

Zoom Guide for Online RC Classes and Support Groups

Last update:

Introduction

This guide is for anyone using Zoom to lead RC classes or support groups. This document assumes you have a basic understanding of how to use Zoom (e.g. joining a meeting, creating an account, scheduling a meeting). If you want to use Zoom for a large gathering, such as a workshop or webinar, take a look at the [Zoom Guide for RC Workshops](#).

If reading isn't your ideal means of learning, you can learn about Zoom by watching [Zoom's video tutorials](#) and [webinars](#). These videos cover joining or scheduling a meeting, meeting controls, breakout rooms, sharing your screen and recording a meeting.

Anyone providing technical support should be familiar with both laptop and smartphone versions of Zoom, since some people will be using their phones even if computers/tablets are recommended.

Account Settings

As a meeting Host or tech support person, you should have a paid Zoom account (Pro or higher) - free accounts limit meetings with 3 or more participants to 40 minutes. Also, it's best if you Host a Zoom meeting using your laptop or desktop computer - accessing the Host's meeting controls on a smartphone or tablet can be difficult.

Changing a few default settings will make it easier to use Zoom for your meeting. To make these changes, log into your Zoom account (using a web browser, not the Zoom app) and access the [Settings](#) page. This page is organized into several sections, such as *In Meeting (Basic)* and *In Meeting (Advanced)*.

If you plan to have someone assist with your Zoom meetings, turn on the **Co-host** option (under *In Meeting Basic*). You can find more information about using a Host in the section below on [Jobs and Roles](#).

Co-host	<input checked="" type="checkbox"/>	Modified Reset
Allow the host to add co-hosts. Co-hosts have the same in-meeting controls as the host.		

Turn on the option to always show the **meeting control toolbar** (under *In Meeting Basic*), which makes it easier to access the control toolbar during a Zoom meeting.

Always show meeting control toolbar	<input checked="" type="checkbox"/>	Modified Reset
Always show meeting controls during a meeting 		


Turn on the **Breakout rooms** option (under *In Meeting Advanced*), which allows you to split participants into smaller rooms. You can find more information in the section below on [Using Breakout rooms](#).

Breakout room



Modified [Reset](#)

Allow host to split meeting participants into separate, smaller rooms

☐ Allow host to assign participants to breakout rooms when scheduling 

If you want to use closed captioning during a meeting, turn on the **Closed Captioning** option (under *In Meetings Advanced*). Starting with Version 5, Zoom will also turn on the option to **Save Captions**.

Closed captioning



Modified [Reset](#)

Allow host to type closed captions or assign a participant/third party device to add closed captions

Save Captions



Modified [Reset](#)

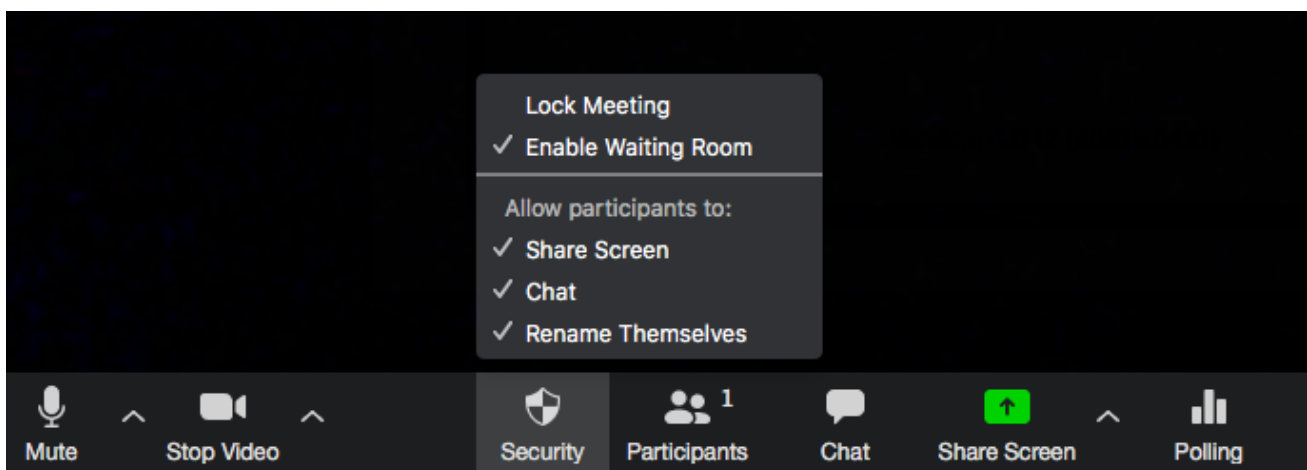
Allow participants to save fully closed captions or transcripts

Security Controls

Zoom requires that all meetings have a Passcode or a Waiting Room enabled for all paid accounts. For larger gatherings, we recommend the following

1. Schedule a meeting rather than using a Personal Meeting Room
2. Select the option to automatically generate a Meeting ID
3. Require a meeting passcode
4. Disable the Waiting Room, unless you need the added security.

At the start of your meeting, it's a good idea to review the "Allow participant" settings displayed when you press on the security shield icon on the bottom of your Zoom screen. For maximum security, turn off all three "Allow participants" options so that only the host can share a screen, send chat messages, or rename profiles.



Once all participants are present, you can **lock the meeting** to prevent anyone else from joining. However, locking the meeting can cause difficulties if someone arrives late, or if a participant loses their connection and wants to re-join.

If you need to remove someone from your meeting, there are two ways to do so:

1. Select the “...” at the top right corner of the participant’s video window and click **Remove**.
2. Select **Manage Participants** and remove a participant by clicking *More* next to their name.

Meeting Roles

The person who manages a Zoom meeting is called the meeting **Host**. Usually, the Host is the person who created the meeting on Zoom. Meetings can also have one or more meeting **Co-hosts** who can assist the Host in running the Zoom meeting.

Only the Host can manage closed captioning and participant settings. Co-hosts can admit participants from a waiting room, manage most security settings, spotlight or mute/unmute participants, or create breakout rooms, but they **cannot** assign language interpreters to audio channels or typists to Closed Captioning or start/end meetings.

Zoom Features	Access
Waiting room - enable/disable & admit	<i>Host and Co-host</i>
Participants - security settings, mute/unmute	<i>Host and Co-host</i>
Screen share - audio/video only	<i>Host and Co-host</i>
Recording - start/stop, allow participants to record	<i>Host and Co-host</i>
Breakout rooms - setup, assign, open, close	<i>Host and Co-Host</i>
Closed captioning - enable, assign typists	<i>Host only</i>
Language Interpretation - enable, manage/assign channels	<i>Host only</i>

If you are leading a class or support group, you may want to ask someone else to be the Host so they can handle the breakout rooms and the closed captioning. If you make someone else the Host, it’s a good idea if they add you as a Co-host so you can mute/unmute participants.

To make someone a Host or Co-host, open the Participants panel once the meeting has started, hover over the name of the person, click on the “More” button, and select “Make Host” or “Make Co-Host”. *(Note: you must first enable the co-host option on your account’s settings page before you can add a co-host to your meetings.)*

Using Breakout Rooms

Breakout rooms allow people to leave the main meeting room and join small groups of 2 or more for mini-sessions or support groups. Assigning breakout rooms can take a few minutes, so it’s best to know when minis or support groups are planned. Having a break, song, or announcements is helpful, if a couple extra minutes are needed.

Make sure to turn on the Breakout room option in your Zoom account settings BEFORE starting your meeting. If you turn the feature on after a meeting has started, everyone will need to log off and log back in again.

Host Tips

- Hosts and Co-hosts can create or manage breakout rooms. Any co-Host or Host can prepare assignments to breakout rooms, and these prepared assignments are individual to that Host or co-Host. Only one set of prepared assignments will be implemented (the one prepared by the co-Host or Host who opens the breakout rooms), and when that happens all other sets of prepared assignments will be lost.

- The Host, and any Co-host who opens breakout rooms, must MANUALLY join a breakout room after they are open. To do this, view the list of breakout rooms and click “Join” next to the room you wish to join.
- The Host or Co-host may want to stay in the main room to assist users who have trouble joining their breakout room or who return to the main room unintentionally. This is not ideal for full discharge, so specify someone who can stay with the Host in the main room.
- People who join a meeting AFTER the Host or Co-host sets up breakout rooms (including people who drop and rejoin a meeting) will NOT be assigned to a room and will be shown as UNASSIGNED at the top of the breakout room list. The Host/Co-host must manually place the person in a breakout room.
- While breakout rooms are in progress, ONLY the Host or Co-host can broadcast a message to all participants such as "Topic Groups are ending in 5 minutes." Neither the Host nor Co-hosts will see the broadcast message.
- Only the Host or Co-host can manually close all rooms and bring everyone back to the main room.

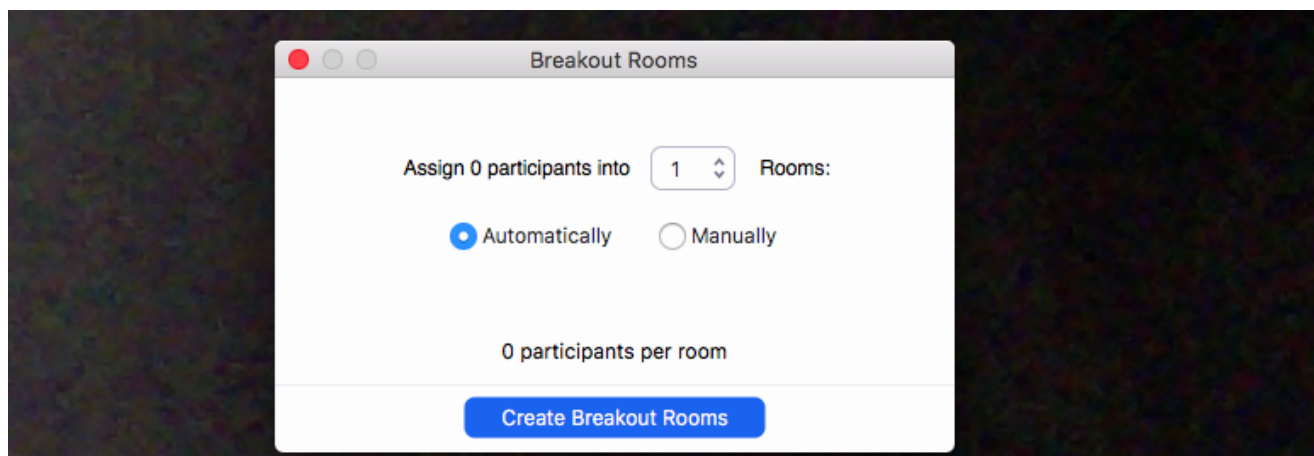
Assigning Rooms

Meeting participants can be automatically or manually assigned to breakout rooms. Choosing **Automatically** will randomly assign participants to a breakout room, whereas choosing Manually requires placing each person into a breakout room.

People who join a meeting AFTER the Host creates breakout rooms will be shown as UNASSIGNED. The Host or Co-host can assign these participants to any available breakout room.

To setup up breakout rooms, follow these steps:

- Confirm that all or most of the participants are signed into the meeting, and then click on the “Breakout Rooms” icon on the toolbar at the bottom of the Zoom window.
- In the popup box, specify how many rooms you need (you can always add more rooms later), and whether you want Zoom to assign participants Automatically or Manually.
- Select “Create Breakout rooms”



Once you have created the rooms, you can move or exchange people between rooms, or create additional rooms. To move a participant, hover over their name and select move to see the list of options. To exchange someone between rooms, click on the Room of the preferred person and then click on their partner. The people will be swapped over.

Confirm that people know the overall timing for the breakout rooms and that they will be responsible for finishing all session turns before the rooms close after that time is completed. When the leader and group is ready, click on “Open all rooms.” Broadcast any messages to all the rooms as needed.

If people need help in their breakout rooms, they may message the Host by clicking “Request Assistance”. The Host can join their breakout room and then return to the main room or to their own breakout room.

Room Options

After you have set up the rooms but before opening them, you can click on the “Options” button at the bottom of the breakout rooms window to select features like moving all participants to their rooms automatically or giving people a countdown when you close the rooms.

The recommended settings are:

- Move all participants into breakout rooms automatically - everyone goes to their breakout rooms at the same time
- Allow participants to return to the main session at any time - participants can return to the main room for help if they run into problems
- Breakout rooms close automatically after X minutes - every room displays a small timer which helps people adjust their sessions to fit within the available time
- Countdown after Host closes breakout rooms - provides everyone with additional slack time to wrap up sessions before returning to the main room

Reassigning Rooms

Before opening the rooms (either automatically or manually assigned), you can modify the room assignments by moving someone to a different room or adding an additional room. For example, if the Leader wants a mini session with a particular person, you can put them in the same room by exchanging them with someone in that room.

After clicking on Create Rooms, hover over the Leader's name and select Exchange, click on the Room # of the preferred person and then click on the other person in the room. The leader and that person will then be swapped over. Once you are done, click on "Open all Rooms" and everyone will go to their respective rooms.

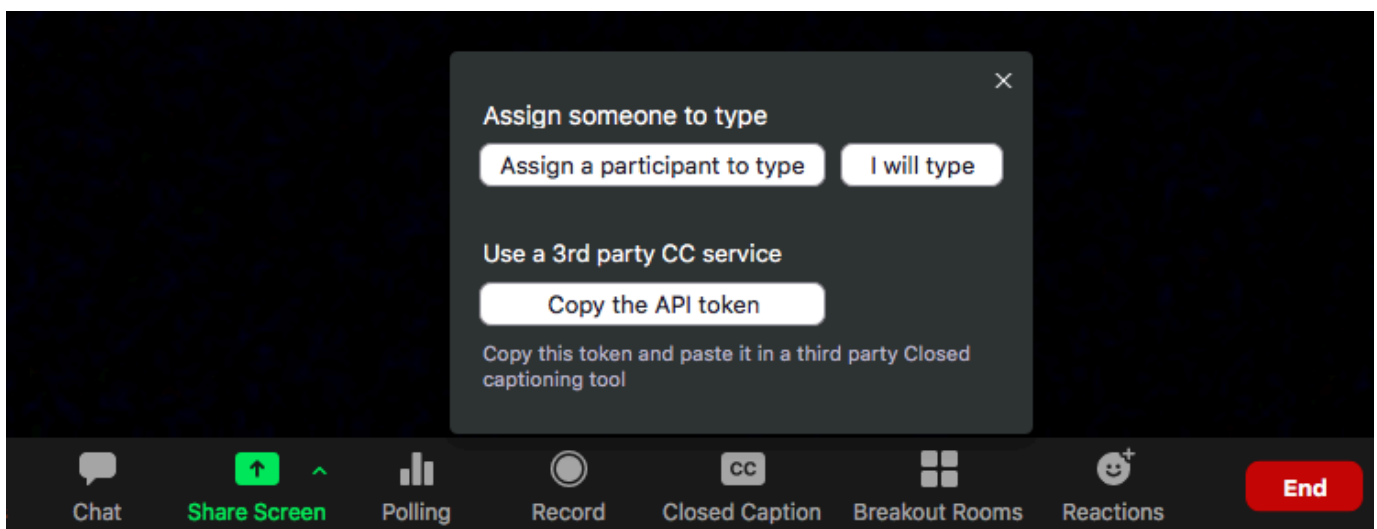
When there are many people in a meeting, a search box appears at the top of the list of people when exchanging. It is possible to use this list to quickly find an individual - in the above example, you can click on the name of the person randomly assigned to the Leader's room, and then use this search box to quickly find the leader's preferred session partner to exchange the randomly assigned person with.

If you create and use breakout rooms during a Zoom meeting, Zoom saves the settings (for that meeting only) and will default to the same rooms the next time you want to send people to breakout rooms. This can be helpful, for example, if you want to have people return to the same group throughout your meeting.

If you want to change the rooms people are assigned to, this is relatively easy. Open Breakout Rooms, select "Recreate," and then choose the number of rooms you want, and whether you want them to be assigned automatically or manually.

Closed Captioning

To use closed captioning during a meeting, first turn on the "Closed Captioning" option on your Zoom account (see [Account Settings](#)). Once you enable the option, you will see the closed caption button on the meeting toolbar - click the button to assign yourself or someone else to type the captions.



When Closed Captioning is enabled, participants (on a laptop or desktop computer) will see a Close Caption button on the menu bar of their Zoom screen. Captions will be broadcast to meeting participants who select "Show Subtitles" in the pop-up menu of the Closed caption button.

Participants can select “View Full Transcript” in the pop-up menu to open a window that displays the entire transcript of captions, which can be helpful if the scrolling captions pass too quickly. Selecting “Subtitle Settings...” in the pop-up menu allows participants to adjust the text size of subtitles.

Meeting Recordings

Meetings can be recorded to the cloud or onto your local computer- recording locally is preferred for security reasons. If needed, the Host or Co-host can grant (or deny) individual participants the ability to record the meeting - open the Participants List and click on the “...” menu by a participant’s name to view the options to allow/deny recording.

Local recordings are converted to MP4 files after a meeting ends. Cloud recordings can take 20-30 minutes (and occasionally several hours) after a meeting ends to be processed.