Teach Yourself VISUALLY™

Zoom™

Paul McFedries

Visual
A Wiley Brand

Teach Yourself VISUALLY™

Zoom™

by Paul McFedries

Visual
A Wiley Brand

Cover Images: © Cobalt/Adobe Stock; Screenshot courtesy of Paul McFedries

Cover design: Wiley

How to Use This Book

Who This Book Is For

This book is for the reader who has never used this particular technology or software application. It is also for readers who want to expand their knowledge.

The Conventions in This Book

① Steps

This book uses a step-by-step format to guide you easily through each task. **Numbered steps** are actions you must do; **bulleted steps** clarify a point, step, or optional feature; and **indented steps** give you the result.

② Notes

Notes give additional information — special conditions that may occur during an operation, a situation that you want to avoid, or a cross-reference to a related area of the book.

③ Icons and Buttons

Icons and buttons show you exactly what you need to click to perform a step.

④ Tips

Tips offer additional information, including warnings and shortcuts.

⑤ Bold

Bold type shows command names, options, and text or numbers you must type.

⑥ Italics

Italic type introduces and defines a new term.

Create a Webinar

*Z*oom's Video Webinar product enables you to create a *webinar* — a phrase *web seminar* — which is a special kind of Zoom meeting. A webinar has a host and optionally one or more panelists, who broadcast audio and video to up to 10,000 view-only attendees (the maximum number depends on your license). To create a webinar, you require a webinar license from Zoom, and that license determines the maximum number of people who can attend your webinar. This section and the rest of the host tasks in this chapter assume you have already purchased a webinar license from Zoom.

Create a Webinar

① Use a web browser to navigate to https://zoom.us.

② Click **My Account**.

Note: If you are on some other page on the Zoom site, click your profile picture and then click your name.

Zoom displays your profile page.

Note: You can combine steps **1** and **2** by navigating directly to https://zoom.us/profile.

③ Click **Webinars**.

④ Click **Schedule a Webinar**.

The Schedule a Webinar page appears.

⑤ Type a name for your webinar.

⑥ (Optional) Type a description for your webinar.

⑦ Select the webinar date.

⑧ Select the webinar time.

⑨ Select the webinar duration.

⑩ Select the other meeting options, as required (not shown).

Ⓐ If you want to allow attendees to ask questions for the host and/or panelists to answer, select the **Q&A** check box (☐ changes to ☑).

Ⓑ If you want to invite one or more people to co-host the webinar, enter their usernames or email addresses here.

⑪ Click **Schedule**.

TIPS

How do I create a recurring webinar?
On the Schedule a Webinar page, click the **Recurring webinar** check box (☐ changes to ☑). Select a recurrence interval (such as Weekly or Monthly), how often you want the webinar to repeat, and when you want the recurrence to end.

How do I create a webinar that requires registration?
In the Schedule a Webinar page's **Registration** section, click the **Required** check box (☐ changes to ☑). If this is a recurring webinar, you then click an option that specifies how often attendees must register (◯ changes to ◉). See the second tip in the following section, "Invite People to Your Webinar," to learn how to change the registration settings.

Table of Contents

SIGN UP FREE

Always free, no credit card required

New Meeting

Join

Schedule

Share screen

Table of Contents

Chapter 6 — Sharing Your Screen

Chapter 7 — Recording a Meeting

Table of Contents

Chapter 10 | Managing Users and Contacts

Edit User

Emails   books@logophilialimited.com

User Type ⓘ   ● Basic   ○ Licensed   ○ On-Prem ⓘ

                Meeting Basic

User Role   Member

Department   e.g. Product

Manager   Paul McFedries

Job Title   Senior Editor

Location   Seattle

Save   Cancel

Table of Contents

Chapter 11 — Chatting with Zoom

Chapter 12 — Making Calls with Zoom Phone
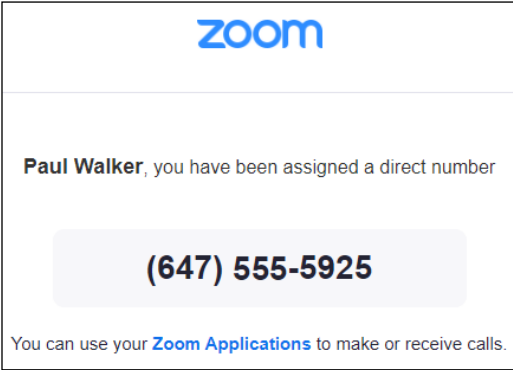
Chapter 13   Setting Up Webinars

Chapter 14   Integrating with Other Apps

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.

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.

New Meeting
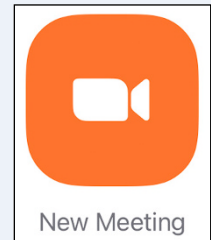
Joining a Meeting

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.

Join
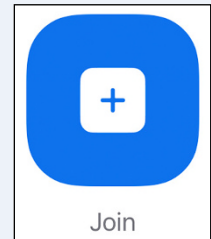
Sharing a Screen

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.

Share Screen
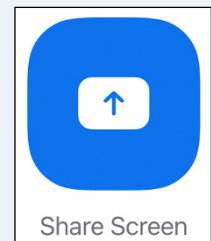
Recording a Meeting

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.

Record
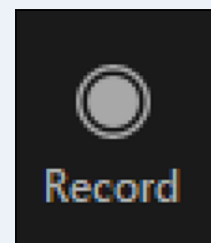
Understanding Other Zoom Products

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 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.

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.

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.

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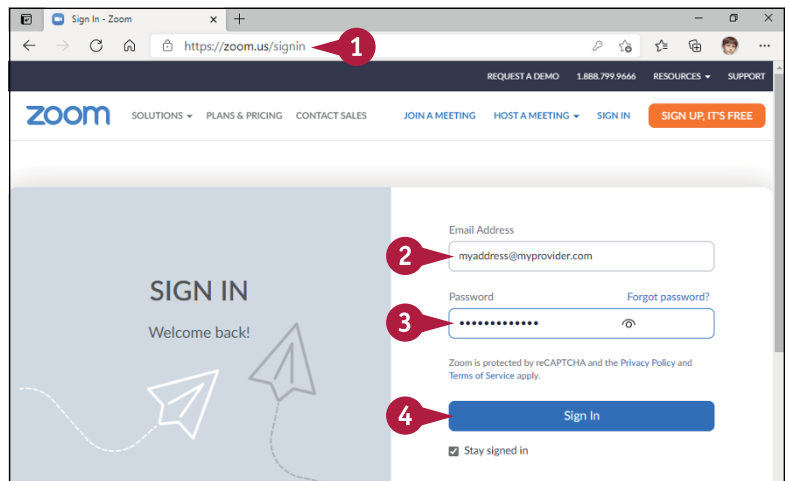
Zoom signs you in to your account and displays your profile page.

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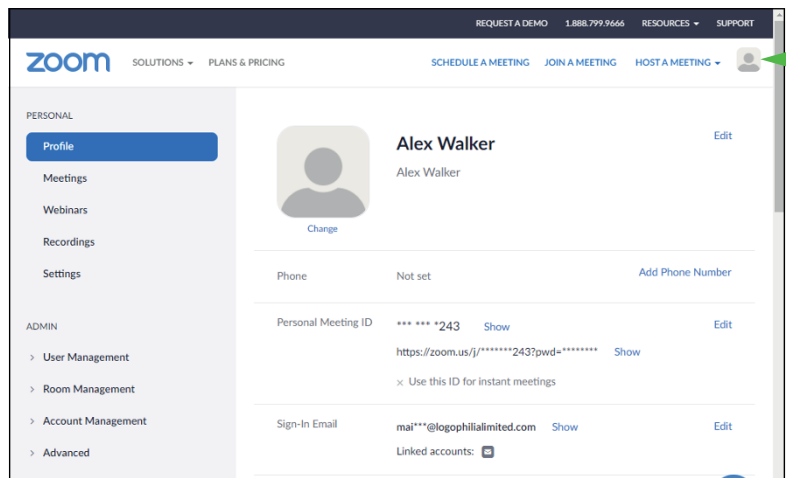
Upgrade Your Zoom Account

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**.
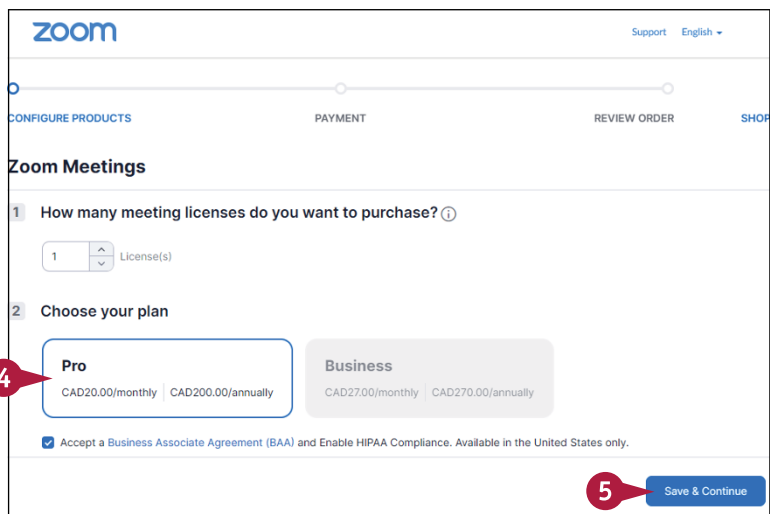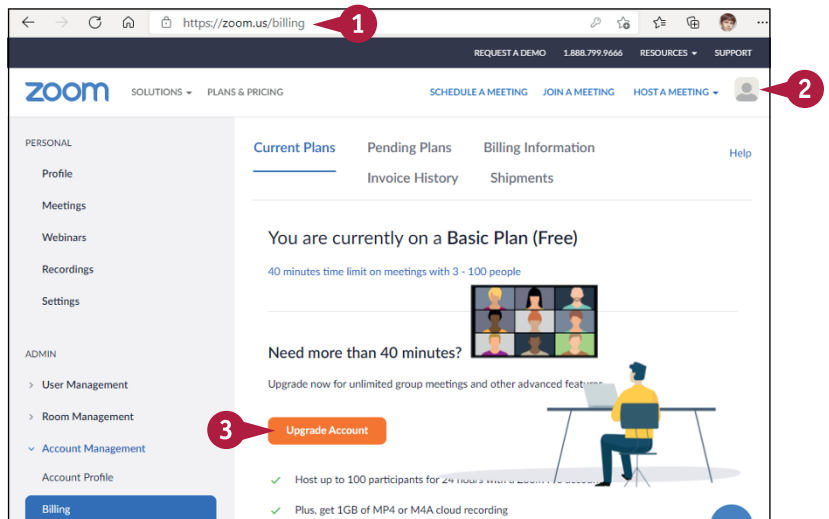
6 Complete your contact information.

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.

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.
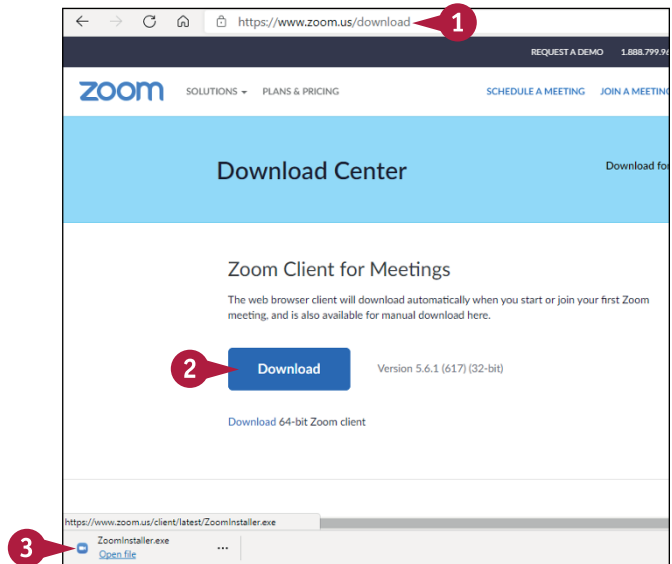
Install the Zoom App on iOS

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.
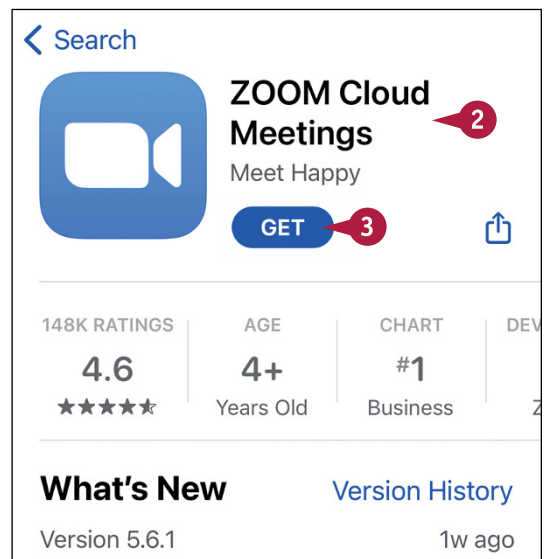
Install the Zoom App on Android

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.
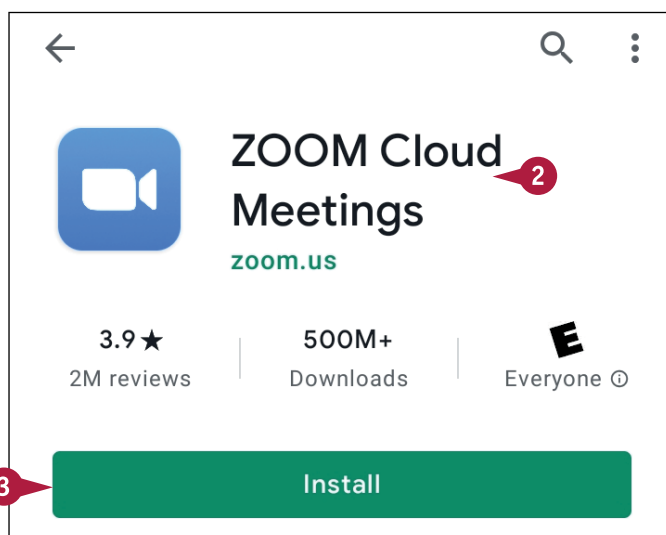
Sign In to the Zoom App

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**.
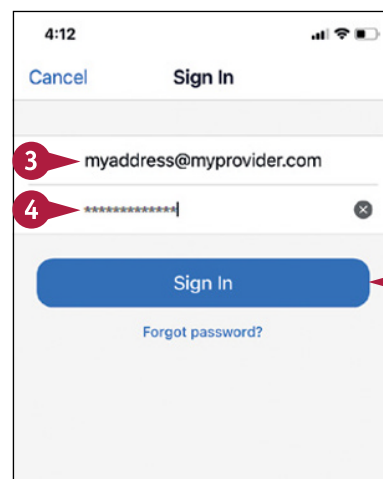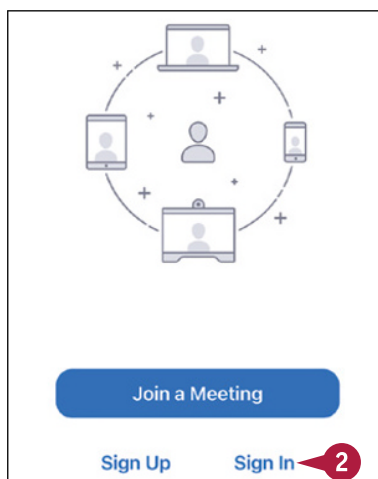
TIP

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.
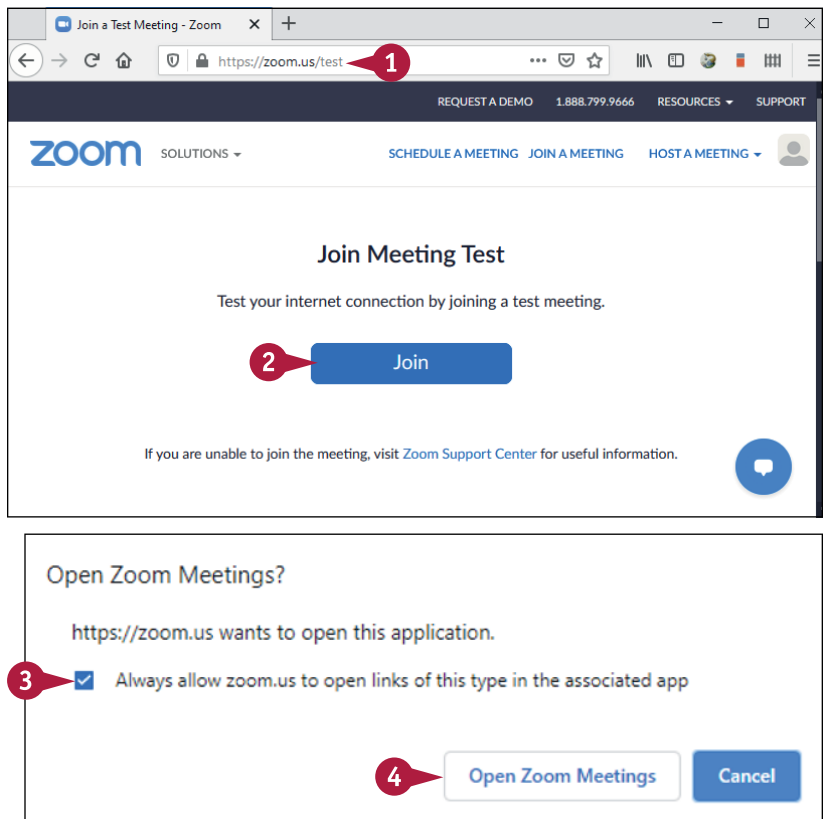
5 If you see the Video Preview window, click **Join with Video**.

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.
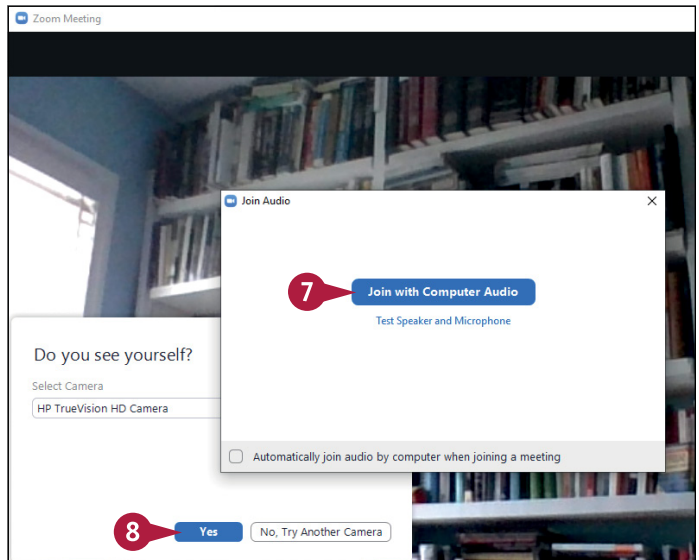
TIPS

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.

Ⓐ 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.

Ⓑ 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).

Ⓒ 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.

Ⓓ 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.
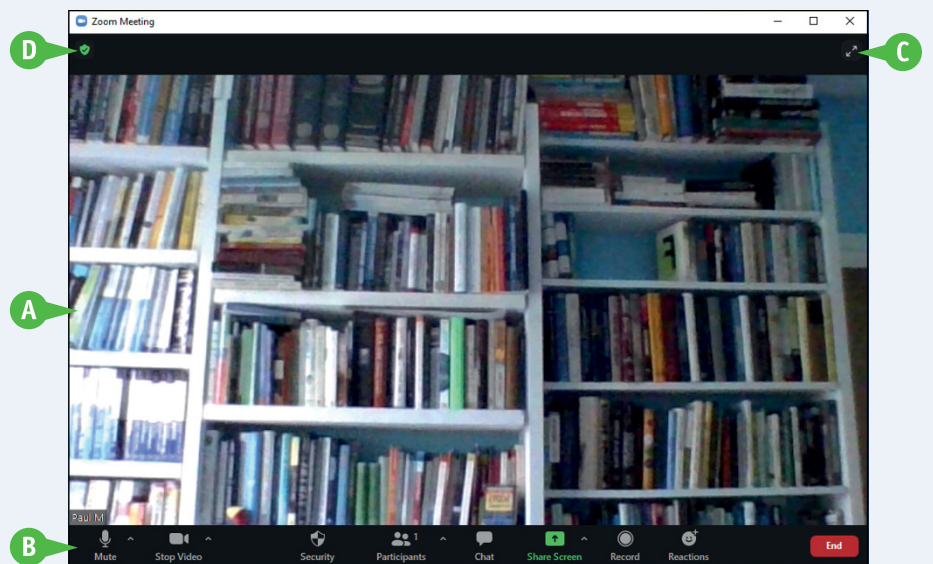
Explore the Zoom Mobile Window

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.
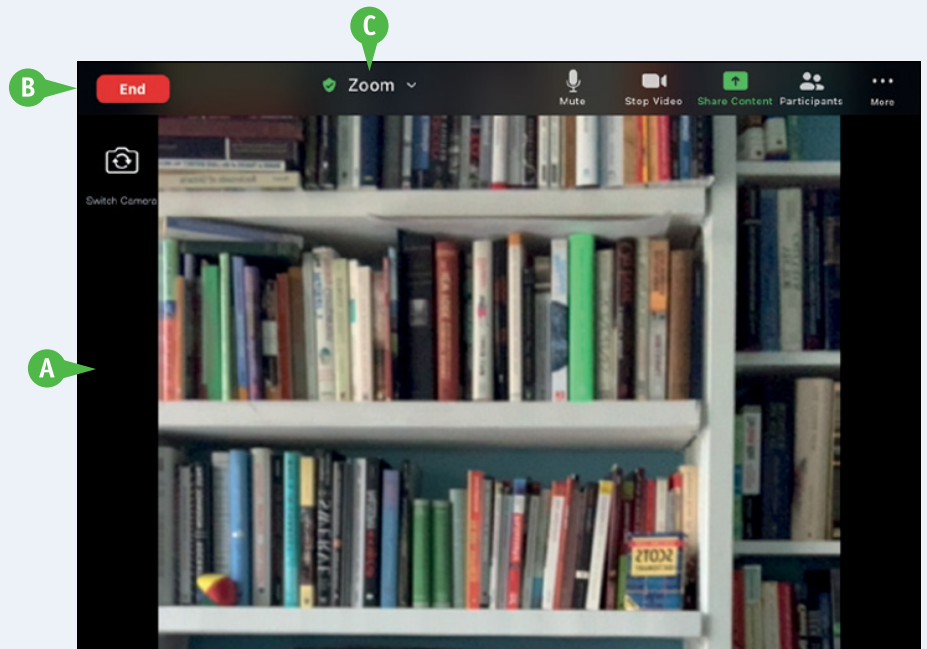
Understanding Presence Status

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.