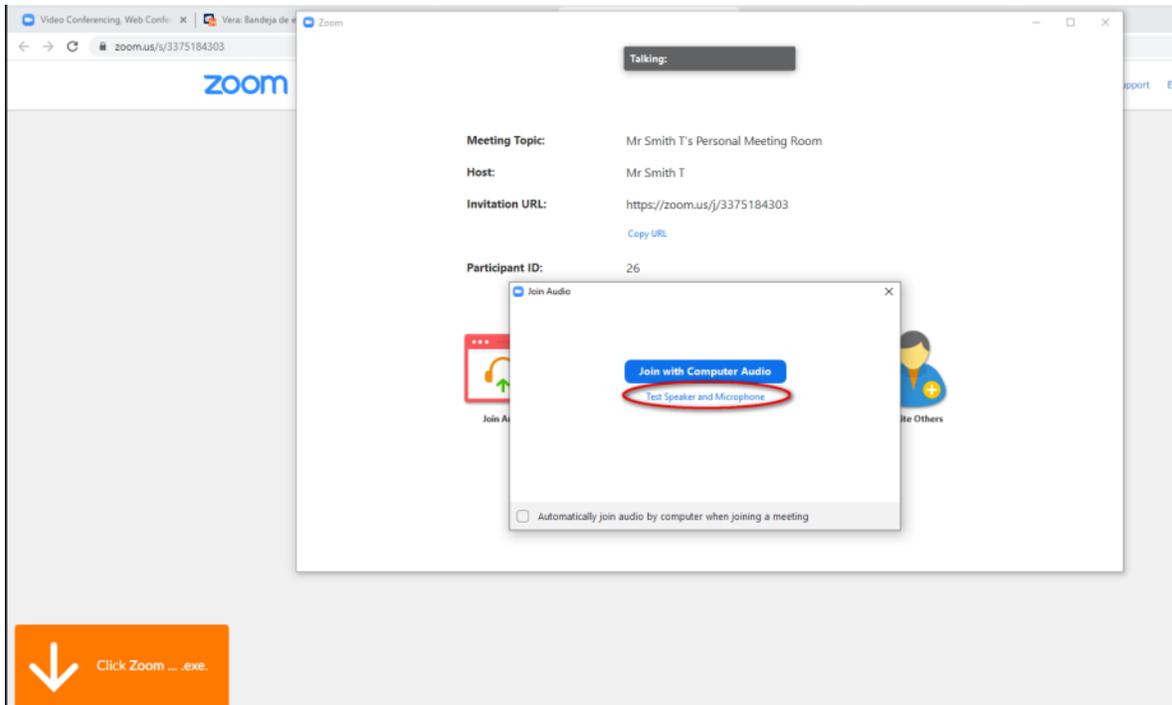
12) Installation will continue



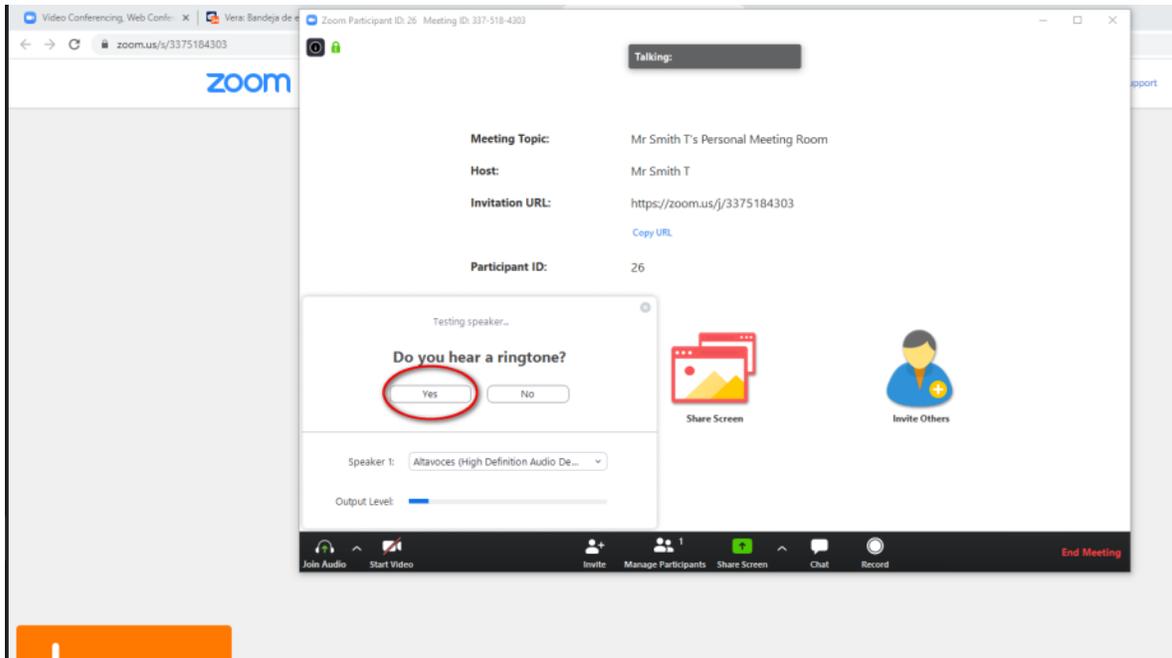
13) When installation finish, Zoom started automatically



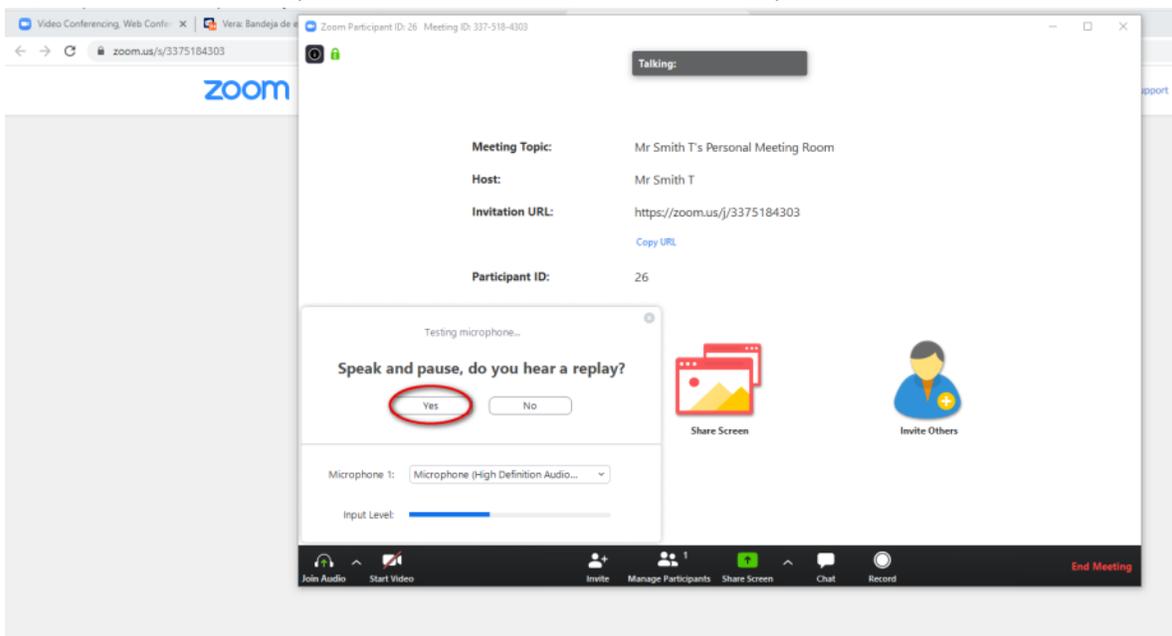
14) Click on **Test Speaker and Microphone** to check the audio and microphone settings



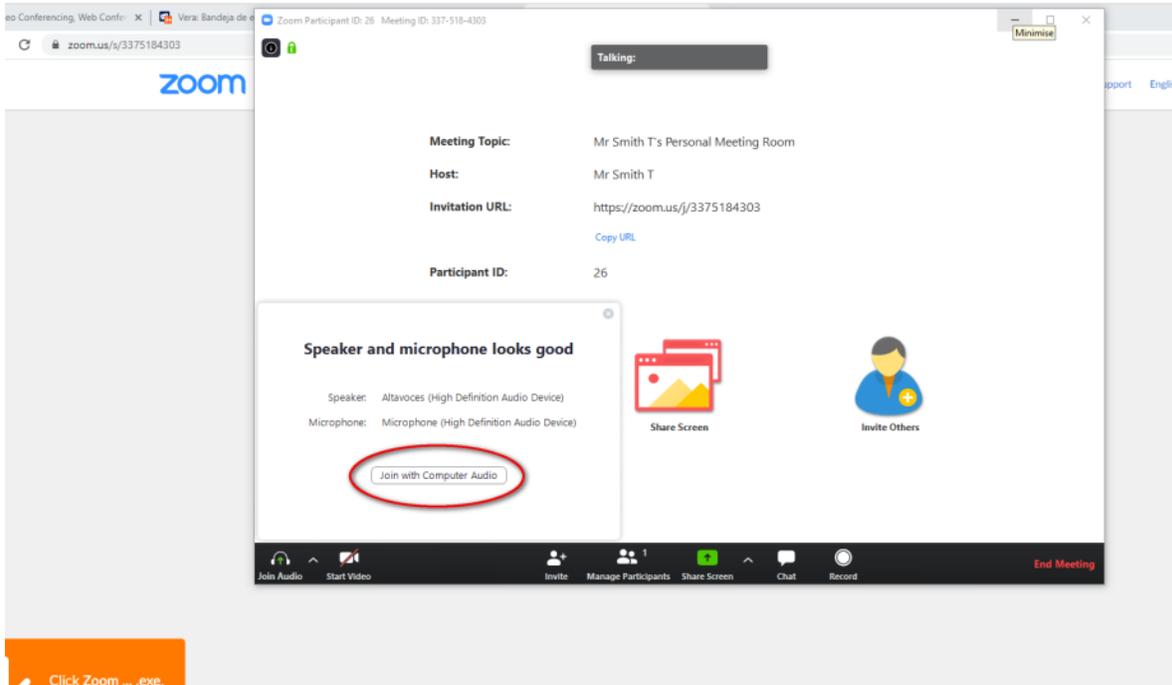
15) Check that you hear the ring tone and click **Yes**



16) Now check the microphone and click **Yes** if all was successfully

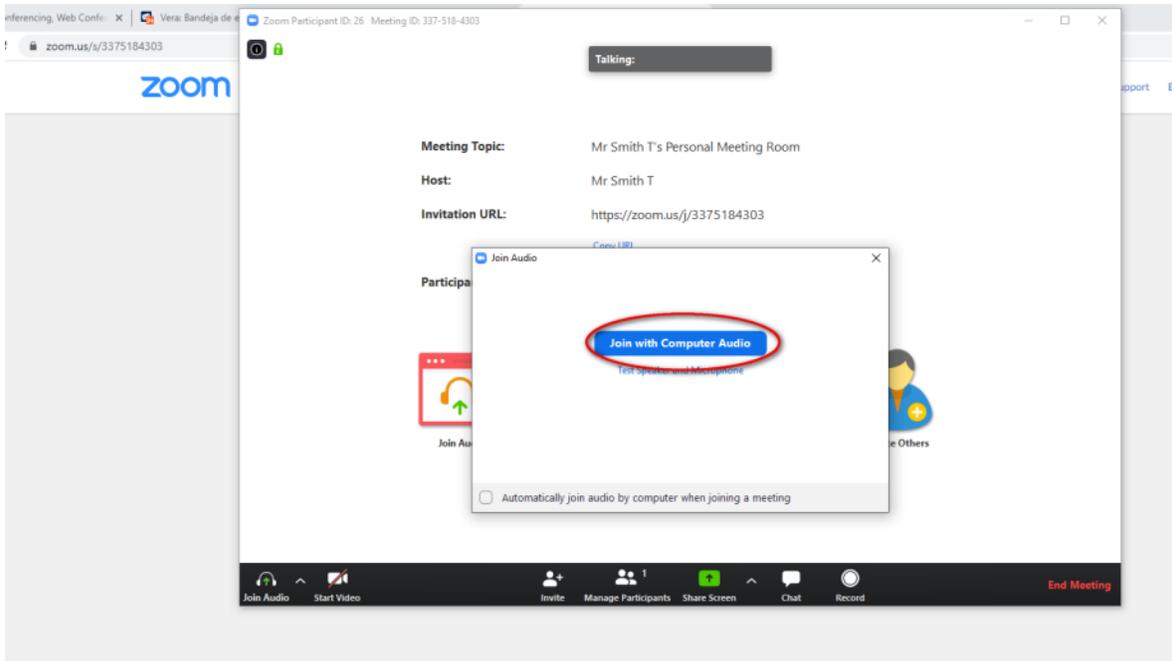


17) Click **Join with Computer Audio**

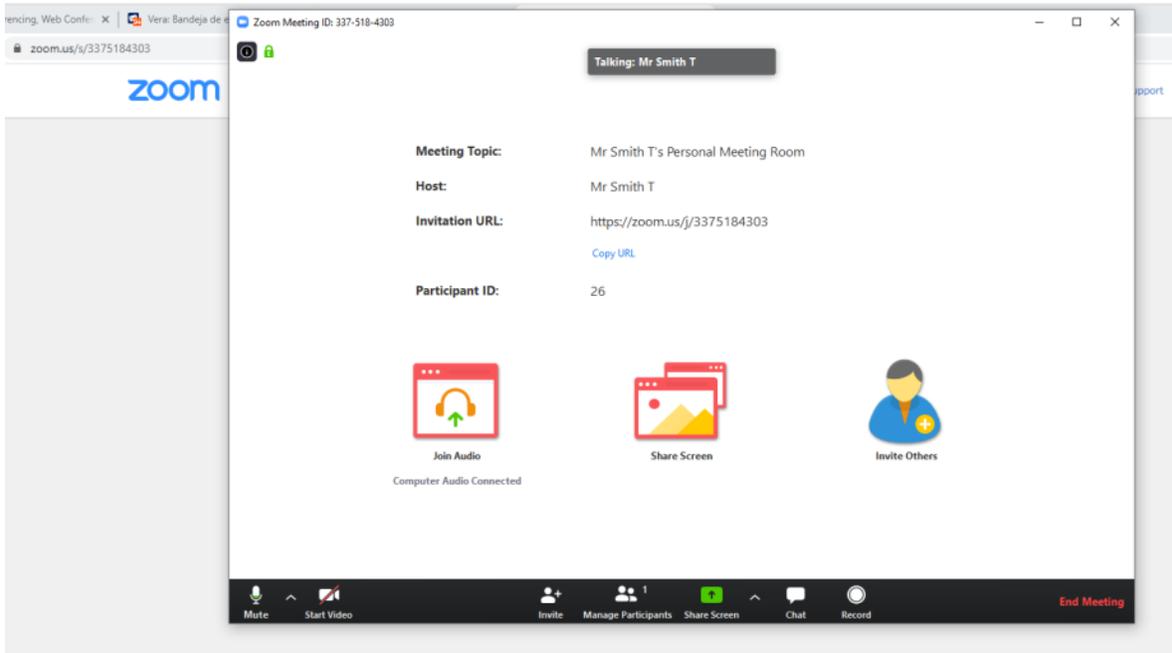


18) Click **Join with Computer Audio**

You can select the checkbox: **Automatically join audio by computer when joining a meeting** to avoid this question every time you want to start or join a meeting.

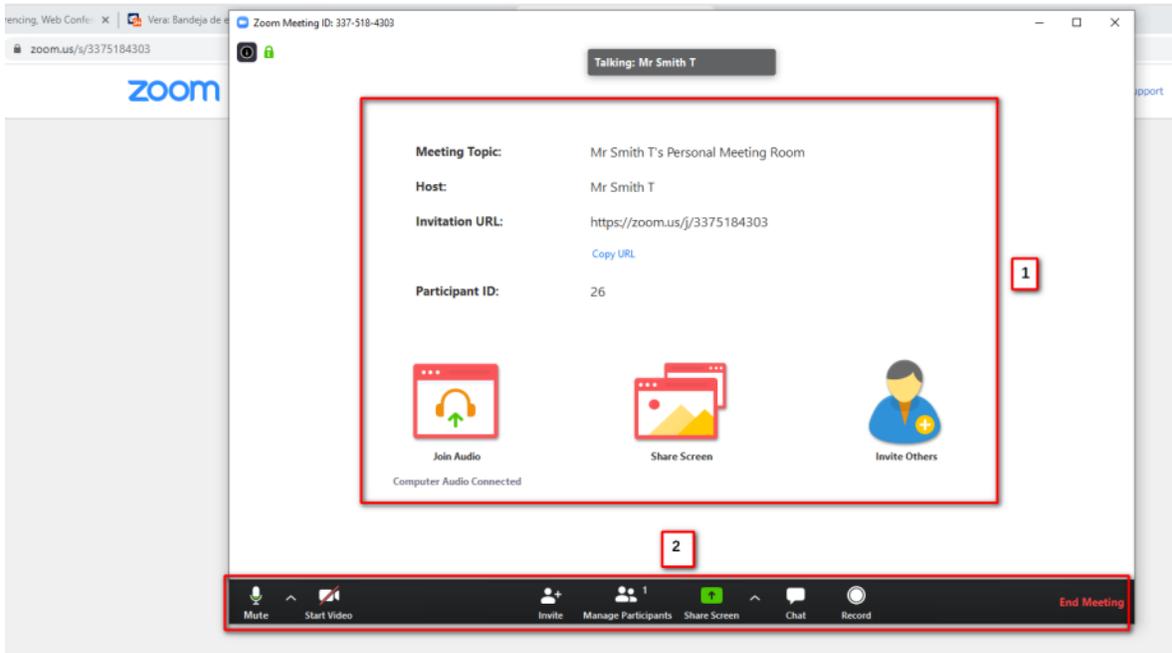


19) Now you are hosting a meeting with no participants.

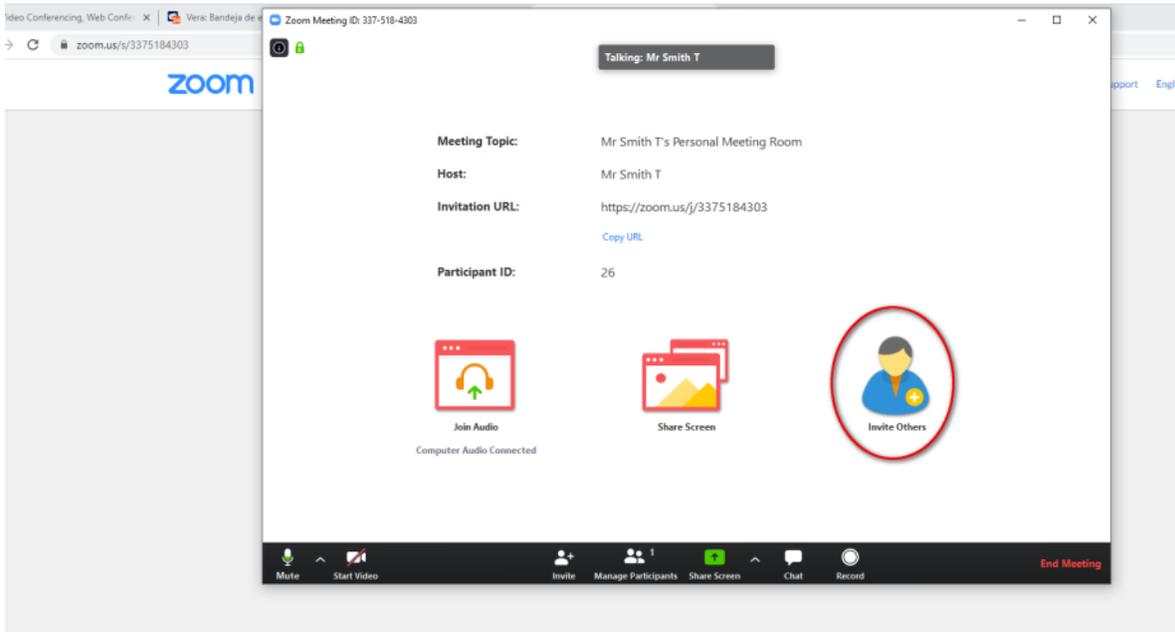


20)

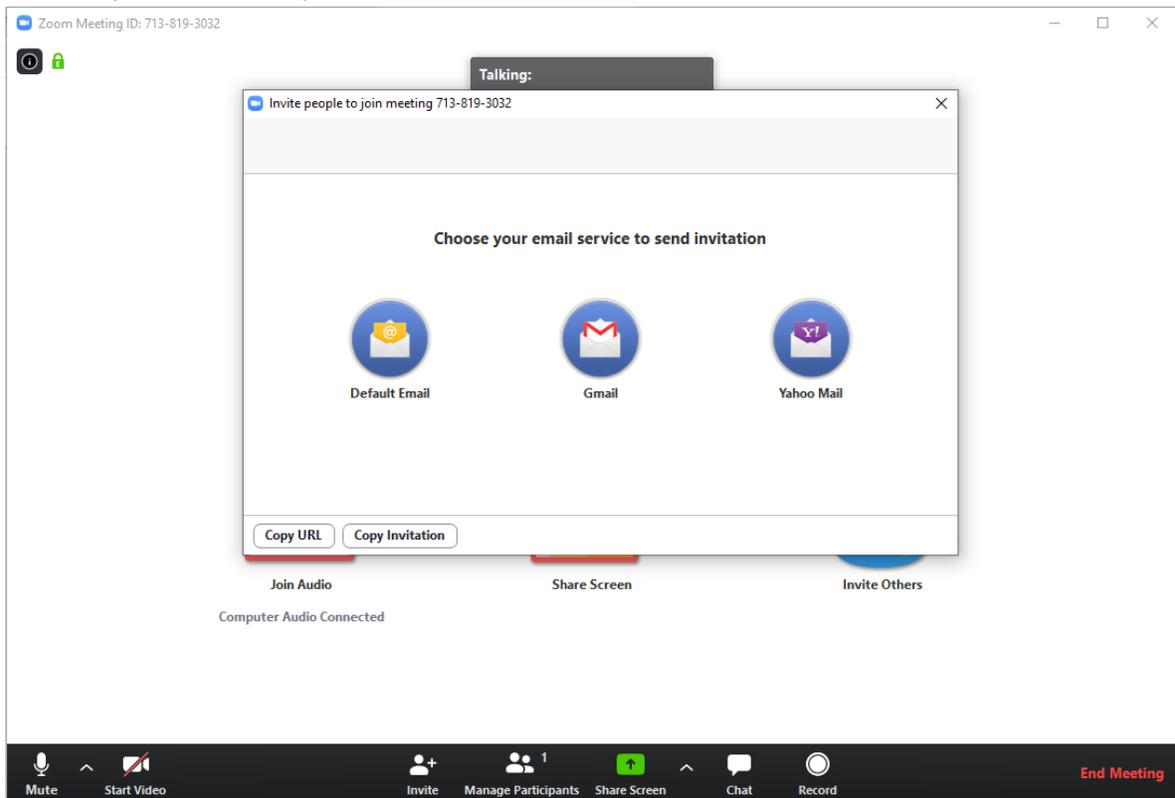
- Info about meeting room and basic options (1)
- Task bar with more options (2)



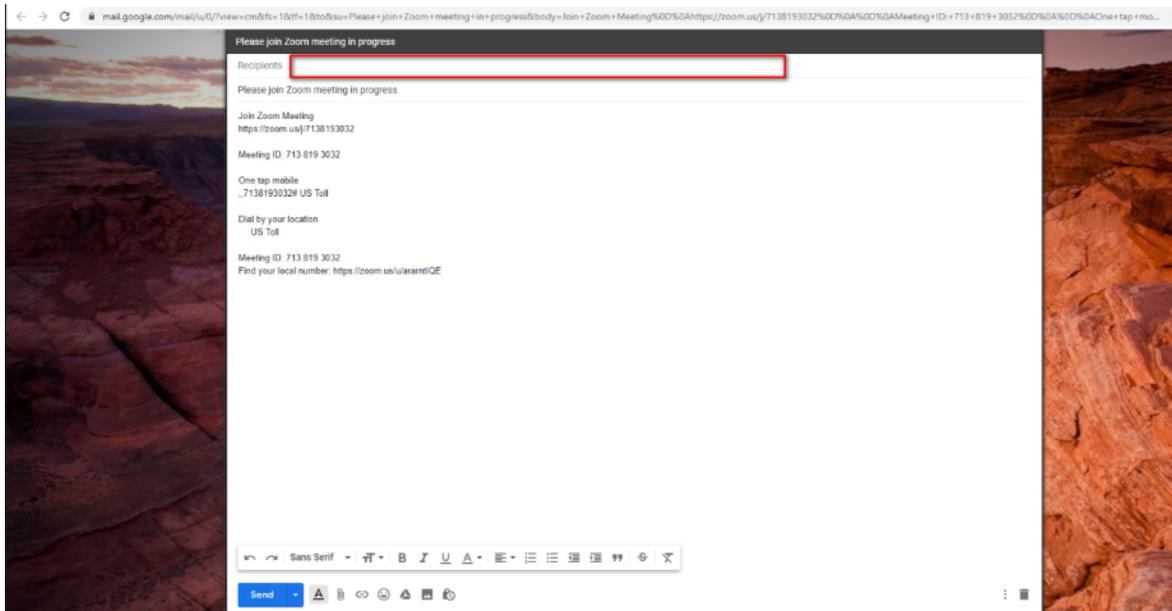
21) Click **Invite Others**



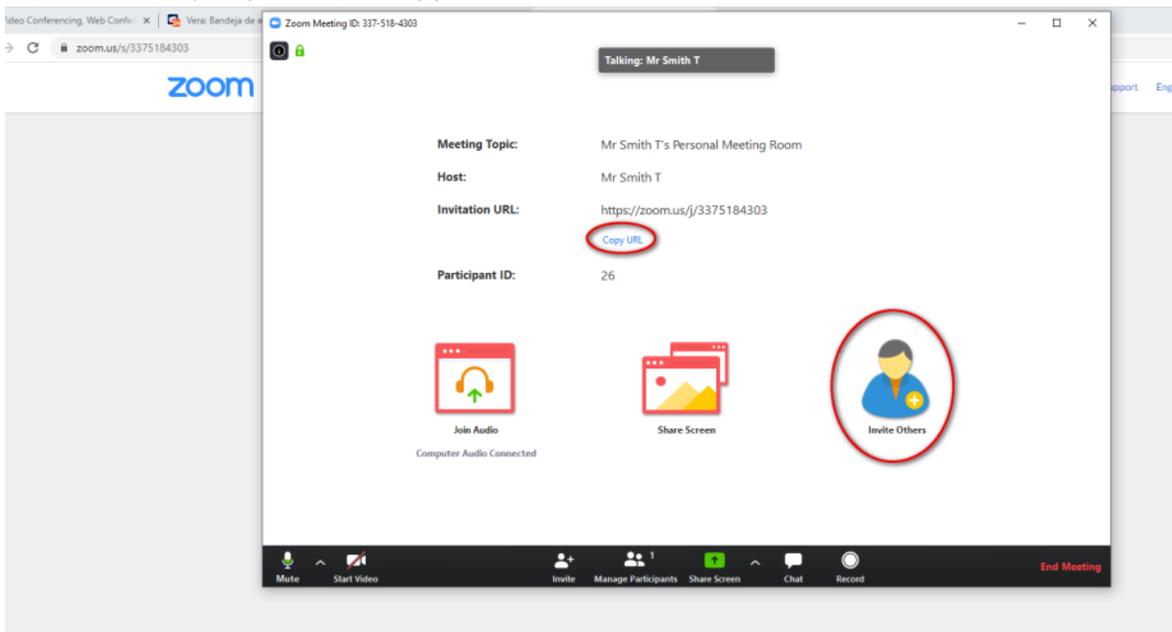
22) Here you can choose your email service to send the invitation



23) For example if you use Gmail and you clicked on the **Gmail** icon, automatically open a new email and you only have to fill the **Recipients** of the competitors and write a **Subject**, after this you send the email with the invitation.

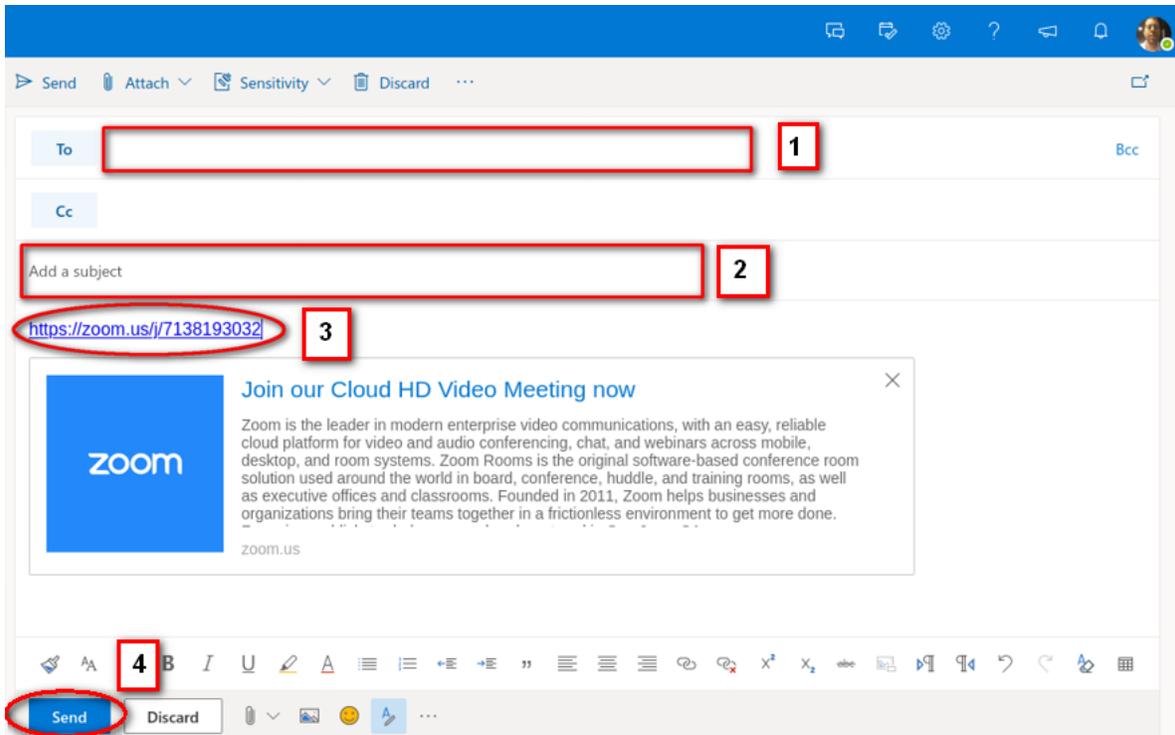


24) Another easy way is click on **Copy URL**.



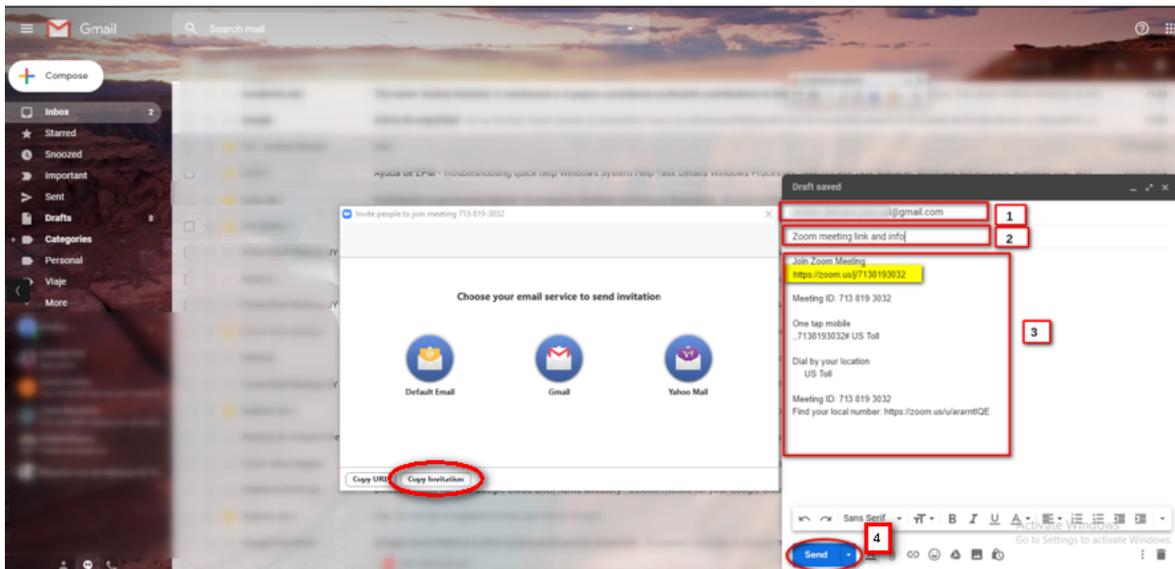
25) Open your email client and compose a new mail.

- Enter the **Recipients** of the participants (1)
- Write the **Subject** (2)
- In the body paste the **URL** copied before (3)
- Click **Send** (4)



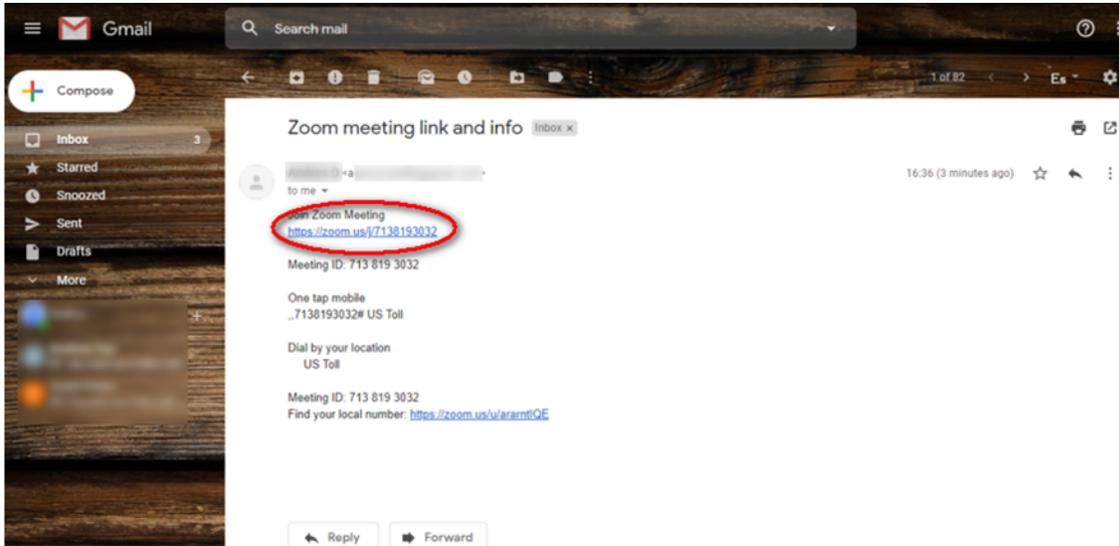
26) Also you can copy all the info about the meeting selecting: **Copy Invitation**

- Enter the **Recipients** of the participants (1)
- Write the **Subject** (2)
- In the body paste the **Invitation** copied before (3)
- Click **Send** (4)

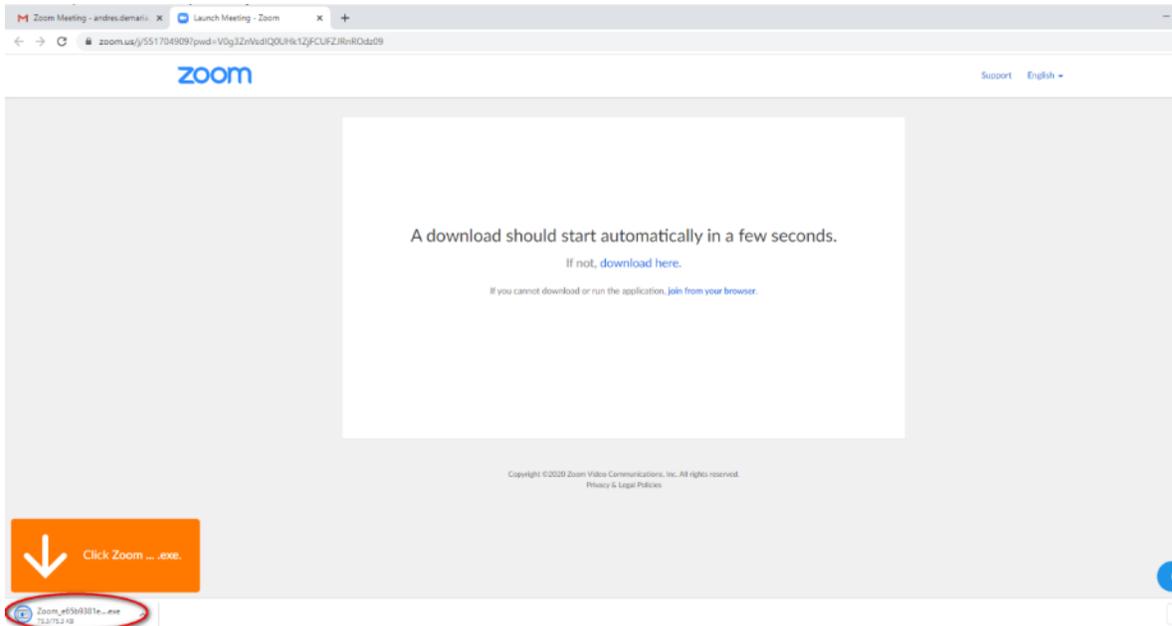


Participant

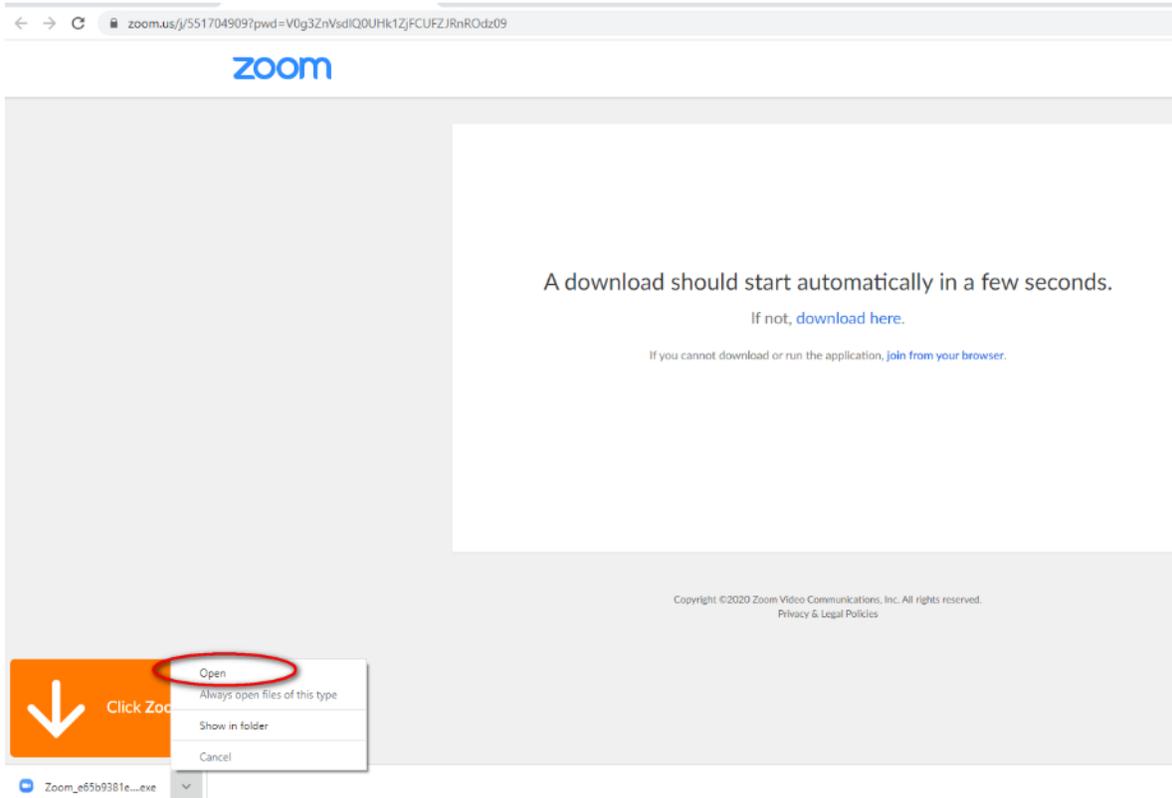
27) The participant will receive an email with the invitation link.
Click on the Join **Zoom Meeting link**.



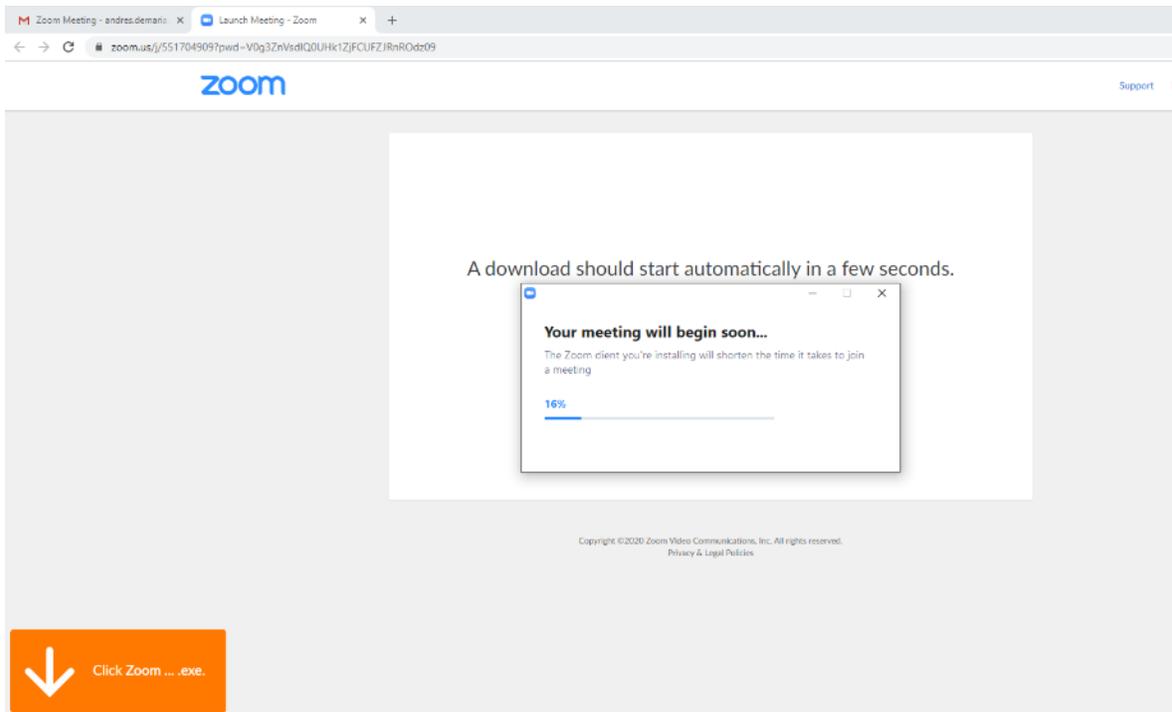
28) A new tab will be open on your browser.
Zoom installer start downloading



29) Click **Open** the downloaded file when finished

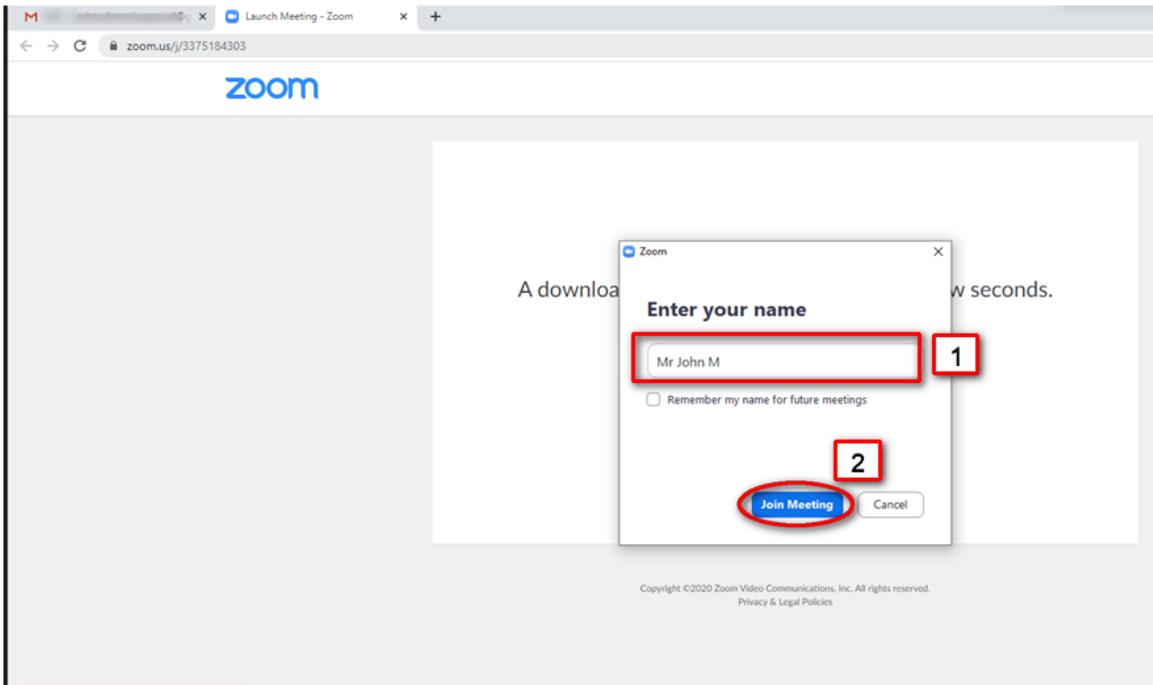


30) Wait until the installation finish.

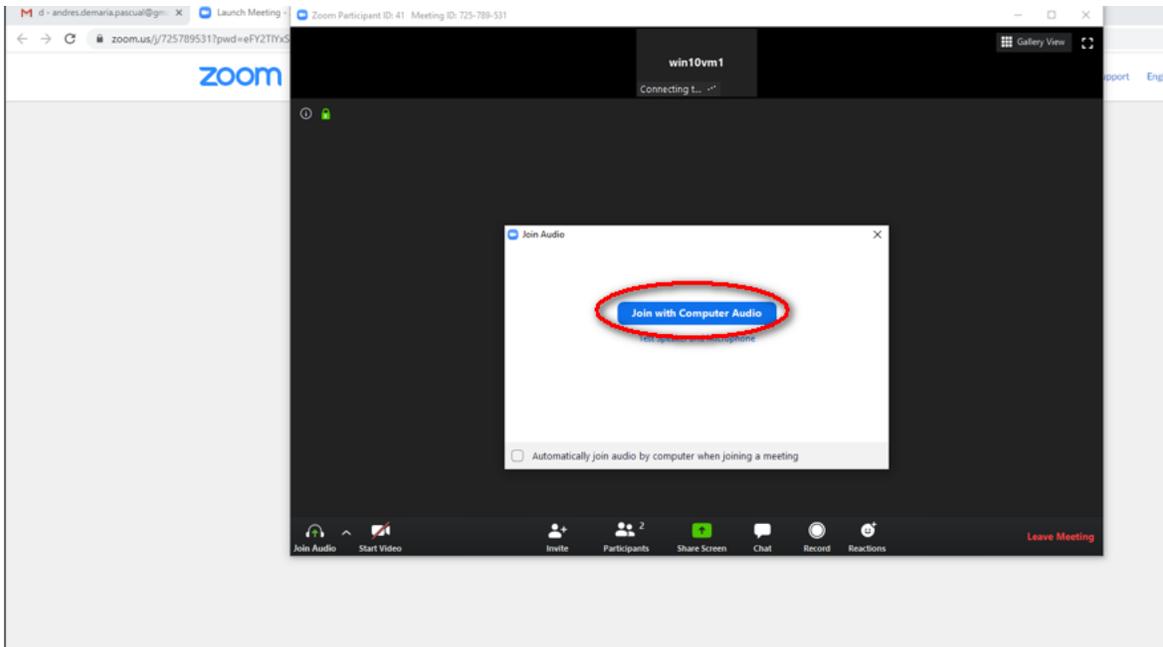


31)

- Enter **your name** to join the meeting (1)
- Click **Join Meeting** (2)



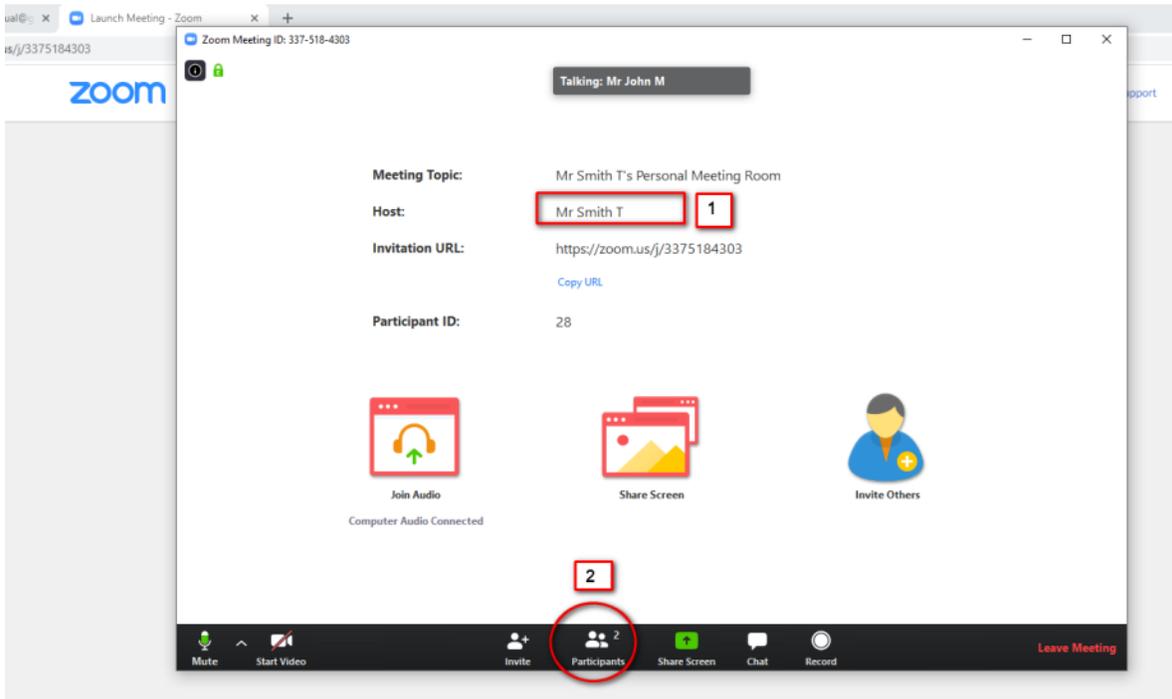
32) Click **Join with Computer Audio**



33)

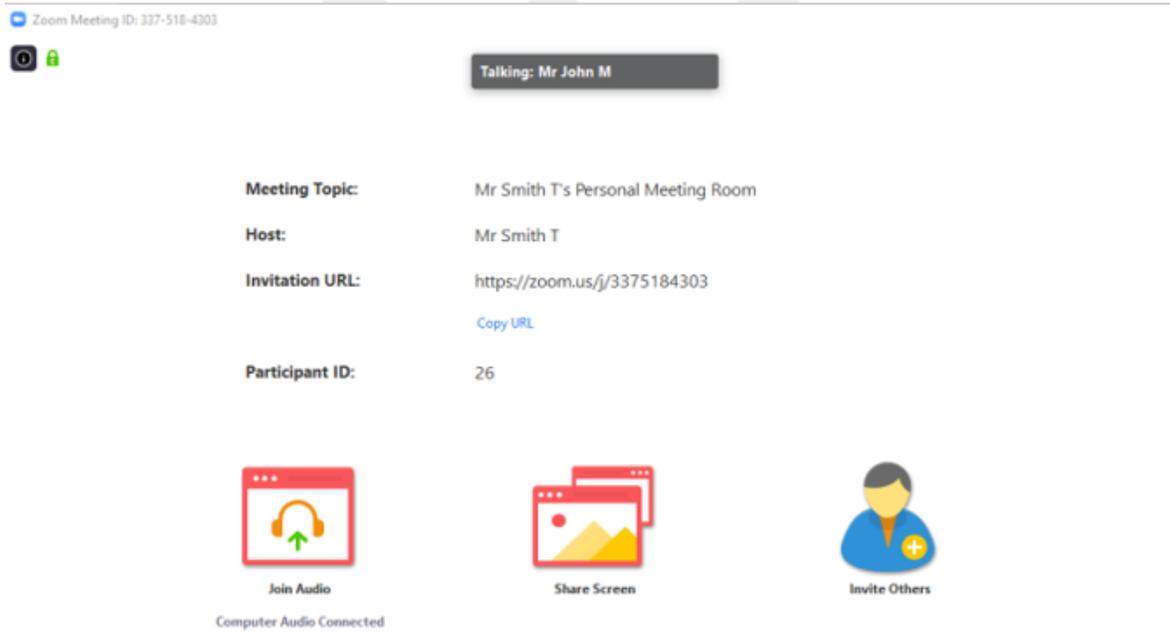
– You will see the host: **Mr Smith T (1)**

– You see the number of participants: two (Mr Smith T as the host and John M as participant) (2)

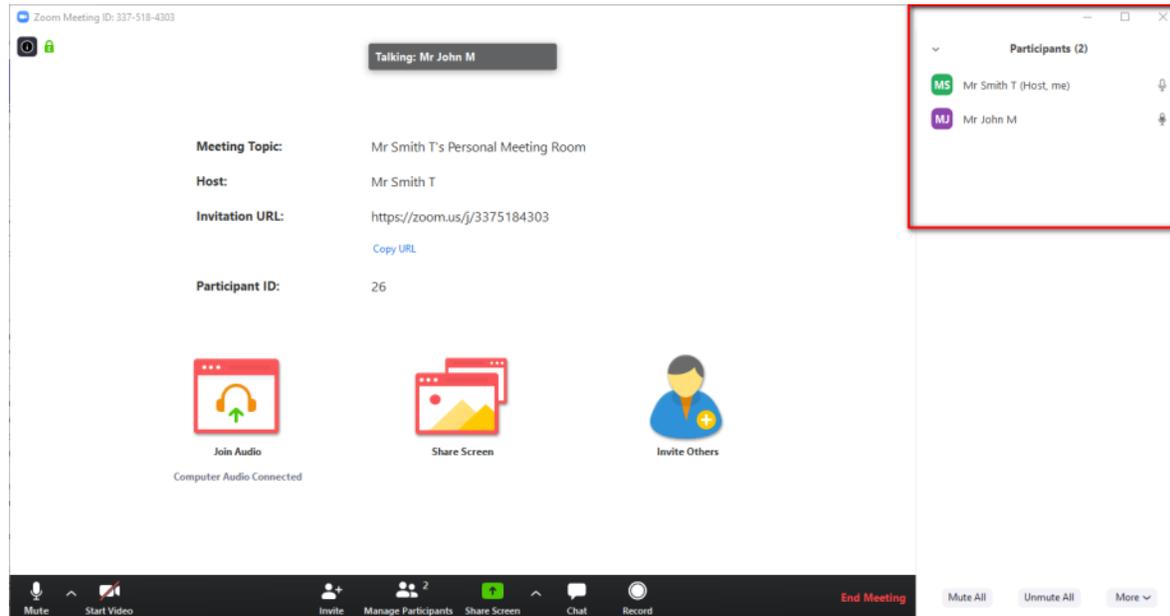


Host

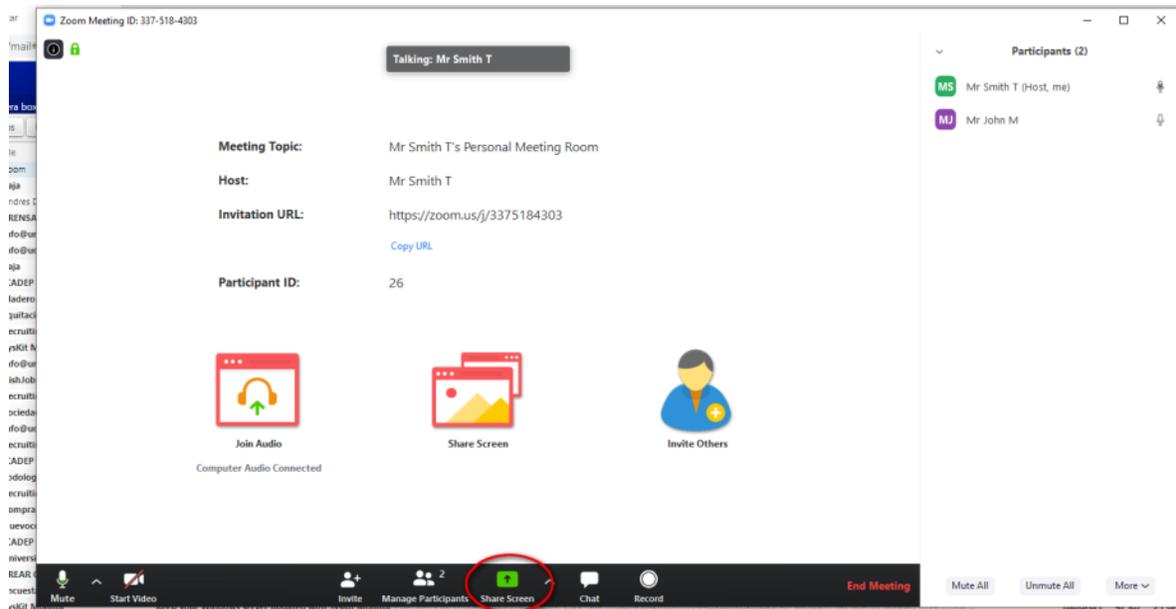
34) Click **Manage Participants**



35) List of participants listed at the right corner (Mr Smith and Mr John).

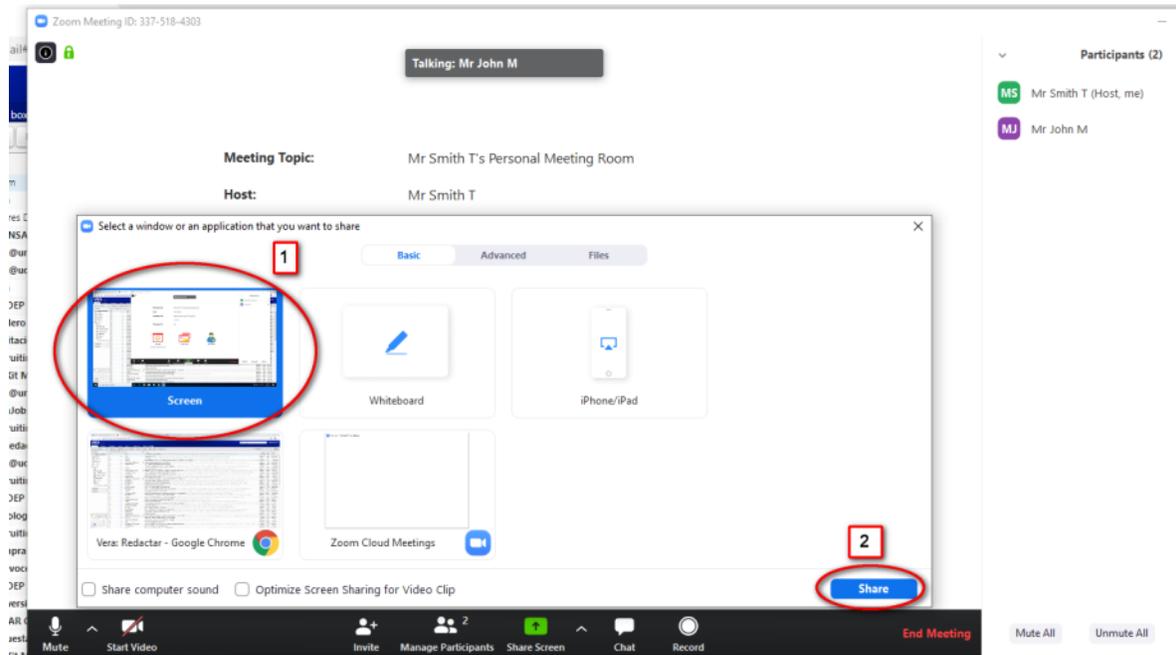


36) Click Share Screen

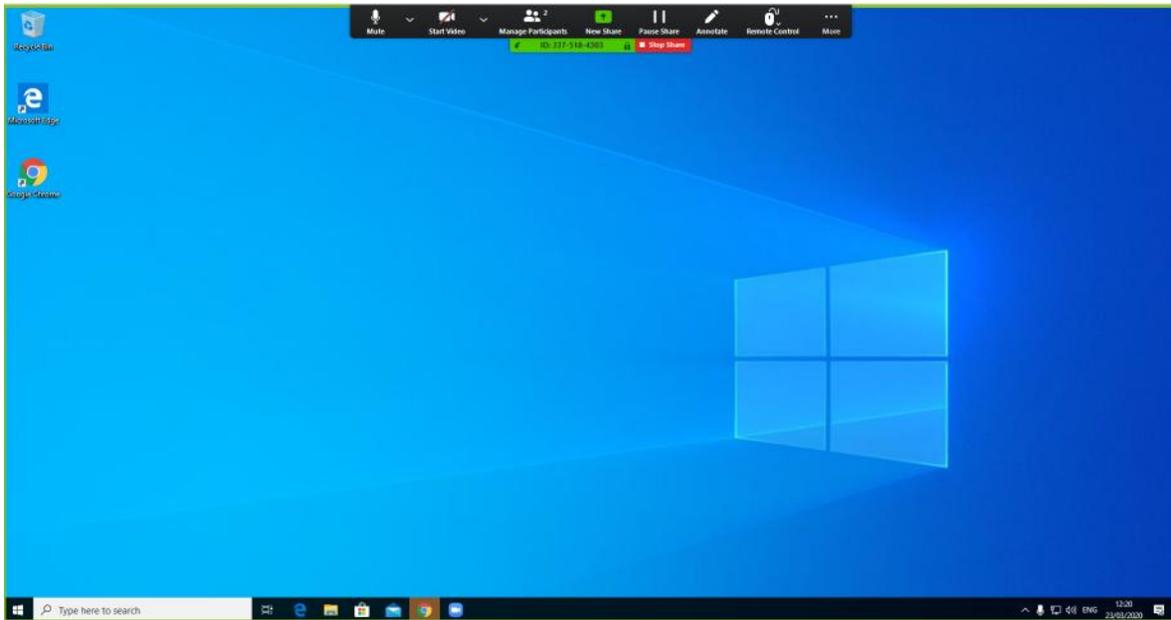


37)

- Select Screen (1)
- Click Share (2)

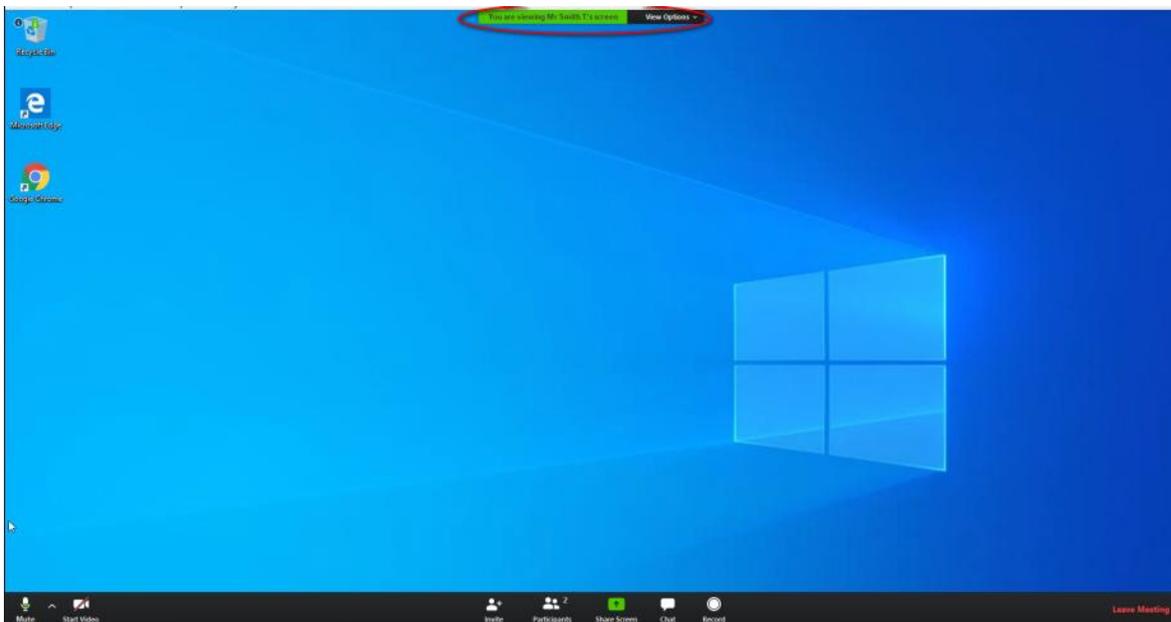


38) Now the host (Mr Smith) is sharing the screen with the participant invited (Mr John).



Participant (Mr John)

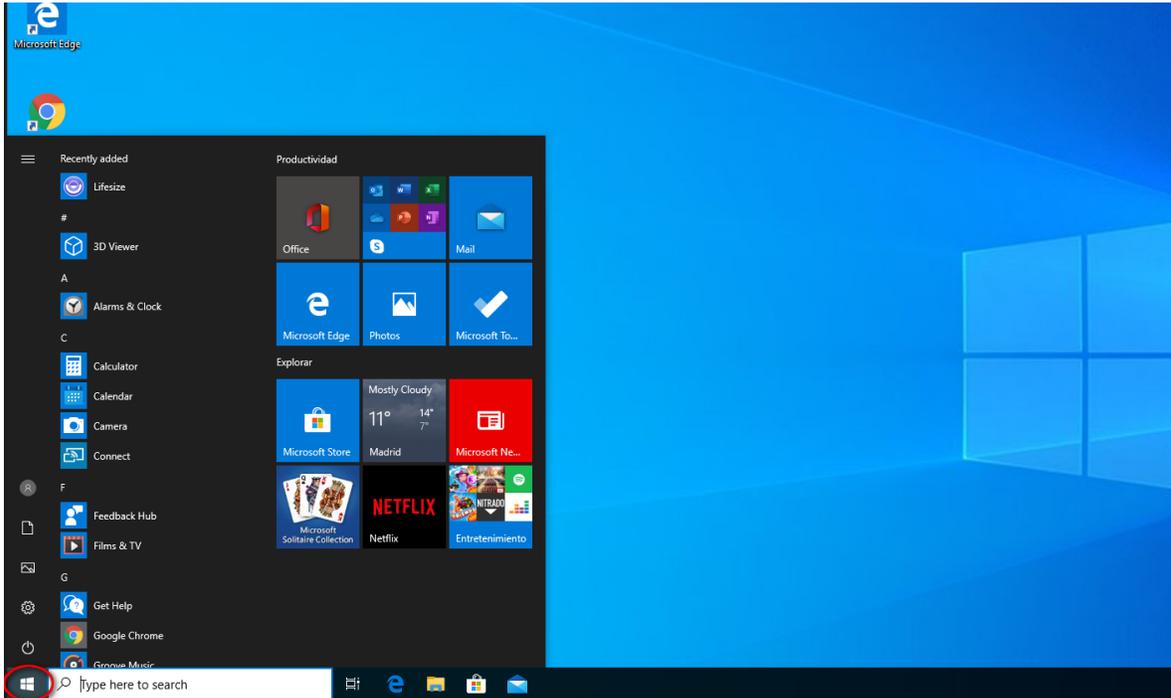
39) On the participant you will see a message (up in the center) that you are viewing the host screen (Mr Smith screen)



Start a new meeting

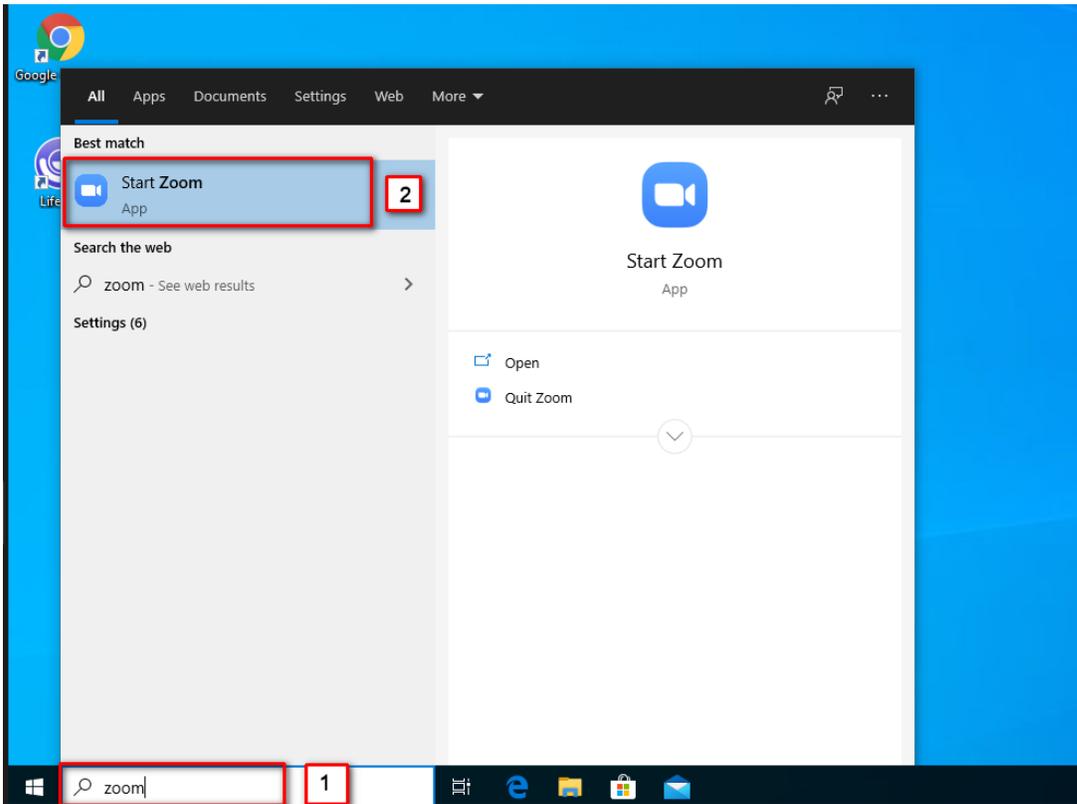
Follow this section if you have a Zoom application installed and a Zoom account created before. If not, please refer to: “Registration and make a Test Meeting”.

1) Click on the **Windows** icon at the left corner.

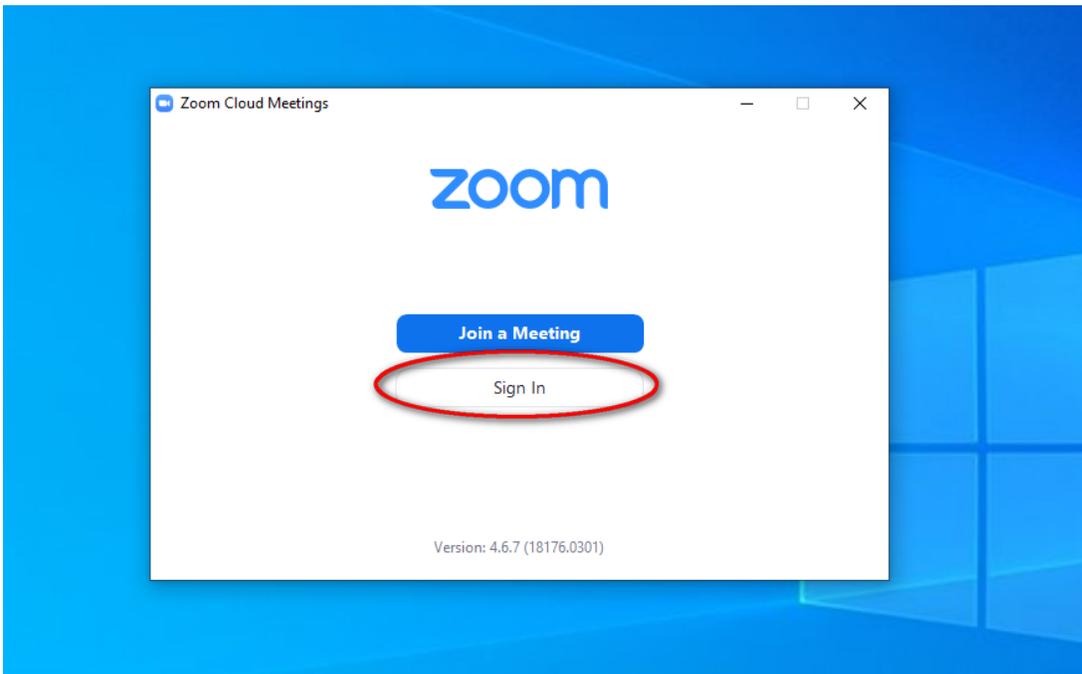


2)

- Type **zoom (1)**
- Click **Start Zoom (2)**

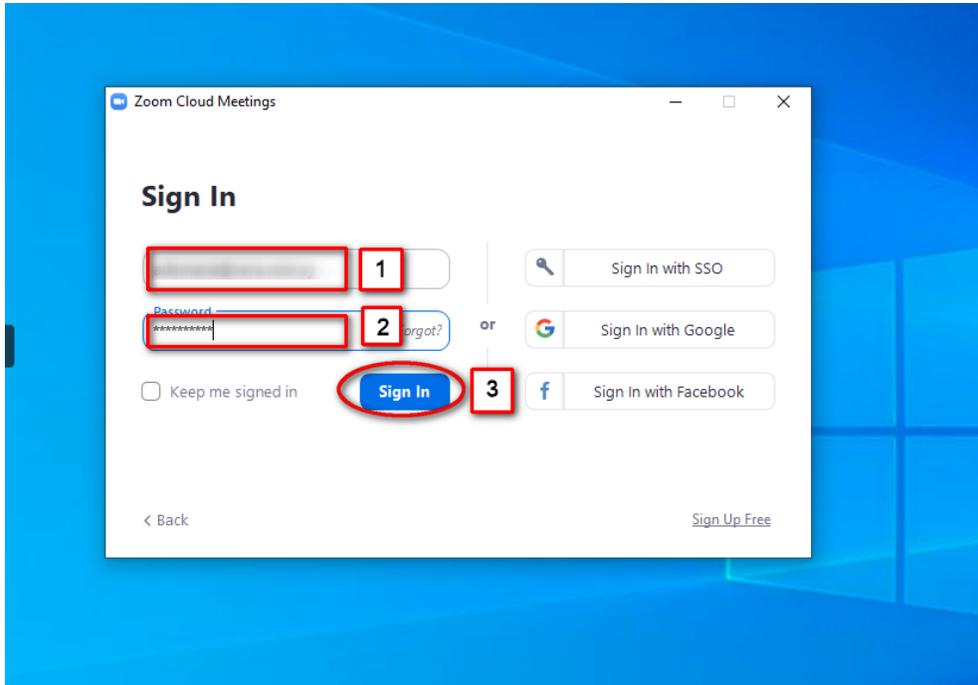


3) Click **Sign In**

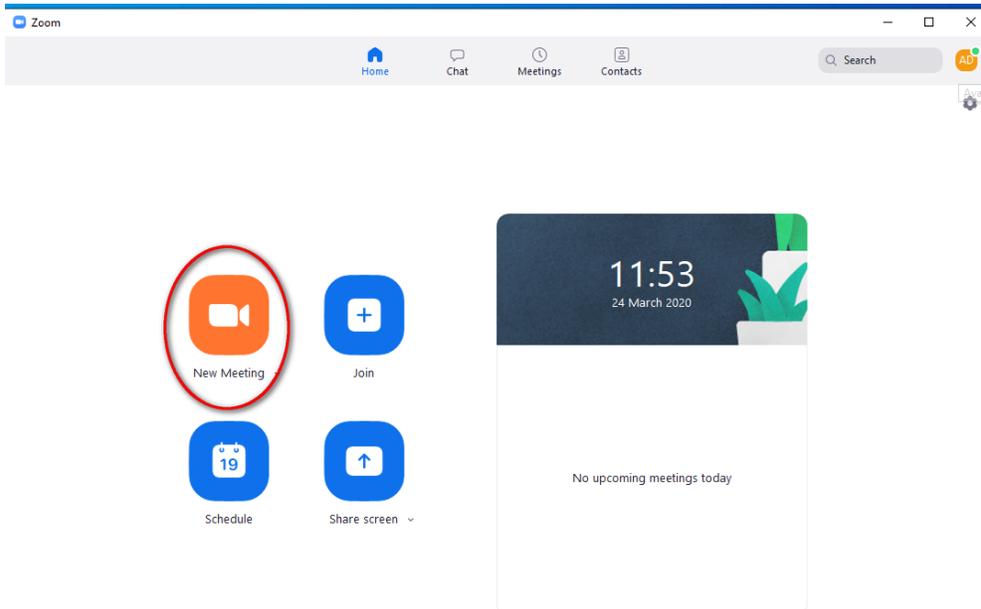


4)

- Enter your **email address (1)**
- Enter your **password (2)**
- Click **Sign In (3)**

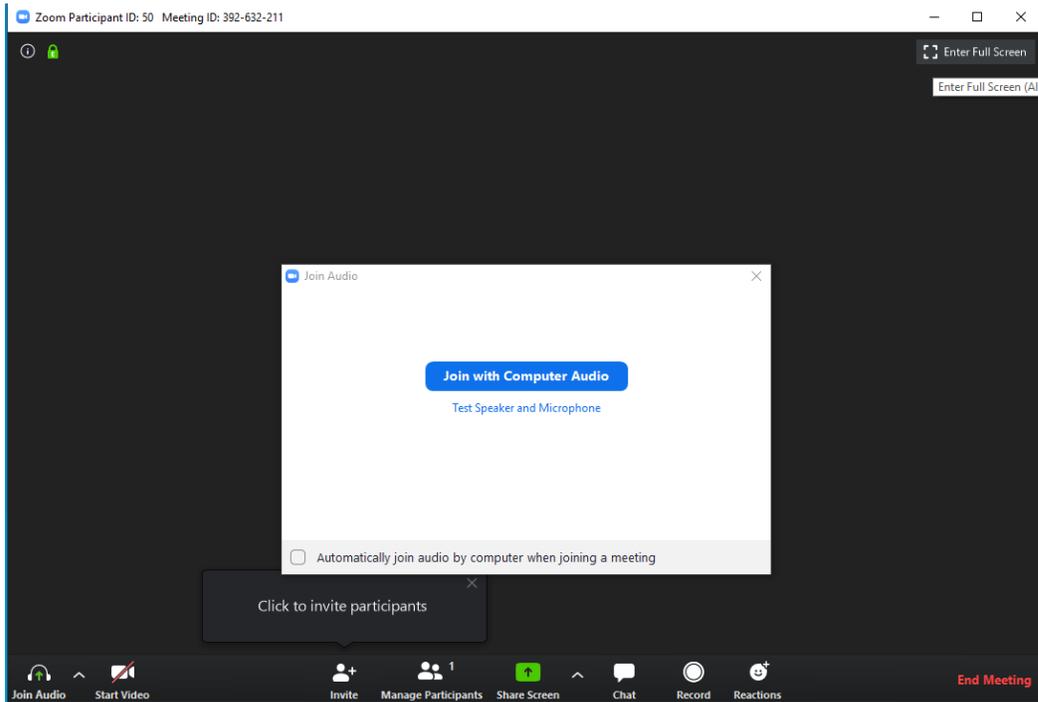


5) Click **New Meeting**



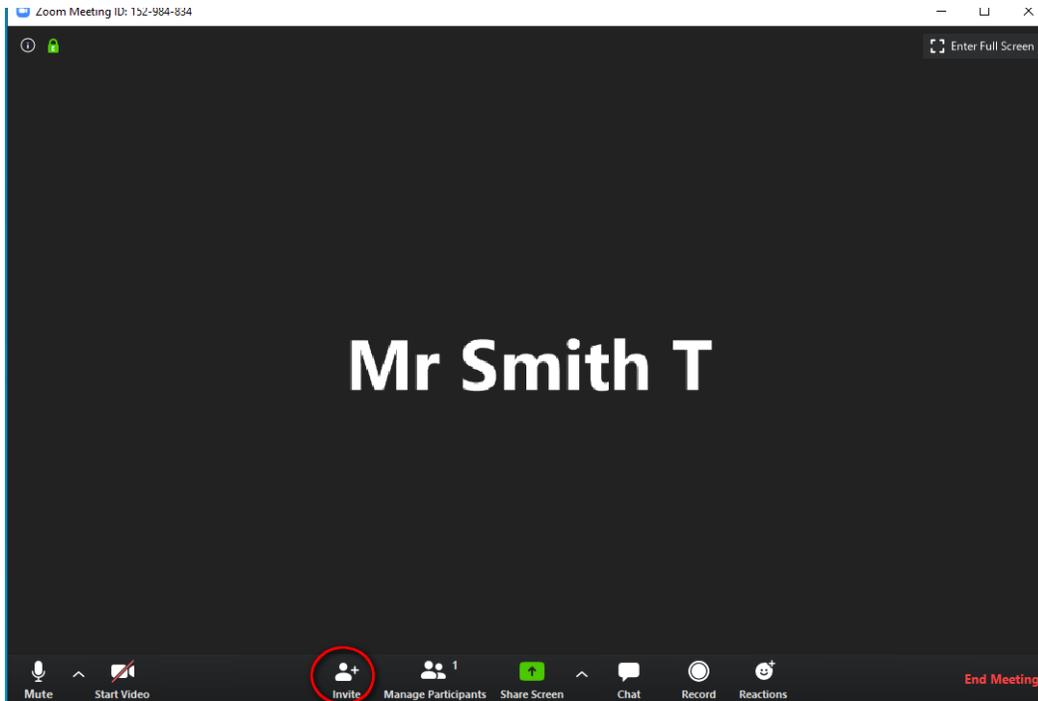
6) Zoom meeting screen.

Click **Join with Computer Audio**



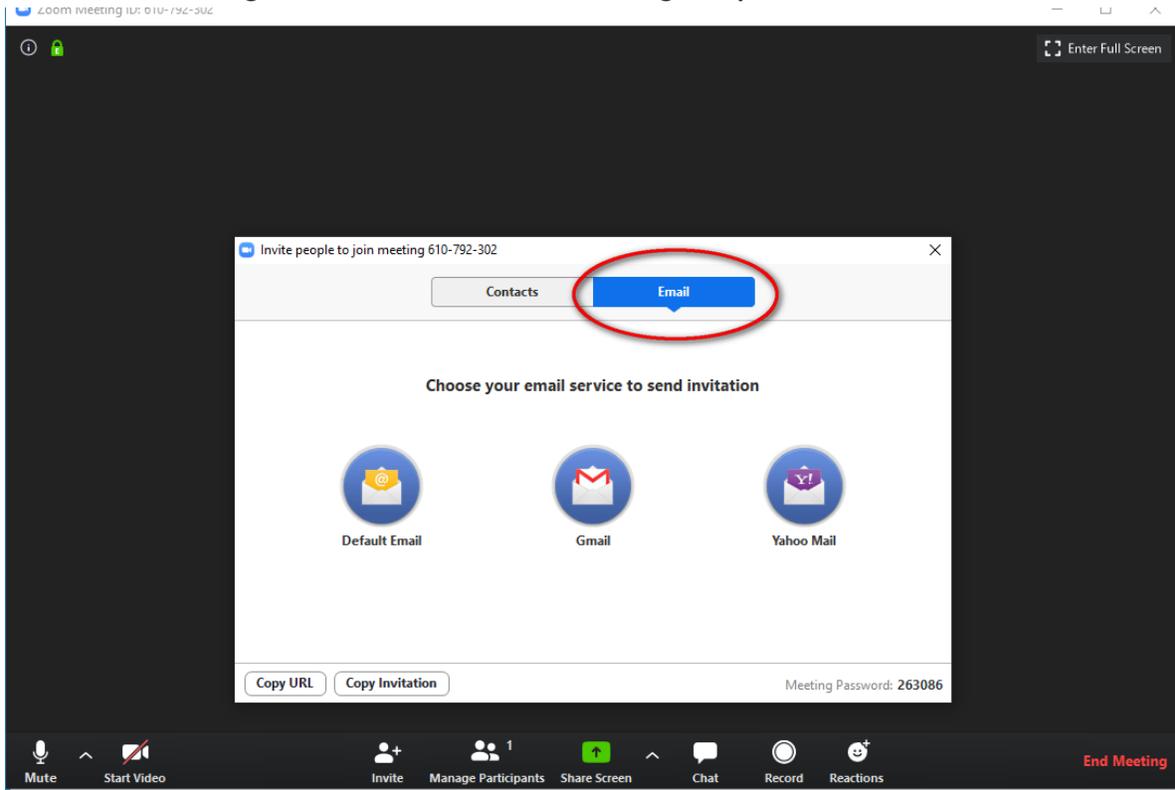
7) Meeting started

Click **Invite**



8) Click Email

Refer to section: **“Registration and make a Test Meeting”, step 22 to continue.**

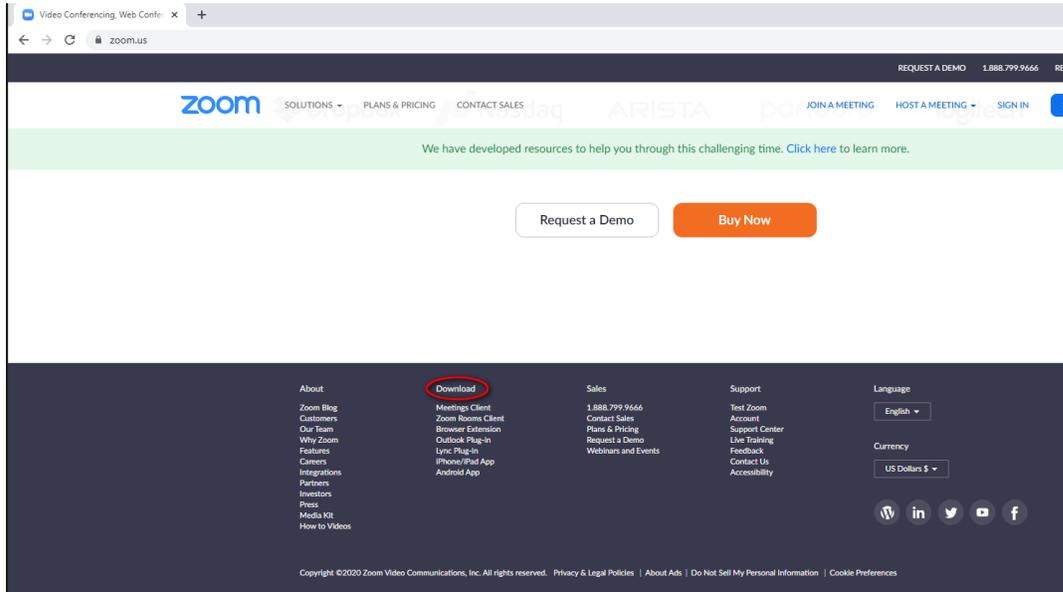


Download and install Zoom application manually

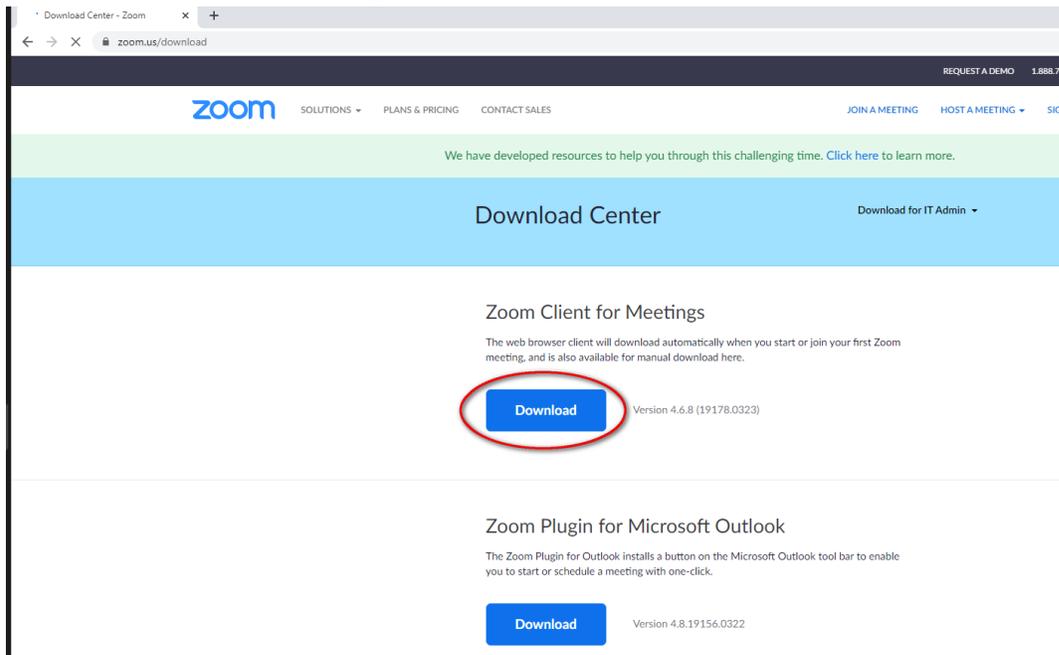
Follow this section if you have a Zoom account created and you want to install the application on your computer.

1) Navigate to <https://zoom.us>

Go to the bottom of the page and click **Download**

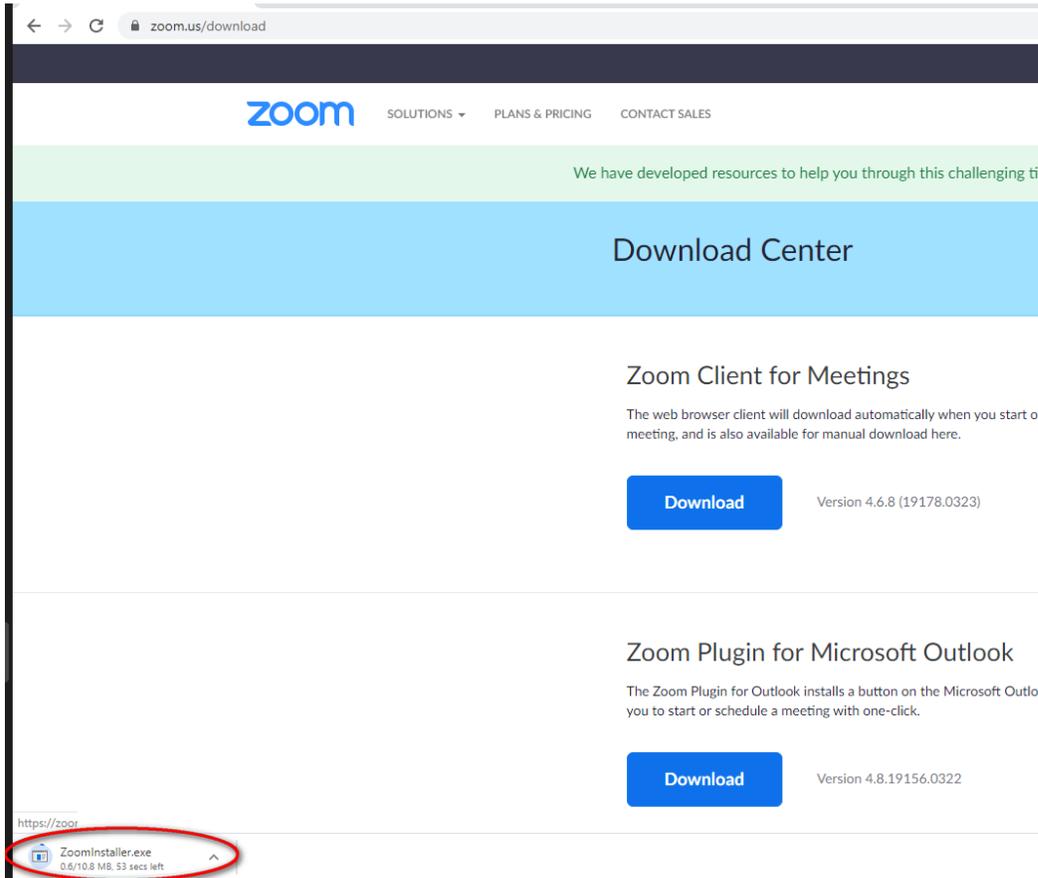


2) On Zoom Client for Meetings, click **Download**

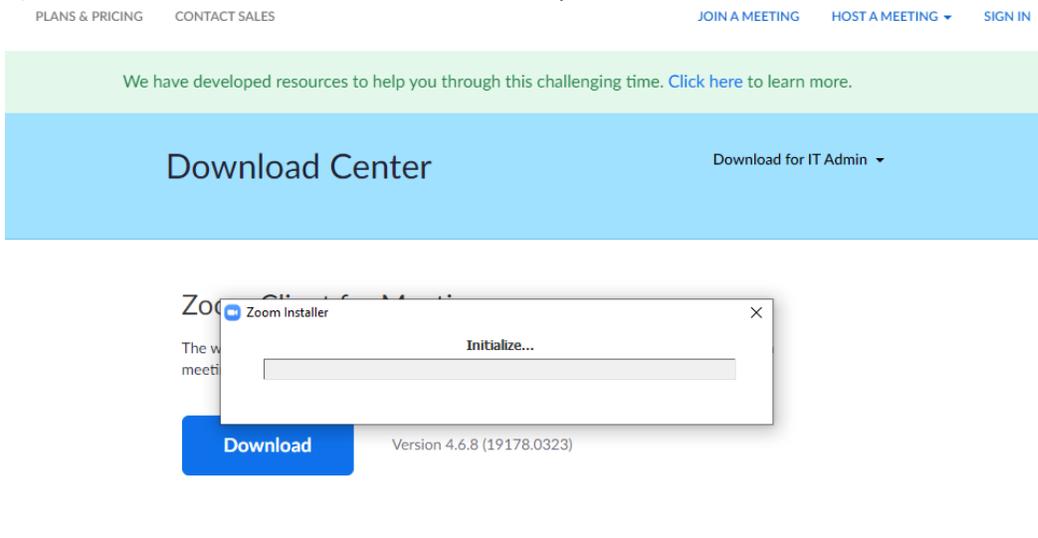


3) Zoom Installer download in progress.

When download process finish, click on the **file** (ZoomInstaller.exe) to start the installation.



4) Zoom will install and initialize automatically

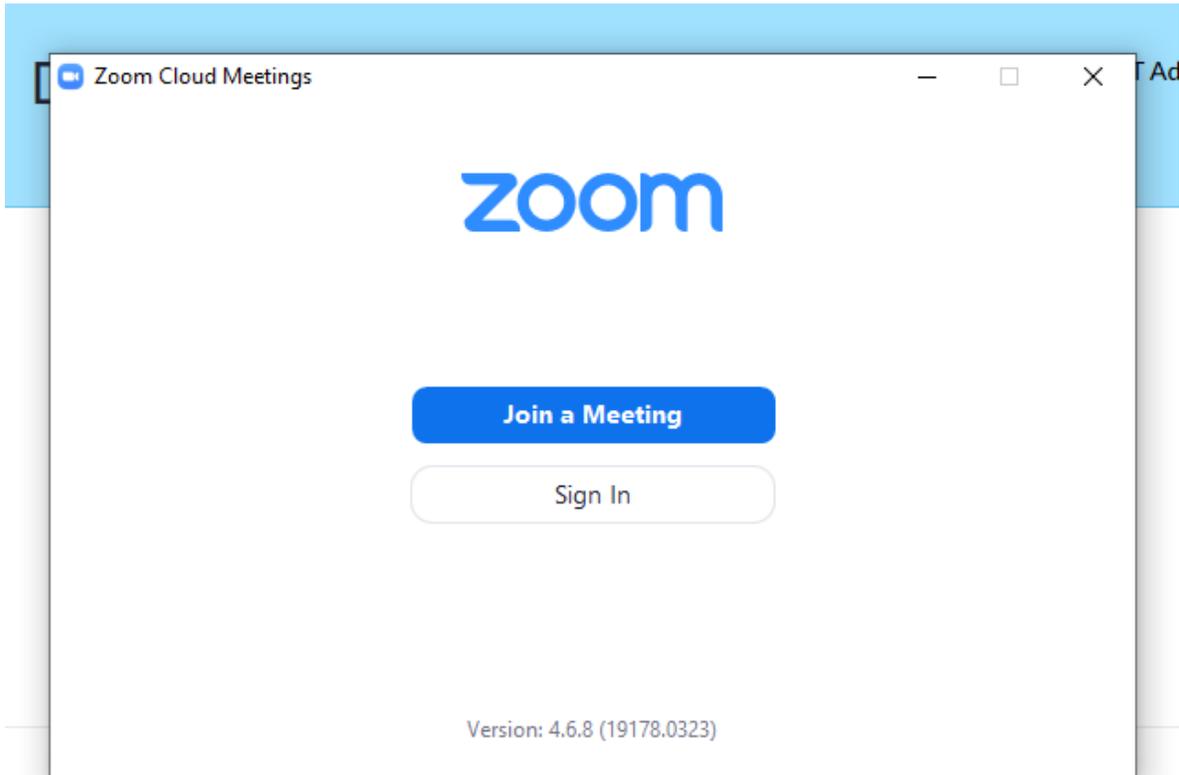


Zoom Plugin for Microsoft Outlook

The Zoom Plugin for Outlook installs a button on the Microsoft Outlook tool bar to enable

5) Zoom meeting screen.

Refer to section: **“Start a new meeting”, step 4 to continue.**



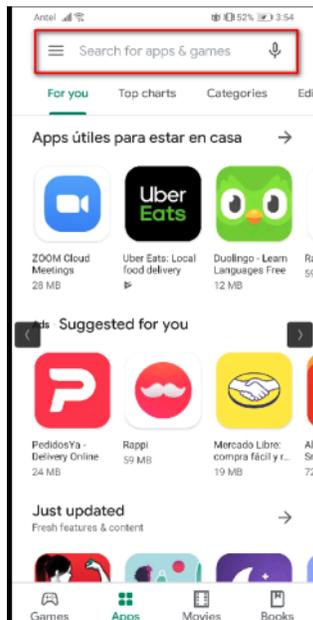
Installing Zoom Android app

Follow this section if you have a Zoom account created and you want to install the application on your cell phone or tablet device.

1) Tap on **Play Store** icon



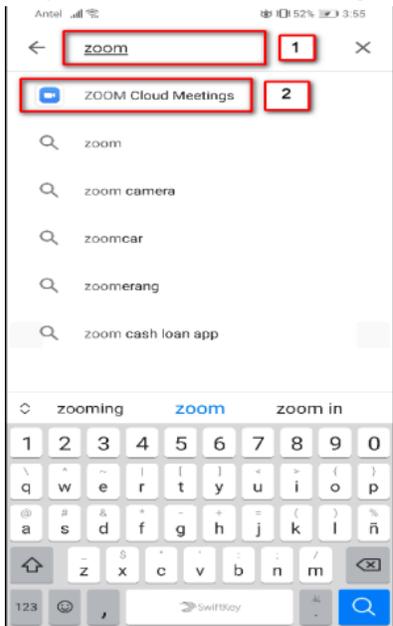
2) Locate the **search** text box



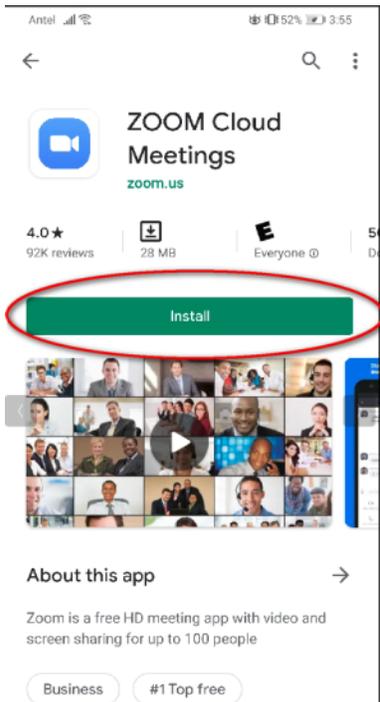
3)

- Enter **zoom (1)**

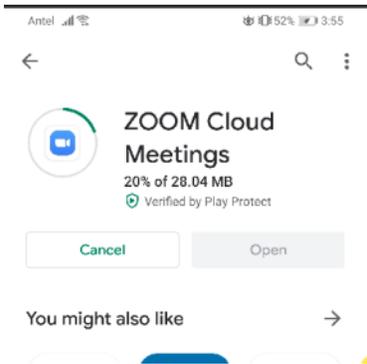
- Tap on **ZOOM Cloud Meetings (2)**



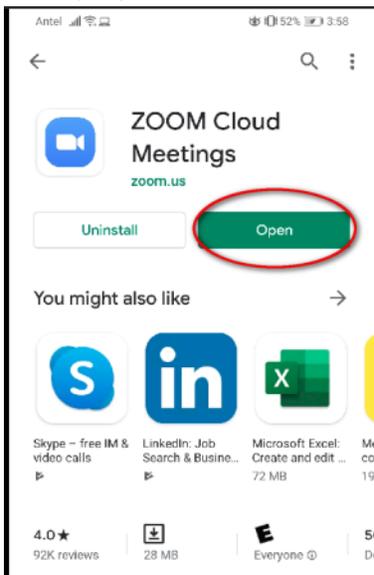
4) Tap on **Install**



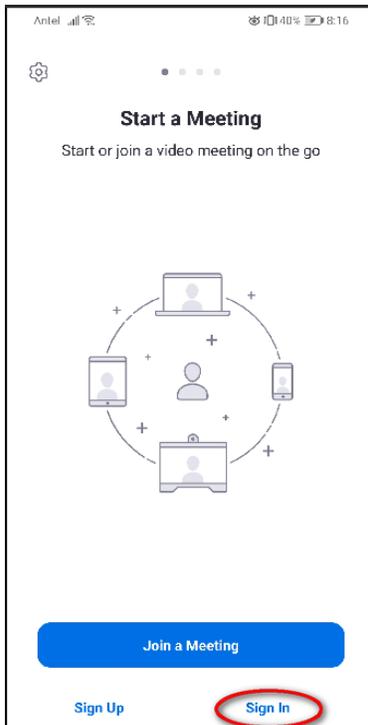
5) Installation in progress



6) Tap **Open** when installation finish

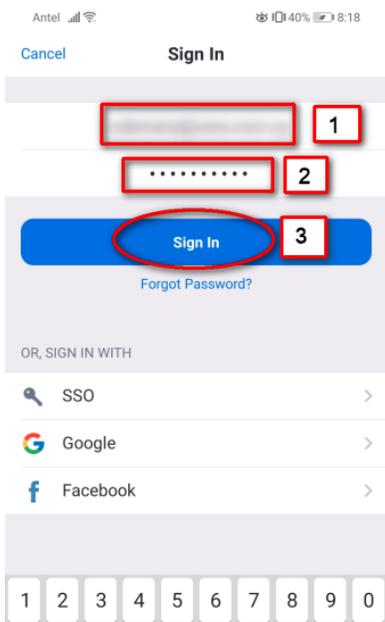


7) Tap on **Sign In**

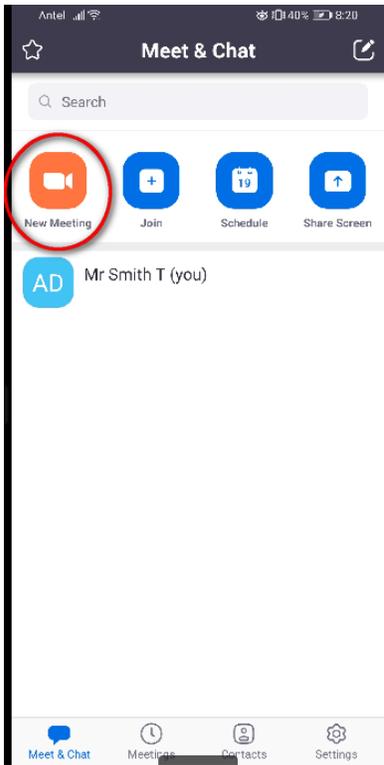


8)

- Enter your email address (1)
- Enter your password (2)
- Tap on **Sign In** (3)



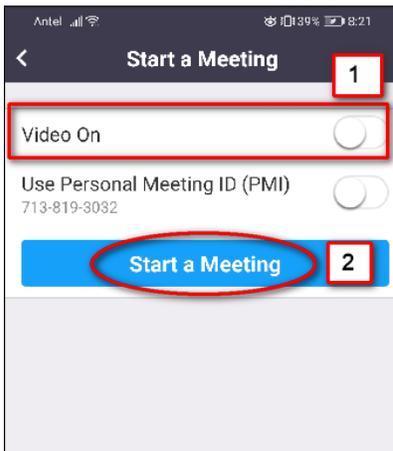
9) Tap on **New Meeting**



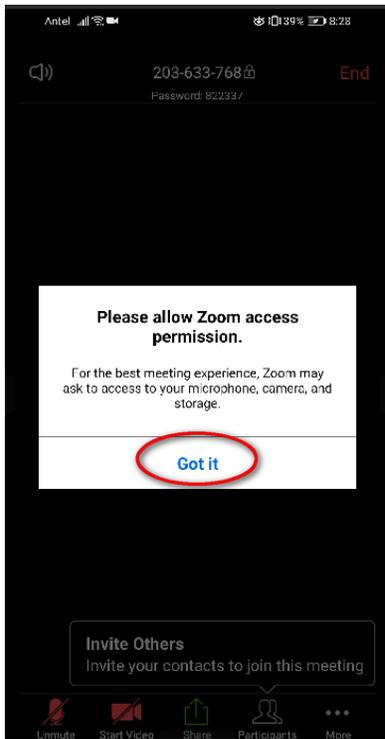
10)

– Disable **Video On (1)**

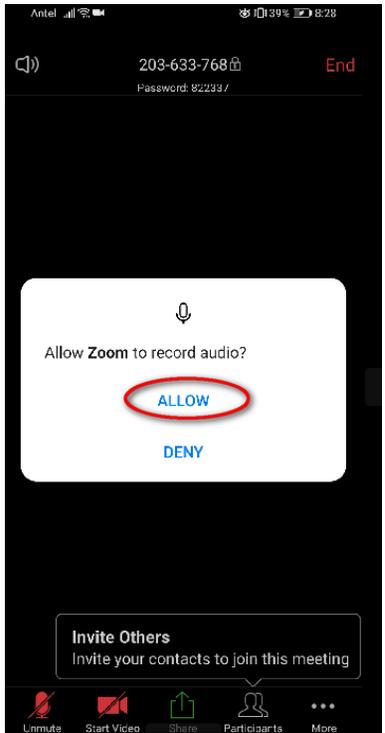
– Tap on **Start a Meeting (2)**



11) Tap on **Got It**

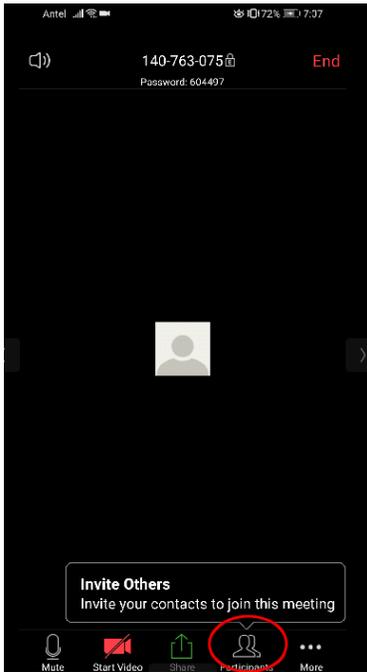


12) Tap on **ALLOW**



13) New meeting started

Tap on **Participants**

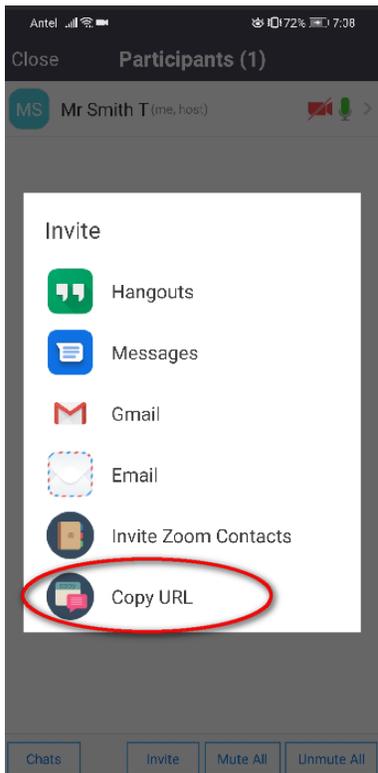


14) Tap on Invite



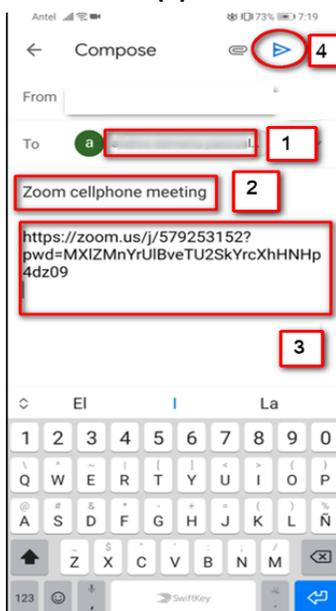
15) Select the method to invite participants

In this case, tap on **Copy URL**



16) Open your email client and compose a new email to send the invitation link

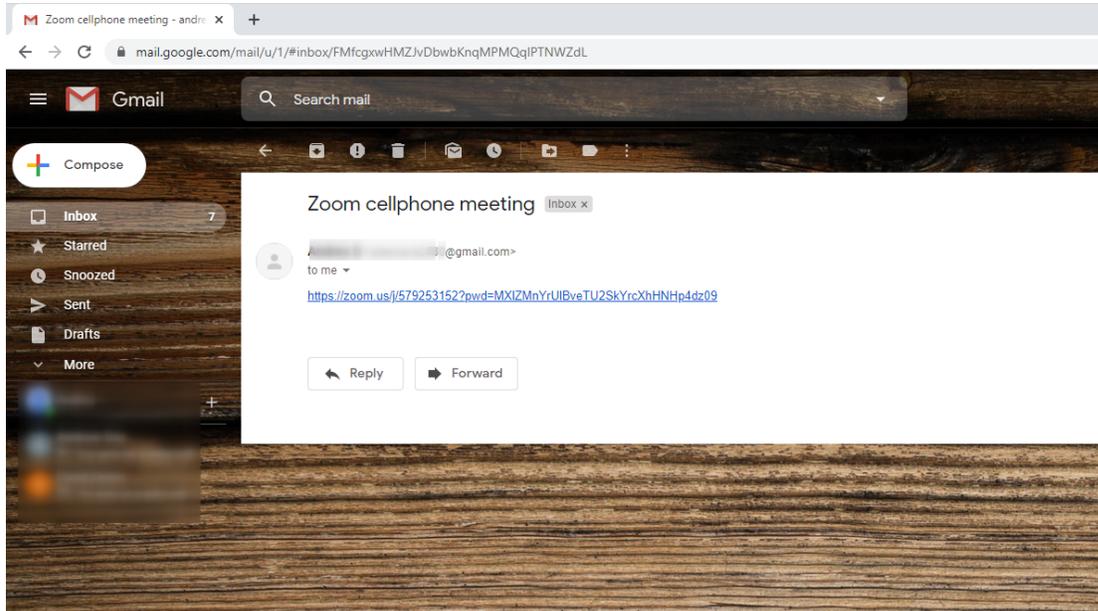
- Enter the **Recipients** of the participants (1)
- Write the **Subject** (2)
- In the body paste the **Invitation** copied before (3)
- Click **Send** (4)



Participant

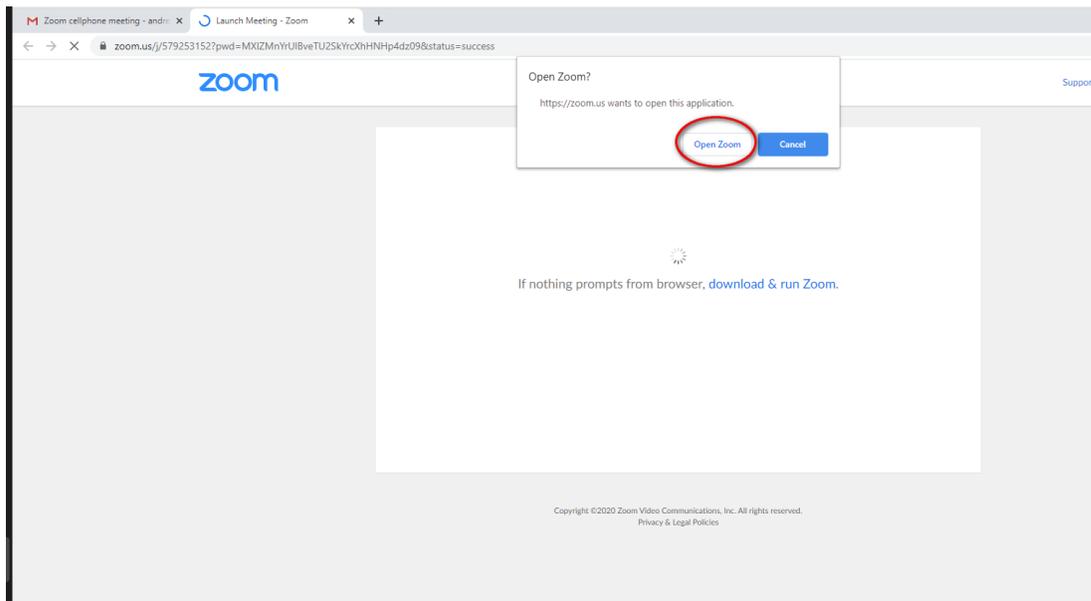
17) The participant will receive an email with the invitation link.

Click on the **Join Zoom Meeting link**.



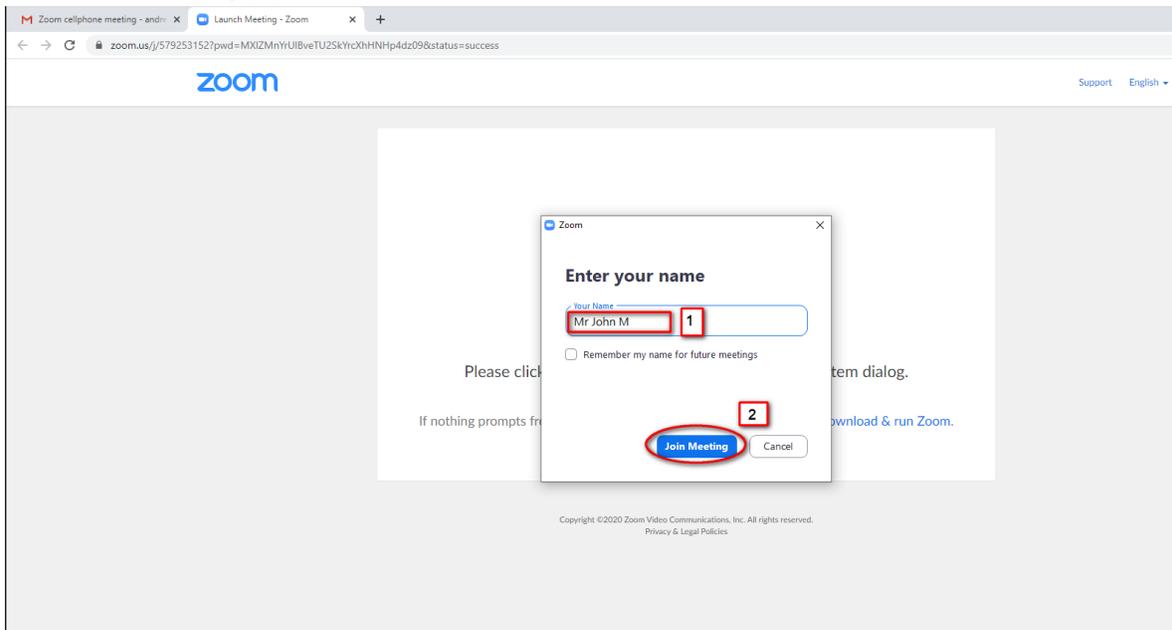
18) A new tab will be open on your browser.

Click on **Open Zoom**. If you don't have zoom installed, refer Section X, to download and install the application.



19)

- Enter your **Name** to join the meeting (1)
- Click **Join Meeting** (2)

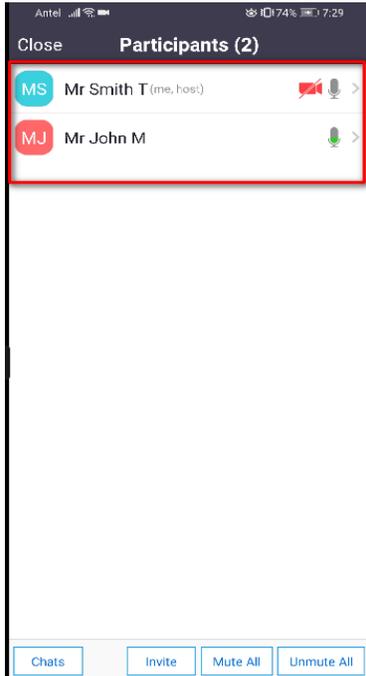


20) Click Join with Computer Audio

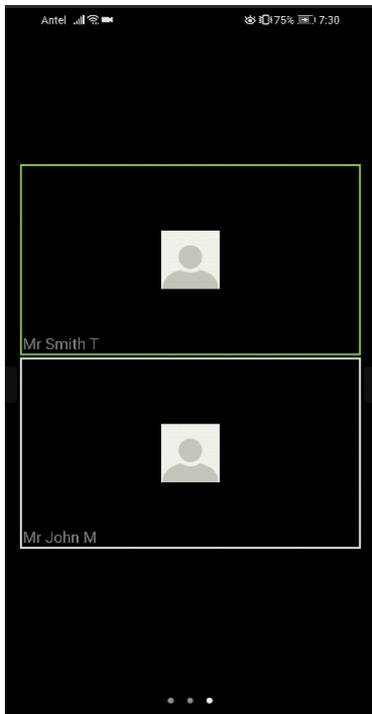


Host

21) On the host you will see the two participants: Mr Smith T (host) and Mr John M (participant)

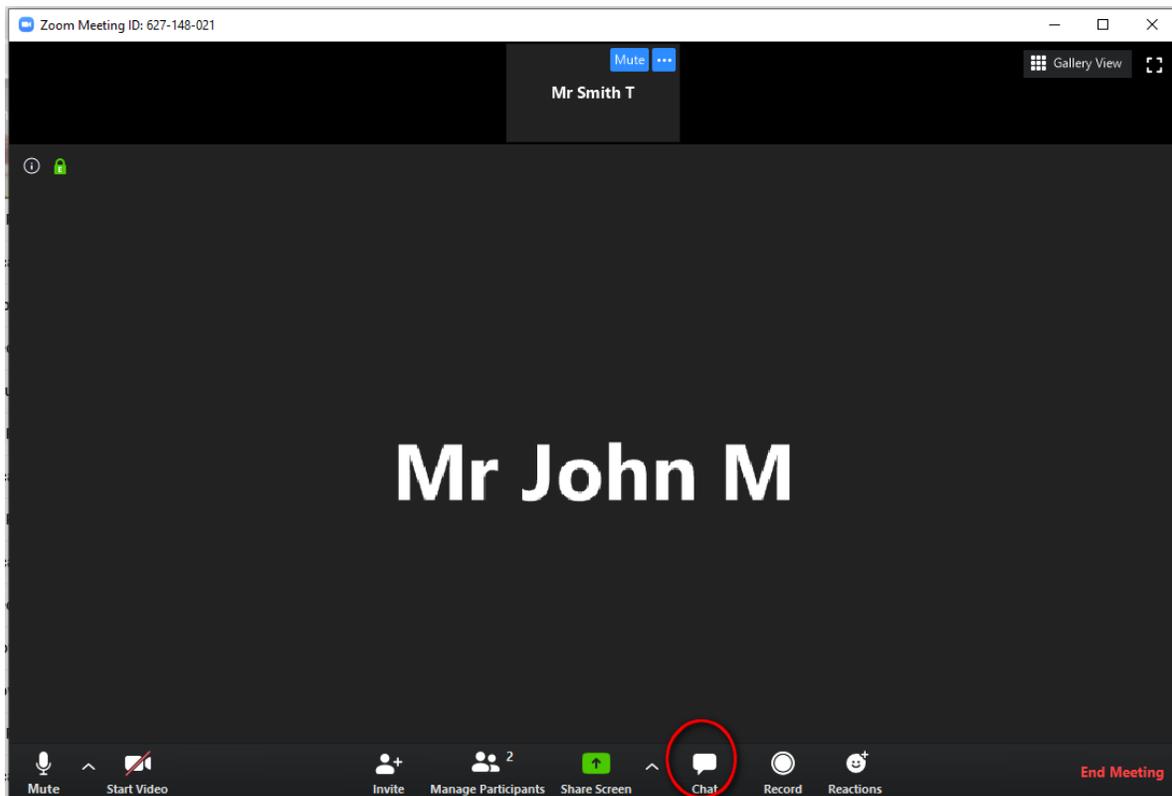


22) Another screen on the cell phone to see the participants



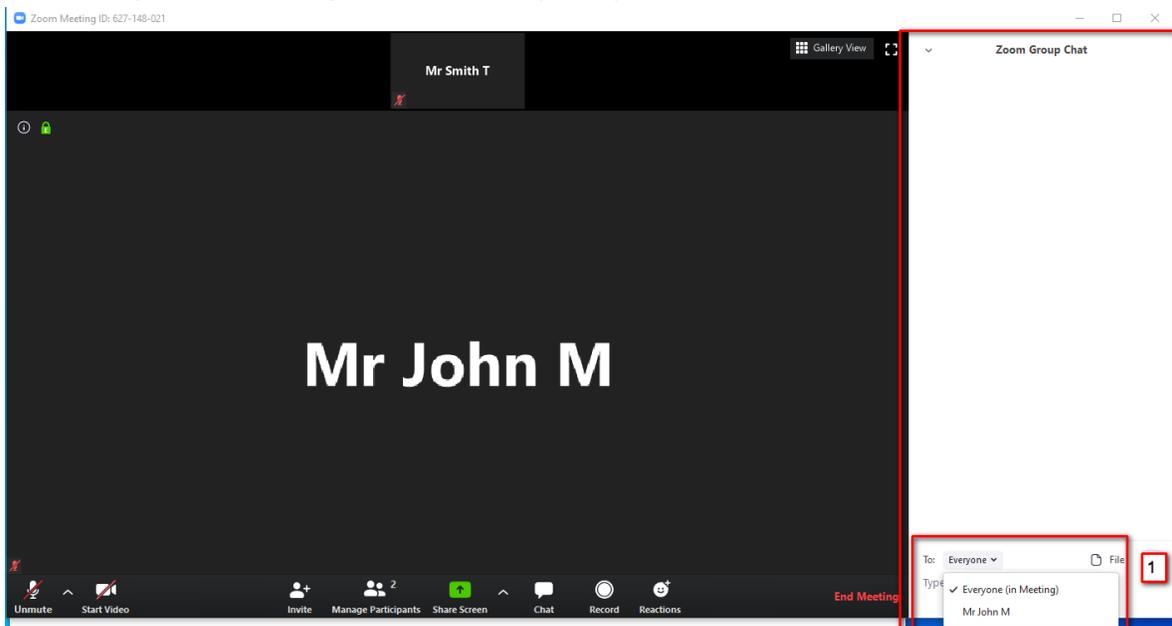
Chat

1) Click **Chat** icon

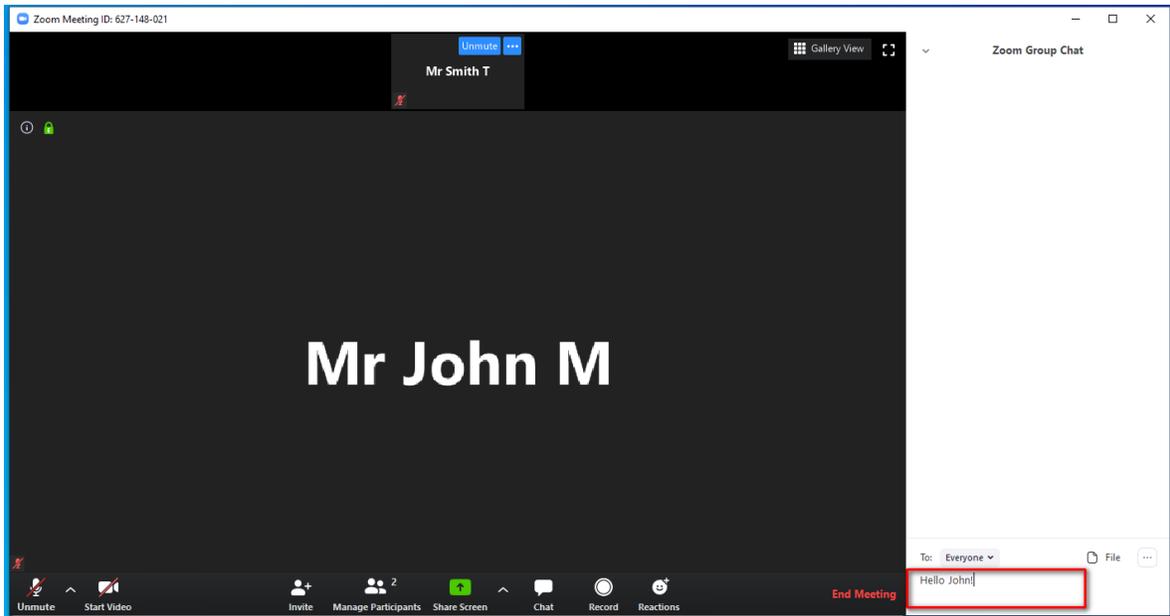


2) At the right **Zoom Group Chat** displayed.

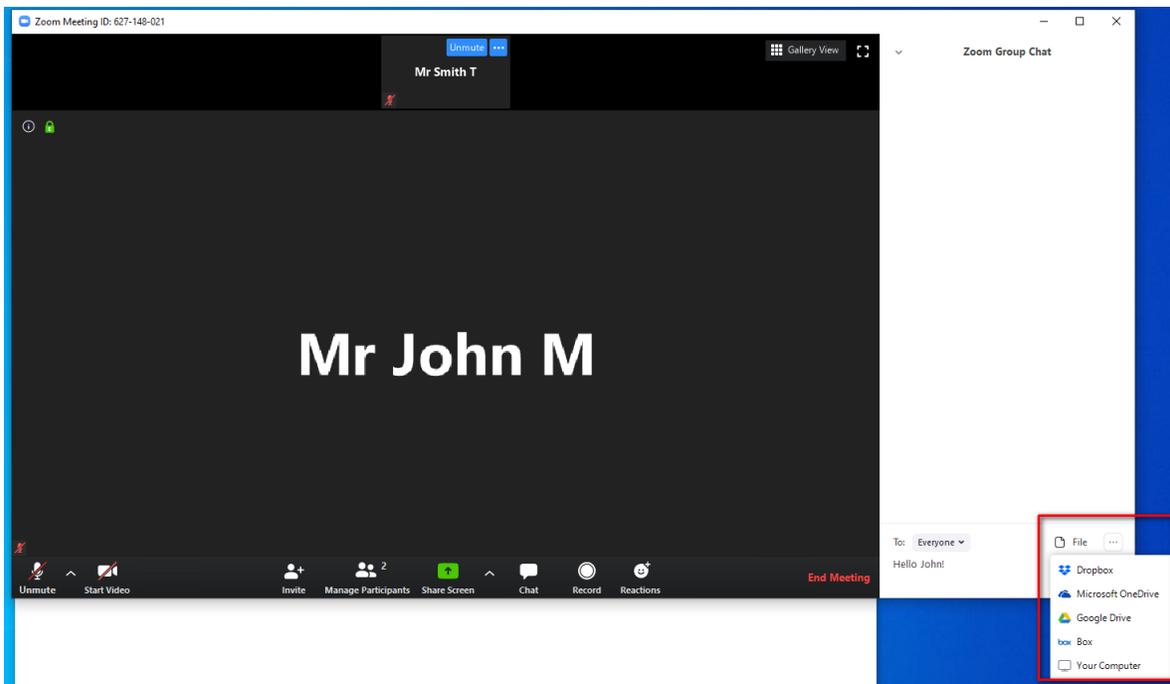
Select **Everyone (in Meeting)** to chat with all participants



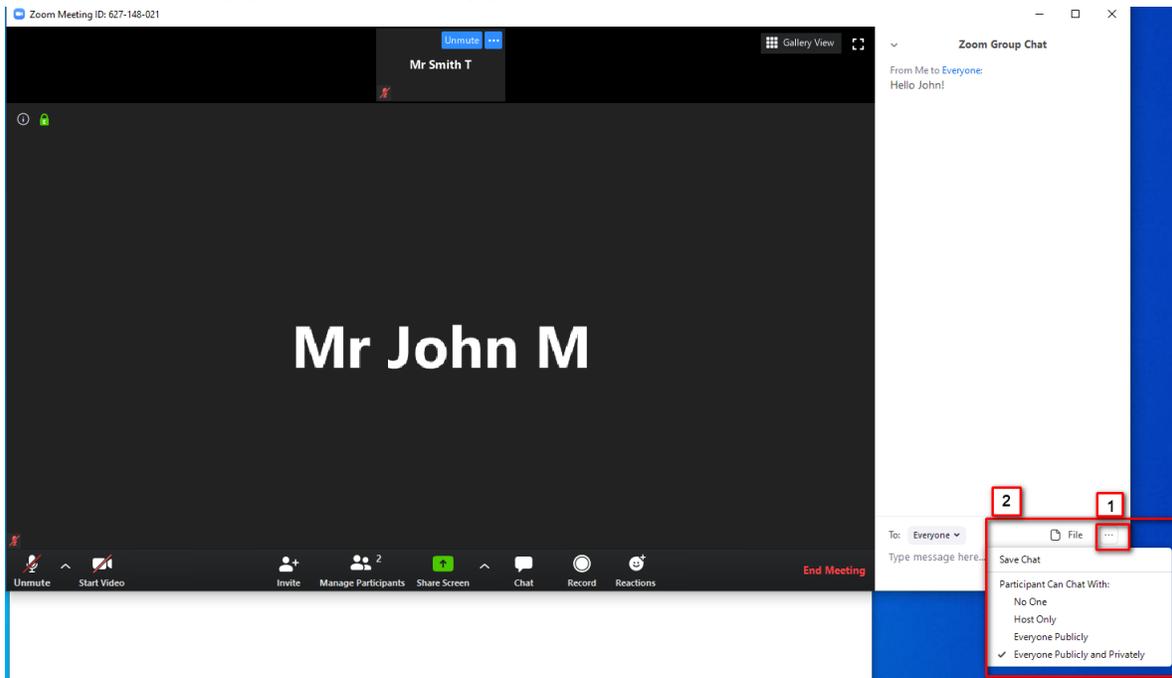
3) Insert the **text** to start the chat and hit **Enter**.



4) Click **File** to see the options to upload files to the chat.

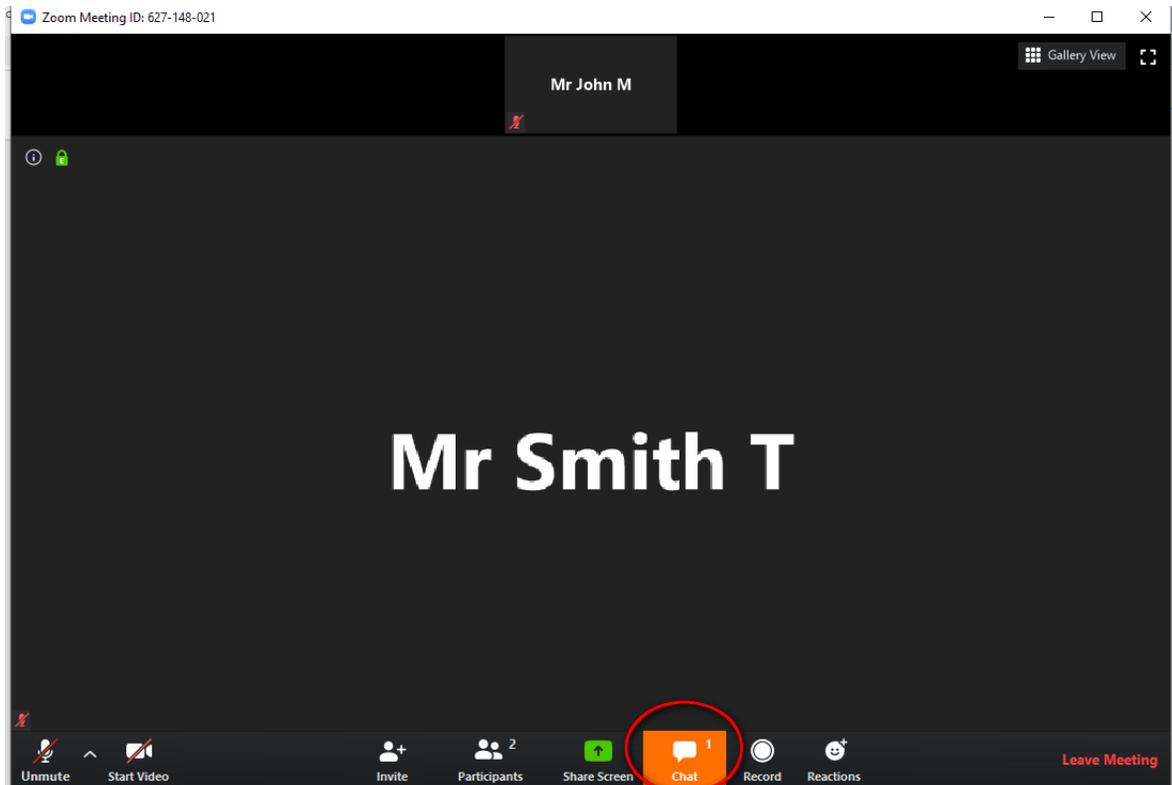


5) Click on the ... (1) to Save the chat (2)

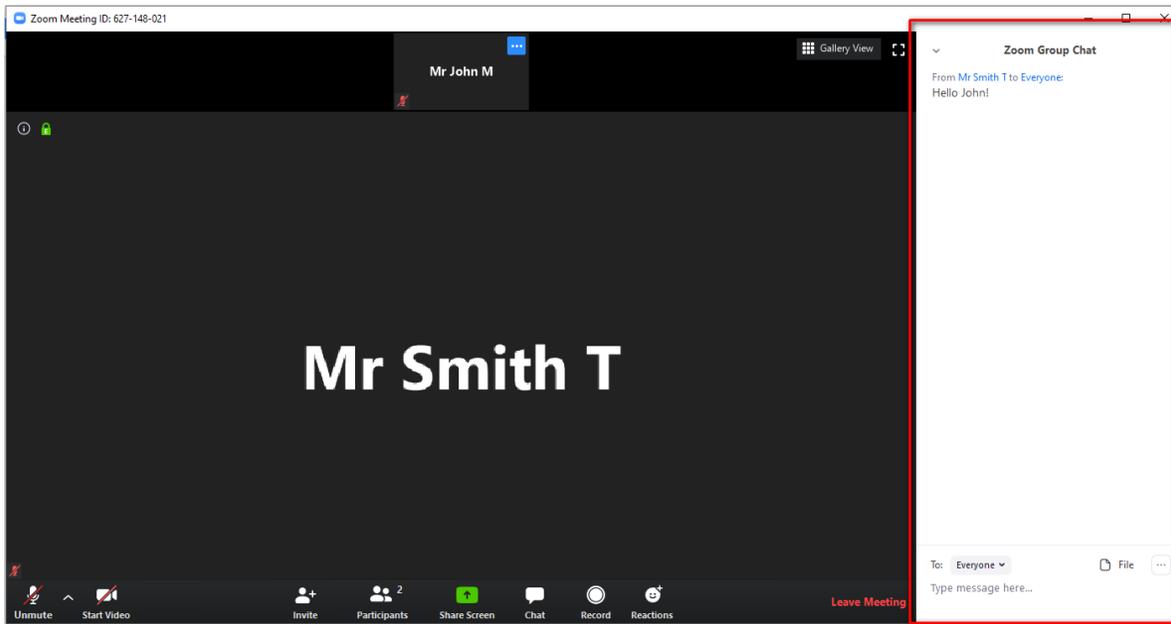


Participant

1) Click Chat icon

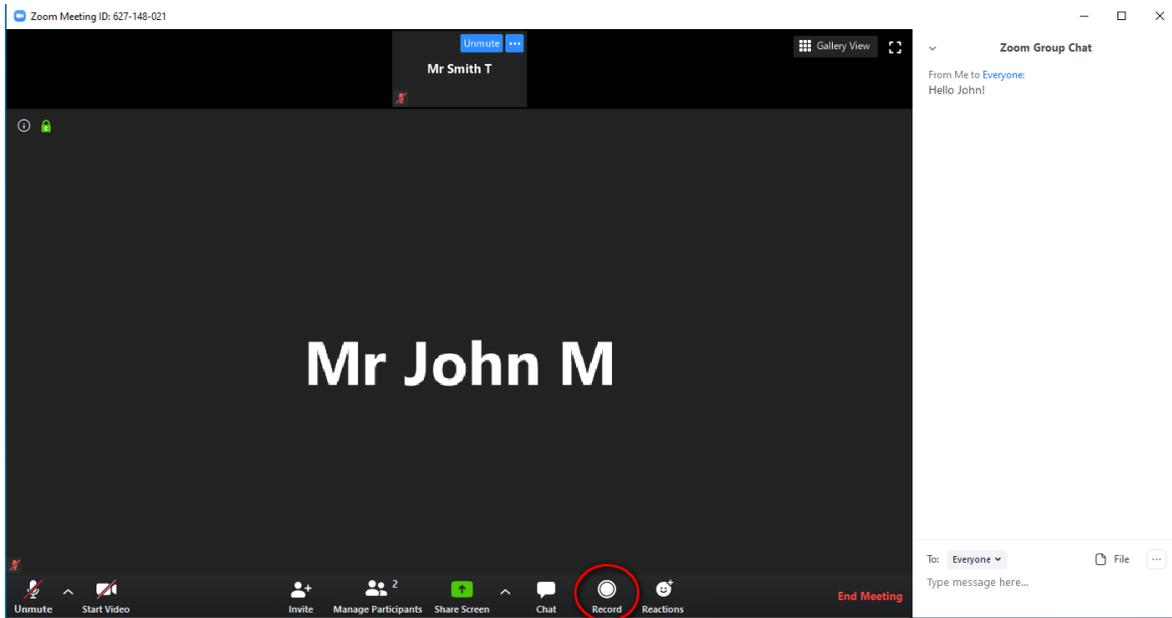


2) Zoom Group Chat displayed.

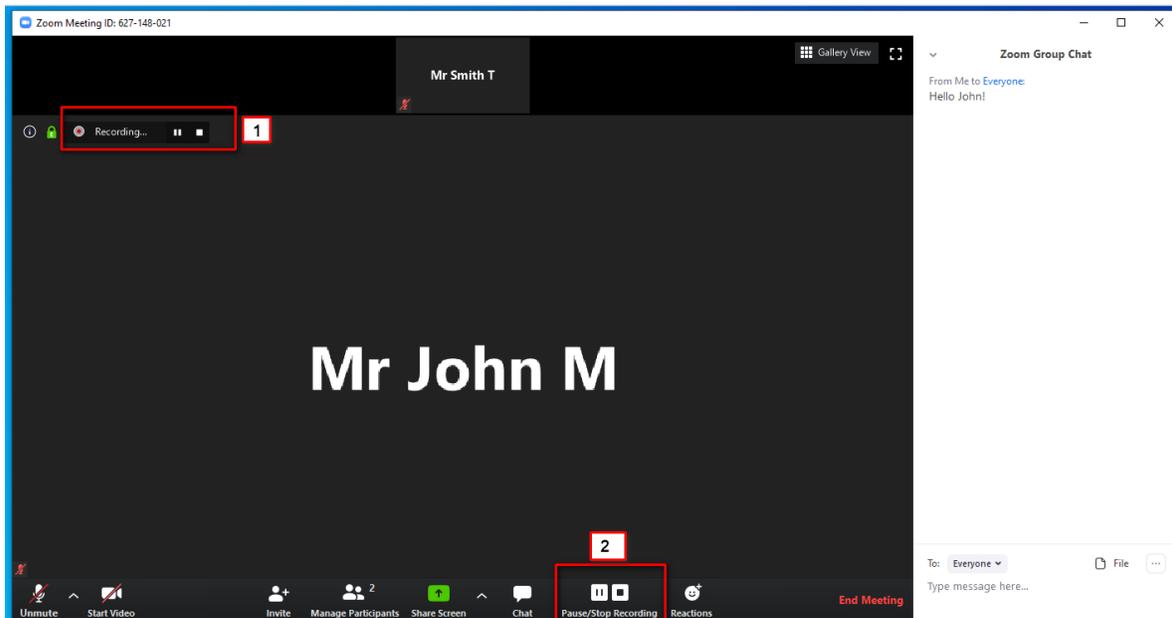


Record

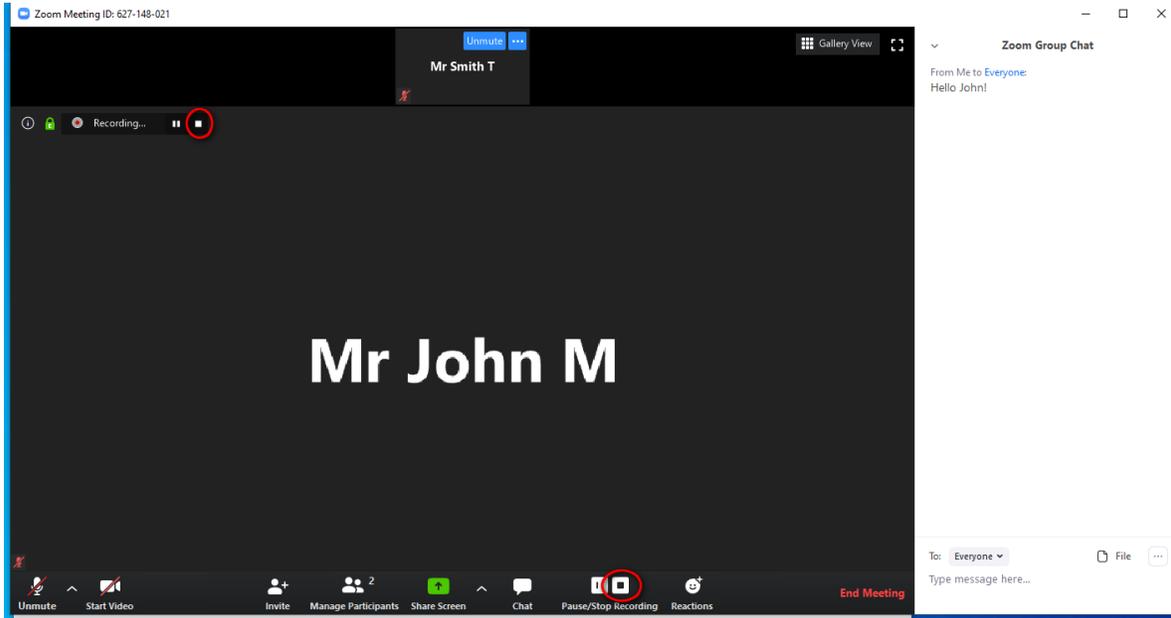
1) Click **Record** icon.



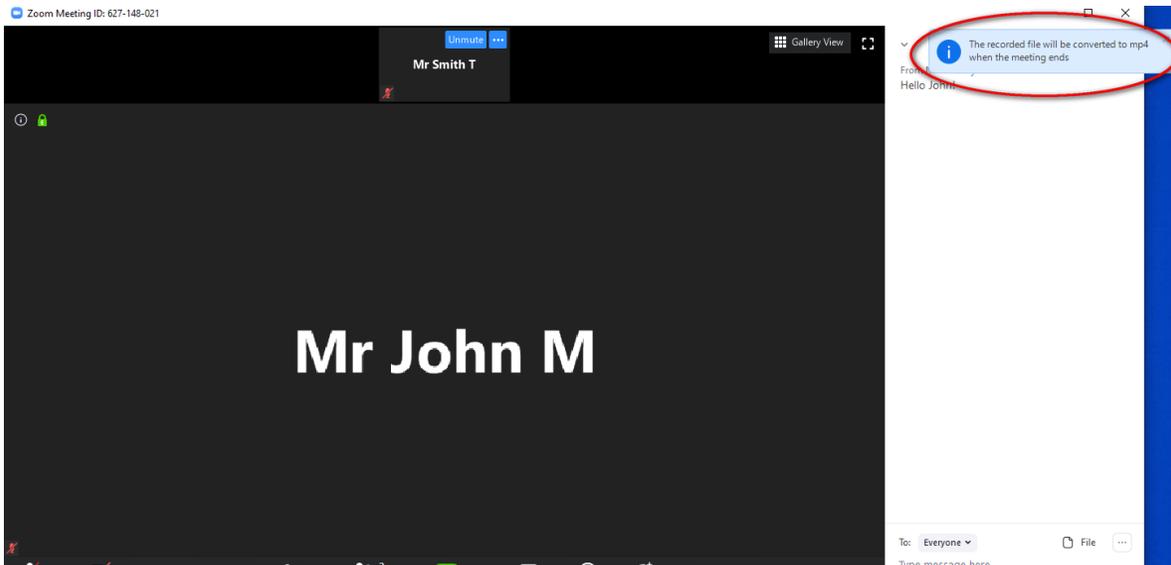
2) Recording buttons (1)(2)



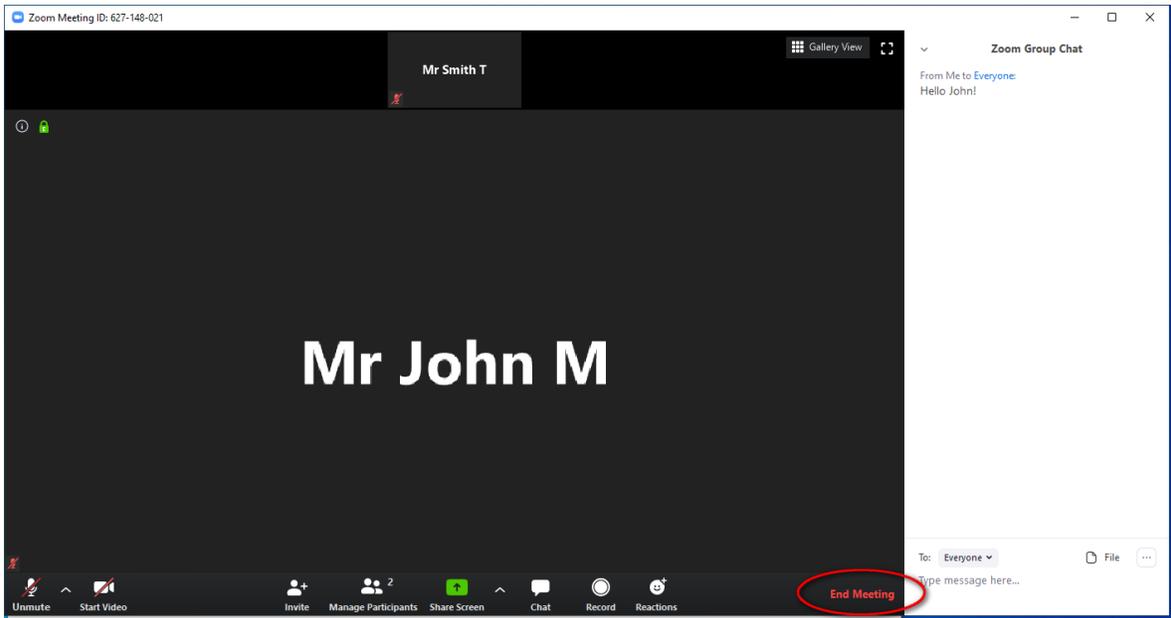
3) Click **Stop**.



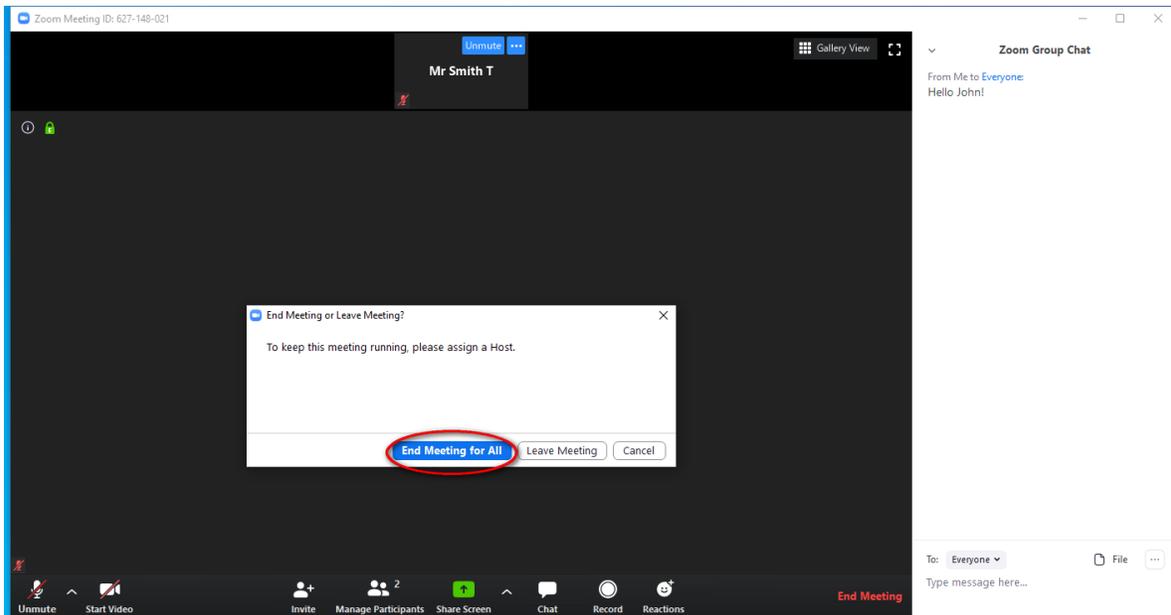
4) A message indicates that the recorded file will be converted when the meeting ends.



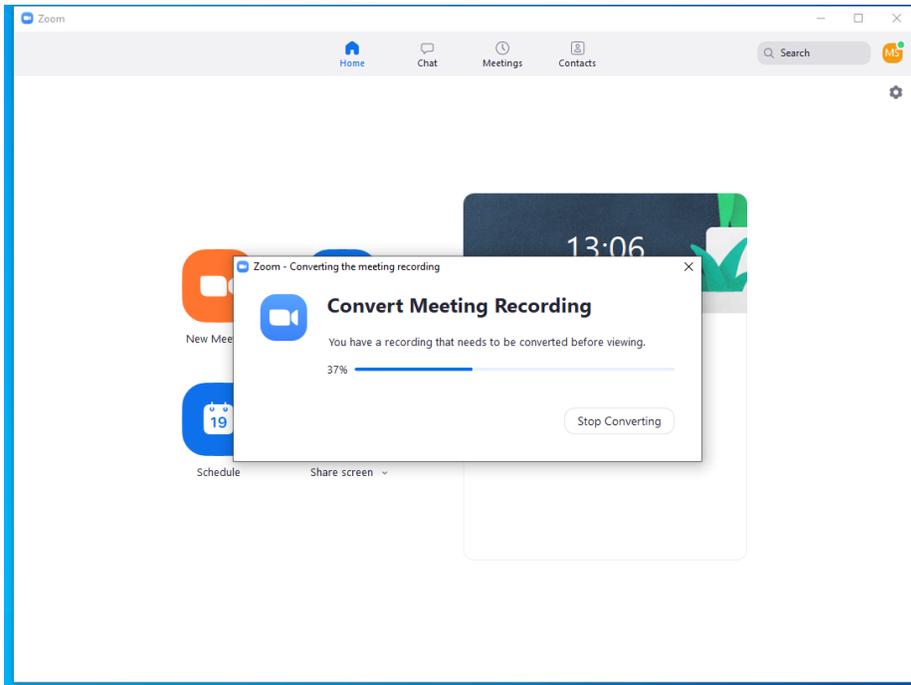
5) Click End Meeting



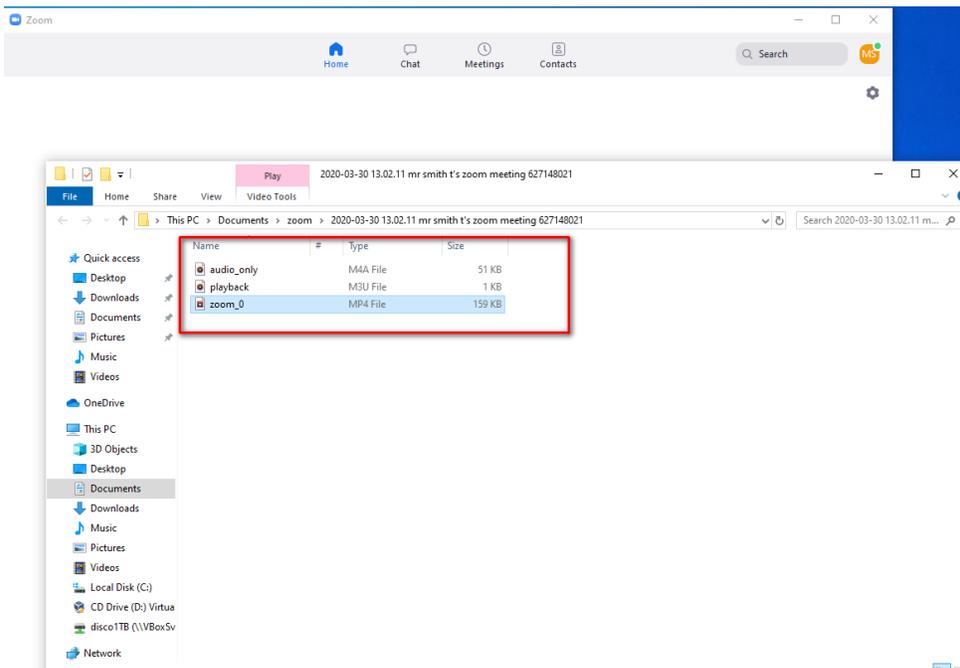
6) Click End Meeting for All



7) Converting record file.



8) Recorded files stored on the Documents folder.



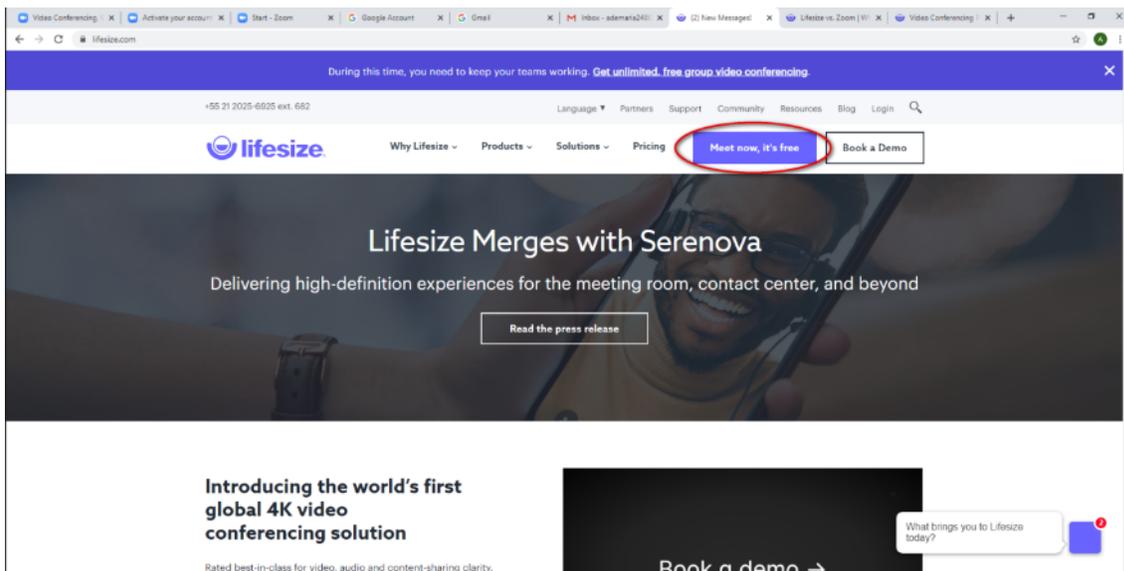
2–LifeSize

Start a new meeting

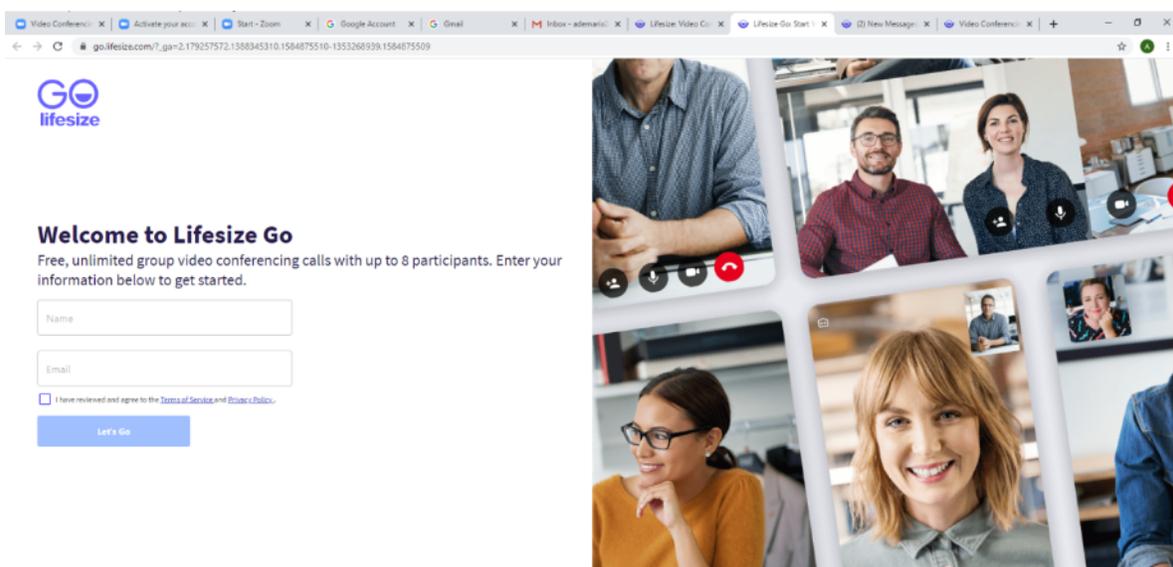
**Follow this section if you never used LifeSize before and you don't have an account.
If you have a LifeSize account and LifeSize installed please refer to: “Download and install LifeSize application manually” step: 10.**

1) Navigate to: <https://lifesize.com>

Click **Meet now, it's free**

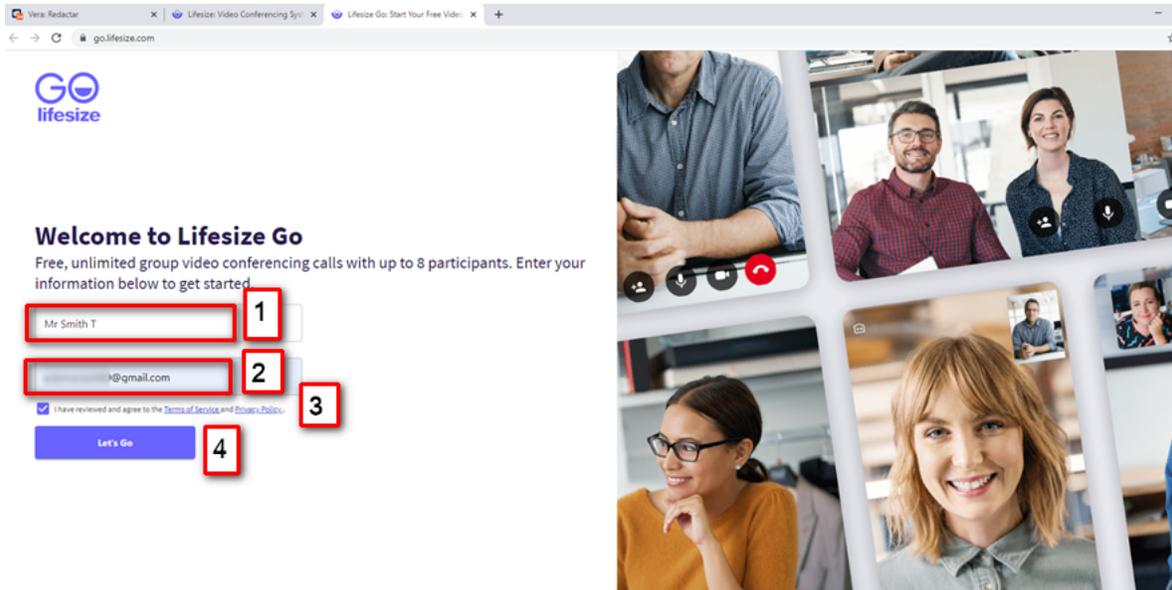


2) Welcome screen



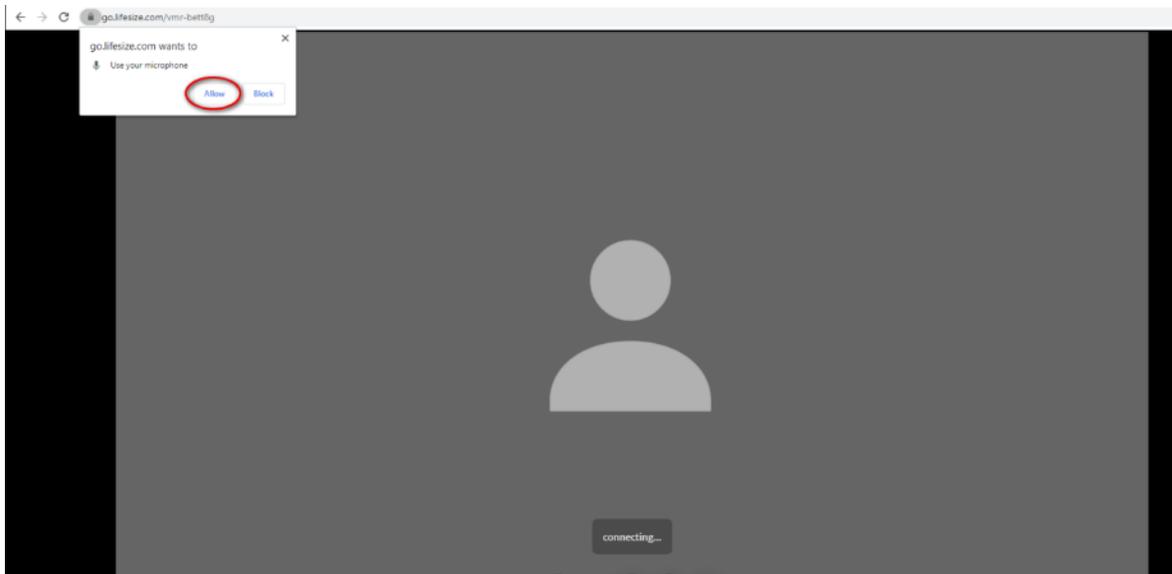
3)

- Enter your **Name (1)**
- Enter your **email (2)**
- Click the checkbox: **I have reviewed and agree to the Terms of Service and Privacy Policy (3)**
- Click **Let's Go (4)**



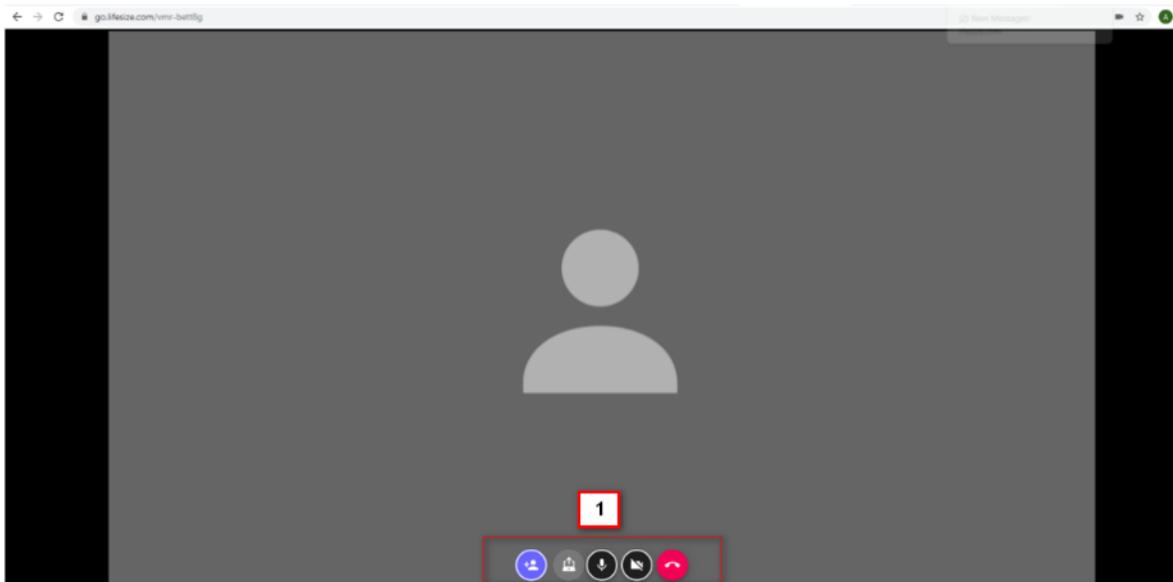
4) New tab will be open on your browser.

Click **Allow** to use your microphone

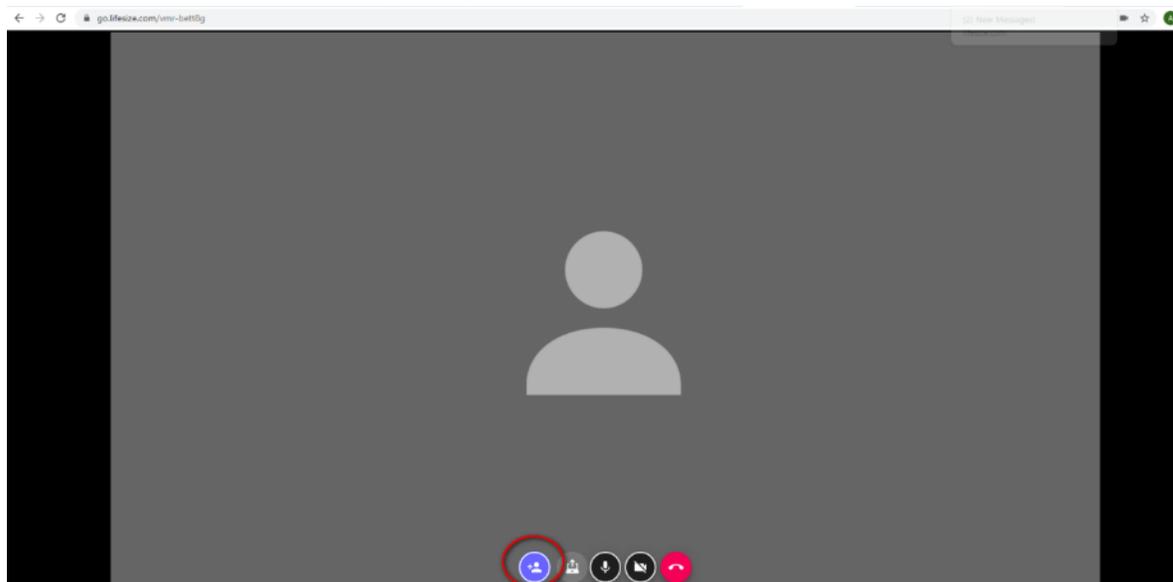


5) Initial screen of **Lifesize** with you as a host and no participants.

– Task bar with options (1)

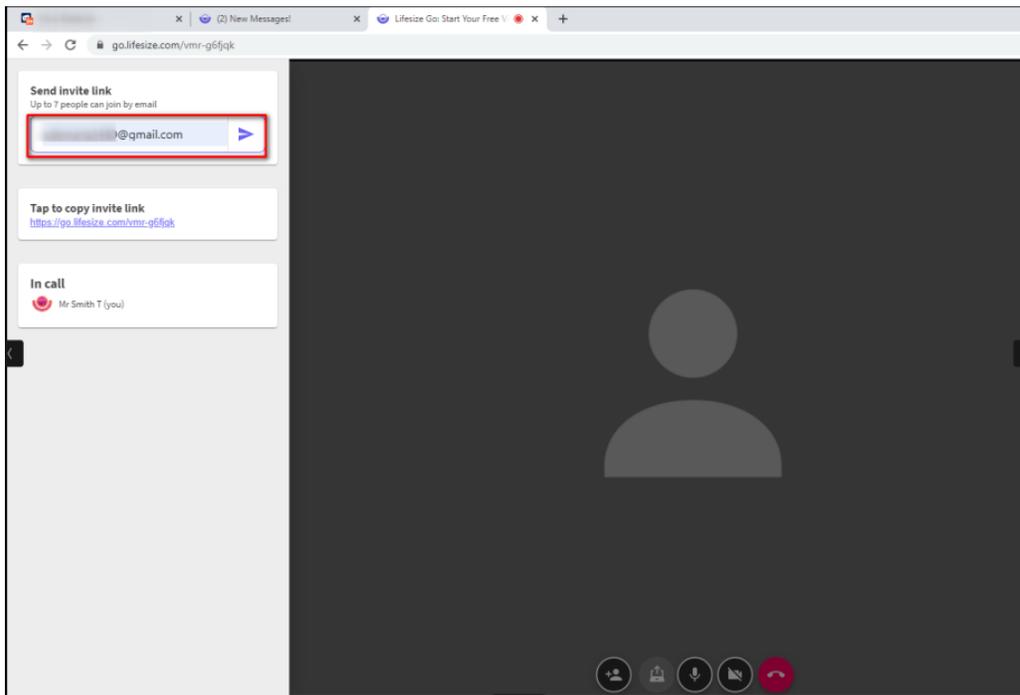


6) Click on the first icon to add participants.



7) On the left side, you can send the invite link.

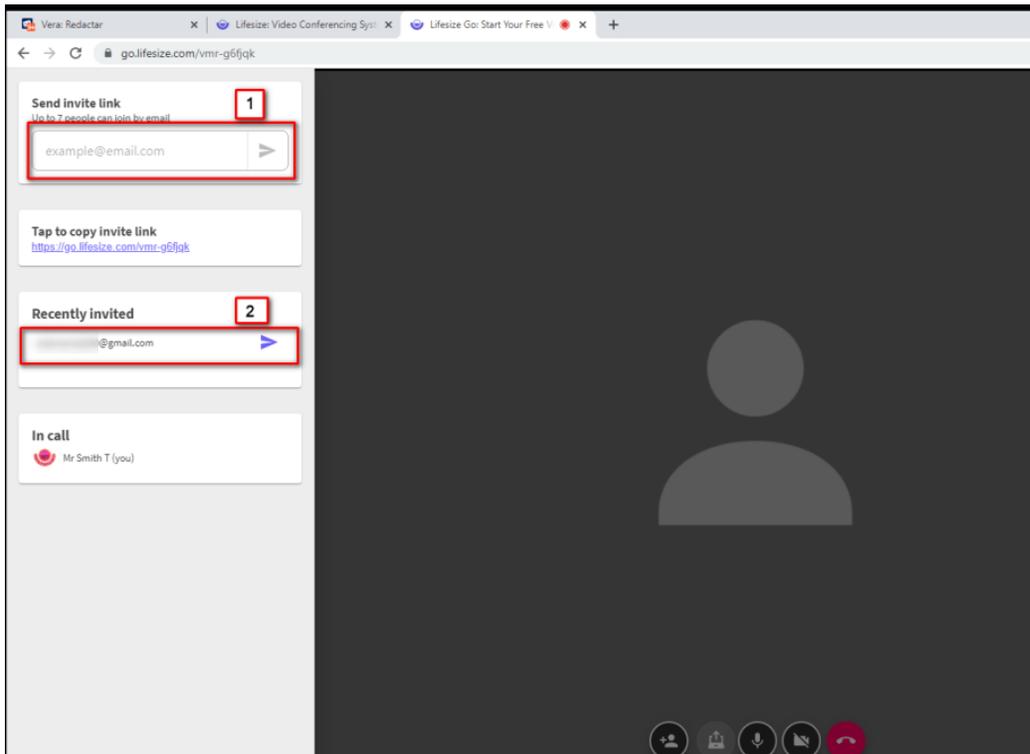
Enter an **email** address of a participant on the text box and click on the **blue arrow** to send the invitation.



8)

- You can enter another **email address** to invite (1)

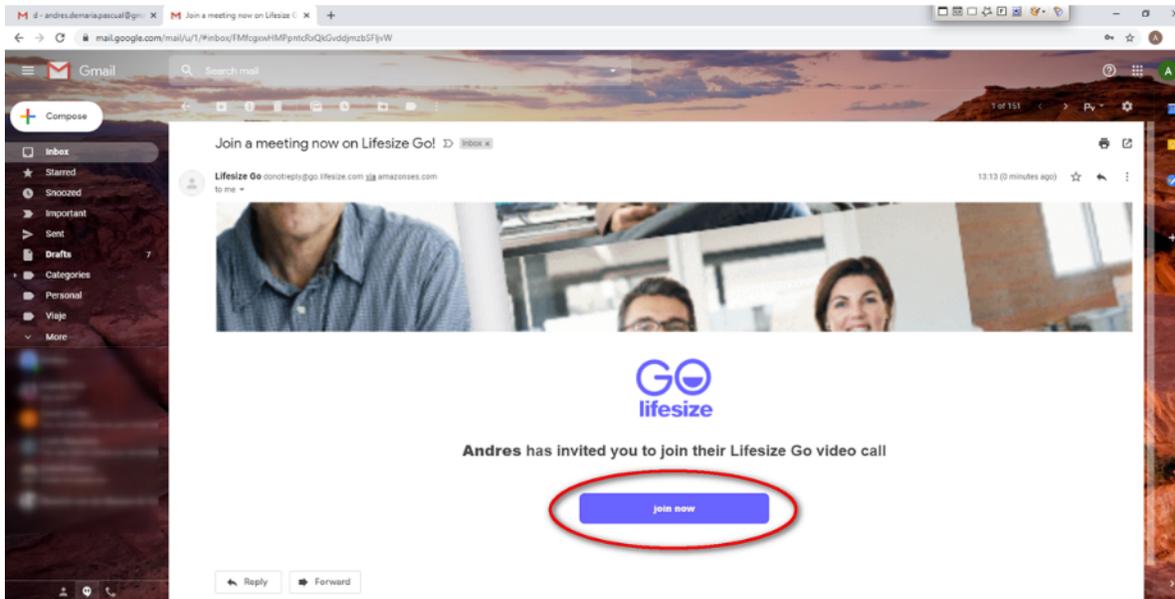
- You can see the **email address** of the people recently invited (2)



Participant

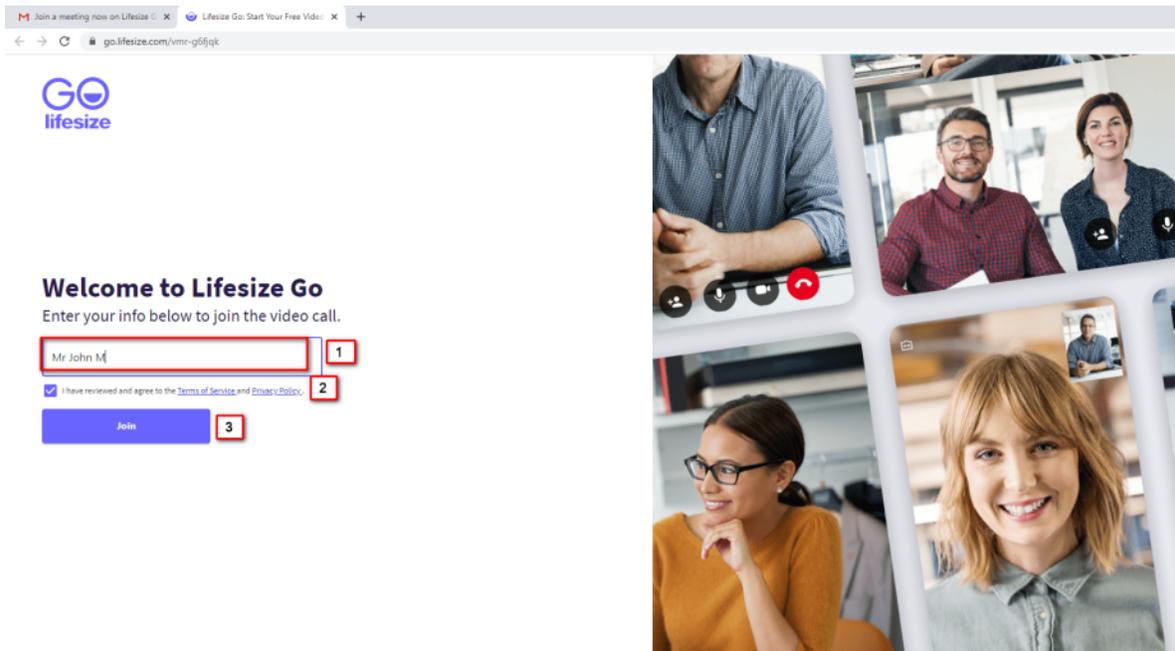
9) The participant invited should receive an email like the image.

Click **Join now**

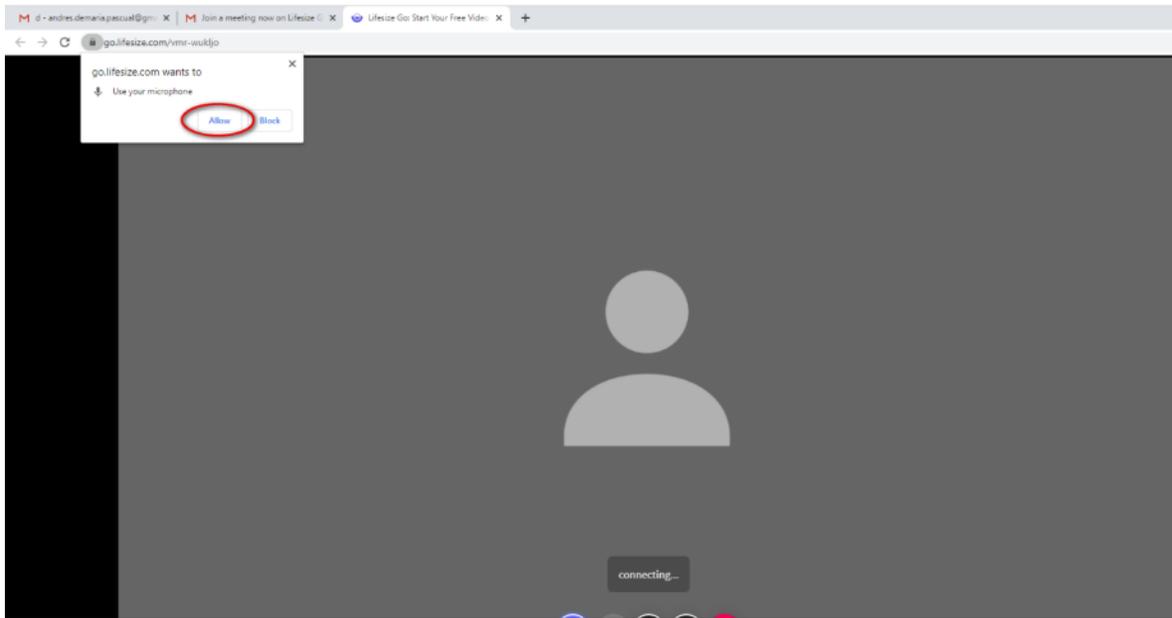


10) New tab will be open on your browser.

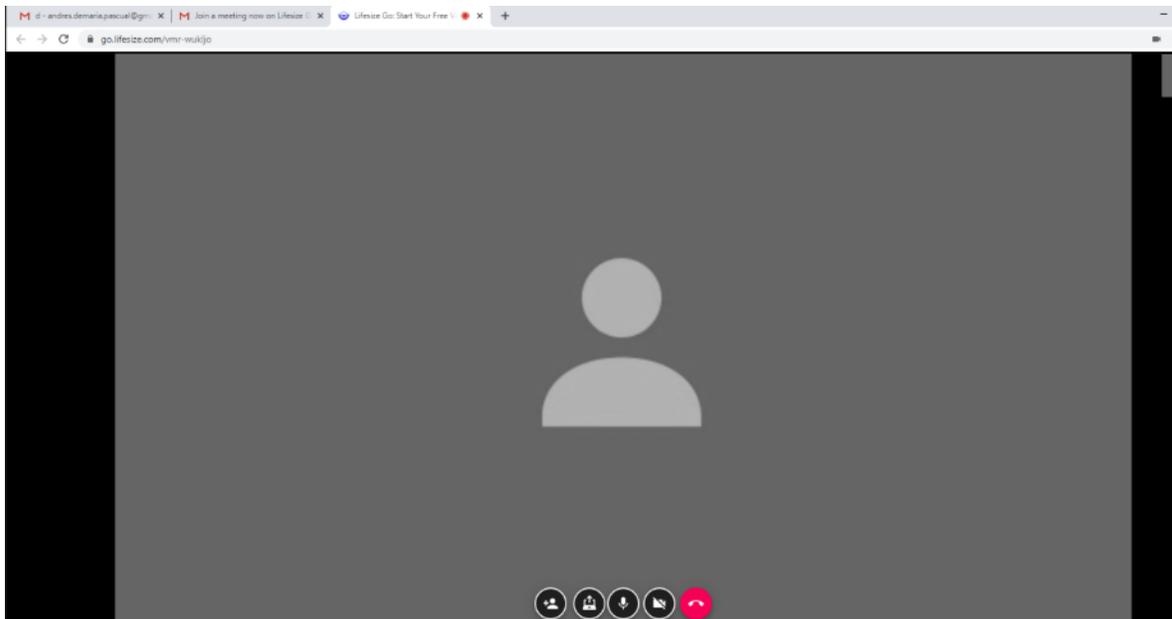
- Enter your **Name (1)**
- Click the checkbox: **I have reviewed and agree to the Terms of Service and Privacy Policy (2)**
- Click **Join (3)**



11) Click **Allow** to use your microphone



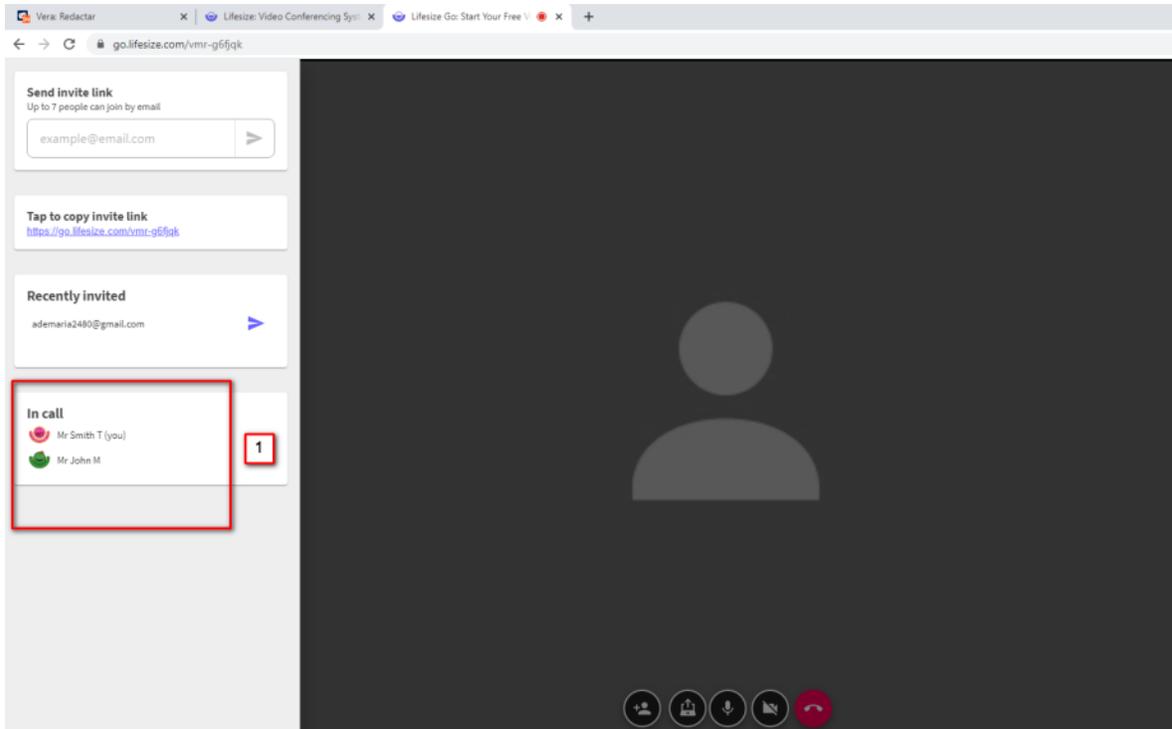
12) You have joined the meeting.



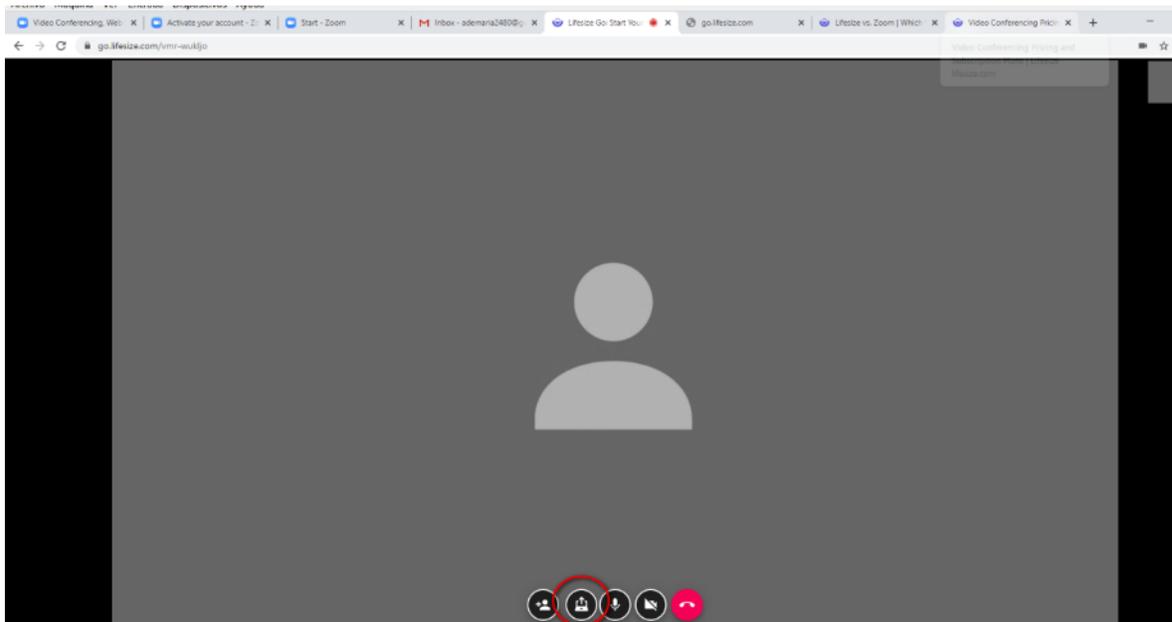
Host

13) On the host you can see the participants in the call (1)

In this case there are two persons in the meeting: the host and one participant.



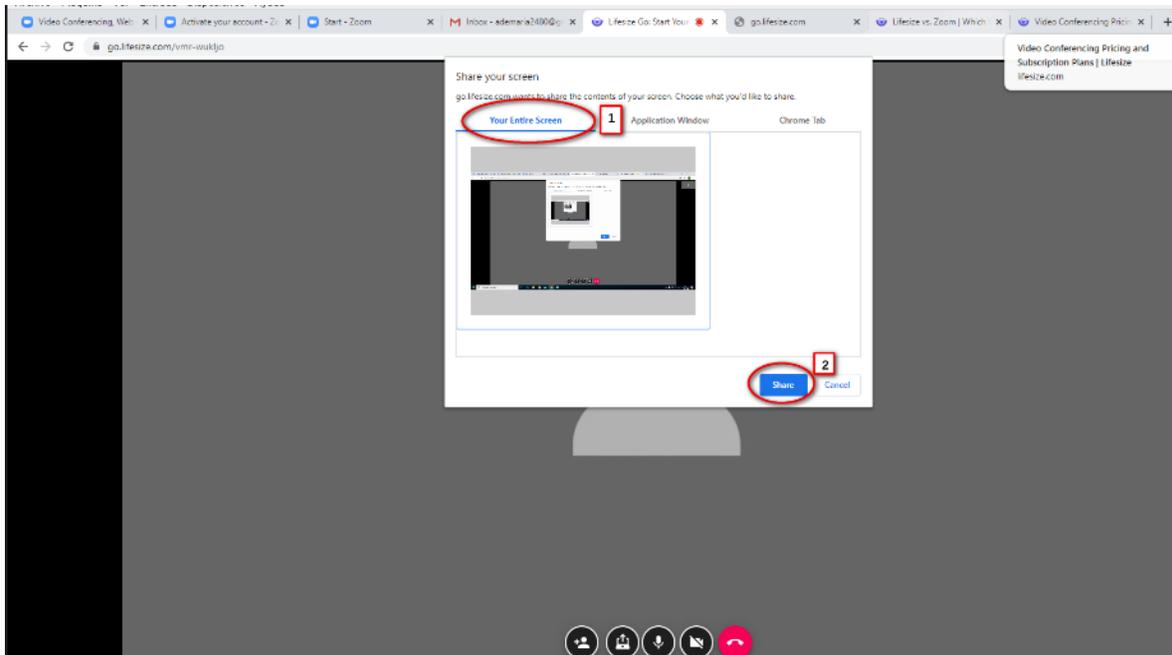
14) As host, click the second icon on the task bar options to **share the screen**.



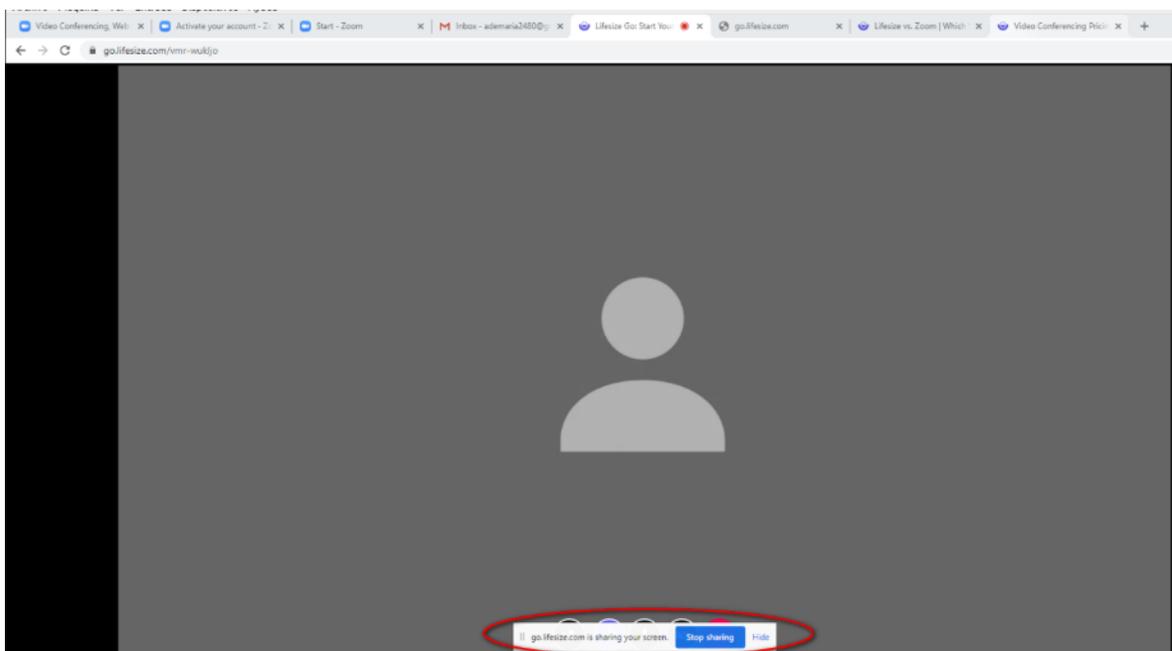
15)

– Select the first tab: **Your Entire Screen (1)**

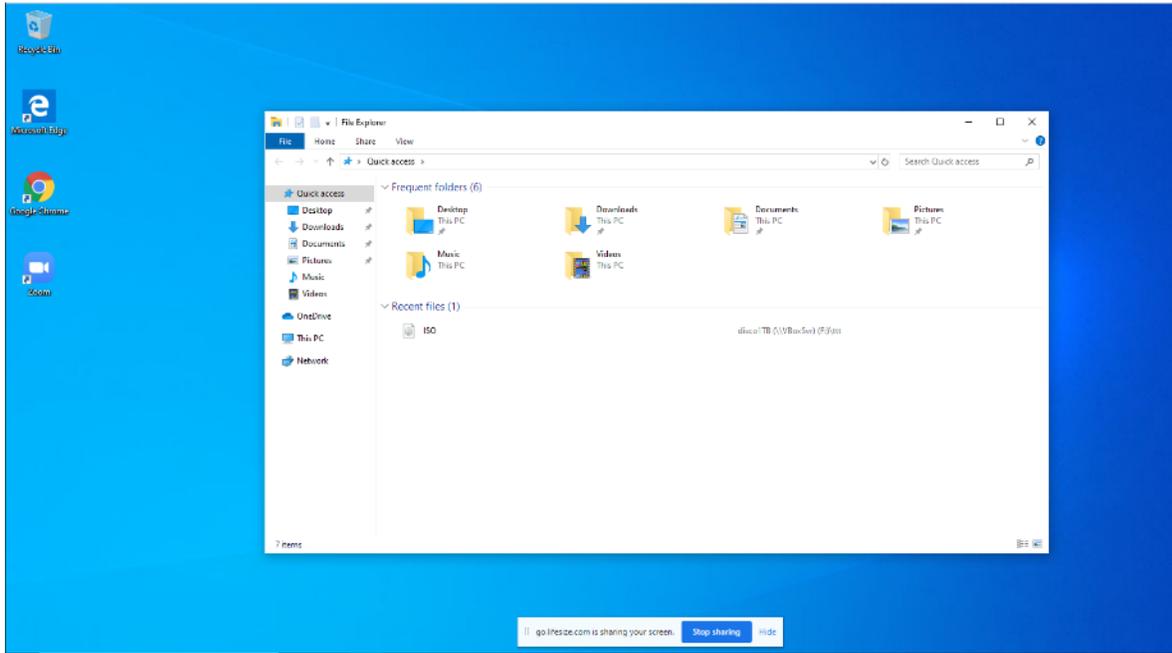
– Click **Share (2)**



16) A message at the bottom advice you that you are sharing your screen, you can **Stop Sharing** or **Hide** the advice.

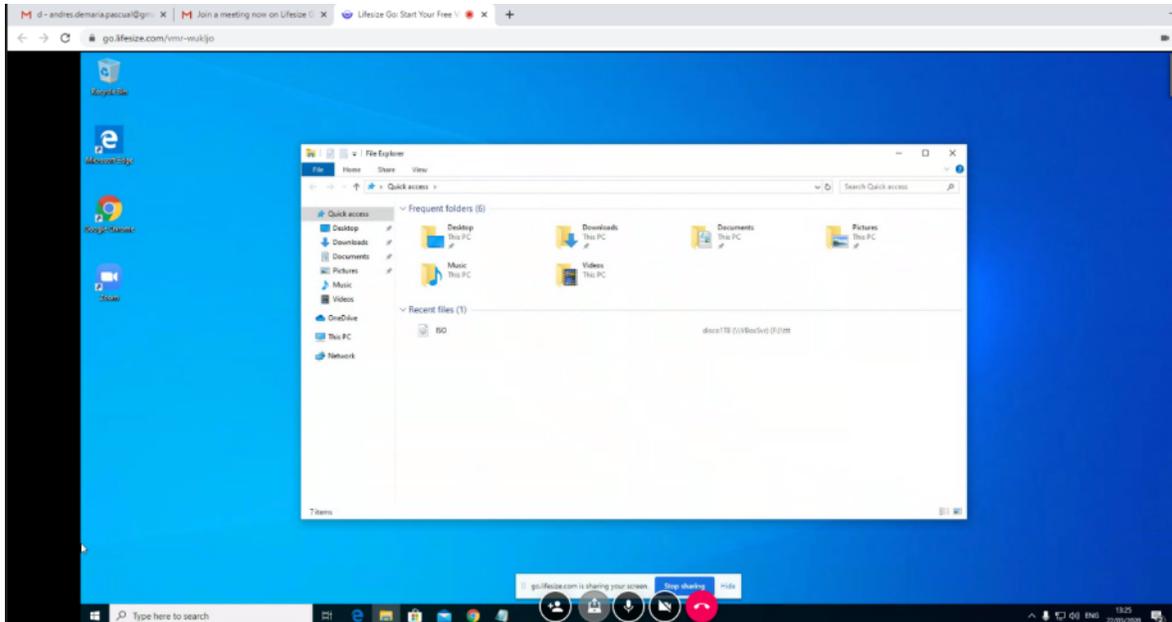


17) Minimize your browser and open the File explorer for example.



Participant

18) Now the participant is watching the host screen with the File explorer opened.

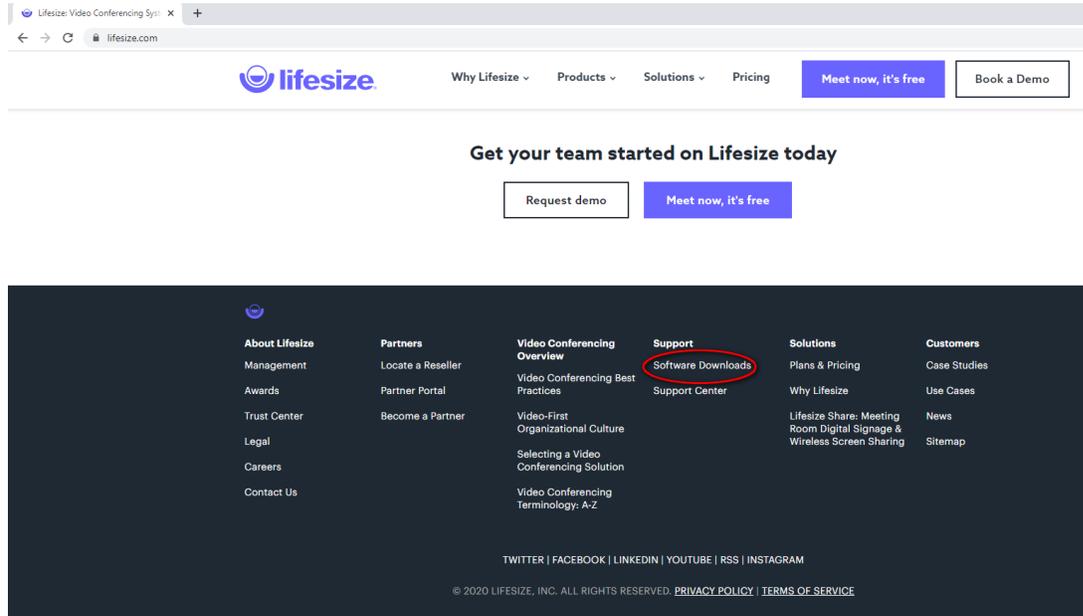


Download and install LifeSize application manually

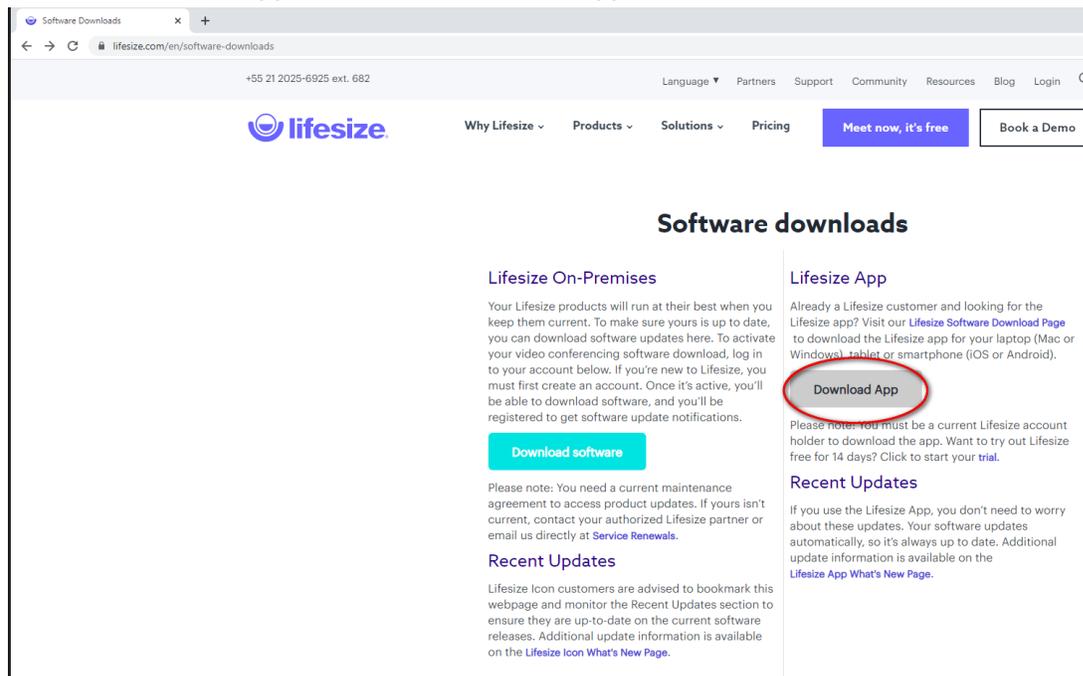
Follow this section if you have a LifeSize account created and you want to install the application on your computer.

1) Navigate to <https://lifesize.com>

Go to the bottom of the page on the **Support** section click **Software Downloads**



2) On the **LifeSize App** section click **Download App**



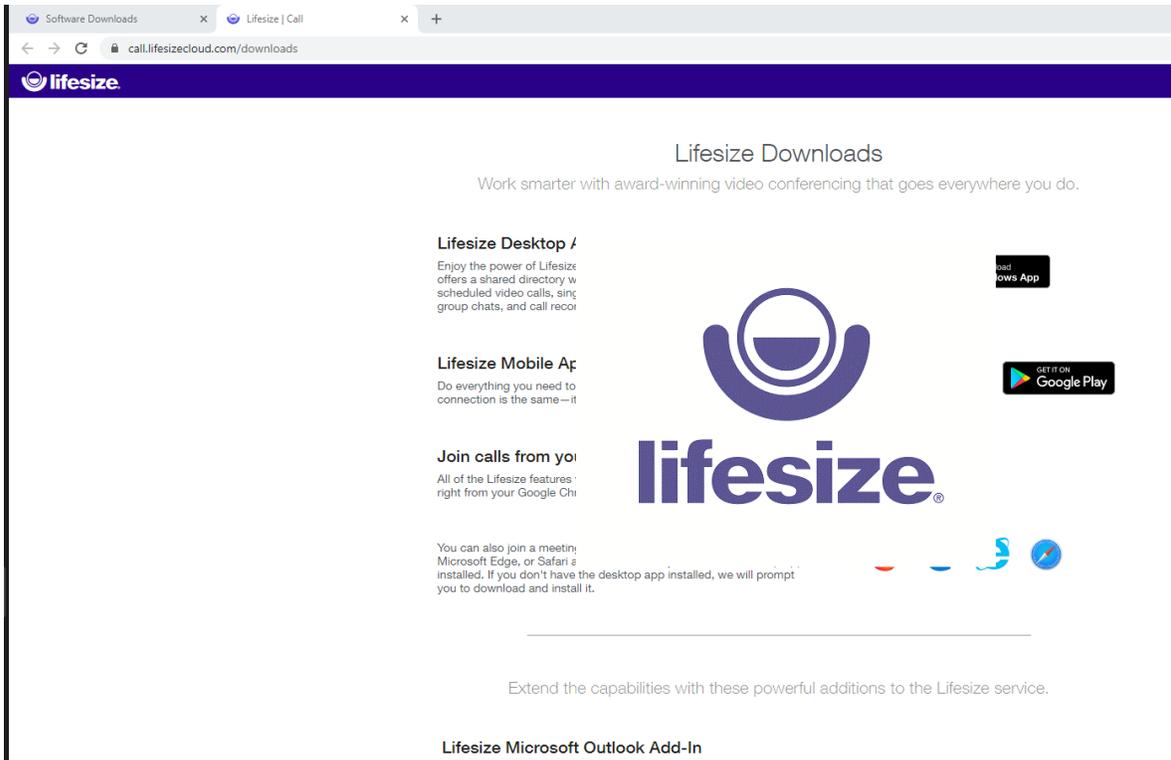
3) Click Download Windows App

The screenshot shows a web browser window with two tabs: 'Software Downloads' and 'Lifesize | Call'. The address bar shows 'call.lifesizecloud.com/downloads'. The page header features the Lifesize logo. The main content area is titled 'Lifesize Downloads' with the tagline 'Work smarter with award-winning video conferencing that goes everywhere you do.' Below this, there are three sections: 'Lifesize Desktop Apps', 'Lifesize Mobile Apps', and 'Join calls from your browser'. The 'Lifesize Desktop Apps' section includes a 'Download Windows App' button, which is circled in red. The 'Lifesize Mobile Apps' section has buttons for 'Download on the App Store' and 'GET IT ON Google Play'. The 'Join calls from your browser' section lists supported browsers: Chrome, Firefox, Internet Explorer, Microsoft Edge, and Safari. At the bottom of the page, there is a footer with the text 'Extend the capabilities with these powerful additions to the Lifesize service.'

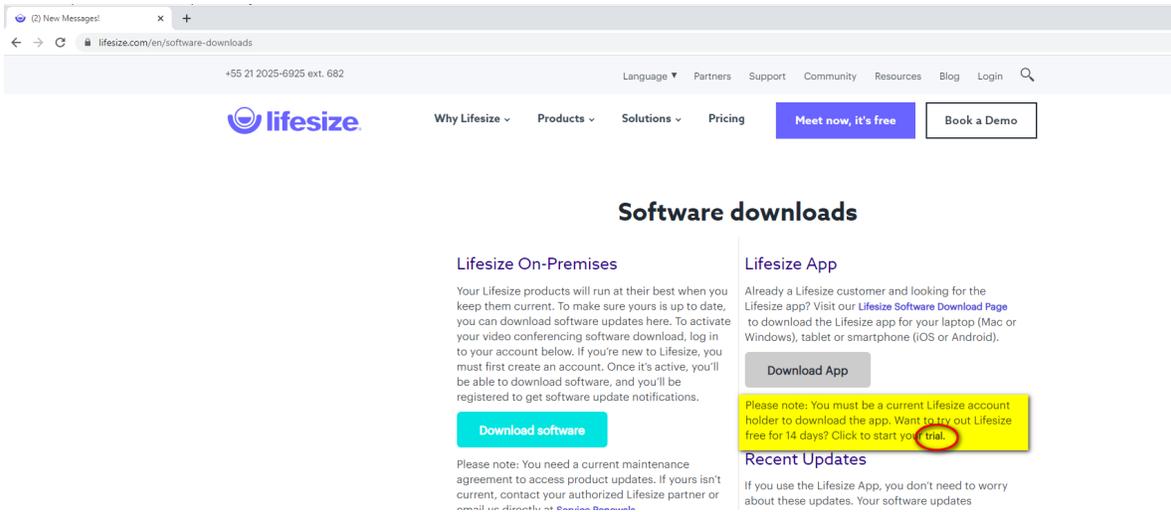
4) LifeSize Installer download in progress.

This screenshot is identical to the one above, showing the 'Lifesize Downloads' page. However, a download bar is visible at the bottom of the browser window. The bar shows a file named 'Lifesize Setup 2.21...exe' with a size of '2.4 GB, 1 MB, 4 mins left'. The file name and the download bar itself are circled in red.

5) When download process finish, click on the file to start the installation.



6) While installing LifeSize, go back to **Software Download** page and click on trial link



7) Fill your information

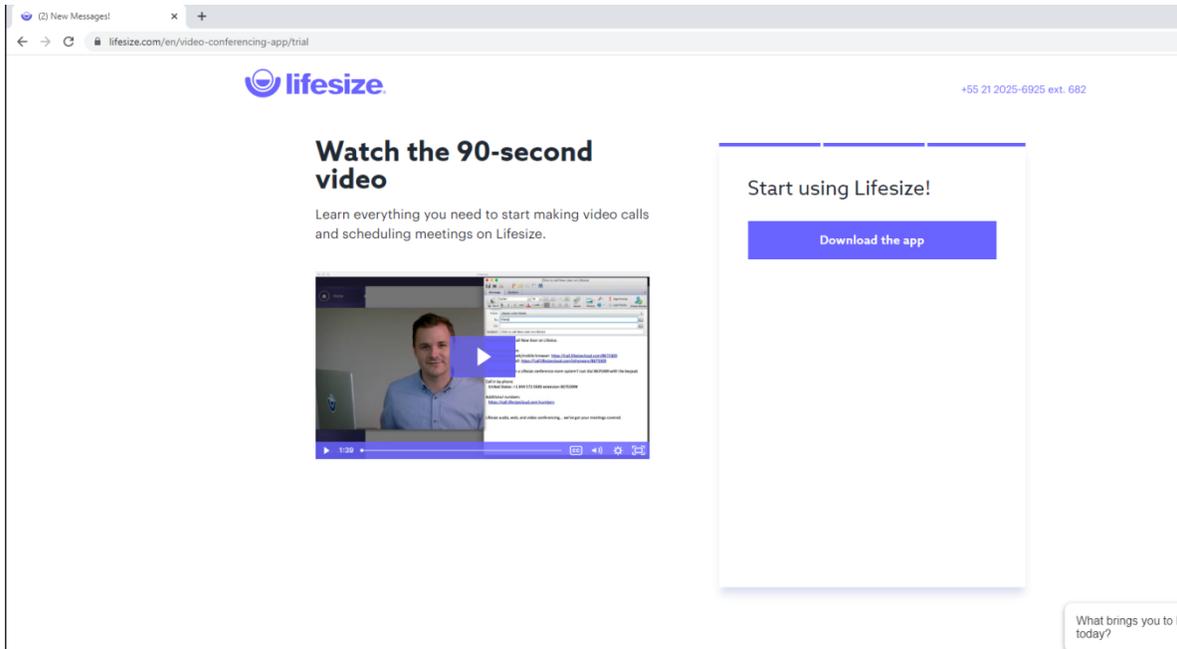
- Enter your **Full Name (1)**
- Enter your **Company Name (2)**
- Enter your **Work Email (3)**
- Enter your **Phone Number (4)**
- Click **Continue (5)**

The screenshot shows the Lifesize website's registration page. The header includes the Lifesize logo and a phone number: +55 21 2025-6925 ext. 682. The main heading is "Try our video conferencing app free for 14 days". Below this is a paragraph describing the app's features and a note: "No credit card required." To the right is a registration form titled "Let's get started" with the following fields: "Full Name*" (containing "Mr Smith T", callout 1), "Company Name*" (containing "ACME", callout 2), "Work Email*" (containing "@gmail.com", callout 3), and "Phone Number*" (callout 4). A blue "Continue" button is at the bottom of the form (callout 5). Below the form is a link to "Privacy Policy and Terms". At the bottom right, there is a small box with the text "What brings today?".

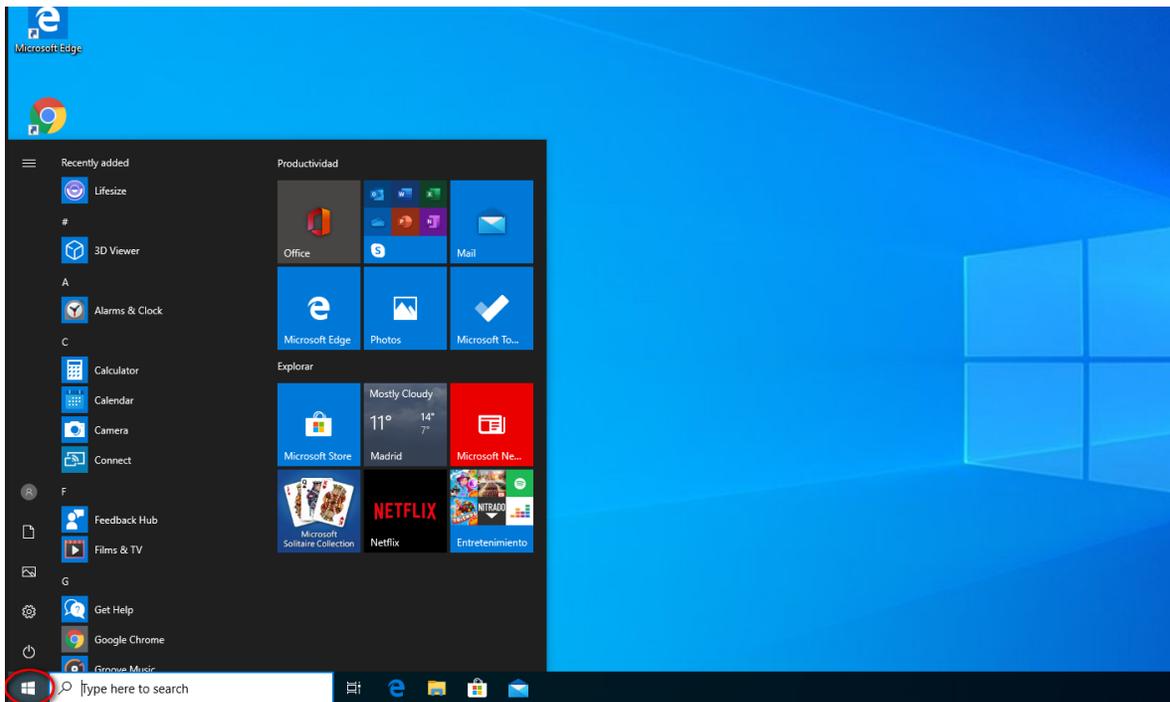
- 8) Create your password
- Enter your **password (1)**
- Confirm your **password (2)**
- Click **Register (3)**

This screenshot shows the same Lifesize website but with the registration form titled "Create your password". The heading "Try our video conferencing app free for 14 days" and the descriptive text remain the same. The form fields are: "Password (Min 8 chars)*" (containing "*****", callout 1), "Confirm Password*" (containing "*****", callout 2), and a blue "Register" button (callout 3). A "Go back" button is located below the "Register" button. The rest of the page layout, including the Lifesize logo, phone number, and "What brings today?" box, is identical to the previous screenshot.

9) Registration finished



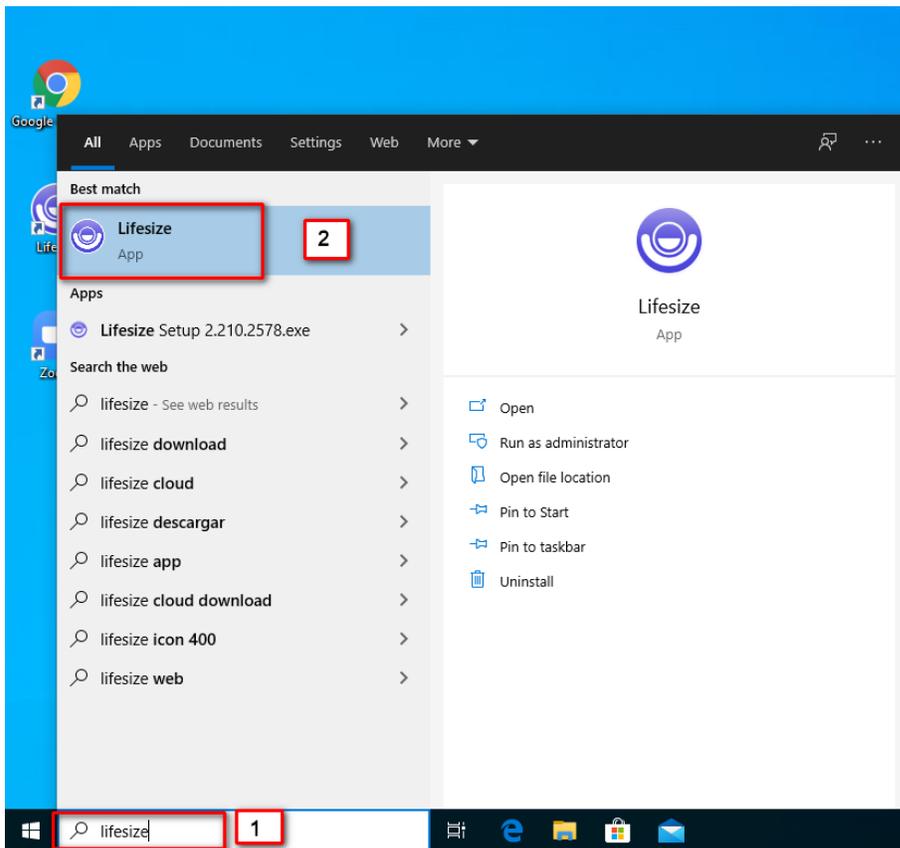
10) Click on the **Windows** icon at the left corner



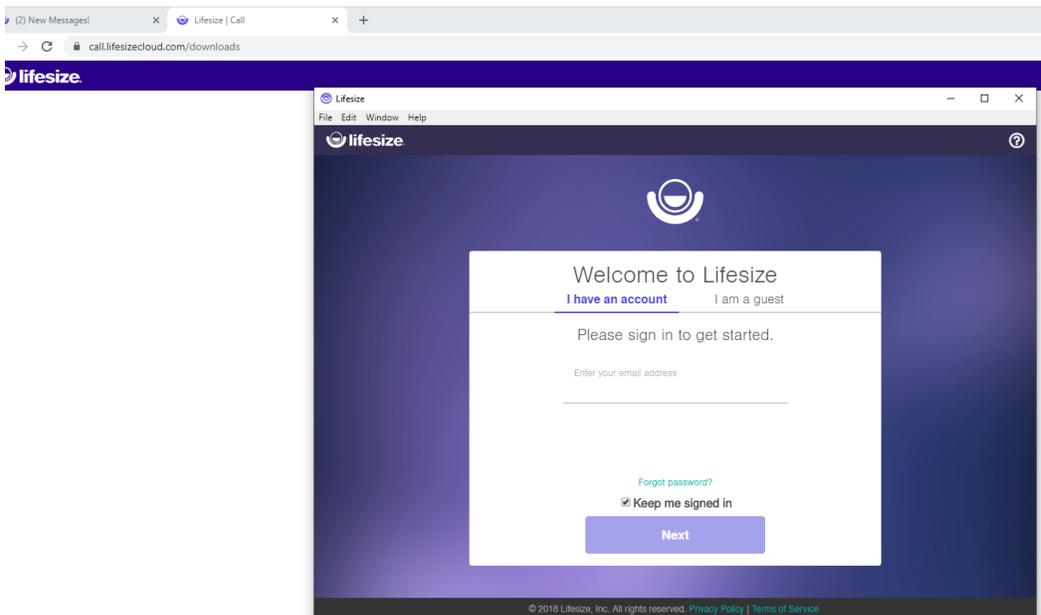
11)

- Type **lifesize** (1)

- Click **Lifesize** (2)

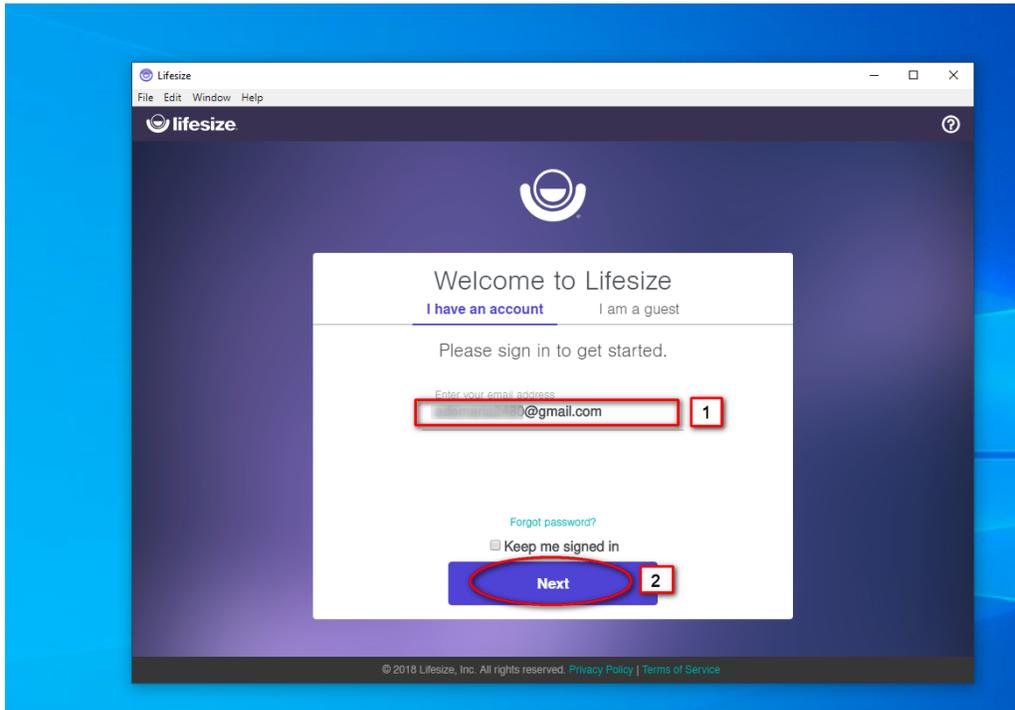


12) LifeSize Welcome screen.



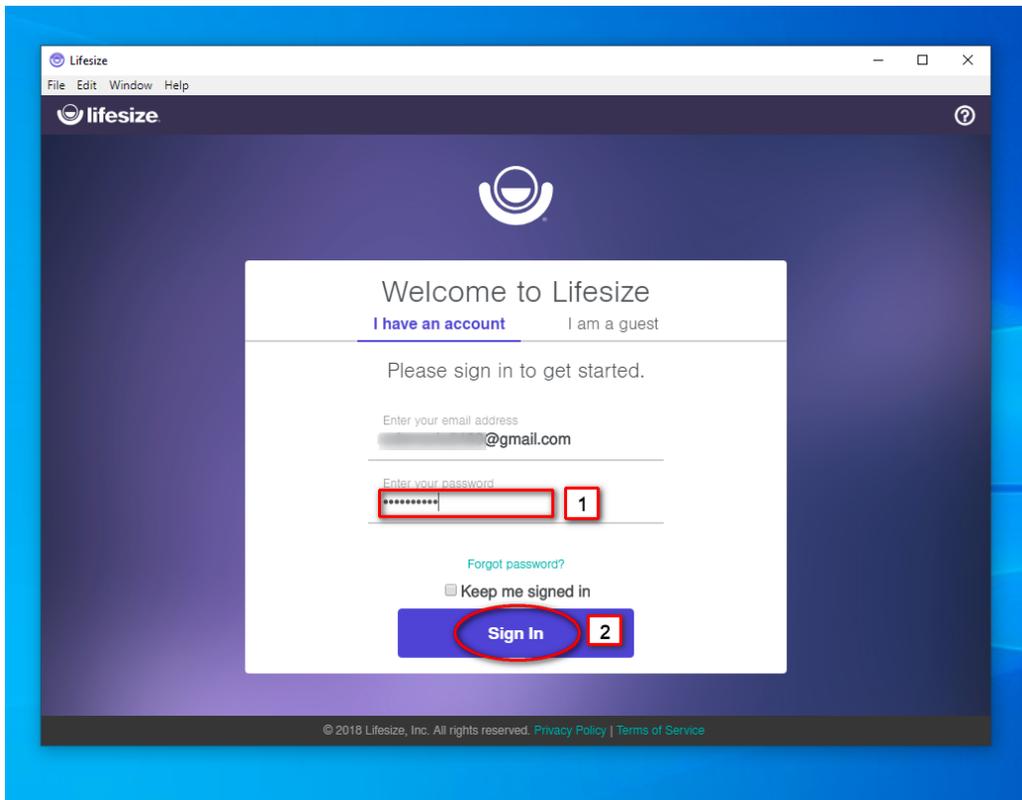
13) Enter your **email address (1)**

Click **Next (2)**

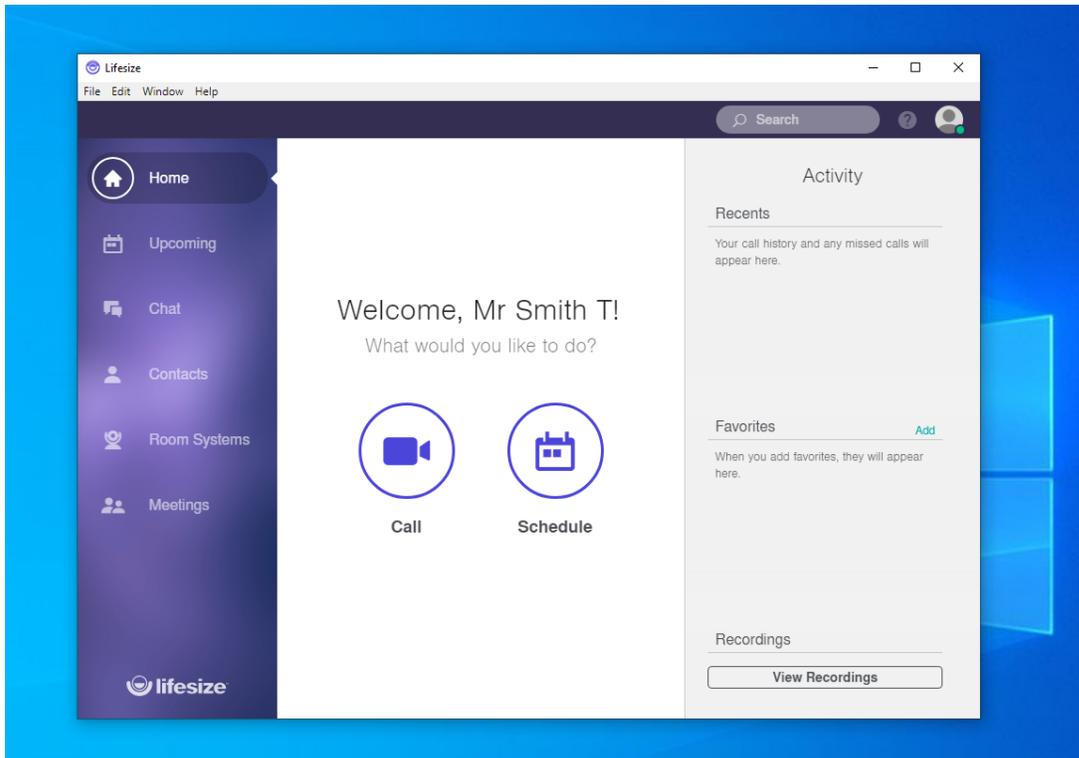


14) Enter your **password (1)**

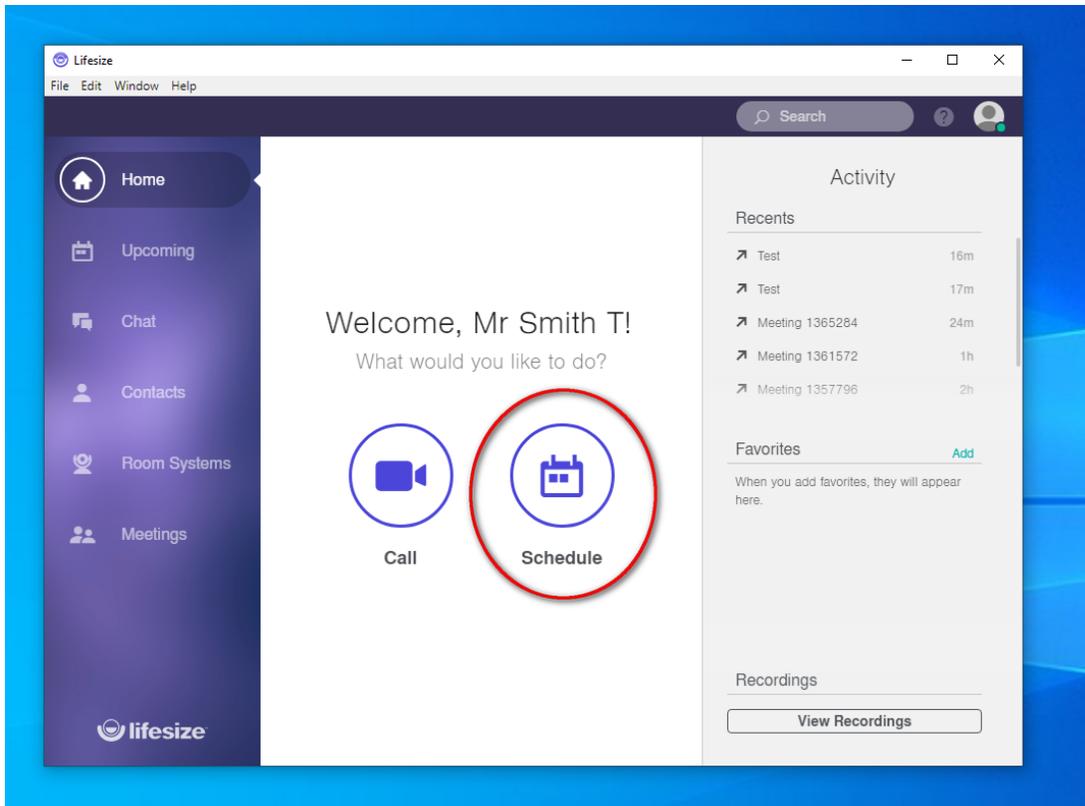
Click **Sign In (2)**



15) LifeSize will open with the Welcome screen

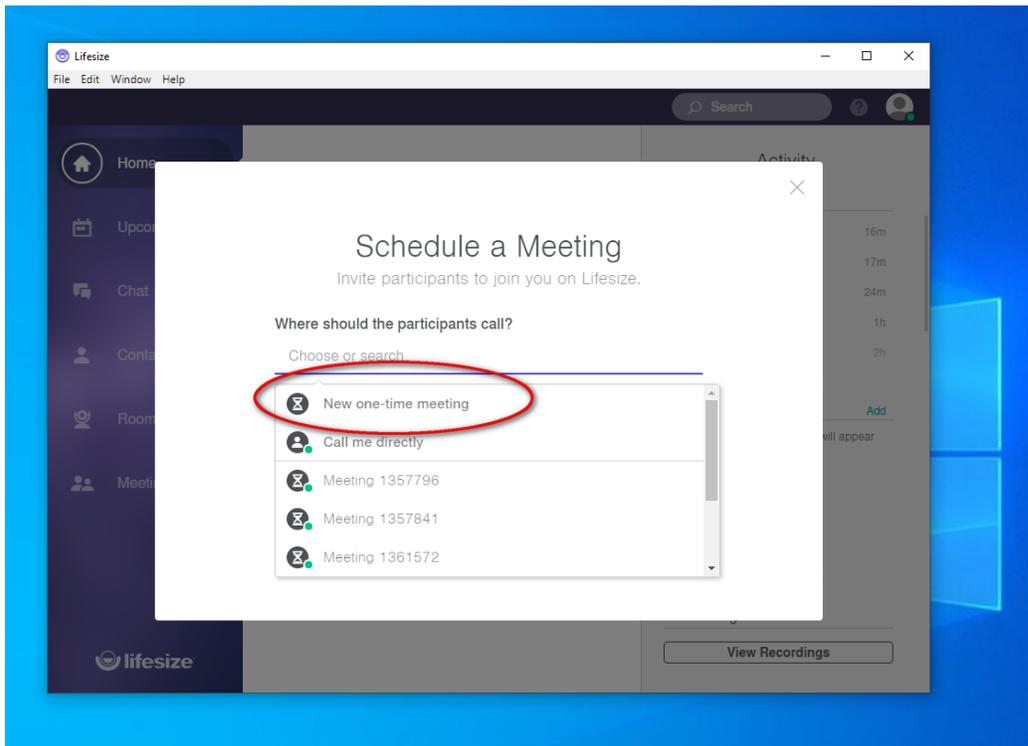


16) Click **Schedule**



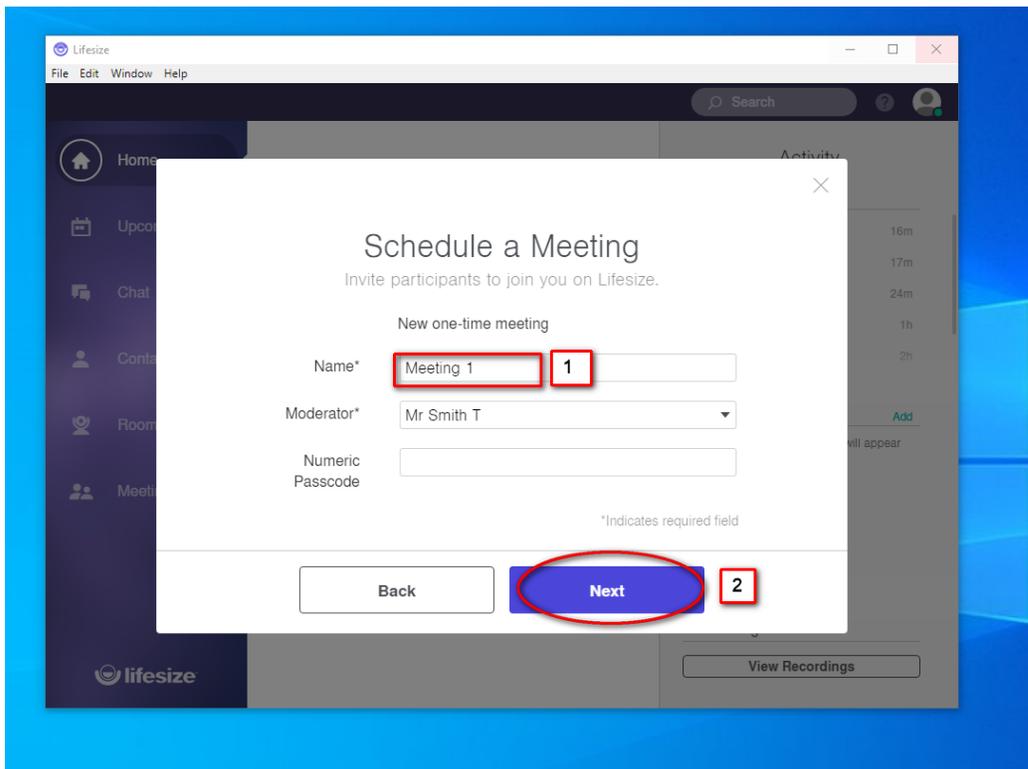
17) Click **Choose or search**

Click **New one-time meeting**

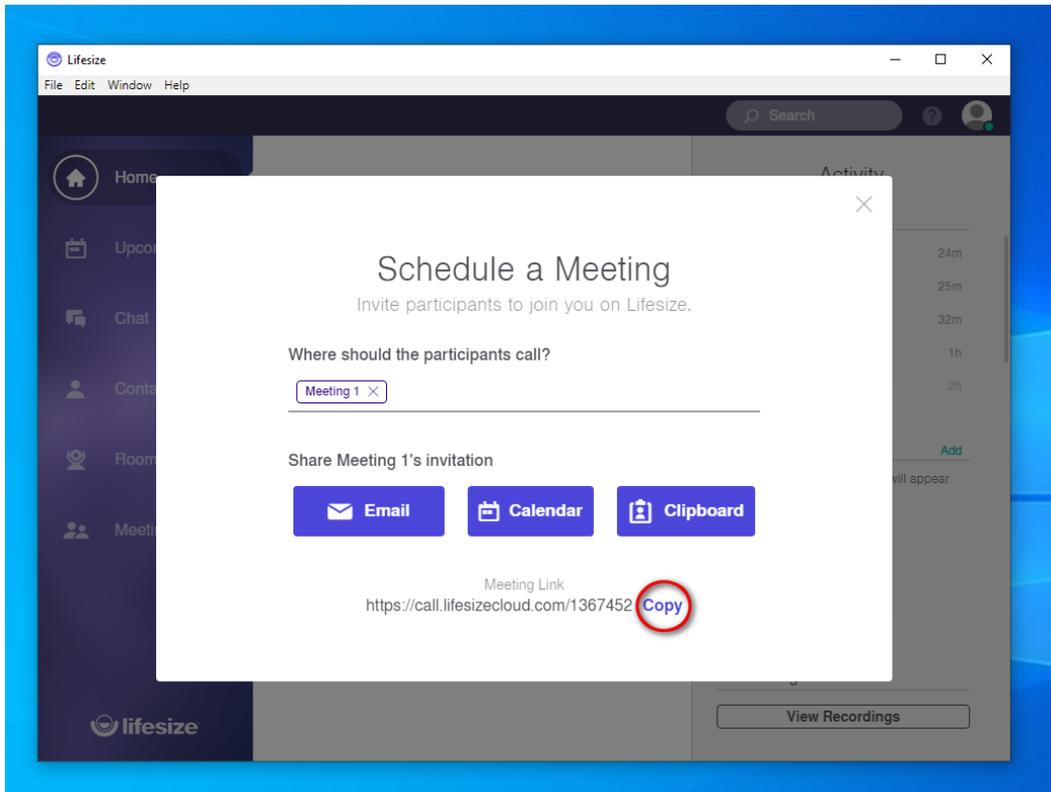


18) Enter the **Name** of the meeting (1)

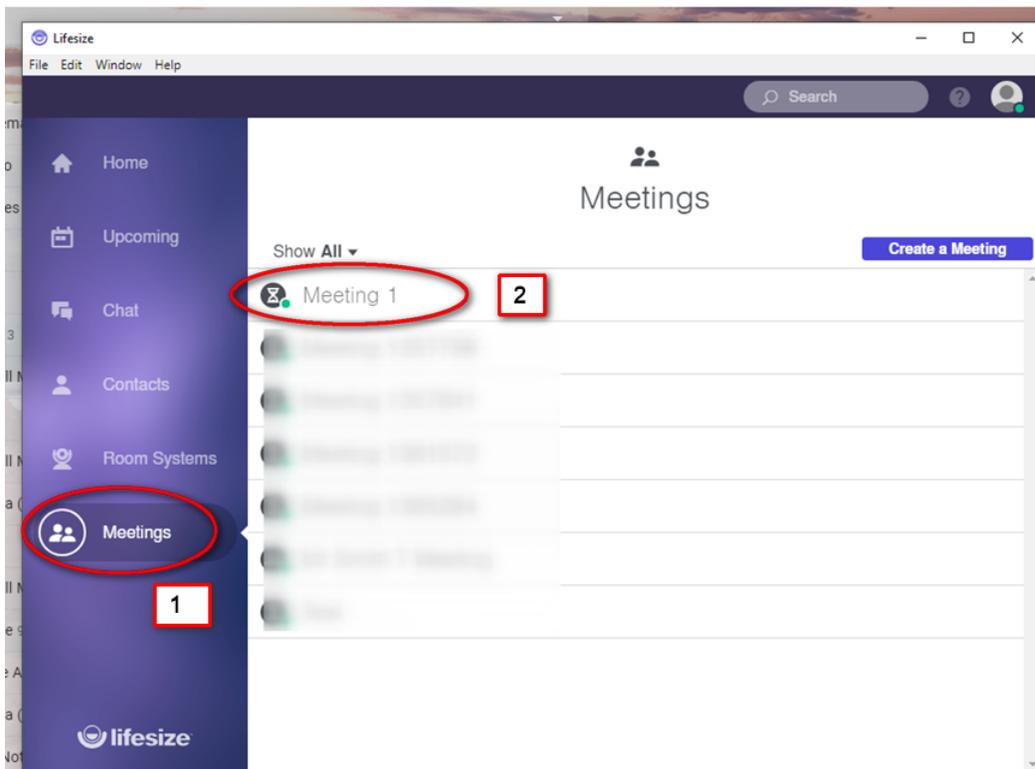
Click **Next** (2)



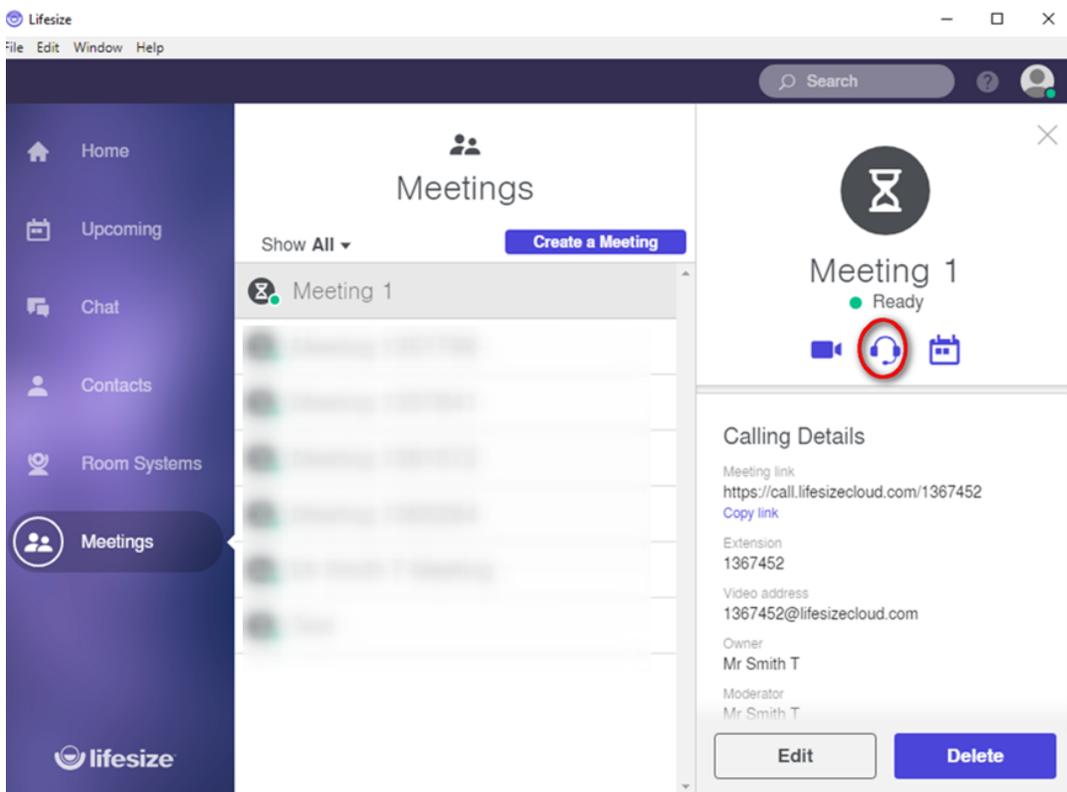
19) Click **Copy** on the meeting link and close the Schedule a Meeting window.



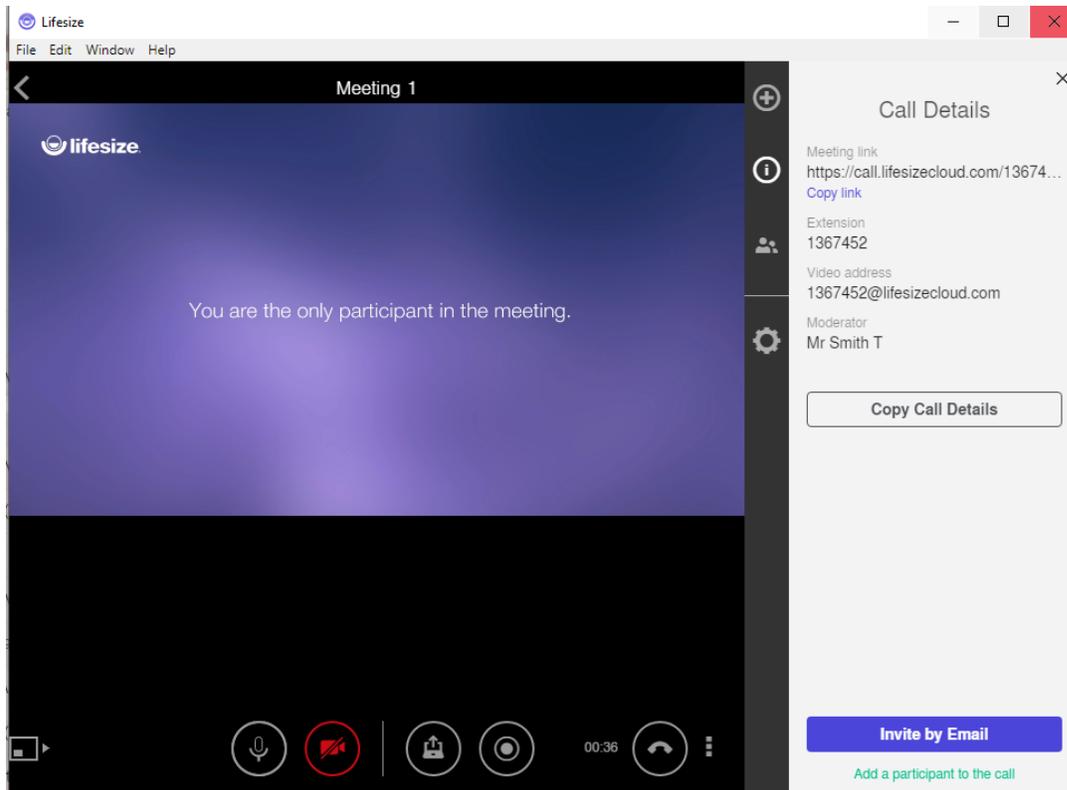
20) On the left options, click **Meetings (1)**
Click **Meeting 1 (2)**



21) Click on the headphones

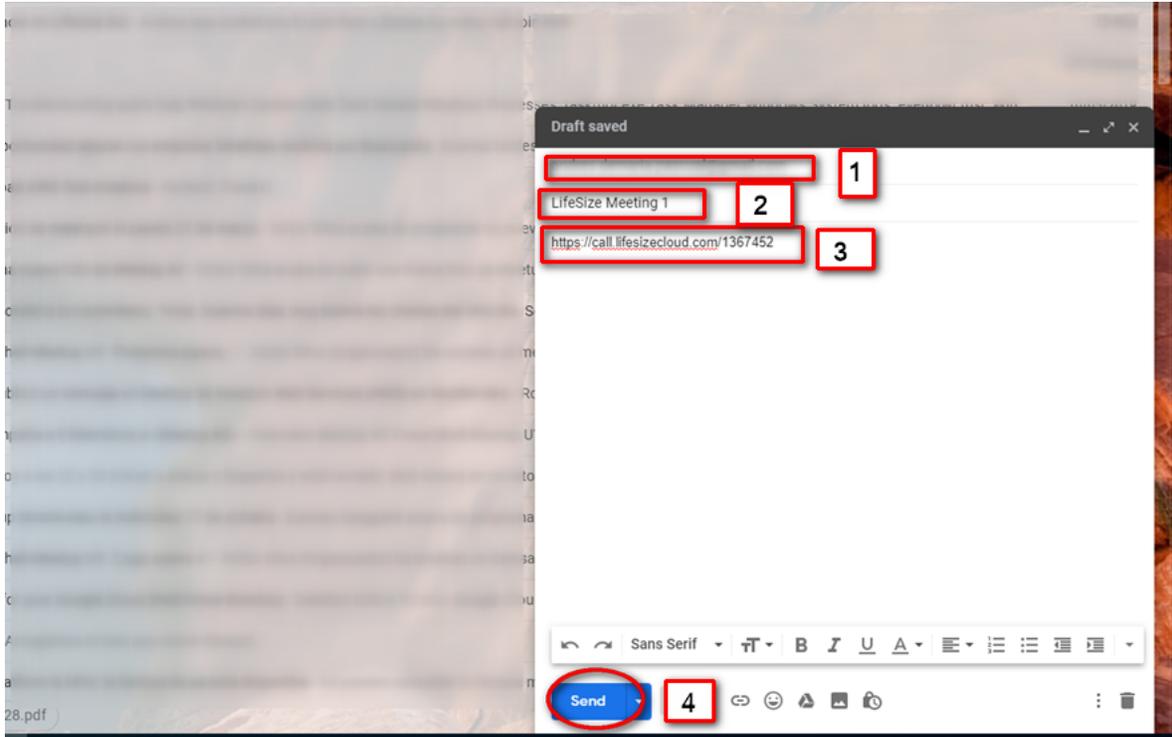


22) Meeting started



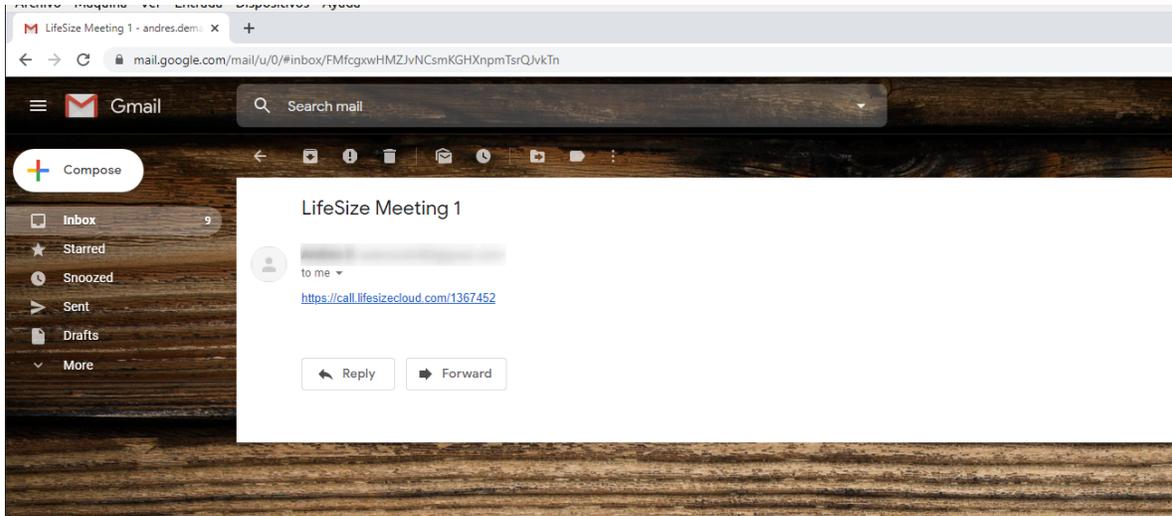
23) Compose a new email to invite a participant

- Enter the **participant email address (1)**
- Enter the **email Subject (2)**
- Paste the **meeting link copied before (3)**
- Click **Send (4)**



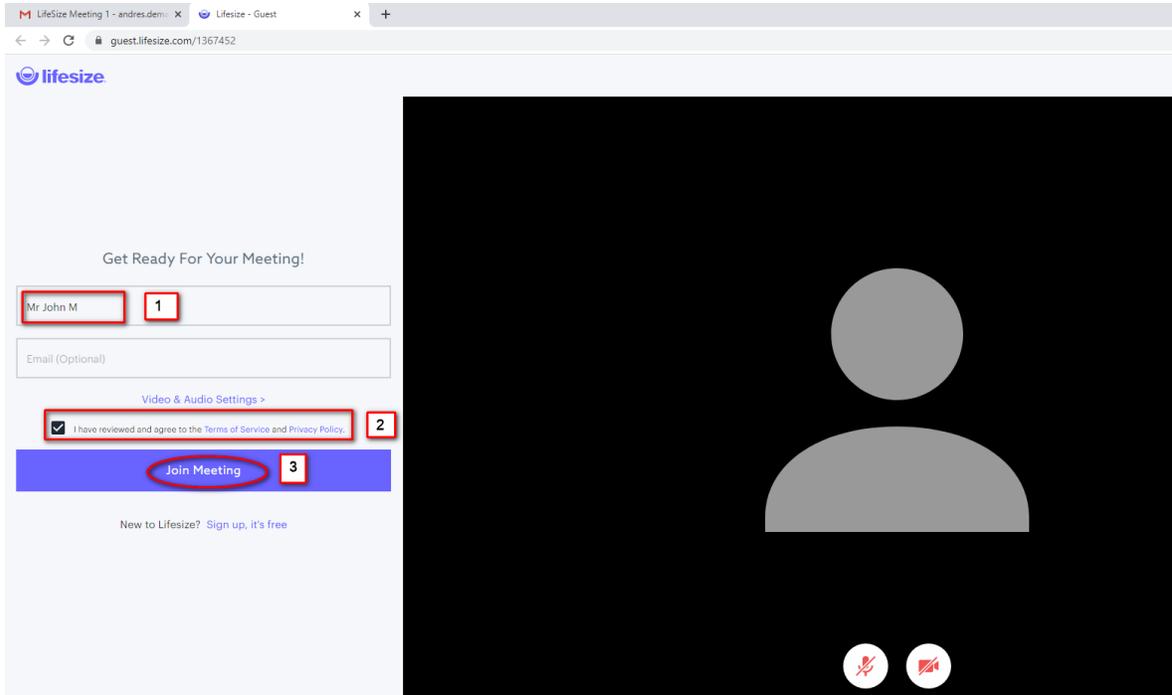
Participant

24) Click on the meeting link received

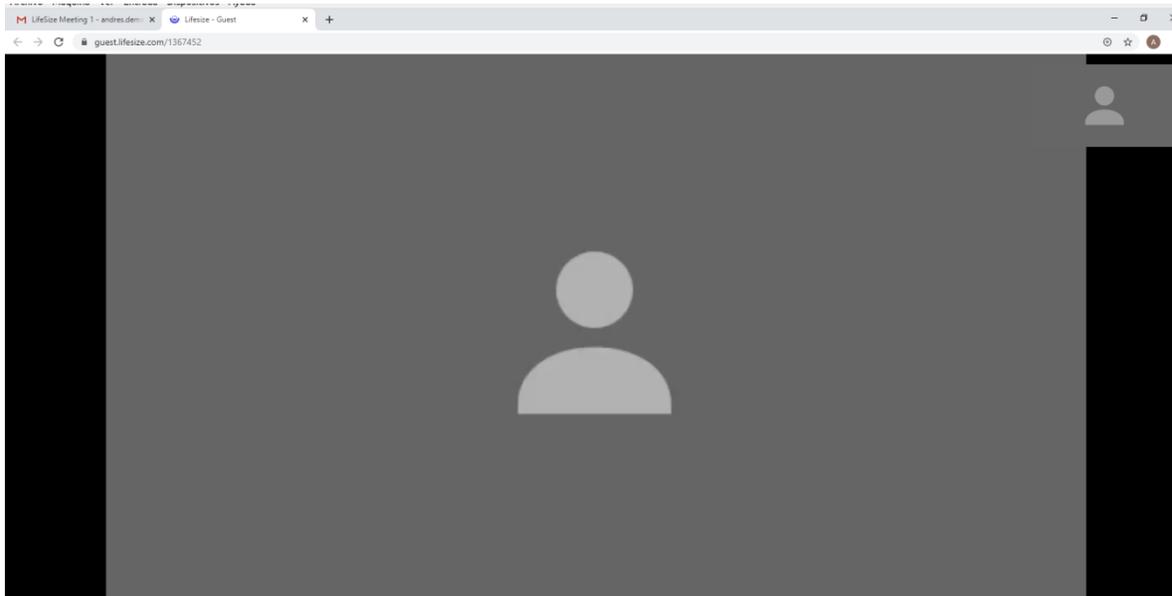


25) A new tab will open on your browser

- Enter your **Name (1)**
- Check **“I have reviewed and agree to the Terms of Service and Privacy Policy” (2)**
- Click **Join Meeting (3)**

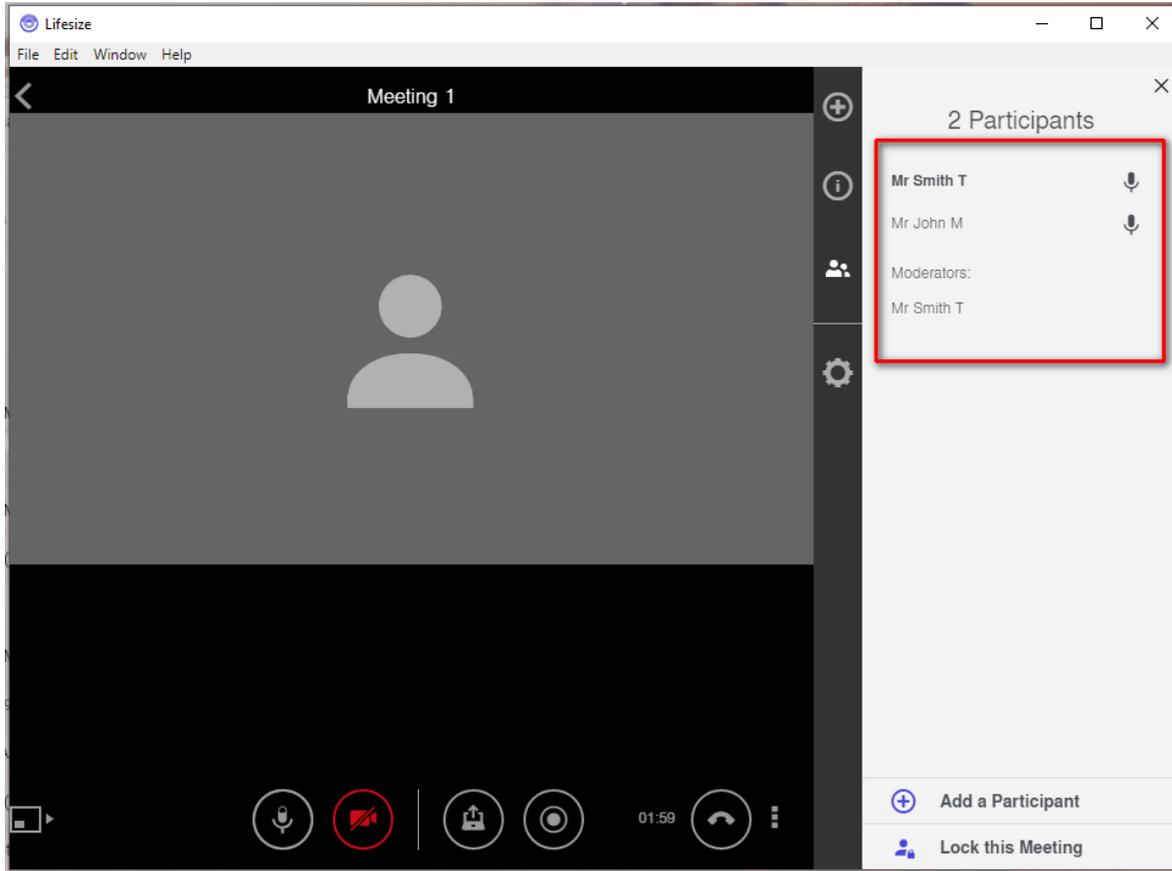


24) Participant (Mr John M) joined the meeting.



Host

26) List of participants on the host (Mr Smith T)



Install LifeSizeAndroid app

Follow this section if you have a LifeSize account created and you want to install the application on your cell phone or tablet device.

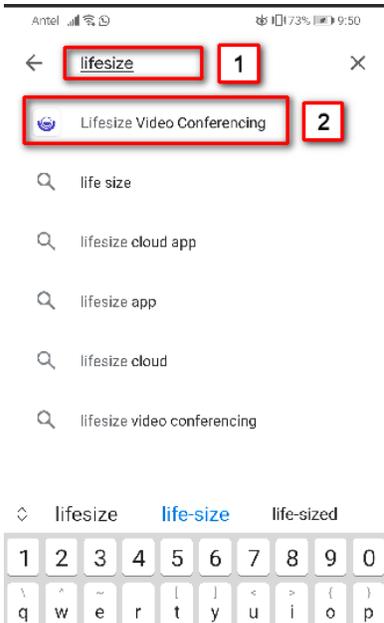
1) Tap on Play Store icon



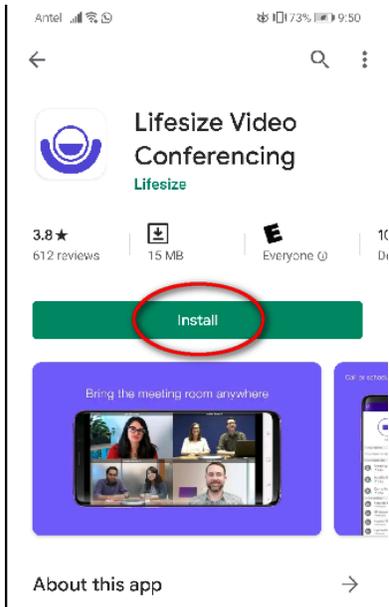
2) Locate the search text box

- Enter **lifesize (1)**

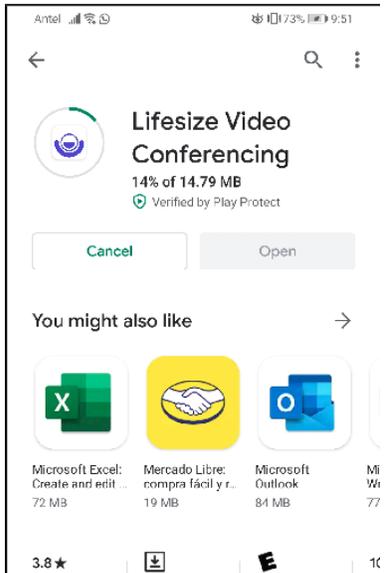
- Tap on **LifeSize Video Conferencing (2)**



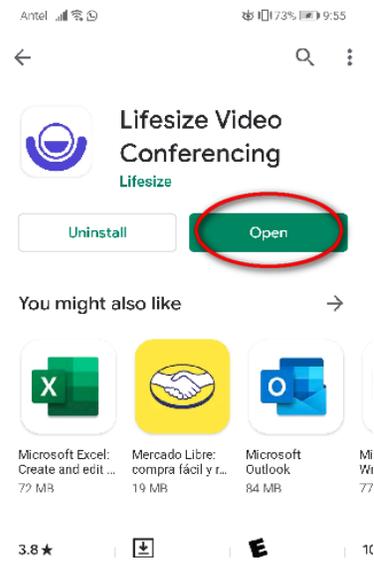
3) Tap on Install



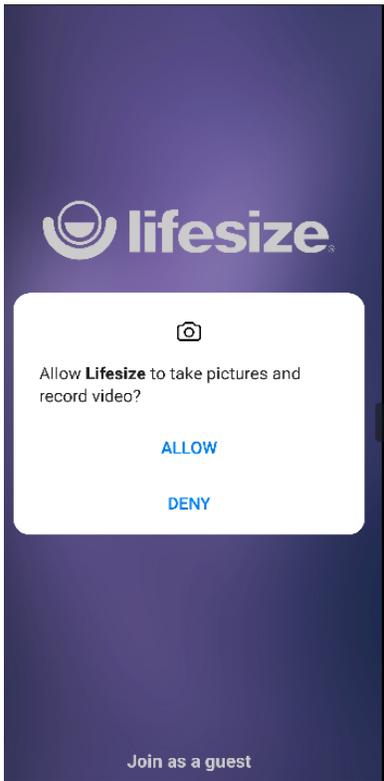
4) Installation in progress



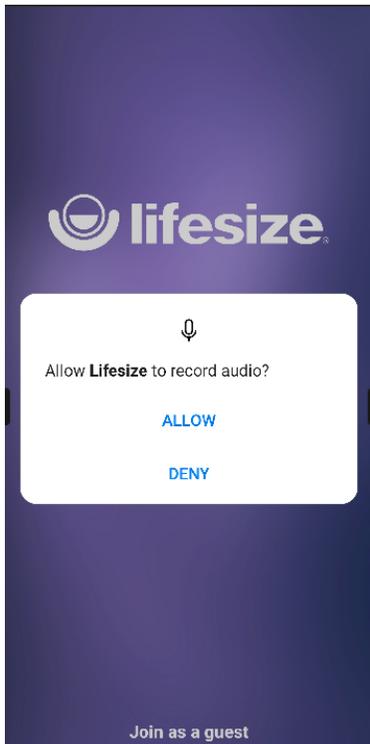
5) Tap on **Open** when installation finish



6) Tap on **ALLOW**



7) Tap on **ALLOW**



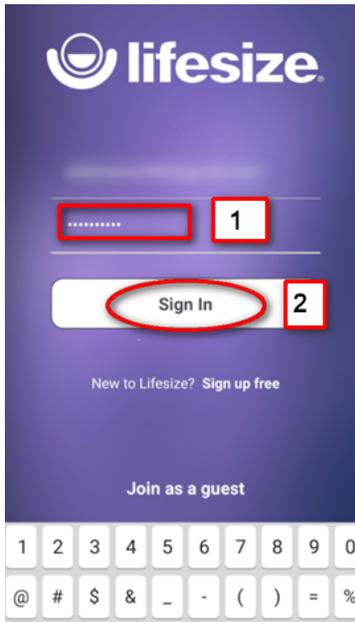
8)

- Enter your **email address (1)**
- Tap on **Next (2)**

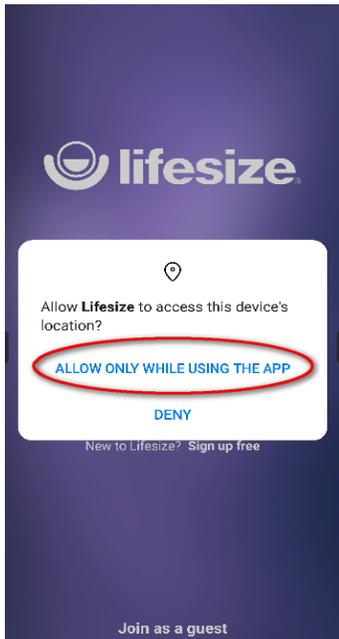


9)

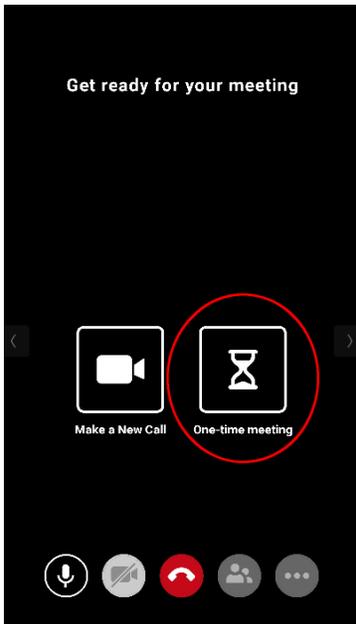
- Enter your **password (1)**
- Tap on **Sign in (2)**



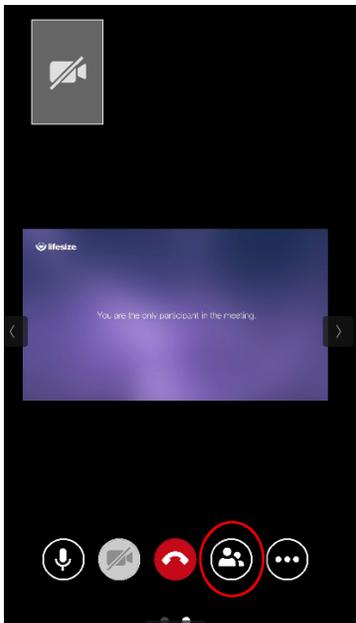
10) Tap on **ALLOW ONLY WHILE USING THE APP**



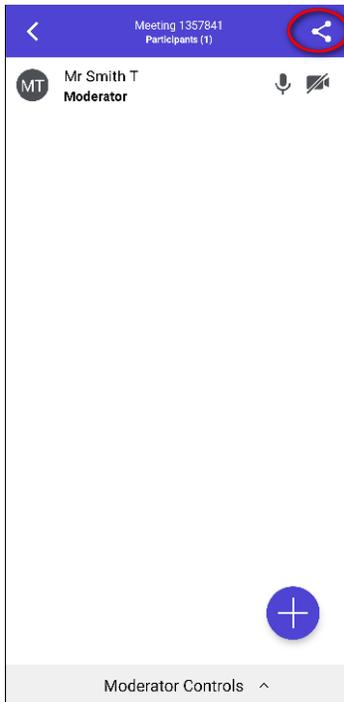
11) Tap on **On-time meeting**



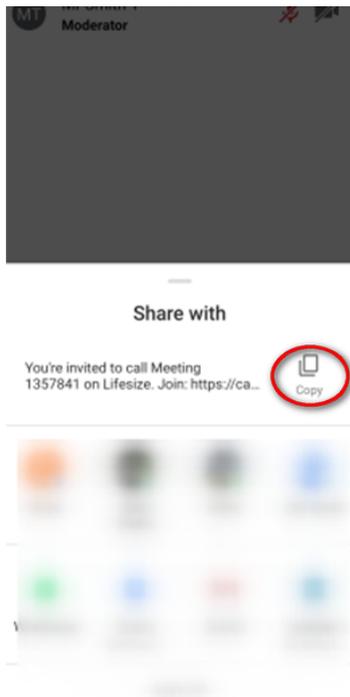
12) Tap on **Participants**



13) Tap on the **share icon**

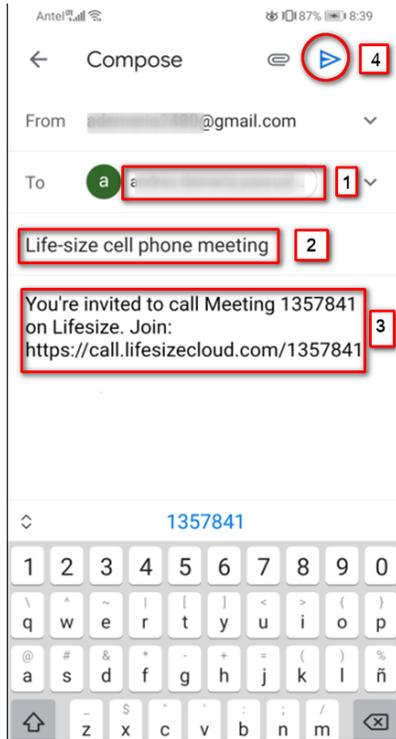


14) Tap on **Copy**



15) Compose a new email to invite a participant

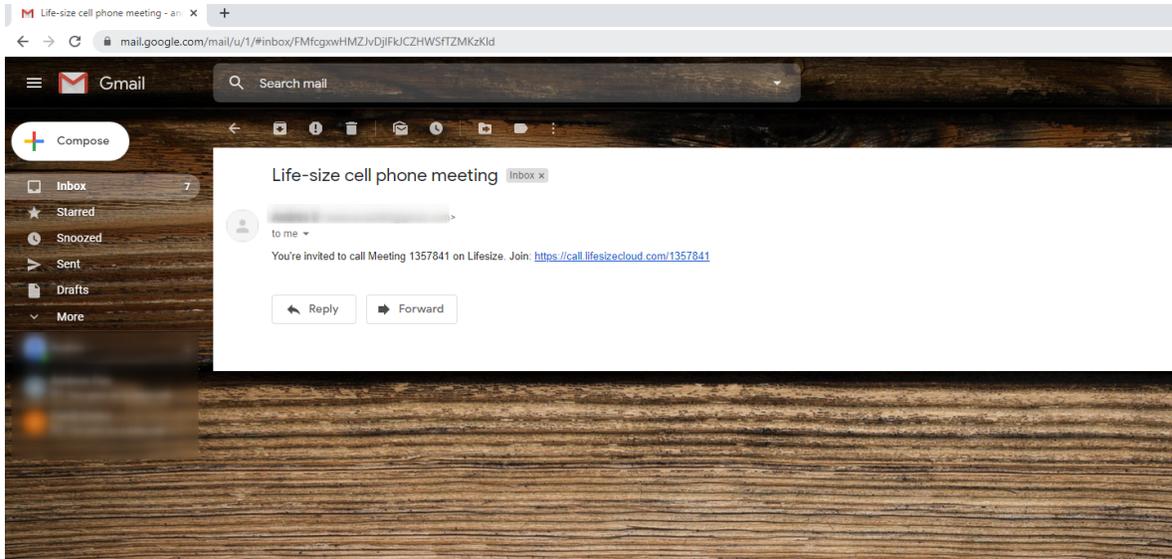
- Enter the **participant email address (1)**
- Enter the **email Subject (2)**
- Paste the **meeting link** copied before **(3)**
- Click **Send (4)**



Participant

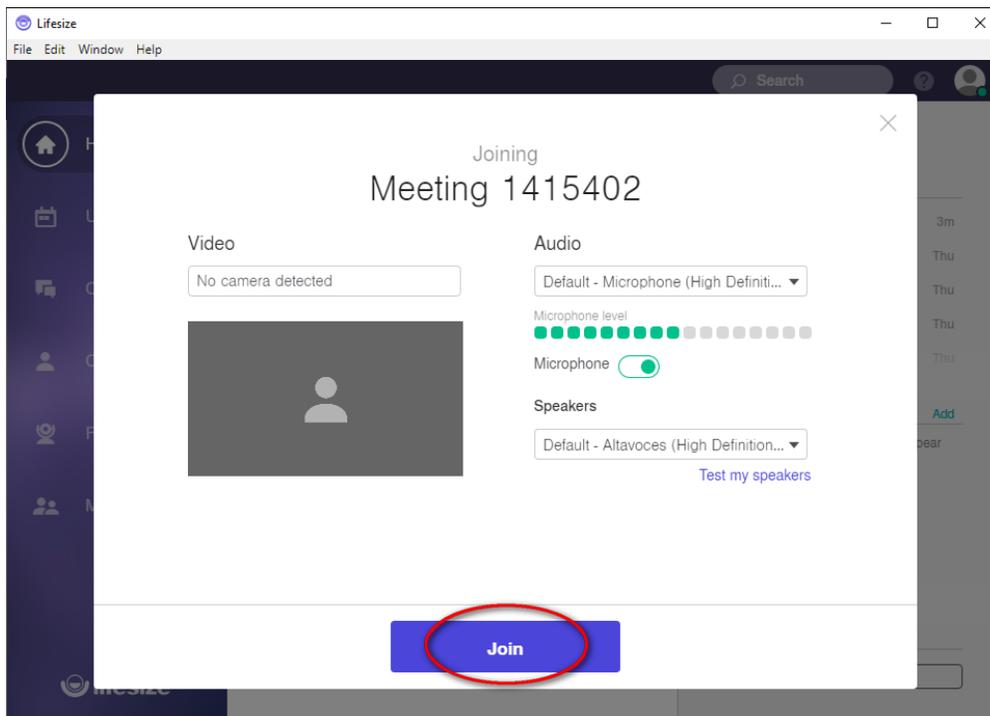
16) The participant will receive an email with the invitation link.

Click on the Join **LifeSize Meeting** link.



17) LifeSize application will open

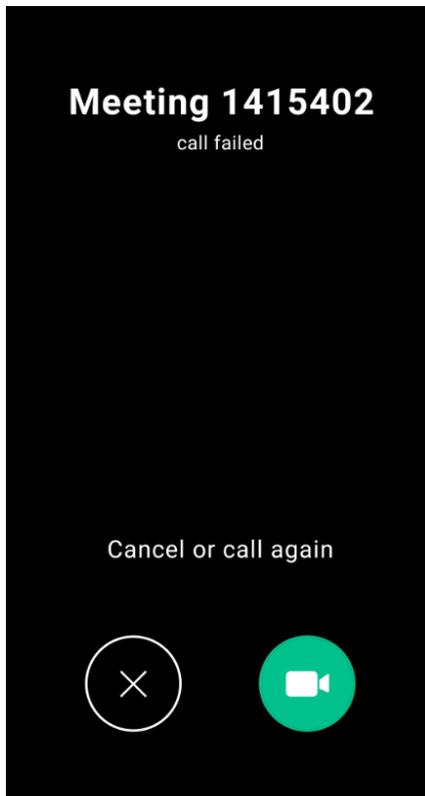
Click **Join**



Host

18) Error received on the host: **"Call failed"**

If this error persist use Zoom application



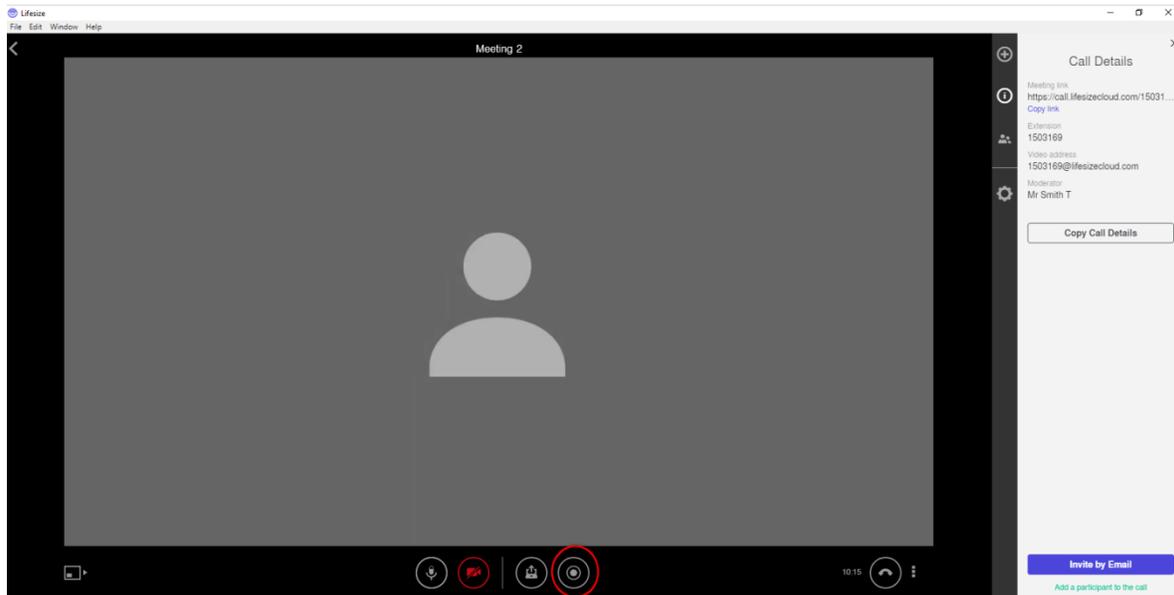
Chat

Chat is not available for one-time meetings.

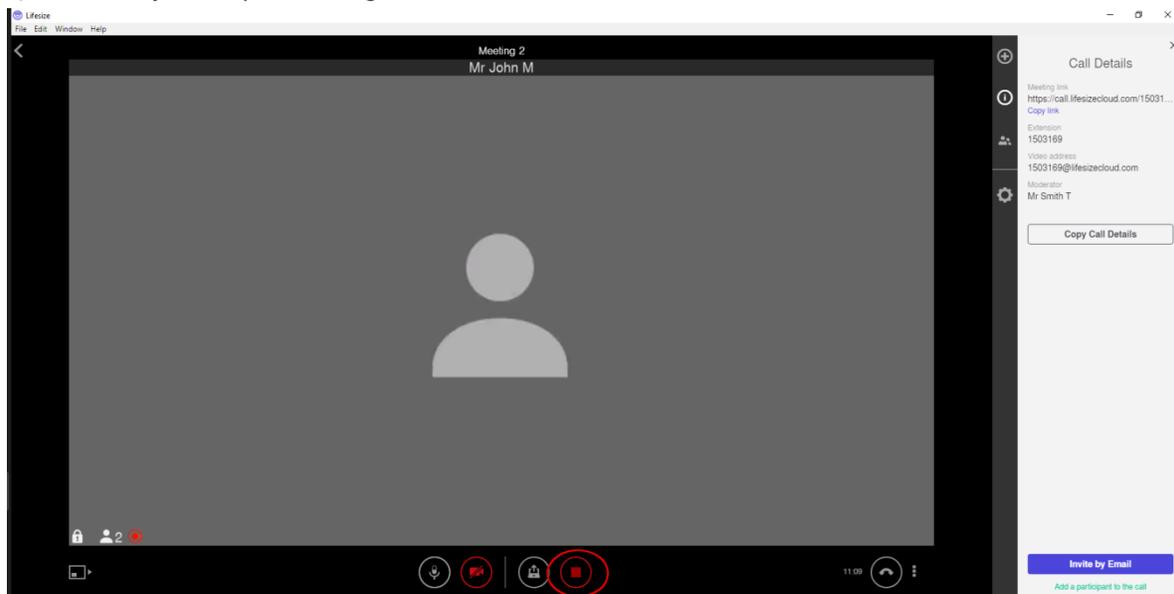
We recommend to use Zoom if you need Chat feature on meetings.

Record

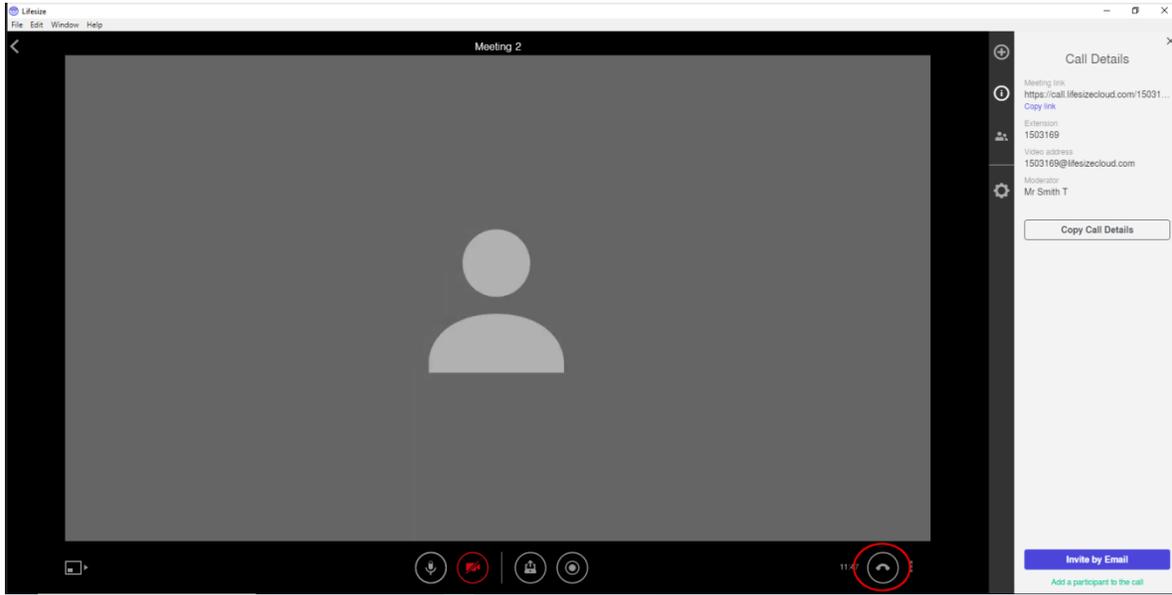
1) Click on the **record** icon



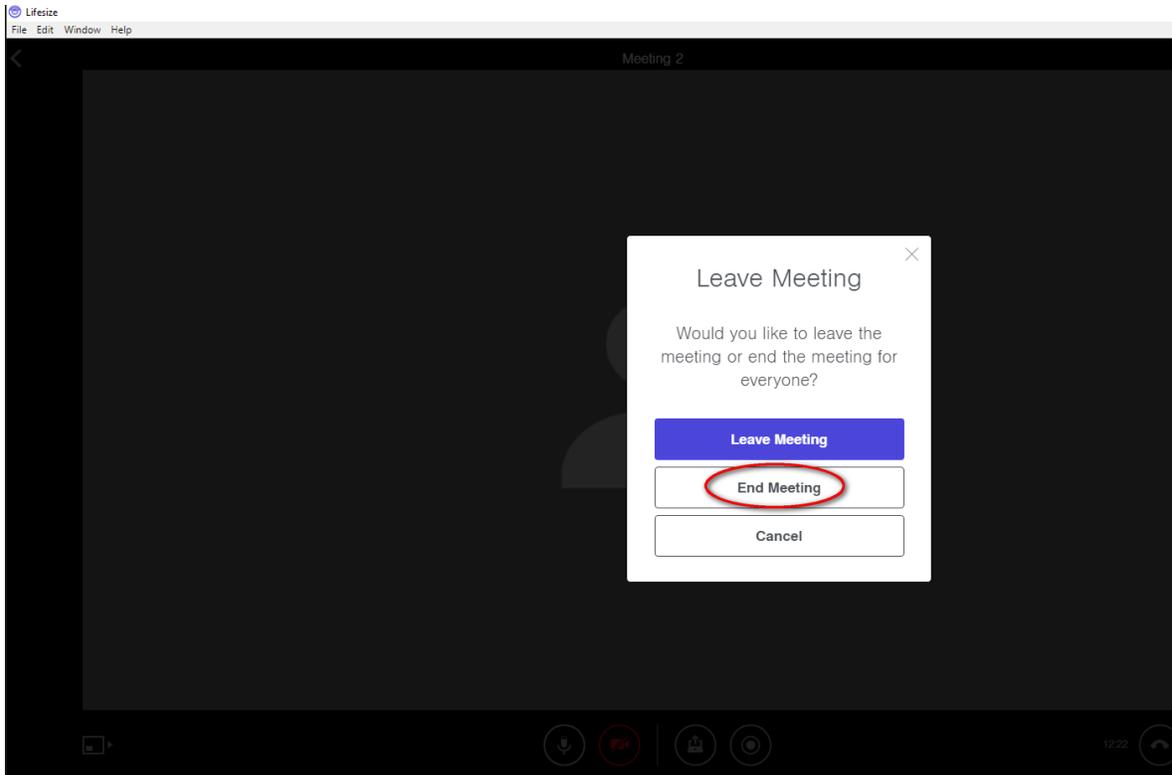
2) Click **Stop** to stop recording.



3) Click **End** icon.

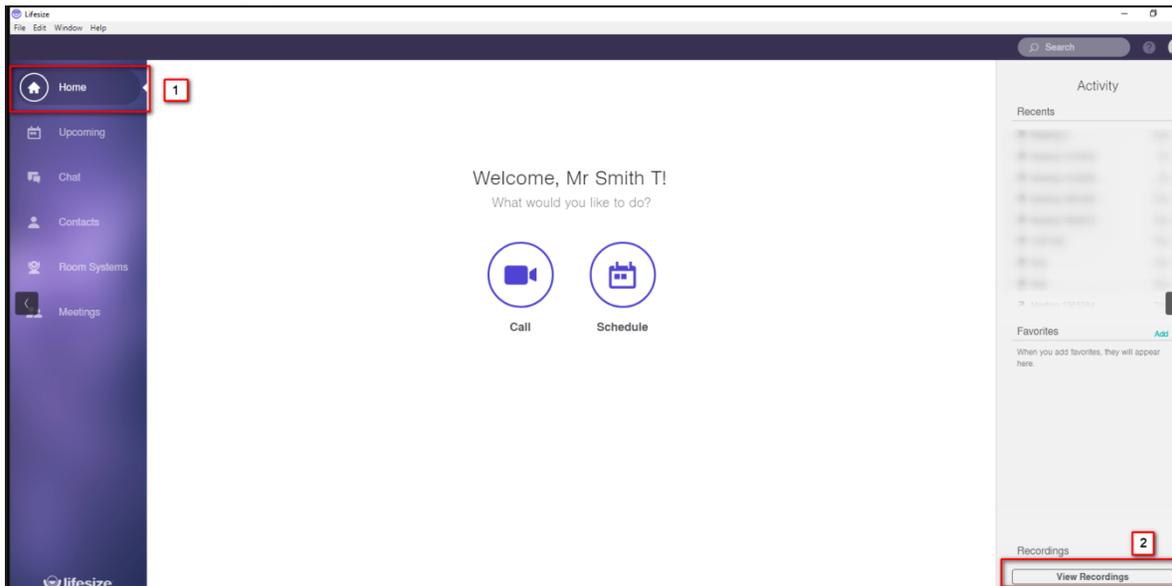


4) Click **End Meeting**

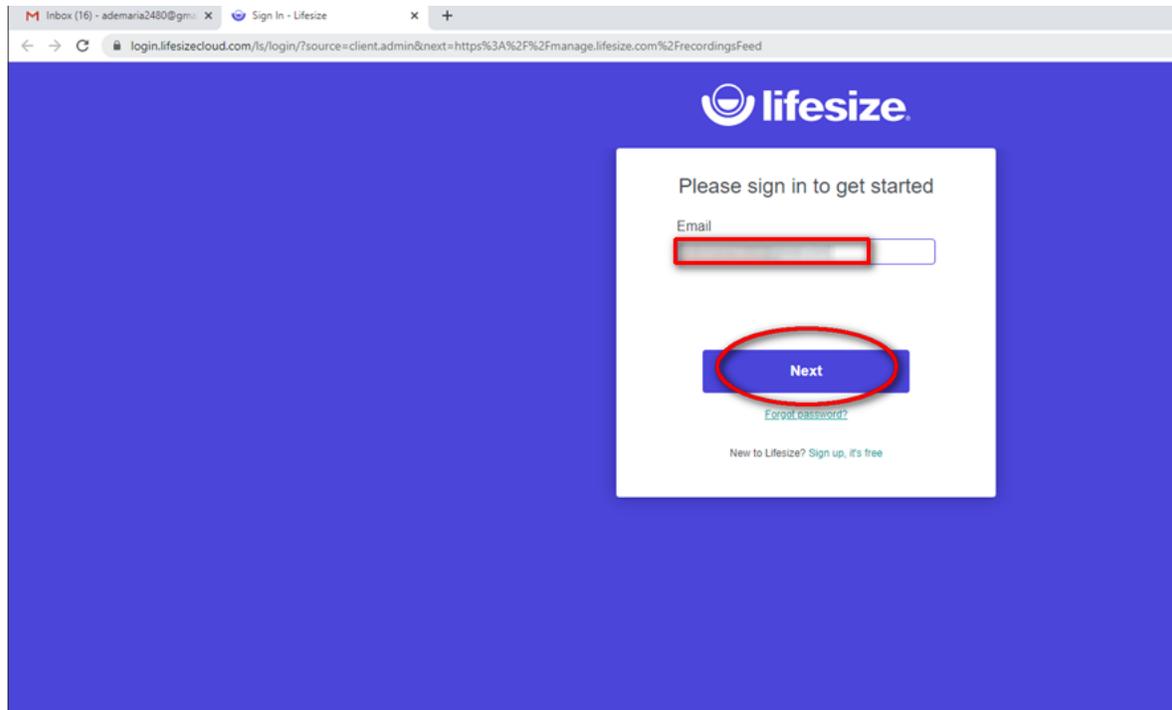


5) Click **Home** icon (1)

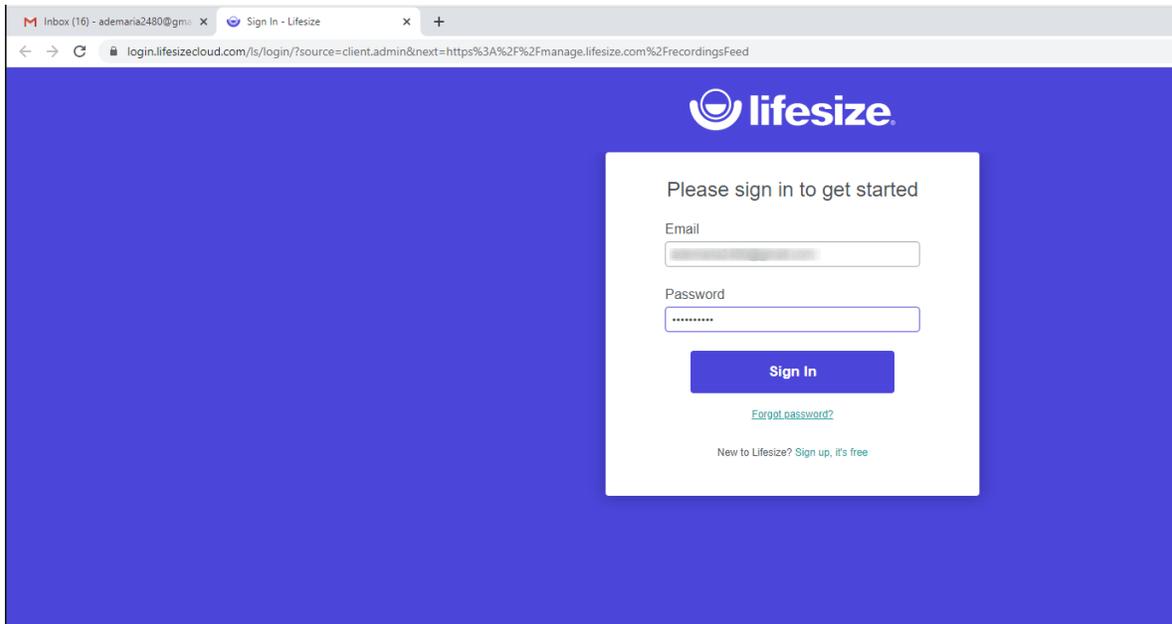
Click **View Recordings** (2)



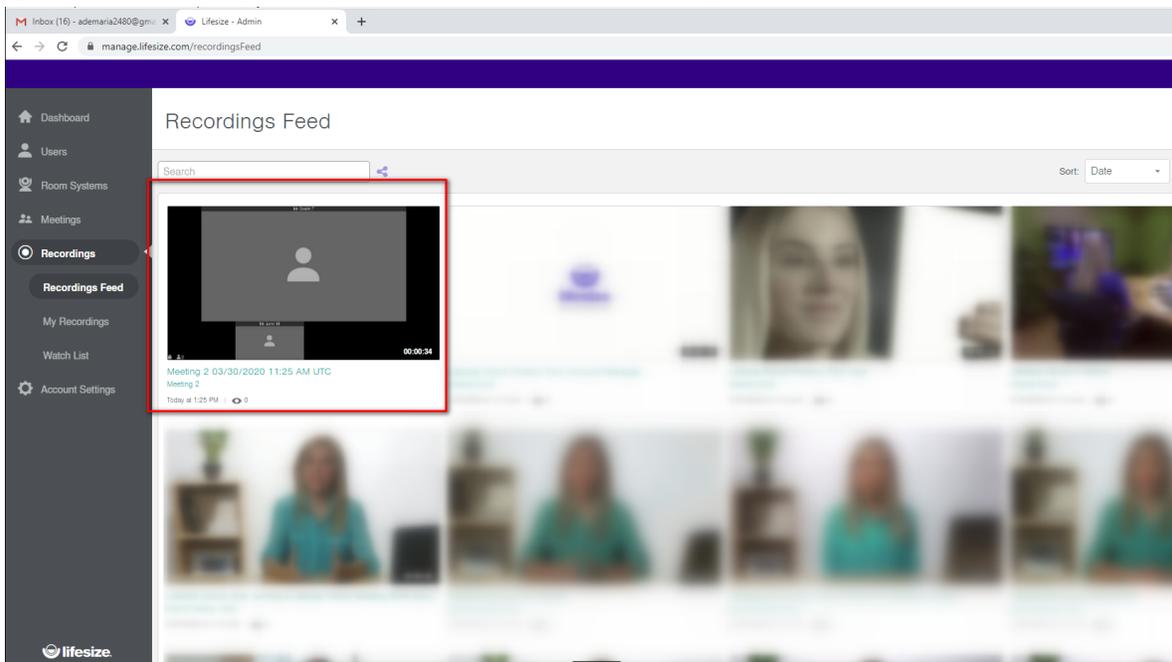
6) Enter your **email** and click **Next**



7) Enter your **password** and click **Sign In**

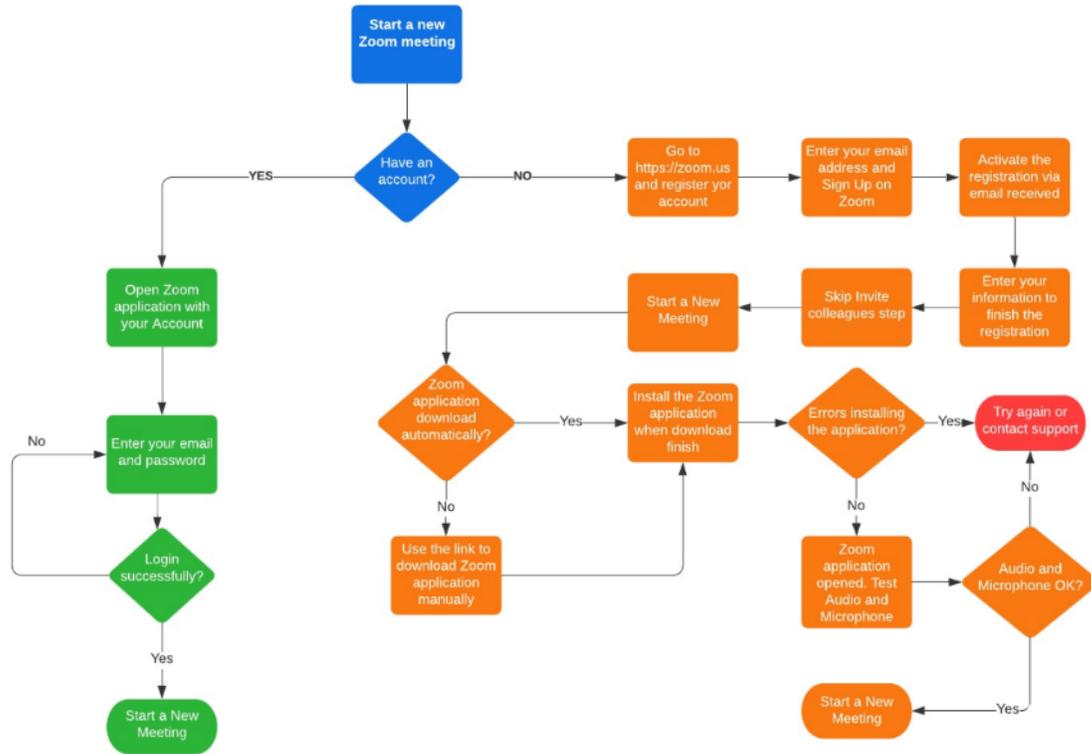


8) A new tab will open on your browser with the **Recordings Feed**

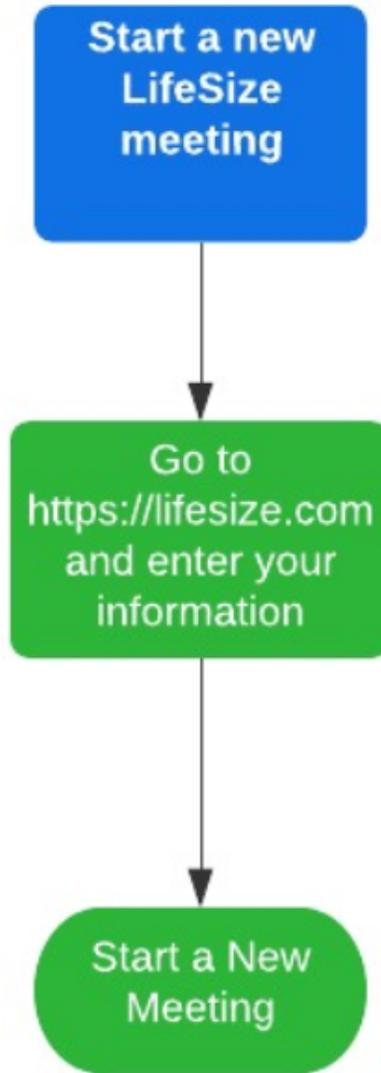


3-Flowcharts -

Zoom Start a new meeting



LifeSize Start a new meeting



Zoom / LifeSize Start a new meeting from the Application Desktop

