

Teach Yourself **VISUALLY** Zoom™



Paul McFedries



Teach Yourself
VISUALLY™

Zoom™

by Paul McFedries

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Published by John Wiley & Sons, Inc., Hoboken, New Jersey.

Published simultaneously in Canada.

978-1-119-83584-4

978-1-119-83591-2 (ebk.)

978-1-119-83592-9 (ebk.)

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About the Author

Paul McFedries is a full-time technical writer. Paul has been authoring computer books since 1991, and he has more than 100 books to his credit. Paul's books have sold more than four million copies worldwide. These books include the Wiley titles *Teach Yourself VISUALLY Windows 11*, *Teach Yourself VISUALLY Excel 2016*, *Amazon Fire TV For Dummies*, *Alexa For Dummies*, and *Cord Cutting For Dummies*. Paul invites you to drop by his personal website at www.paulmcfedries.com or follow him on Twitter @paulmcf.

Author's Acknowledgments

It goes without saying that writers focus on text, and I certainly enjoyed focusing on the text that you'll read in this book. However, this book is more than just the usual collection of words and phrases. A quick thumb-through the pages will show you that this book is also chock full of images, from sharp screenshots to fun and informative illustrations. Those colorful images sure make for a beautiful book, and that beauty comes from a lot of hard work by Wiley's immensely talented group of designers and layout artists. I thank them for creating another gem. Of course, what you read in this book must also be accurate, logically presented, and free of errors. Ensuring all of this was an excellent group of editors that included project editor Lynn Northrup, technical editor Doug Holland, copy editor Kim Wimpsett, and production editor Barath Kumar Rajasekaran. Thanks to all of you for your exceptional competence and hard work. Thanks, as well, to acquisitions editor Devon Lewis for asking me to write this book.

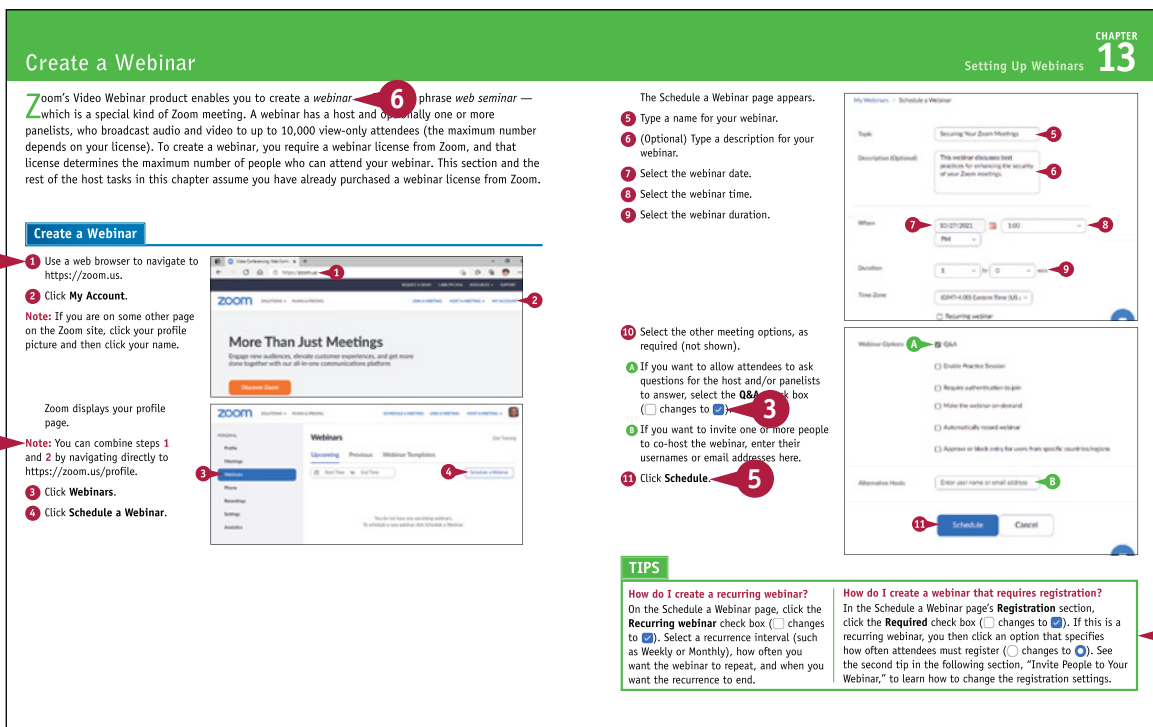
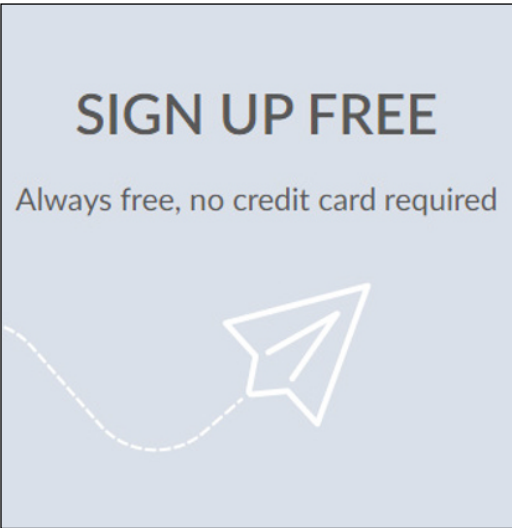


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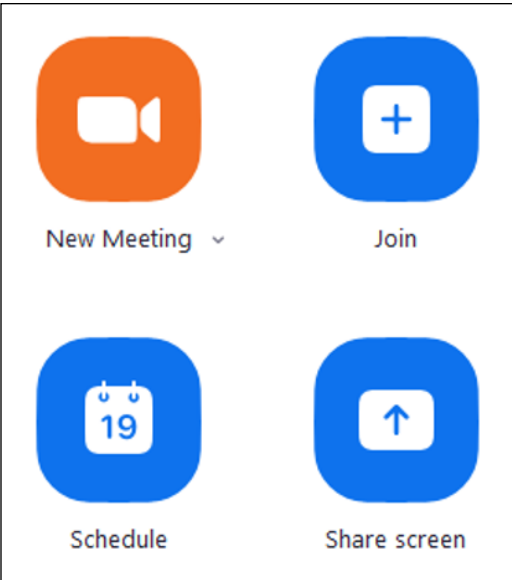
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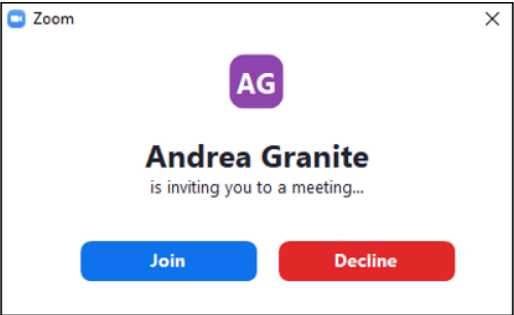
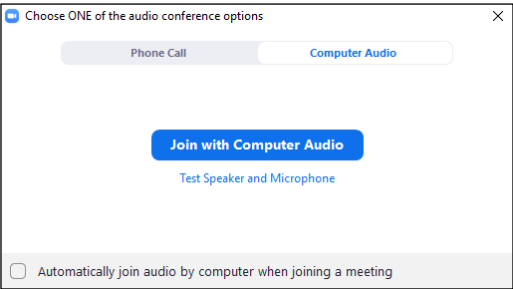


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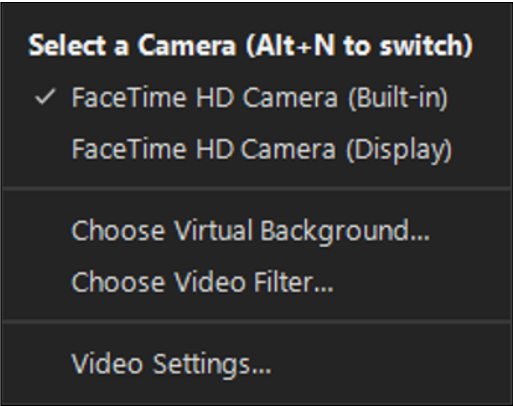
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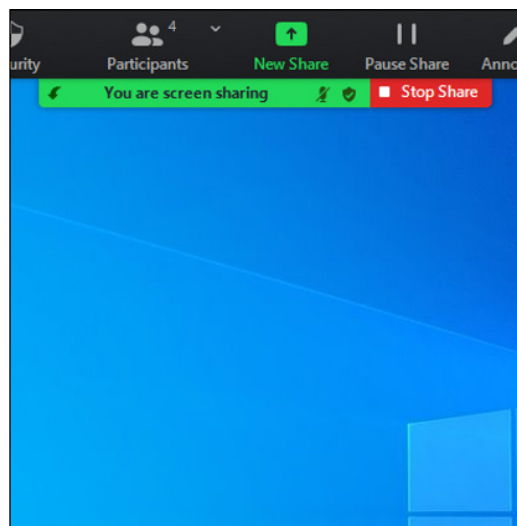
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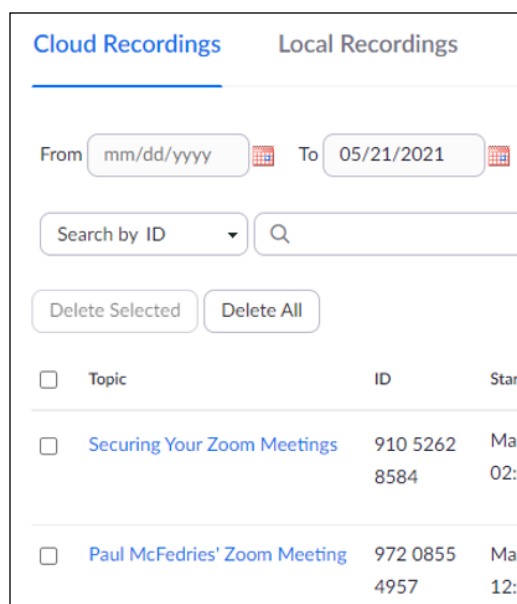
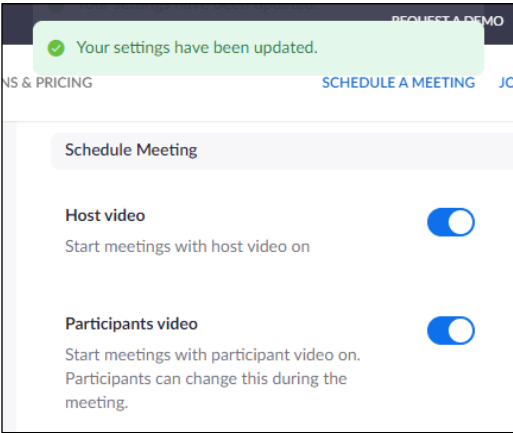


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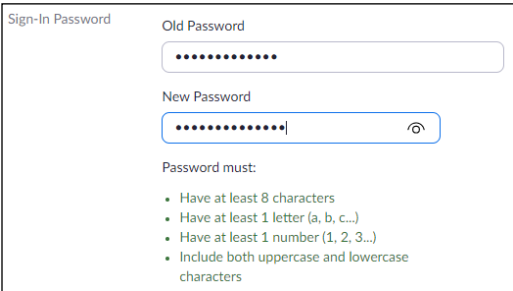
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The screenshot shows the 'Edit User' form with the following fields and values:

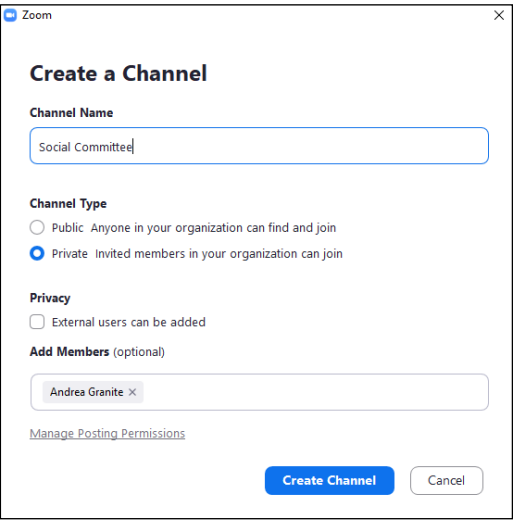
- Emails:** books@fogophilaalimited.com
- User Type:** Basic (selected), Licensed, On-Prem
- Meeting Basic:** Meeting Basic (dropdown menu)
- User Role:** Member (dropdown menu)
- Department:** e.g. Product
- Manager:** Paul McFedries
- Job Title:** Senior Editor
- Location:** Seattle
- Buttons:** Save, Cancel

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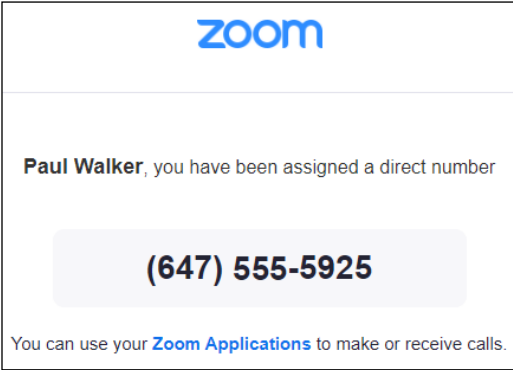
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The screenshot shows a web browser window titled "Polls". The main heading is "Polling 1: Zoom Security Poll" with an "Edit" link. The poll contains two questions:

1. Has a malicious user ever infiltrated one of your meetings?
☐ Yes
☐ No

2. Which Zoom security features do you currently use? (Multiple choice)
☐ Strong password
☐ Two-factor authentication
☐ Waiting Room
☐ Allow only authenticated users
☐ Disable passcode embedding

At the bottom, there is a checkbox "Allow Panelists to vote" which is checked, and a blue "Launch Polling" button.

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The screenshot shows a "Select a Service" dialog with three service icons: Google (Calendar), Exchange (Outlook), and Office 365 (Outlook). Below the icons, the permissions for the selected services are listed:

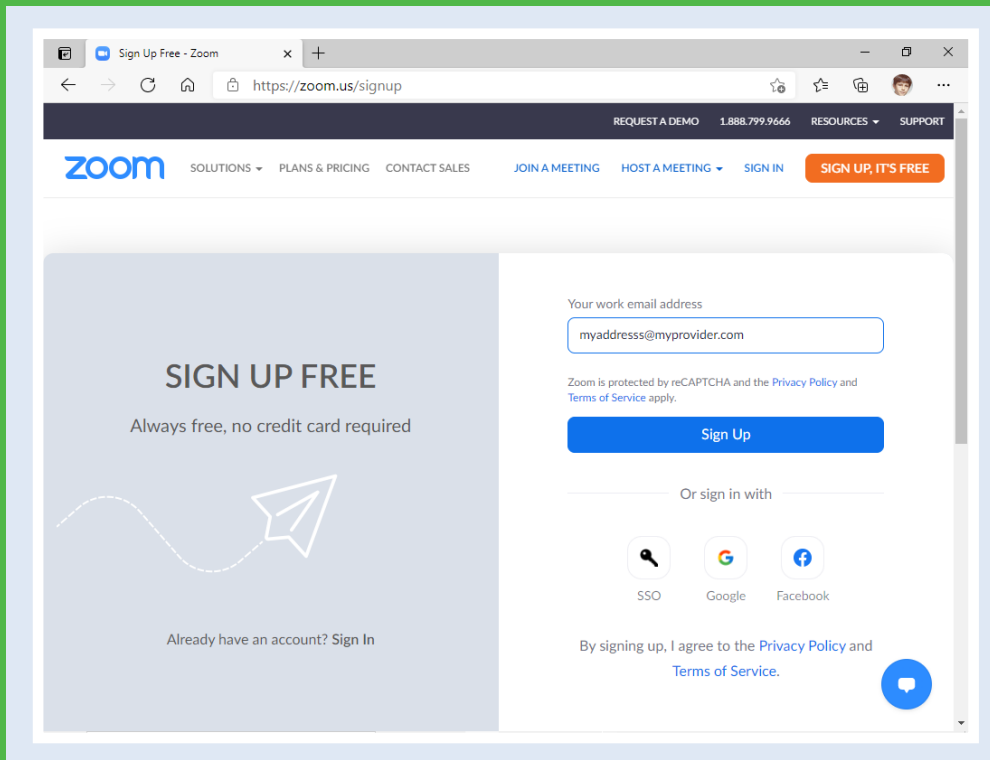
Permissions:	Calendar	Read	Write
Calendar	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Contacts	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Below the permissions table, it states: "Zoom will access your calendar and contacts with the permissions selected above". At the bottom is a blue "Next" button.

CHAPTER 1

Getting Started

To get the most out of Zoom, you need to understand Zoom meetings and other Zoom products and then create and sign in to your Zoom account. From there, you can download the Zoom client, join a test meeting, and examine the Zoom desktop and mobile windows.



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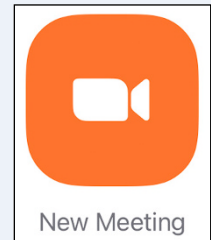
Understanding Zoom Meetings

A *Zoom meeting* is an online connection point where multiple people in multiple locations can gather to socialize or to exchange ideas and information. In most Zoom meetings, each attendee interacts using both audio and video, which enables the meeting participants to hear and see each other.

Each Zoom meeting is created and moderated by the meeting host, who is also responsible for inviting the other attendees to the meeting. Besides conversing and discussing ideas, meeting participants can also share their computer screen with others, and the meeting host can record the meeting for later playback.

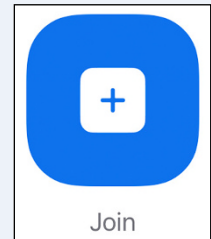
Hosting a Meeting

Every Zoom meeting must be created by a person called the *host*. The host sets the parameters of the meeting (for example, whether attendees can share their screens), sends out invitations to the meeting participants, and controls access to the meeting. Hosts can create instant meetings that start right away or can schedule meetings that start at a specified time. Hosts are also responsible for moderating the meetings, which can include muting or removing participants, as well as ending the meeting.



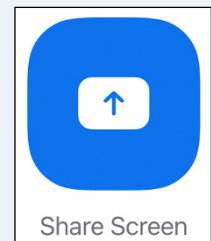
Joining a Meeting

To participate in a Zoom meeting, you must *join* the meeting. For almost all Zoom meetings, you can join only if you receive an invitation from the meeting host and if the host allows you access to the meeting when you request it. Once you are in the meeting, you normally share your device's camera feed so that other attendees can see you. Your microphone is normally muted, but you can quickly unmute the microphone to participate in the conversation.



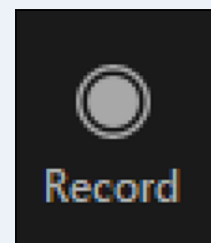
Sharing a Screen

If allowed by the meeting host, during the meeting you can request to share your device screen. *Sharing* usually refers to allowing other attendees to see some or all of your screen, usually so that you can demonstrate a procedure or display something. You can also share by writing on a digital whiteboard, playing a video file, or playing an audio file. You can also share a presentation by showing the slides as a virtual background.



Recording a Meeting

The meeting host can elect to *record* the meeting, which saves the meeting video and audio to a file. The recording can be used to document the meeting or to allow people who were unable to attend the meeting to view the meeting. The host can store the meeting recording using either the host's computer or the cloud storage provided with the host's Zoom account.



Understanding Other Zoom Products

Most people use Zoom only for hosting and joining meetings. However, Zoom offers several other products. For example, Zoom Chat enables you to exchange messages with other Zoom users, Zoom Phone enables you to make and receive phone calls with other Zoom users, and Zoom Video Webinar enables you to broadcast a meeting to hundreds or even thousands of people.

It's important to understand that although Zoom offers the option of setting up a free account for Zoom Meetings and that a free account includes Zoom Chat, there are no free versions of either Zoom Phone or Zoom Video Webinar.

Zoom Chat

Zoom Chat is available to all Zoom users and enables each user to send instant messages to other Zoom users and to external users. Besides exchanging text messages, Zoom Chat also enables you to exchange data such as screenshots, files, and audio messages. You can set up *channels*, which are private or public groups where you can quickly send messages to the channel members.

Zoom Chat

Connect your teams and streamline communications

[Sign Up, It's Free](#)

Zoom Phone

With Zoom Phone, you can use the Internet to place calls to and receive calls from other Zoom

users and external contacts. During a call you can add other callers, transfer a call, and start an instant meeting with people on the call. Zoom Phone also provides a voicemail service and a history of the calls you make and receive. Zoom Phone is an extra feature that requires a subscription.

Crystal-clear audio, even if the lingo isn't.
Zoom Phone. Powering modern business communications.

Zoom Video Webinar

Zoom Webinar enables you to broadcast a meeting to as many as 10,000 attendees. Each person joins the meeting as a view-only attendee, so only the webinar host or one of the designated webinar panelists can participate. That participation includes not only the audio and video feed, but also screen sharing. Webinar attendees have access to the meeting's chat facilities and can answer questions posed by the host or a panelist. Zoom Webinar is an extra feature that requires a subscription. The number of people who can attend depends on the license you purchase.

[My Webinars](#) > [Schedule a Webinar](#)

Schedule a Webinar

Topic

Description (Optional)

Create a Basic Zoom Account

To get the most out of your Zoom experience, you should create a Zoom account. You can join Zoom meetings without an account, but having an account enables you to host meetings, customize your Zoom profile, configure settings for meetings and other Zoom products, and access extra meeting features. A Basic Zoom account has some restrictions — most notably the meetings you host are limited to 40 minutes if you have three or more participants — but the account is free and takes only a few steps to set up.

Create a Basic Zoom Account

- 1 Using a web browser, navigate to <https://zoom.us/signup>.

The Zoom sign-up page appears and asks you to enter your date of birth.

- 2 Select the month of your date of birth.
- 3 Select the day of your date of birth.
- 4 Select the year of your date of birth.
- 5 Click **Continue**.

- 6 Type your email address.

- 7 Click **Sign Up**.

Zoom sends an email to the address you provided in step 6.

- 8 In the Zoom email, click the confirmation link (not shown).

The Welcome to Zoom screen appears.

- 9 Type your name, type a password (twice), and then click **Continue** (not shown).

Zoom activates your new account.

The top screenshot shows the Zoom sign-up page in a web browser. The address bar shows <https://zoom.us/signup> with a red callout 1. The page has a dark header with the Zoom logo and navigation links. The main content area says "For verification, please confirm your date of birth." Below this are three dropdown menus for month, day, and year, with red callouts 2, 3, and 4 respectively. A blue "Continue" button is on the right with a red callout 5. Below the dropdowns, there is a small text "This will not be shared".

The bottom screenshot shows the next step in the sign-up process. The header is similar. The main content area has a large grey box on the left that says "SIGN UP FREE" and "Always free, no credit card required". On the right, there is a form labeled "Your work email address" with a text input field containing "myaddress@myprovider.com" and a red callout 6. Below the input field, there is a small text "Zoom is protected by reCAPTCHA and the Privacy Policy and Terms of Service apply." and a blue "Sign Up" button with a red callout 7.

Sign In to Your Zoom Account

Once your Zoom account has been created, you can sign in to your account to modify your settings, join a meeting, or host a meeting. When you first activate a new Zoom account, Zoom signs you in automatically. In subsequent visits to the Zoom website, you will often need to sign in manually.

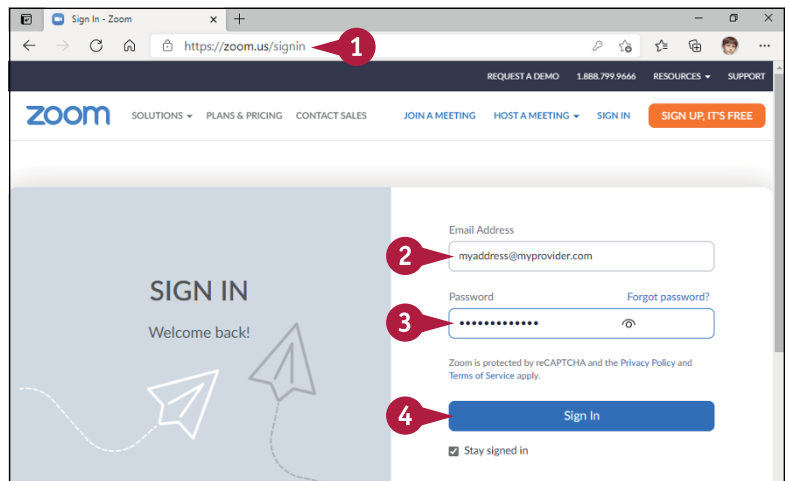
Once you have completed your work on the Zoom site, it is a good idea to sign out of your account. This ensures that nobody who has access to your computer can make changes to your Zoom account.

Sign In to Your Zoom Account

- 1 Using a web browser, navigate to <https://zoom.us/signin>.

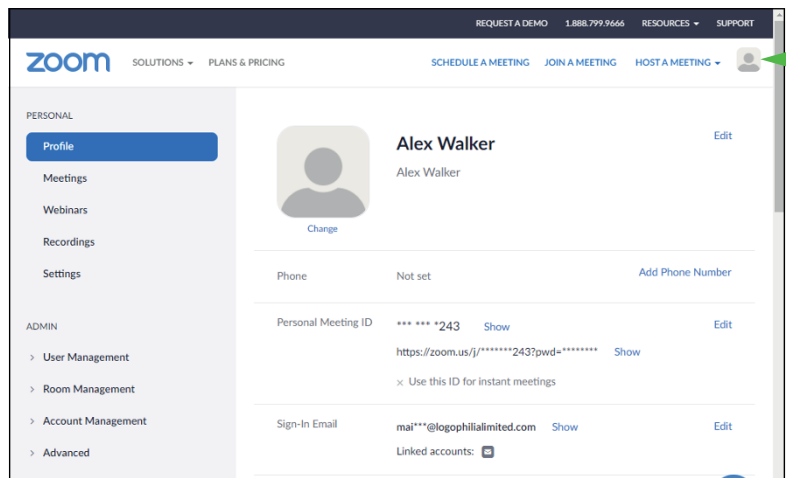
The Zoom Sign In page appears.

- 2 Type the email address you used to sign up with Zoom.
- 3 Type your Zoom account password.
- 4 Click **Sign In**.



Zoom signs you in to your account and displays your profile page.

- A To sign out of your Zoom account, click your profile picture and then click **Sign Out**.



Upgrade Your Zoom Account

If you are currently using a free Basic account, you can get more features by upgrading to one of Zoom's paid account types. With the Basic license, you can join meetings and host meetings, but your hosted sessions are limited to 100 people and cannot be longer than 40 minutes if three or fewer people participate.

Besides hosting meetings with no time limit, upgrading your account also enables you to record meetings to cloud storage, work with expanded controls for users, and work with advanced administration controls.

Upgrade Your Zoom Account

1 Using a web browser, navigate to <https://zoom.us/billing>.

2 Sign in to your account.

Zoom displays a summary of your current plan.

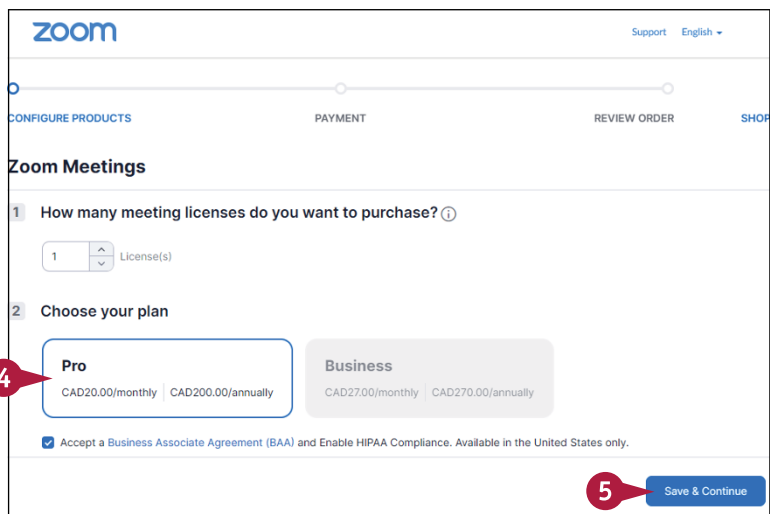
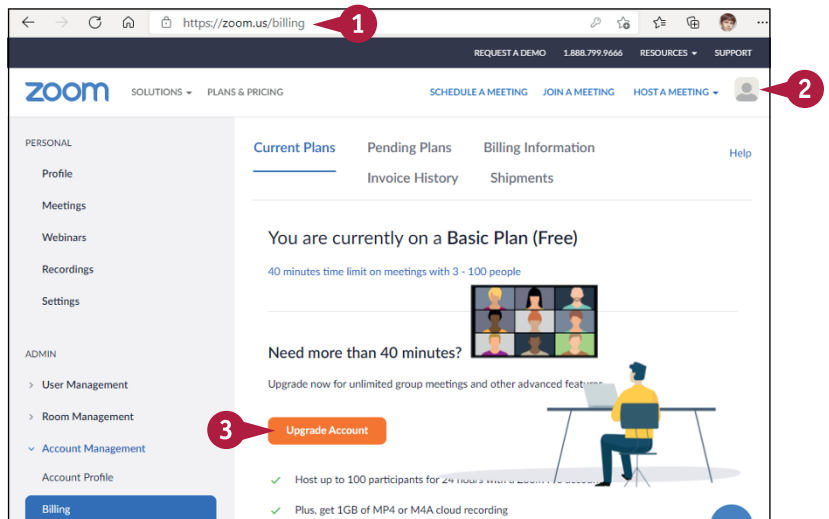
3 Click **Upgrade Account**.

4 Click the type of plan you want.

5 Click **Save & Continue**.

If you see a window asking if you want Zoom United (which combines Zoom Meetings, Chat, and Phone), click **No, thanks**.

If you see a window asking if you are interested in other Zoom products, click **Skip This Step**.



6 Complete your contact information.

7 Click **Save & Continue**.

8 Complete your payment information.

9 Click **Save & Continue**.

Zoom displays the Review Order window with a summary of your order.

10 Click **Place Order** (not shown).

Zoom upgrades your account.

The screenshot shows the Zoom Billing Contact form. At the top, there's a progress bar with three steps: CONFIGURE PRODUCTS, PAYMENT, and REVIEW ORDER. The first step, 'Billing Contact', is active. Below the title, a note states: 'This is the contact or department who receives the invoices or any billing communications'. The form fields are: First Name (Alex), Last Name (Walker), Email Address (mail@logophillalimited.com), Company/Organization Name (Optional) (Logophilla Limited), Employee Count (2-10), and Address (3175 Broad Ripple Drive). A red circle with the number 6 points to the form fields. At the bottom right, a red circle with the number 7 points to the 'Save & Continue' button.

The screenshot shows the Zoom Payment form. At the top, there's a progress bar with three steps: CONFIGURE PRODUCTS, PAYMENT, and REVIEW ORDER. The second step, 'PAYMENT', is active. Below the title, there's a checkbox for 'Full Address' and 'Same as Bill To Contact'. The form fields are: Card Holder Name (Alex Walker), Credit Card Number (4500 1234 5678 9087), CVV (123), and Expiration Date (01 / 2041). A red circle with the number 8 points to the form fields. At the bottom right, a red circle with the number 9 points to the 'Save & Continue' button.

TIPS

What is the difference between a Pro account and a Business account?

The Pro plan is designed for small teams, so it limits meeting sizes to 100 participants. The Business plan is geared toward small and medium-sized businesses, so it allows meeting sizes up to 300 attendees. With a Business license you can also use your own domain name and add your company's branding to your meetings.

How do I cancel a plan?

Navigate your web browser to <https://zoom.us/billing> and sign in to your account. Under the Admin heading, click **Billing** and then click the **Current Plans** tab. Click the **Cancel Plan** link that appears beside the plan you want to cancel.

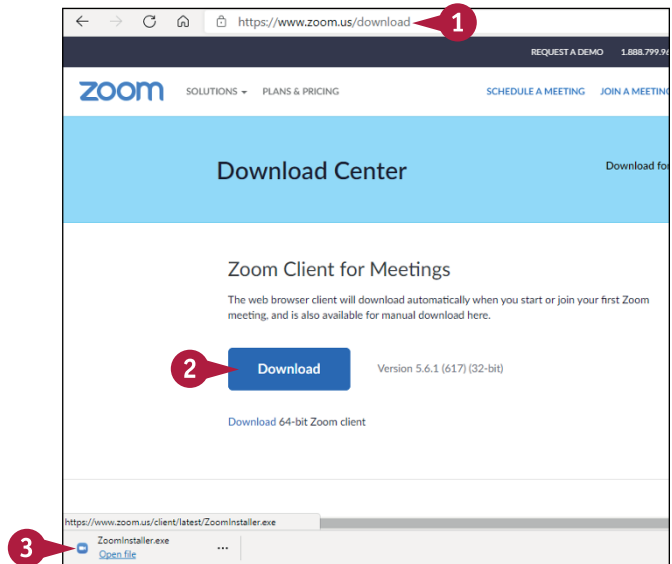
Download and Install the Zoom App

Although you can use the Zoom website to perform tasks related to meetings, most Zoom users prefer to host and join meetings using the Zoom app (sometimes called the *Zoom client*). The Zoom app is a software program that runs on your computer or mobile device. There are versions of the Zoom app available for Windows and Mac computers, as well as iOS and Android smartphones and tablets. Once you have installed the Zoom app, you need to run the app and then sign in to your Zoom account.

Download and Install the Zoom App

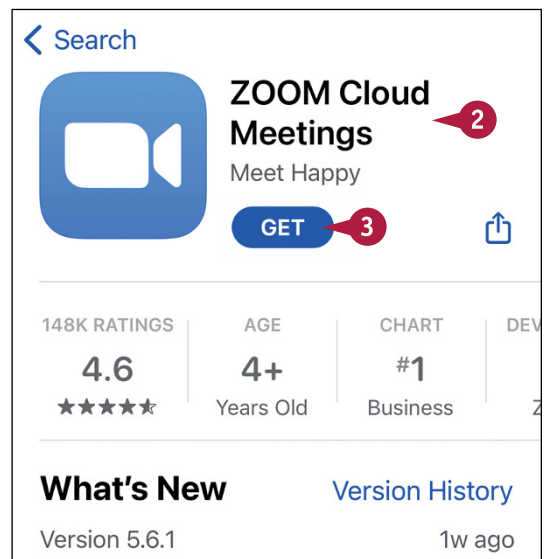
Install the Zoom App on Windows or Mac

- 1 Using a web browser, navigate to <https://zoom.us/download>.
- 2 Click **Download**.
- 3 Open the downloaded file and follow the instructions that appear on-screen.



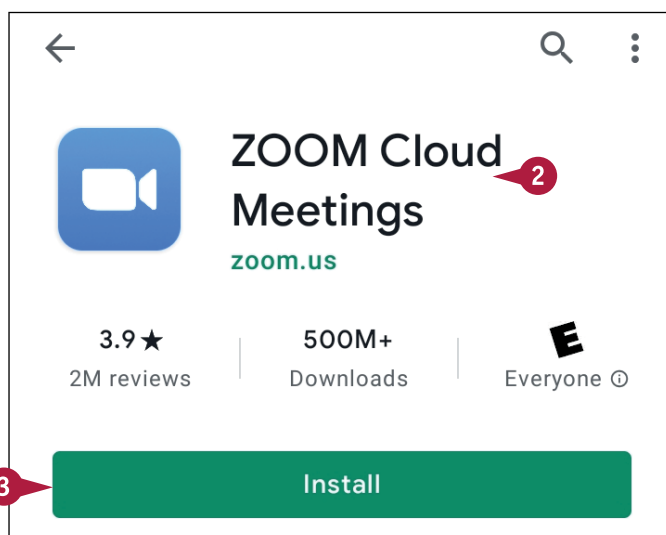
Install the Zoom App on iOS

- 1 On the Home screen, tap **App Store** (not shown).
- 2 Locate the Zoom Cloud Meetings app.
- 3 Tap **Get** and follow the instructions that appear on-screen.



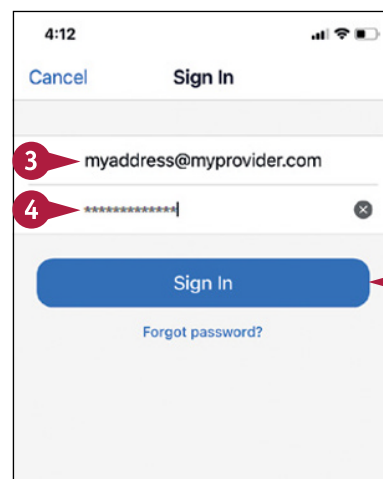
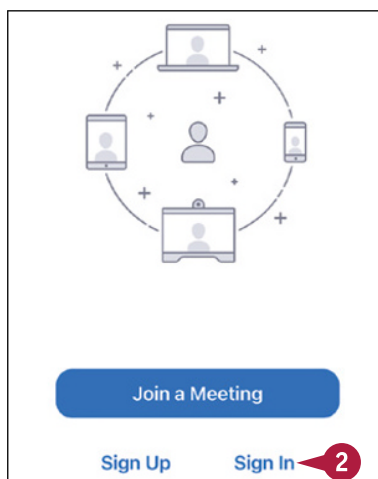
Install the Zoom App on Android

- 1 On the Home screen, tap **Play Store** (not shown).
- 2 Locate the Zoom Cloud Meetings app.
- 3 Tap **Install** and follow the instructions that appear on-screen.



Sign In to the Zoom App

- 1 Open the Zoom app.
- 2 Select **Sign In**.
- 3 Type your Zoom account email address.
- 4 Type your Zoom account password.
- 5 Select **Sign In**.



TIP

Is it possible to launch the Zoom app automatically each time I start Windows?

Yes, by following these steps:

- 1 Run the Windows Zoom app and sign in to your Zoom account.
- 2 Click your profile icon in the upper-right corner of the Zoom window.
- 3 Click **Settings**.
- 4 Click the **General** tab.
- 5 Click **Start Zoom when I start Windows** (☐ changes to ☒.

Join a Test Meeting

Before you host your own meetings and join other people's meetings, it is worthwhile to take a few minutes to get to know the Zoom environment. The easiest way to become familiar with Zoom is to join a test meeting. You can do this on your own at any time, and the resulting meeting is just like a regular Zoom meeting. This enables you to look around and try some meeting features.

This section shows you how to join a test meeting. The next two sections take you through the major features of the desktop and mobile meeting windows.

Join a Test Meeting

1 Using a web browser, navigate to <https://zoom.us/test>.

2 Select **Join**.

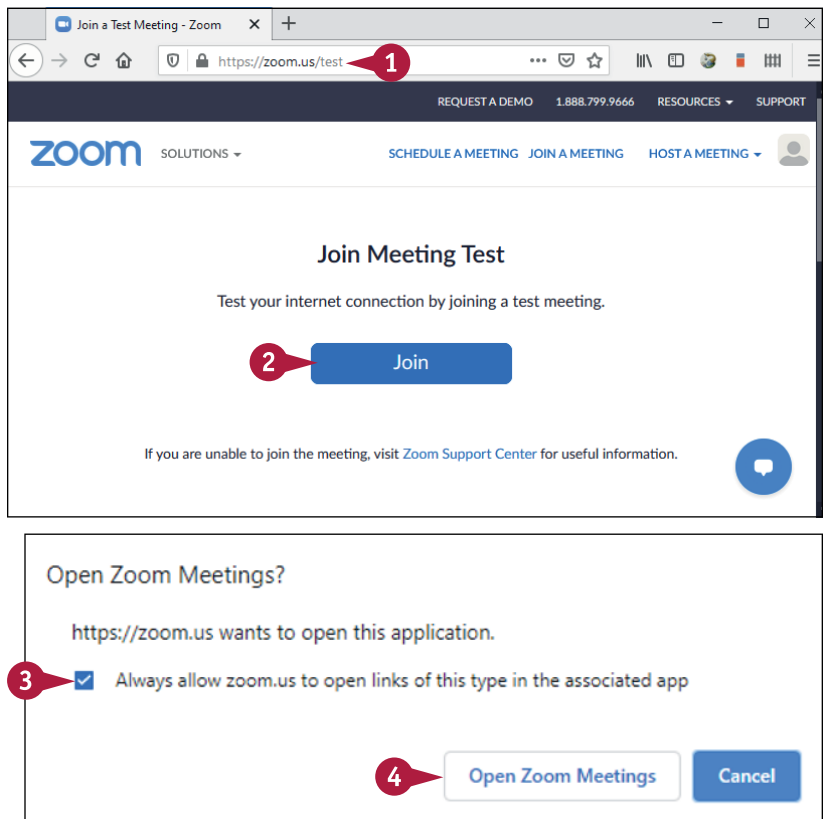
Note: If you do not have the Zoom app installed, your web browser will either download the app or prompt you to download it from your device's app store.

Your browser asks for permission to launch the Zoom app. The steps vary depending on your browser and operating system.

3 Select the check box that tells the operating system to always allow your web browser to launch the Zoom app (☐ changes to ☒.

4 Select the button that launches the Zoom app (such as the **Open Zoom Meetings** button shown here).

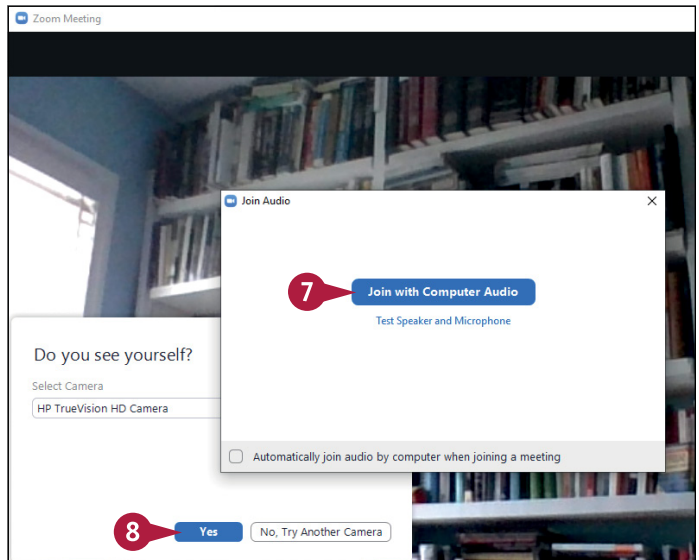
Note: On a Mac, click **Allow**; on iOS, tap **Launch Meeting** and then tap **Open**; on Android, tap **Zoom** in the Open With window.



- 5 If you see the Video Preview window, click **Join with Video**.
- 6 If you're prompted to enter your name (not shown), type your name and then tap **OK** (Android) or **Continue** (iOS).

The Join Audio window appears.

- 7 Select **Join with Computer Audio**.
- Note:** On some devices, you need to select **Call using Internet Audio** instead.
- 8 If you joined the meeting with video, click **Yes** when Zoom asks if you can see yourself.
 - 9 The Zoom app now tests your audio (not shown); to learn more about audio testing, see Chapter 4.



TIPS

Why am I seeing a message that the meeting was ended by the host?

The test meeting is not designed for extended interaction. Instead, the purpose of a test meeting is to take a quick look around and make sure your video and audio are working. Zoom configures every test meeting to automatically end after several minutes.

I started the test meeting without video. How do I turn on my video during the meeting?

Move your mouse within the Zoom window to display the attendee controls and then select the **Start Video** button. To learn more about the attendee controls in a Zoom meeting window, see the next two sections.

Explore the Zoom Desktop Window

If you use the Zoom app on a Windows computer or on a Mac, you can get more out of your Zoom meetings by becoming familiar with the major features of the Zoom desktop window. These features include where the video feeds appear, the meeting controls, and the icons for obtaining meeting data and for entering full-screen mode.

The image used in this section to demonstrate the Zoom desktop window is from a Windows computer, but the macOS version of the window is identical.

A Video Feed

The main section of the Zoom desktop window displays the participant video feeds. In a test meeting or when you first start an instant meeting, you see just your own video feed.

B Controls

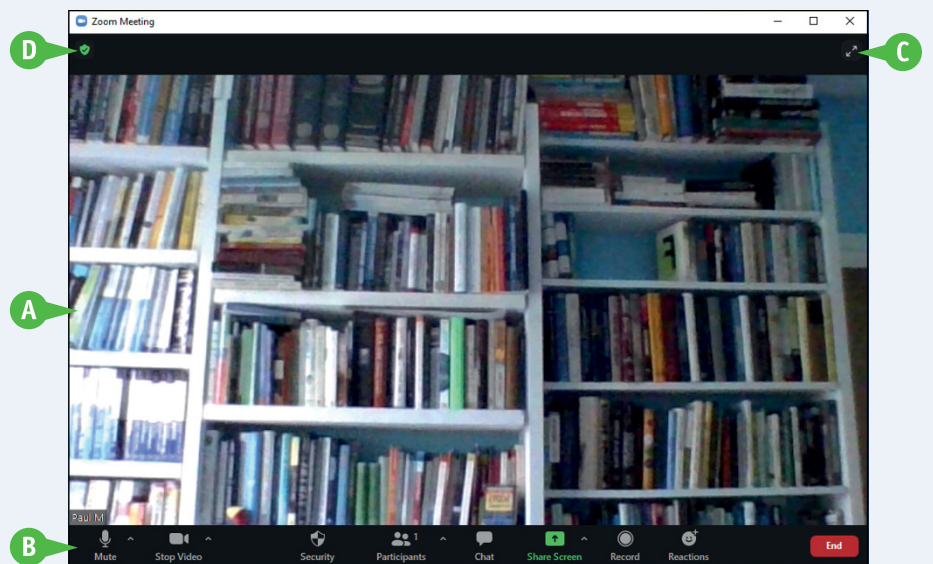
The bottom strip of the Zoom window displays a set of controls that you can use to configure the meeting and access meeting features. If you do not see the controls, move the mouse within the Zoom window to display them. The controls you see depend on whether you are the meeting host (see Chapter 2) or a meeting attendee (see Chapter 3).

C Enter Full Screen

Clicking **Enter Full Screen** (🖥️) expands the Zoom window so that it takes up the entire desktop. You can also enter full-screen mode by pressing **Alt + F** (Windows) or **Shift + ⌘ + F** (Mac). To exit full-screen mode, either press **Esc** or double-click the mouse.

D Meeting Information

Clicking the **Meeting Information** icon (📋) displays a dialog box that shows the meeting ID and passcode, the name of meeting host, and a link that can be used to invite people to the meeting. You can also click **Settings** (⚙️) to open the Zoom app's Settings dialog box.



Explore the Zoom Mobile Window

If you use the Zoom app on an Android or iOS smartphone or tablet, you can get more out of your Zoom meetings by becoming familiar with the major features of the Zoom mobile window. These features include where the video feeds appear, the meeting controls, and how you obtain meeting data.

The image used in this section to demonstrate the Zoom mobile window is from an iPad, but the iPhone and Android mobile windows are similar.

A Video Feed

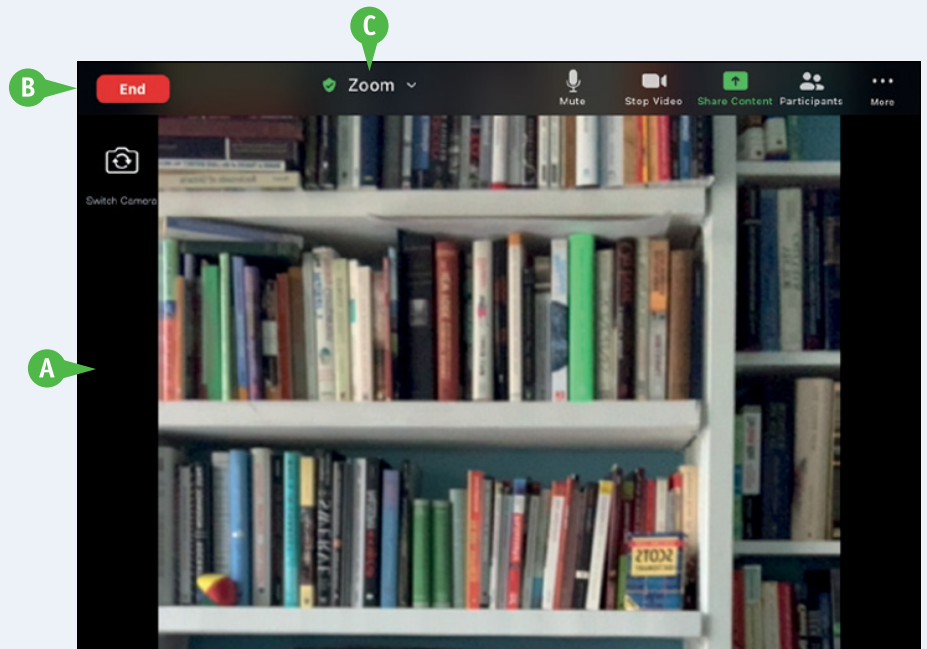
The main section of the Zoom mobile window displays the participant video feeds. In a test meeting or when you first start an instant meeting, you see just your own video feed.

B Controls

This strip (which might appear at the bottom of the window, depending on your device) displays a set of controls that you can use to configure the meeting and access meeting features. If you do not see the controls, tap the screen to display them. The controls you see depend on whether you are the meeting host (see Chapter 2) or a meeting attendee (see Chapter 3).

C Meeting Information









Click **Zoom** to display a dialog that shows the meeting ID and passcode, the name of meeting host, and a link that can be used to invite people to the meeting.



Understanding Presence Status

The Zoom desktop and mobile apps use presence status icons to indicate the current status of users you interact with on Zoom. A user's *presence status* is an indication of the person's current engagement with the Zoom app. The presence status is useful because it lets you know whether a user is available for a meeting, chat, or phone call. For example, if you want to invite a user to an instant meeting, you would delay that meeting if the user's presence status indicates that person is not currently available.

The following table describes the main presence status icons.

Icon	Presence Status	The User Is . . .
	Available (desktop)	Signed in to the Zoom desktop app
	Available (mobile)	Signed in to the Zoom mobile app
	Offline	Not signed in to the Zoom desktop or mobile app
	Away	Signed in to the Zoom desktop or mobile app, but their device is in sleep mode or the user has manually set their status to Away
	Do not disturb	Signed in to the Zoom desktop or mobile app, but has chosen not to receive any Zoom notifications for a period of time
	In a Zoom meeting	Hosting or has joined a Zoom meeting
	On a call	Currently on a Zoom Phone call
	In a calendar event	Taking part in an event that was scheduled using a synced calendar

Set Your Presence Status

When you are hosting or attending a Zoom meeting or on a Zoom Phone call, the Zoom app automatically sets your presence status accordingly so that other users know that you are currently busy. However, there will be times when you prefer to set your presence status manually. For example, if you are signed in to the Zoom desktop app, you might require some uninterrupted time. In that case, you can manually set your presence status to Do Not Disturb.

The Zoom desktop app supports three presence statuses: Available, Away, and Do Not Disturb.

Set Your Presence Status

- 1 Sign in to the Zoom desktop app.
- A Your user icon displays your current presence status.
- 2 Click your user icon.
- 3 Click the presence status you want to set.
- 4 If you click **Do not disturb**, click the amount of time you want to be undisturbed.
- B Zoom updates your presence status icon.

